



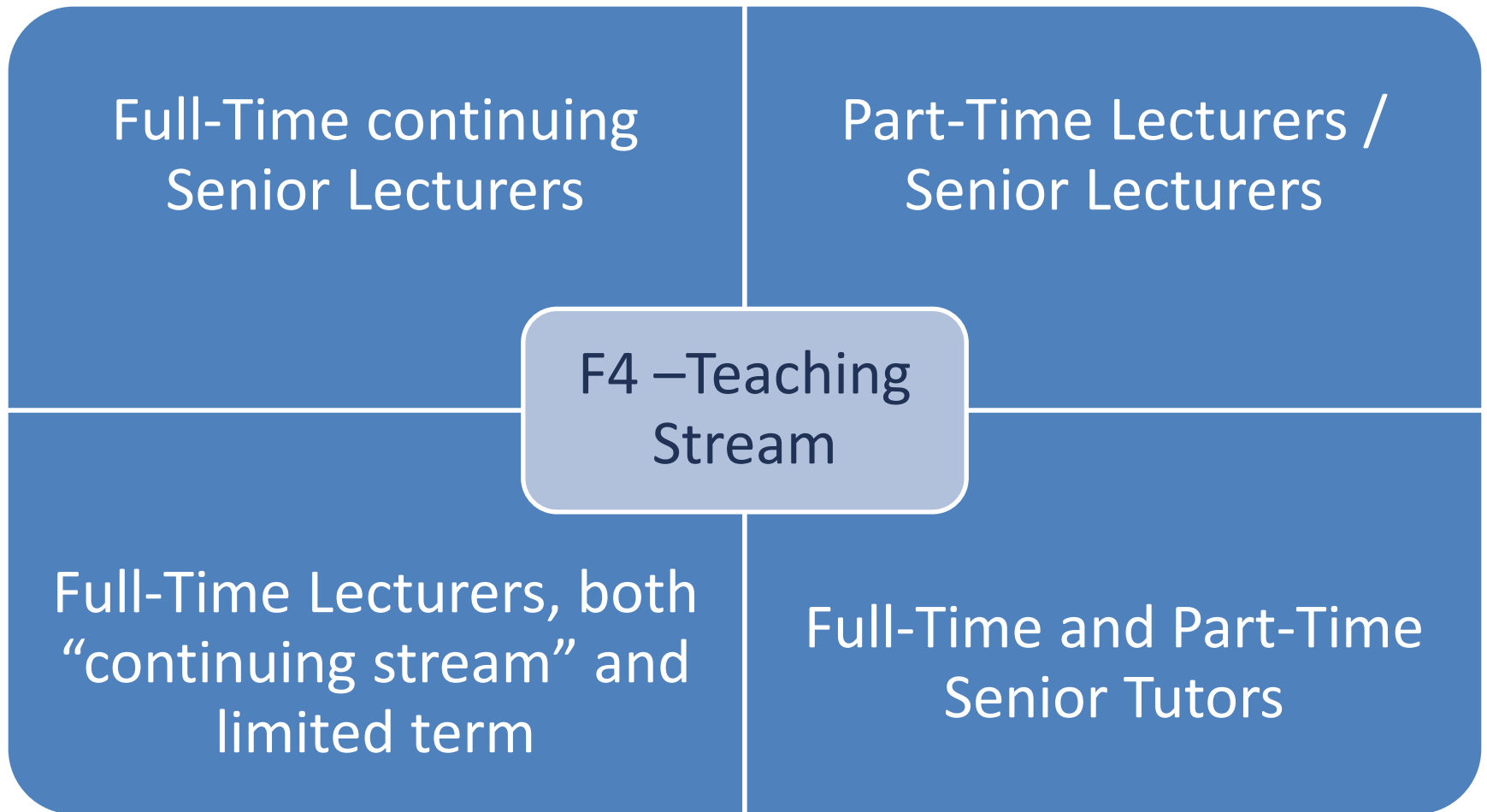
UNIVERSITY OF
TORONTO

Changes to HRIS Records for the Teaching Stream

January 13, 2016

Office of the Vice-Provost, Faculty &
Academic Life

Current Configuration



New Configuration - Summary

- **NEW** employee subgroups for the teaching stream
 - FA, FB
- **NEW** Ranks/Codes available in FA and FB:
 - Assistant Professor (Conditional), Teaching Stream (85)
 - Assistant Professor, Teaching Stream (84)
 - Associate Professor, Teaching Stream (83)
 - Professor, Teaching Stream (82)
- **Changes** to Rank and Tenure Screen and codes (IT9023)
- **NEW** Emeritus Ranks under Other University Appointment (IT9031)



New Employee Subgroups

FA

- Full-Time Continuing Appointments
- New Ranks
 - Some did not opt in to new Policy & rank
- Review dates **required** for Assistant Professors, Teaching Stream
- New Status Code for permanent status faculty

FB

- Full-Time Limited-Term Appointments (Teaching Stream CLTAs)
- **Mandatory** end date for contract (cannot exceed 5 years)
- New Ranks
 - For those signing back on new Policy and ranks only
 - New appointments and limited-term renewals with new ranks

F4

- Part-Time, Limited-Term Appointments (FTE = under 76%)
- Lecturer / Senior Lecturer
- Senior Tutors
- During transition also includes: Full-Time, Limited-Term on Old Ranks
 - If renewed, must use new ranks and new record created in FB



ESG Code	ESG Text	Rank Code	Rank Text	Status Code	Status Text	Job Code	Job Text	FTE	Contract	Validity Rules	Pay Scale	Pay Scale Level
F A	Teaching Stream, Continuing	81	Senior Lecturer (only for those who did not opt-in to new ranks effective January 1, 2016)	06	Continuing Status	1870	Teaching Stream, Continuing	Any FTE permitted (as long as the initial appointment was equal to or greater than 76%)	Continuing	No NEW appointments at this rank. No one promoted to this rank in FA	01A	02
		82	Professor, Teaching Stream	06	Continuing Status	1870	Teaching Stream, Continuing	Any FTE permitted (as long as the initial appointment was equal to or greater than 76%)	Continuing		01A	04
		83	Associate Professor, Teaching Stream	06	Continuing Status	1870	Teaching Stream, Continuing	Any FTE permitted (as long as the initial appointment was equal to or greater than 76%)	Continuing		01A	03
		84	Assistant Professor, Teaching Stream	02	Probationary	1870	Teaching Stream, Continuing	100% (though 76% to 100% permitted in policy)	Continuing	Dates required for Interim Review and Promotional Review in 9023	01A	02
		85	Assistant Professor, Teaching Stream (Conditional)	05	Pre-probationary	1870	Teaching Stream, Continuing	100% (though 76% to 100% permitted in policy)	Term	Annual Contracts (6 years maximum)	01A	01



ESG Code	ESG Text	Rank Code	Rank Text	Status Code	Status Text	Job Code	Job Text	FTE	Contract	Validity Rules	Pay Scale	Pay Scale Level
F B	Teaching Stream, Non-Continuing	82	Professor, Teaching Stream	03	Limited Term	1871	Teaching Stream, Non Continuing	76 to 100%	Term	Contract minimum 1 year to maximum 5 years	01A	04
		83	Associate Professor, Teaching Stream	03	Limited Term	1871	Teaching Stream, Non Continuing	76 to 100%	Term	Contract minimum 1 year to maximum 5 years	01A	03
		84	Assistant Professor, Teaching Stream	03	Limited Term	1871	Teaching Stream, Non Continuing	76 to 100%	Term	Contract minimum 1 year to maximum 5 years	01A	02
		85	Assistant Professor, Teaching Stream (Conditional)	03	Limited Term	1871	Teaching Stream, Non Continuing	76 to 100%	Term	Contract minimum 1 year to maximum 5 years	01A	01



Future State for F4

(F4 will house Full-Time Limited-Term faculty on old ranks)

ESG Code	ESG Text	Rank Code	Rank Text	Status Code	Status Text	Job Code	Job Text	FTE	Contract	Validity Rules	Pay Scale	Pay Scale Level
F4	Teaching Stream	71	Lecturer	03	Limited Term	464	Lecturer/Sr. Lecturer	Any FTE for existing faculty / New positions 75% of lower	Term	Going forward contracts minimum 1 year and FTE 75% or less	01A	01
		81	Senior Lecturer	03	Limited Term	464	Lecturer/Sr. Lecturer	Any FTE for existing faculty / New positions 75% of lower	Term	Going forward contracts minimum 1 year and FTE 75% or less	01A	02
		80	Senior Tutor	06 or 03	Continuing Status or Limited Term					Continuing or Part-Time	No new appointments	



Changes to Infotype 9023

Employee Information Financial Information Time recording Benefits Information

Infotype text	S..	
Monitoring of Tasks	✓	▲
Other University Appointment	✓	▼
Personal Data	✓	
Planned Working Time		
Student Number/Empl. Authorization		
Telecommunications		
Rank and Status Information	✓	

New label for all academics

Period

Period

From To

Today

Curr. week

Current month

Last week

Last month

Current Year

To Current Date

Current Period

Direct selection

Infotype STy



Old and New Codes for 9023

OLD	OLD	NEW	NEW	NEW
Tenure	Tenure Description	Status Code	Status Text	When to use
01	Tenured	01	Tenured	F1, Ranks 10, 20 (upon successful tenure review)
02	In Tenure Stream	02	Probationary	F1 Rank 30 or 20 (if appointed as Associate Professor, without tenure) FA Rank 84
03	Non-Tenure Stream	03	Limited Term	F2, F4 or FB All Ranks
04	Tenure Denied	04	Tenure / Continuing Status Denied	F1 Rank 30 or 20 (if appointed as Associate Professor, without tenure) or FA Rank 84 after an unsuccessful review for tenure/continuing status
05	Pre-Tenure Stream	05	Pre-Probationary	F1 Rank 38 FA Rank 85 (Conditional appointments)
		06	Continuing Status	FA, Ranks 82, 83 (upon successful review for continuing status)

FA - Rank and Status (9023)

Rank Info	
Faculty Rank	84 Assistant Professor, Teaching Stream
	Faculty Rank Date 01.01.2016
2003 PPAA	
<input type="checkbox"/> Unamended Policy	X for those who did not opt in
Status	
Status	02 Probationary
Interim Review Date	31.12.2014
	Status Effective Date 01.01.2016
Continuing Status Review Date	31.12.2015
Review Effective Date	01.07.2016

New Rank

Effective date for converted records

X for those who did not opt in

02 Status means dates are mandatory

Dates can be found in the letter of offer

Date when person became Assistant Professor, Teaching Stream (normally hire date, January 1 for converted—can be edited)



More on Rank and Status (9023)

Codes are dynamic for FA & FB
meaning only those available for the rank
and employee subgroup will populate

Find by
Person
Collect
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Pers.area Appointed Subarea Academic
Employment Active EE subgrp TeachStr,Continuing

Start 01.01.2016 - 31.12.9999

Chngd

Rank Info
Faculty Rank 84 Assistant Professor, Teaching Stream
Faculty Rank Date 01.01.2016

2003 PPAA
 Unamended Policy

Status
Status 02 Probationary
Interim Review Date 31.12.2014 Status Effective Date 01.01.2016
Continuing Status Review Date 31.12.2015
Review Effective Date 01.07.2016

Hit list

Academic Rank (1) 1 Entry found

Restrictions

Acad. Rank	Rank Desc.
02	Probationary



Conversion of Records

Records will be centrally converted on January 25, 2016 for:

- **All FA teaching stream faculty** (including those who did not opt in)
- **FB faculty who were hired as Assistant Professor, Teaching Stream (n=8)**
 - Those on full-time limited-term contracts at the ranks of Lecturer or Senior Lecturer will remain in F4 until the end of that contract. If renewed a new record should be created in the FB employee subgroup using new rank



Records Not Being Converted

- All remaining teaching stream employees currently in F4:
 - Full-Time Limited-Term Appointments at Lecturer / Senior Lecturer
 - Part-Time Teaching Stream Appointments -- Not eligible for new ranks
 - Senior Tutors -- Not eligible for new ranks
- Teaching Stream Academic Administrators currently in F8 PDAD&C Subgroup
 - Will move back to original faculty position in FA at end of their administrative term
 - Working on changing Rank and Status for these records



Things to know about the conversion

- All FA records have a January 1, 2016 effective date for Rank & Status
- You can edit the rank effective date for Associate Professor, Teaching Stream to match Senior Lecturer segment if desired
- Interim review dates are required for all Status 02 (Probationary) Assistant Professors, Teaching Stream (even for those not requiring an interim review—we supplied dates for conversion)

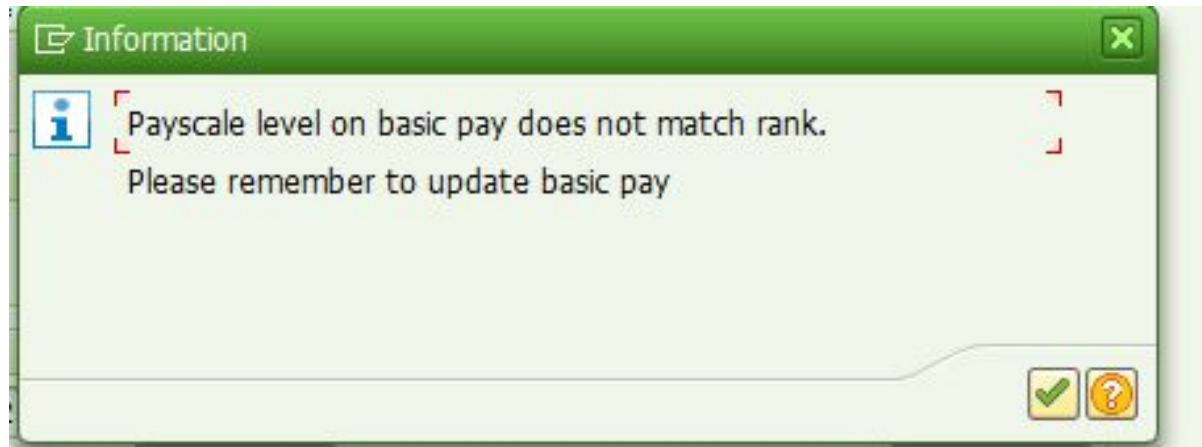


Known Issues (phase 2 fixes)

- For all records, IT9009 (Appointment Details) will not be updated until February and until then will not have the updated information on position, pay scale group and level
- F3 Instructors (OISE only) and Senior Athletic Instructors (KPE only) have status code 3 – Limited Term, discussing solutions to remedy



Known Issues (con't)



- This warning may arise as we need to update some additional fields relating to pay scale and rank



Resources

- Policies:
 - Policy and Procedures on Academic Appointments (PPAA)
 - Policy and Procedures on Employment Conditions of Part Time Academic Staff

http://www.governingcouncil.utoronto.ca/Governing_Council/policies.htm
- HR Systems Training & Support Centre:
 - How to choose the correct employee subgroup for the teaching stream

<http://www.hrandequity.utoronto.ca/resources/hristsc.htm>
- Academic Administrative Procedures Manual:
 - www.aapm.utoronto.ca



Resources – Coming Soon!

- How to choose the right employee subgroup: Quick Guide
- Full grid of Academic Subgroups (similar to FA, FB & F4 presented on slides 5 to 7)
- Updated HRIS documentation – processes are the same, only choices are different!



Questions?

- HRIS-specific questions regarding entry and maintenance of records: HRIS
<http://sites.utoronto.ca/ams/help.htm>
- Policy-specific questions regarding individual faculty, letters of appointment, process, etc.:
Stephannie Roy, Office of the Vice-Provost, Faculty & Academic Life, stephannie.roy@utoronto.ca

