

INSTRUCTIONS FOR COLLECTION OF WORKLOAD DATA

FOR MEMBERS OF THE INSTRUCTIONAL STAFF

I. Overview

Workload data will be collected for everyone in a tax-levy, full-time Instructional Staff title, including employees paid through Income Fund Reimbursable (IFR) accounts. This workload data collection does not replace the Teaching Load Report.

Full-Time Teaching Instructional Staff

Regarding full-time teaching instructional staff, it is expected that, in the overwhelming majority of cases, the total reported undergraduate teaching contact hour workload for the Fall and Spring semesters will conform to the provision of the Appendix to the PSC/CUNY collective bargaining agreement entitled “Pertinent Sections of the Workload Settlement Agreement” (hereinafter WSA). The colleges are to report the actual teaching workload of faculty members (including equivalencies), even if this does not result in the exact contractually-required workload for the faculty member and to explain the reasons for the deviation. Questions regarding the WSA or other contract issues should be directed to the college’s Labor Designee, who will, if necessary, consult with the Office of Faculty and Staff Relations.

Instructional Staff in the Higher Education Officer Series, College Laboratory Technician Series, and Adjunct and Hourly Titles

For staff in the Higher Education Officer series, College Laboratory Technician series and adjunct and hourly titles, workload data will be recorded automatically. Each college is to review this data and make necessary changes or corrections. Because 35 hours will be entered automatically on the workload screen (Screen 17) for all Higher Education Officer and College Laboratory Technician series personnel and for staff serving in REM positions, the colleges are asked to review this information and, if necessary, move the workload to the proper category or categories. For those persons whose workload is categorized as “College and University Administration” and “Departmental Administration and Support,” the changes that were made previously will be carried over for the current year’s data collection. For all new hires and for personnel whose prior workload was split among more than these two categories – “College and University Administration” and “Department Administration and Support” – the workload will be entered automatically as follows:

- **College Laboratory Technician series:** 35 hours under “Department Administration and Support”;
- **Higher Education Officer:** 35 hours under “College and University Administration”;

- **Higher Education Associate, Higher Education Assistant, and Assistant to HEO:** 35 hours under “Departmental Administration and Support”; and
- **REM position:** 35 hours under “College and University Administration.”

With the exception of the professional hours worked by some teaching adjunct instruction staff,¹ part time hours (*e.g.*, Hourlies and Adjuncts) are reported as the total hours for the semester. The workload data for these Instructional Staff members will be entered on the appointment screens (Screens 11 and 29), and this workload data will be moved to the workload screen (Screen 17). The information appearing on Screen 17 should then be reviewed and, if necessary, corrected by the college. The professional hours alluded to earlier should be recorded in the OTHER category on Screen 17 as a total number of professional hours worked for the semester.

All of the above-described entries are to be reviewed by the college, and the workload, if necessary, should be apportioned among other categories as appropriate.

CUPS Screen 17

Data for members of the Instructional Staff are entered on CUPS Screen 17. The top half of the screen lists each Instructional Staff position as recorded in the CUPS System with Job Number, Title, Department, and Appointment Type. Information on approved leaves, if relevant and entered in the CUPS system, will automatically appear on Screen 17. The bottom half of the screen is used to enter or modify workload data in categories as follows:

- X Teaching Classroom
- X Teaching Other Than Classroom
- X Sponsored Research
- X Unsponsored Research
- X College and University Administration
- X Departmental Administration
- X Counseling/Advisement
- X Other

A total for each of these categories is automatically provided by the CUPS system.

¹ Article 15.2.b. of the PSC/CUNY collective bargaining agreement states: “Adjunct Professors, Adjunct Associate Professors, Adjunct Assistant Professors, Adjunct Instructors, and Adjunct Lecturers who are assigned a teaching workload of six (6) or more contact hours at the same college, will be paid at the appropriate teaching adjunct rate of pay for one (1) additional hour per week in order to engage in professional assignments related to their academic responsibilities, such as office hours, professional development, participation in campus activities and training. It is understood that the professional hours for adjuncts provided herein shall not be counted toward the maximum adjunct teaching hours in section 15.2 of this Agreement. This provision does not apply to full-time instructional staff who teach a course as a multiple position.”

Position and Person

Distinction is made between the person and the position (see Screen 17). Each Instructional Staff member has a workload relevant to a specific position (on the CUPS System, Job 1, 2, 3, 4 or 5). Workload is to be reported for each particular position and semester. For example, an Adjunct Assistant Professor may have a semester workload of 45.0 hours in the Fall semester and become a Substitute Assistant Professor with a weekly workload of 9 hours in the Spring semester. This person is to have data entered for two positions. The part-time position, for example, appears as Job 1, and a semester workload of 45.0 contact hours is entered for the Fall semester. The full-time position appears as Job 2, with the appropriate weekly workload of 9 hours for the Spring semester. The CUPS Workload Report (3-72) includes a Fall Effective Date and a Spring Effective Date. The status of an individual in the Workload Report is dependent on their status on the specific Effective Date. For example, an individual who resigns prior to the Fall Effective Date will not appear in the workload report. Similarly, an individual who resigns after the Spring Effective Date will appear in the workload report.

II. Workload Components

Workload data for each member of the Instructional Staff are collected in each of his/her positions for the Fall and Spring semesters. Summer session is not part of the data collection. At Kingsborough and LaGuardia, one of the six-week modules may be used as part of the yearly workload assignment, and these hours should be reported in either the corresponding Fall or Spring. Special intersession courses that are part of a full-time faculty member's workload should be reported for the appropriate semester.

Workload data are reported in the following categories:

- X Teaching Classroom
- X Teaching Other Than Classroom
- X Sponsored Research
- X Unsponsored Research
- X College and University Administration
- X Departmental Administration
- X Counseling/Advisement
- X Other

Definition of "Classroom Teaching"

A teaching contact hour requires an organized class meeting at a regularly scheduled time during a semester, quarter, or session for a fifty-minute period or its approved equivalent. An approved equivalent may be either more or less than a fifty-minute period.

For annual undergraduate teaching contact hour workload, the colleges are referred to the WSA. For graduate instructional workload, a teaching contact hour is defined by the college.

Any formula used by the college to equate work assignments to a classroom contact hour must be reported to the Office of Faculty and Staff Relations and consistently applied in workload reporting. For example, if a three-hour laboratory assignment is equated with two hours of classroom instruction, the assignment should be reported as two contact hours per week. Such formulas and equivalencies apply to annual-salaried employees only.

Credit for oversized classes (or the credit from these classes given to other faculty members) is reported only under the category “Teaching Other Than Classroom” and is not reported under “Classroom Teaching” using an equivalency formula. See “Teaching Other than Classroom” for more detailed instructions. A list of the faculty members who receive credit for oversized classes must be forwarded to the Office of Faculty and Staff Relations.

Equivalencies (including among others the formulas for credit for oversized classes, graduate instruction, and tutorials) used to calculate the teaching contact hours reported in workload must be filed with the Office of Faculty and Staff Relations.

The PSC/CUNY collective bargaining agreement contains a provision that states:

In order to avoid the loss of teaching hours due to difficulties in scheduling, the annual undergraduate teaching contact hour workload shall be managed over a three-year period. The intent of this provision is to ensure that classroom contact hours not scheduled in one year because the courses assigned to the faculty member do not permit an exact correspondence with the stated workload, may be scheduled in a subsequent year within the three-year period. Calculated over the three-year period, the average annual undergraduate teaching contact hour workload of every faculty member shall equal the hours specified above.

To implement this provision, the colleges should report the actual number of hours taught during the semester (including equivalencies), even if this means that the total workload reported for the faculty member does not add up to the annual workload required of that faculty member. This new provision is not intended to alter the basic faculty workload. Rather, it permits minor adjustments of the annual workload, when necessary in particular situations, to avoid the loss of teaching contact hours because of scheduling difficulties. It is not intended and should not be used to accomplish other purposes. A list of the faculty members whose workload is being averaged pursuant to this new provision must be forwarded to the Office of Faculty and Staff Relations. In lieu of averaging, a college may continue the practice of paying faculty who, in special circumstances, teach contact hours in excess of the contractual agreement, at the appropriate overtime pay rate, subject to the rules stated in the *Statement of Policy on Multiple Positions*.

“Classroom Teaching” includes:

- X The contact hours produced by full-time members of the Instructional Staff assigned to the classroom.
- X The contact hours produced by full-time members of the Instructional Staff who are assigned to the classroom and who are paid as hourlies or adjuncts for this additional teaching assignment.
- X The contact hours produced by anyone in an adjunct title.
- X The contact hours produced by a member of the Instructional Staff who is employed by the University in a capacity other than full-time or part-time teaching, who is not in the Executive Compensation Plan, and who in special circumstances is assigned to teach for extra compensation. (For example, a Higher Education Officer who teaches one course for three weekly contact hours is reported in each position, one with a workload of 35 administrative hours and one with a workload of 3 teaching contact hours.)
- X The contact hours produced by Instructional Staff members who within the standard workweek of 30 or 35 hours teach a course as a required part of their regular workload without additional compensation. (For example, for librarians or counselors who teach as part of their regular assignments, the normal workload of 30 or 35 hours is reduced by the number of hours taught in accordance with the college's equivalency formula. A librarian, who teaches a three-hour course as a part of his/her workload in a college where the equivalency is two for one, has a workload entered as three hours under “Classroom Teaching” and 29 hours under “Other.”) The college must report its equivalency formulas to the Office of Faculty and Staff Relations.
- X Teaching contact hours produced by Instructional Staff members under the Executive Compensation Plan who teach without additional compensation. (For example, a Vice President who teaches a three-hour course in the Fall semester should be reported as having one position with workload entered for the three hours under “Teaching Classroom”; the 35 hours under “College and University Administration” should remain unchanged.)
- X The teaching contact hours provided by Volunteers.
- X If a coaching assignment is an actual course, the workload for an adjunct or full-time faculty member/coach is reported under “Classroom Teaching.” If a coaching assignment is not an actual course, the workload for an adjunct or full-time faculty member/coach is reported under “Teaching Other Than Classroom.” All formulas for full-time faculty should be submitted to the Office of Faculty and Staff Relations.
- X Assigned hours for supervision of student teachers or other field work courses, if there is an actual class, are reported under “Classroom Teaching.” Any formula used to equate numbers of students with credit hours should be submitted to the Office of Faculty and Staff Relations.

Teaching Workload of Graduate Assistants

For teaching Graduate Assistants A and B, the maximum yearly workloads are 240 hours and 120 hours respectively. For Graduate Assistant C titles (a purely teaching position) the maximum yearly workload is 180 classroom teaching hours per year. For reporting purposes, the workload should be shown as the weekly contact hours for the classes taught. A teaching Graduate Assistant B and a Graduate Assistant C may also hold an adjunct title, but the total combined hourly assignments may not exceed 240 contact teaching hours for the Graduate Assistant B and 270 contact teaching hours for the Graduate Assistant C during the work year. A person appointed as a Graduate Assistant A cannot be appointed in another CUNY title. Graduate Assistants A and B may perform a combination of teaching and non-teaching functions. Graduate Assistants C may perform teaching only. Their total workloads, however, are governed by the limitations outlined in Section 15.3 of the Agreement between The City University and the Professional Staff Congress/CUNY.

Definition of "Teaching Other Than Classroom"

Each college is required to maintain documentation for all teaching hours reported under this heading. Documentation must be maintained on a semester-by-semester basis in order that the data for an entire semester may be examined if necessary.

"Teaching Other Than Classroom" includes:

- X The contact hours per week for a faculty member who is "credited" with additional teaching contact hours for graduate courses or for dissertation supervision.
- X The contact hours per week for a faculty member who is "credited" with additional teaching contact hours as a result of special circumstances, such as credit given for oversized classes or excess hours accrued in a prior semester carried over to the current semester within the same academic year.
- X Assigned hours for supervision of student teachers or other fieldwork courses if there is no class. Formulas used to equate numbers of students to credit hours must be submitted to the Office of Faculty and Staff Relations.
- X A coaching assignment that is not an actual course.

All equivalencies used to calculate teaching contact hour workload (including, among others, credit for oversize classes, teaching graduate courses, coaching activities, and teaching tutorials) must be filed with the Office of Faculty and Staff Relations.

Definition of "Sponsored Research"

"Sponsored Research" is defined as research and other projects for which the college is reimbursed from non-tax-levy sources, normally from outside the University (*e. g.*, the National Institute of Health) usually through The City University Research Foundation. The workload reported is the number of authorized teaching contact hours per week from which

the Instructional Staff member has been reassigned to engage in Sponsored Research.

Definition of "Un-sponsored Research"

"Un-sponsored Research," usually under the auspices of the college or the department, covers research or other academic projects not reimbursed from sources outside the University but supported from tax-levy funds. The workload reported in weekly contact hours for this category is the number of authorized teaching contact hours per week from which the person has been reassigned to participate in the approved research or other academic project.

When there is a semester faculty exchange between a senior and a community college, the "home" college reports the correct yearly workload. Any reduction of hours is reported as "Un-sponsored Research."

This category includes the reassigned time provided for untenured faculty pursuant to the PSC/CUNY collective bargaining agreement.² The reassigned time provided under the

² Article 15.1 of the PSC/CUNY collective bargaining agreement states:

(d) (1) Effective October 31, 2002, untenured Assistant Professors, Associate Professors and Professors, except Librarians and Counselors, who are initially appointed on or after September 1, 2002, will receive a total of 12 contact hours of reassigned time during their first three (3) annual appointments in order to engage in scholarly and/or creative activities related to their academic disciplines. Assignment of such reassigned time will be made by the college pursuant to guidelines designed to encourage scholarship. (d) (1) Effective October 31, 2002, untenured Assistant Professors, Associate Professors and Professors, except faculty librarians and faculty counselors, who are initially appointed on or after September 1, 2002 and before September 1, 2006, will receive a total of 12 contact hours of reassigned time during their first three (3) annual appointments in order to engage in scholarly and/or creative activities related to their academic disciplines. Assignment of such reassigned time will be made by the college pursuant to guidelines designed to encourage scholarship.

(2) Effective September 1, 2006, untenured Assistant Professors, untenured Associate Professors and untenured Professors employed as faculty counselors or as faculty librarians who were initially appointed to those titles on September 1, 2002, September 1, 2003, September 1, 2004, or September 1, 2005 and who continue in active pay status will receive the equivalent of 12 contact hours of reassigned time to be used during the 2006-2007, 2007-2008, and 2008-2009 academic years, regardless of tenure status, in order to engage in scholarly and/or creative activities related to their academic disciplines. Assignment of such reassigned time will be made by the college pursuant to guidelines designed to encourage scholarship.

(e) Effective September 1, 2006, untenured Assistant Professors, untenured Associate Professors and untenured Professors (including those employed as faculty counselors or as faculty librarians) who receive an initial appointment to a professorial title on or after September 1, 2006 will receive twenty-four (24) contact hours of reassigned time (inclusive of the reassigned time provided for in 15.1 (d) (1) above), to be used during their first five (5) annual appointments, in order to engage in scholarly and/or creative activities related to their academic disciplines. Assignment of such reassigned time will be made by the college pursuant to guidelines designed to encourage scholarship.

(f) For the purpose of calculating the reassigned time provided in paragraphs (d) (2) and (e) above to untenured Assistant Professors, untenured Associate Professors and untenured Professors employed as faculty counselors or as faculty librarians, 12 contact hours shall be equivalent to the number of clock hours that would be necessary to provide full reassigned time to a faculty counselor or a faculty librarian for 15 weeks. Assignment of such reassigned time will be made by the college pursuant to guidelines designed to encourage scholarship.

collective bargaining agreement to untenured faculty counselors and librarians should be reported as weekly contact hours in the same manner as for teaching faculty.

Definition of "College and University Administration"

College Administration workload, reported in weekly contact hours, is the number of authorized teaching contact hours per week from which a member of a teaching member of the Instructional Staff has been reassigned to college administrative duties.

For a full-time administrator (*e.g.*, Director of the Academic Computer Center), with the exception of those under the Executive Compensation Plan, a workload of 35 hours should be entered. No workload need be entered for those under the Executive Compensation Plan whose total workload comes under the heading "College and University Administration." When someone under the Executive Compensation Plan performs additional functions (*e.g.*, teaching, research) the hours assigned to these functions are entered under appropriate headings. For example, an Associate Dean who teaches a three-hour course during the Spring semester should be reported with 3 hours under the category of "Classroom Teaching" for the Spring semester.

College Administration is not tied to specific departments, even if the administrator is the head of his/her academic department. (For example, the Dean of Students may also serve as a department chair.)

Workload for the Director of a Center or Institute is reported under "College and University Administration." Included under College and University Administration are the hours reassigned to perform duties for the Professional Staff Congress/CUNY, the PSC/CUNY Welfare Fund, the University Faculty Senate, the College Council, and other similar activities.

Definition of "Departmental Administration and Support"

This category includes the number of authorized weekly teaching contact hours from which a member of the Instructional Staff is reassigned to perform departmental administrative duties. For example, the hours of department chairs, deputies, and coordinators are reported under "Departmental Administration and Support."

Additional examples of reassigned time reported under "College and University Administration" are curriculum development, development of a learning laboratory under departmental auspices, and course coordination.

For a teaching Instructional Staff member reassigned to full time administration (*e.g.*, Director of College Relations), a workload of 35 hours should be entered. Attendance at committee meetings is not *per se* counted under administration unless reassigned time is specifically authorized by the college for this purpose.

For non-teaching Graduate Assistants A and B, the yearly maximum workloads are 450 hours and 225 hours respectively. Using the maximum workload, each college should establish a weekly standard for each non-teaching Graduate Assistant that does not exceed these annual limits. Graduate Assistants B and C may also hold adjunct titles but the total combined assignment may not exceed the yearly maximum permitted in Article 15.3 of the Agreement between The City University of New York and the Professional Staff Congress/CUNY.

The workload of College Laboratory Technicians is recorded automatically with 35 hours under “Departmental Administration and Support,” but the College may move the hours to the appropriate workload category.

Definition of “Counseling/Advisement”

Workload for student personnel staff is entered in this category. **The workload of student personnel staff (including counselors) in Instructor, Lecturer, or professorial titles is 30 hours per week as assigned.** Workload for Instructional Staff in Higher Education Officer series titles is 35 hours. If these assignments are split between administration and counseling, the workload entry should reflect the number of hours attributed to each assignment. For example, the workload of a Director of Counseling, an Associate Professor who supervises the Counseling Center for 20 hours per week and counsels students for 10 hours per week, is reported as follows: 20 hours, “Departmental Administration and Support,” and 10 hours, “Counseling/Advisement.” Teaching hours, which are part of a counselor's full-time workload, are reported in the manner described earlier.

The workload of teaching Instructional Staff members who receive reassigned time for counseling in the area under the jurisdiction of a Vice President for Student Affairs, Dean of Students, or equivalent, is reported under “Counseling/Advisement.” For example, the workload of a Professor of Marketing who has a total workload of 9 weekly contact hours to serve as a Placement Counselor is reported as follows: 6 hours, “Teaching” and 3 hours, “Counseling/Advisement.” Please note that contact hours are not the same as the clock hours spent on the placement assignment.

The workload of a member of the teaching Instructional Staff who receives authorized reassigned time for special academic advisement administered by a department, Academic Dean, or Provost is reported under “Counseling/Advisement.” The workload of teaching Instructional Staff members who advise students as part of their regularly assigned teaching duties is not reported here.

Definition of “Other Workload”

This category includes workload not previously described. Colleges are reminded to maintain documentation for contact hours reported under this heading. The workload of Librarians is reported in this category.

The workload of a full-time faculty member who is redeeming "credited" hours under the

workload averaging provision is reported in this category.

The “professional hour worked by eligible teaching adjunct instructional staff is reported in this category.

Items Which Are Not Reported

The duties and activities by members of the teaching Instructional Staff that are not part of the workload data collection and that are not to be reported unless they constitute a full-time assignment, a portion of a full-time assignment, or represent authorized reassigned time from weekly teaching contact hours. The following are examples of duties and activities that are not reported in the workload data collection:

- X Courses in Adult and Continuing Education that are not degree credit bearing;
- X Tutoring;
- X Office hours (unless part of an organized course of study); attendance at committee meetings;
- X Advisement responsibilities that are part of regularly assigned teaching duties.

Computer Edits

Computer “edits” for maximum workload limits have been programmed as follows:

Classroom Teaching	18 weekly contact hours
Other than Classroom Teaching	18 weekly contact hours
Sponsored Research	
Teaching Faculty	15 weekly contact hours
Non-Teaching Instructional Staff	35 hours per week
College Sponsored Research	
Teaching Faculty	
(Community Colleges)	15 weekly contact hours per semester
(Senior Colleges)	12 weekly contact hours per semester
Non-Teaching Instructional Staff	35 hours per week
College/University Administration	35 hours per week
Department Administration and Support	
Teaching Faculty	30 hours per week
Non-Teaching Instructional Staff	35 hours per week
Counseling/Advisement	
Teaching titles	35 hours per week
Non-Teaching titles	35 hours per week
Other	35 hours per week

Total

Teaching Faculty	30 hours per year
Non-Teaching Instructional Staff	35 hours per week

Answers to Frequently Asked Questions

Full-Time Personnel

- The home college reports the workload of faculty members. The home college is the college that is responsible for entering the individual's position on CUPS, regardless of budgetary arrangements. For example, the home college reports the workload of a faculty member who works at the Graduate School; conversely the Graduate School reports the workload of a faculty member it pays but who teaches at another of the CUNY colleges.

The home college reports the workload of a faculty member holding a joint appointment.

The home college should report workload under “College and University Administration” for faculty members participating in the University Faculty Fellows program.

- There is no workload entry for a faculty member who is on a full-time leave for a whole semester. If a faculty member is on leave in the Fall semester, but returns for the Spring semester, a workload entry is made for the Spring semester only. The College reports the faculty member's workload without regard to his/her total yearly workload.

If an individual was on leave for the semester and no leave was entered into CUPS by the Personnel Office, a leave must be retroactively entered in the appropriate appointment on Screen 11 by an individual with authorization to change Screen 11. In such instance, the Effective Date field must be changed to coincide with the Leave Begin Date.

Faculty members, who are on leave for part of a semester or on a partial leave, should have the actual number of hours they spend on any activity recorded. The leave information (*i.e.*, the leave code and the dates of the leave) is also to be entered in CUPS. That proportion of their workload assumed by a substitute must also be recorded for the substitute.

- When there is a semester faculty exchange between a senior and community college, the correct yearly workload is the workload at the home college. Any reduction of hours occurring from such an exchange is reported as “Unsponsored Research.”
- International faculty exchange agreements vary considerably. Therefore, workload

data for the participating faculty members are reported on an individual basis. The college Labor Designee must send a letter to the Office of Faculty and Staff Relations, explaining each individual case.

Part-Time Personnel

- The actual number of hours is reported when entering the workload for adjunct faculty. For example, an Adjunct Professor teaching a 3-hour course in the Fall semester should be reported under the category of Classroom Teaching with an entry of 45.0 hours.
- The workload of IFR Instructional Staff, except for non-credit Continuing Education Teachers, is reported in the same manner as for tax-levy employees. The workload of non-credit Continuing Education Teachers is not reported.
- **The professional hours alluded to earlier should be recorded in the OTHER category on Screen 17 as a total number of professional hours worked for the semester.**
- The workload for part-time staff should be reviewed after it is automatically moved from the appointment screens to Screen 17. Title codes should be verified, and any miscoding or improperly assigned hours should be corrected.
- In those exceptional and special circumstances in which an Instructional Staff member serving in a full-time teaching title is permitted to teach for extra compensation, he/she shall be coded as an hourly (*e.g.*, Assistant Professor [H]) and not in an adjunct title.
- In addition, in those rare circumstances in which staff serving in the Higher Education Officer or College Laboratory Technician series may be assigned to teach for additional compensation, they should be coded as adjunct, rather than hourly, personnel (*e.g.*, Adjunct Lecturer rather than Lecturer [H]).

The Workload Profile List

The Workload Profile List (72) provides reports to be used in conjunction with the Instructional Staff Workload Data Collection, as well as summary reports which provide statistical calculations including average salary and average workload, and the percentages of total workload derived from each of the workload categories.

The reports will provide data for each position in accordance with entries that have been made in Screen 17, Workload Summary Screen, for the current academic year, either by direct entry on the part of the college or by CUPS. Individuals will be listed in alphabetical order, by department and by position.

For each position, the information provided is name, title, salary, ID number, and a replication of the information provided on Screen 17 for hours broken down into categories of teaching, research, administration, counseling and advisement, other hours, and totals for each semester. Individuals who are on leave for one or both semesters will have leave type code provided.

The population of the Workload Profile List is limited to Instructional Staff appointments with Appointment Begin Dates or Appointment End Dates which fall within the current academic year. Active and terminated appointments will be included as well as appointments from which leave has been granted. An option permits the exclusion of appointments from which a permanent leave has been granted.

The population for the Workload Summary and the Workload Summary Detail List differs from the Workload Profile List in that the summaries automatically exclude all appointments from which a leave without pay has been granted, irrespective of whether such leaves are permanent leaves. This will result in differing headcounts if the two documents are compared.

The reports may be run for a prior academic year, beginning with the 1989-90 academic year. An option also permits a flatfile to be created in addition to the report. If this flatfile option is selected, the report destination must be a valid VM Reader Address.

An asterisk will identify any position for which no hours are reported for a particular semester. An inconsistency list will print separately, listing those appointments for which no hours and no corresponding leave exists, and those appointments with leaves of absence for which workload hours exist.

The default for the colleges will produce a Workload Profile List of all Instructional Staff appointments with Appointment Begin Dates or Appointment End Dates which fall within the current academic year. Active and terminated appointments will be included as well as appointments from which leave has been granted. The default for those with Global Campus (99) sign-on will produce the same report (separately) for each of the colleges.

Options exist to limit the reports to annual or hourly appointments, and to limit selection of up to ten departments, or to limit the population to academic teaching titles in academic departments.

Attachment A depicts the Workload Profile List Screen. Attachment B provides detailed instructions for running the Workload Profile List Report. The Workload Output File Layout is Attachment C.

CUPS REPORT REQUEST MANUAL Revised 12-99

72.A.1

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REPORT REQUEST SYSTEM ***CUPS*** CAMPUS GLOBAL
      **** WORKLOAD PROFILE LIST ****
CAMPUS CODE: 99 ACADEMIC YEAR: 1997
REPORT SELECTIONS (SELECT ONLY ONE)
Y PRINT ALL EMPLOYEES DO YOU WANT A FILE (Y/N)? : Y
N PRINT ONLY EMPLOYEES WITH WORKLOAD
N PRINT ONLY EMPLOYEES WITH NO WORKLOAD
** NO SELECTION RESTRICTION **
N PRINT WORKLOAD SUMMARY (ENTER X FOR REPORT BY TITLE)
N PRINT WORKLOAD SUMMARY DETAIL LIST
** DEPARTMENT SELECTION **
D D D D D D D D D D
REPORT OPTIONS
Y BYPASS PERMANENT LEAVES
B ANNUAL/HOURLY/BOTH (A/H/B)
N BASIC TEACHING TITLES IN ACAD DEPTS
REPORT 072 DESTINATION CUNYVM.RCSBH #OF COPIES 1
ACTION - 03 CAMPUS 99
1=HELP 2=REPORT MENU 3=SYSTEM MENU 4=REFRESH CLEAR=RTN TO
PREV SCREEN
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CUPS REPORT REQUEST SYSTEM MANUAL Revised 12-99

72.B.1

Workload Profile List Report

1. You must have security clearance for function '03,' ***CUPS REPORTS***, or for Report 72-03, Workload Profile List Report.
2. When you are on the CUPS ***SYSTEM MENU*** screen enter function '03' and press the "Enter" key.
3. You will now be on the CUPS ***STANDARD REPORTS MENU*** screen. Enter 72 and press the "Enter" key. You will go to the **WORKLOAD PROFILE LIST SCREEN**.
4. If a destination where the report is to be sent has been entered for you in the Security System it will appear on the bottom of the screen. If the destination field is blank you must specify where the output is to be routed. If you don't know a valid destination please confer with your data processing department. The destination may be the reader for your assigned VMID, or for any other assigned VMID, or it may be a printer location. **If the flatfile option is selected, the destination may only be a valid VM Reader address.** To send it to a reader, type in the node (check with your data processing department), followed by a period, followed by the VMID, e.g. NODE.OPERATOR.

5. Select options if desired. The options for the report are as follows:

Campus Code

For the individual campus this field is protected and cannot be changed.

For those designated individuals at The Central Office this field is not protected to allow them to print the Report for a specific campus or to print the Report for the entire University.

Academic Year

(Default = Current Academic Year)

If you wish to run the Report for another academic year, beginning with 1989-90, change the default by entering the four digit year of the Fall semester, e.g., "1989" for the academic year 1989-90.

Report Selections

Select No More Than One

(Default = Print All Employees)

Print All Employees

CUPS REPORT REQUEST SYSTEM MANUAL Revised 12-99

72.B.2

Print Only Employees With Workload

Print Only Employees With No Workload

If you wish to produce a report of only those employees for whom workload appears on Screen 17, or a report only of those employees for whom no workload appears on Screen 17, change the Y to N next to Print All Employees and change the N to Y accordingly. **Please note that one and only one selection may be made from the above group.**

No Selection Restriction

Print Workload Summary

Print Workload Summary Detail List

The Workload Summary and the Workload Summary Detail presents statistical calculations by title and department with campus summaries. It is prepared from the Workload Profile List data although it excludes all appointments from which a leave of absence without pay has been granted. If you wish to produce the Workload Summary and/or its detail list which represents the specific individual data in the order in which it appears on the Workload Summary, change the N to Y accordingly.

If you wish to produce the Workload Summary calculated and presented for the entire campus as a single unit without the calculation and presentation of the departmental statistics, change the N to X.

Individuals with Global Campus 99 may not run the Workload Summary and the Workload Summary Detail List for the entire University due to the size of the report produced, except that the campus summaries (Print Workload Summary = X) may be run for campus 99.

Bypass Permanent Leaves

(Default = N)

If you wish to produce the Workload Profile List excluding those appointments from which Instructional Staff Permanent Leaves have been granted, change N to Y. Appointments with the following leaves will be excluded:

17 – “CCE” LEAVE TO SERVE IN ANOTHER TITLE

18 – LEAVE TO SERVE IN ANOTHER TITLE

43 – LEAVE TO SERVE IN A “REM” TITLE

44 – LEAVE TO SERVE IN AN EXECUTIVE COMPENSATION PLAN
TITLE

45 – LEAVE TO SERVE IN AN EXCLUDED TITLE (NON-“REM”)

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72.B.3

Annual/Hourly/Both (A/H/B)

(Default = B = Both)

If you wish to limit the population of the Reports and/or summaries to annual appointments, change the default to A (this will also include monthly appointments). If you wish to limit the population to hourly appointments, change the default to H (this will also include contact hour appointments.) The inconsistency listing is not affected by the selection criteria and therefore will be produced for the entire college irrespective of limiting the report through this option.

Department

You can select up to ten different departments. If these fields are left blank, the program will not use the department as a criteria for selection and therefore all departments will be included on the report. The inconsistency listing is not affected by the selection criteria and therefore will be produced for the entire college irrespective of limiting the report through this option.

Basic Teaching Titles in Academic Departments

(Default = N)

If you wish to limit the population of the Reports and/or Summaries to Basic Teaching Titles in Academic Departments, change the default to Y. The population utilized will be:

1. All teaching titles including substitutes except for:

Distinguished Series

University Series

Resident Series

Visiting Series

Medical Series

Law Series

2. All Academic Departments: Department Codes between 5050 (Accountancy) and 8900 (X-Ray Technology) except for the following departments:

5070 Adult & Continuing Education

5260 School of Medical Education

5870 College Discovery
7040 KCC Association
8060 SEEK

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72.B.4

File Creation

If you wish to create a file of the selected workload data in addition to the report, enter a 'Y' in the field 'Do you want a file (Y/N)?'. Enter a valid VM Reader Address in the report destination. Two outputs will return to the VM Reader: the report and the data file. See Attachment C for the Workload Output File Layout.

If you are using the default options the colleges will produce a report of all Instructional Staff appointments with Appointment Begin Dates or Appointment End Dates which fall within the current academic year, in alphabetical order, by department and position, with total appointments by department. The default for those with Global Campus (99) sign-on will produce the same report (separately) for each of the colleges.

6. If the options have been entered correctly, or if you are using the default options, the message 'OK TO PROCEED?' will be displayed. If you enter a 'Y' in this field your request to run the program will be processed. If you enter anything else or nothing at all and press the 'Enter' key you will have the ability to reset the reports and options.

7. When you enter a 'Y' and press the 'Enter' key in response to the message, 'OK TO PROCEED?' you will return to the Standard Reports Menu with the message that your job has been submitted. You can now select another report, press the PF3 key to return to the system menu or press the PF12 key to sign off.

8. The Reports will be sent to the destination requested.

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