

Archivum FIS (Faculty Information System) Assignments

Unit Director & Unit Liaison Instructions

Glossary:

Archivum USF IT's implementation of the Appian platform.

IT The Information Technology group, responsible for developing, improving, and maintaining FIS.

ODS The Office of Decision Support, reporting to the Office of the Provost, is the primary support resource for FIS and represents faculty and administration in the development of FIS in concert with IT.

P.A.N. Pre-Assignment narrative. The opportunity for Faculty to have input into their Assignment and desired courses before being entered. The use of P.A.N. in a unit is optional. If included, and the faculty member does not complete, the process may proceed.

Unit A department, school, or college operating as a distinct group within FIS with its own permissions groups.

Unit Head The Chair, Director, Dean, or other titled person responsible for the Unit (e.g. Department Chair). College Dean is the Unit Head at the College level.

Unit Liaison The administrative specialist with knowledge of the system and processes that serves as the primary resource for Faculty in the Unit and main conduit to College and Office of Decision Support resources. College Liaison is the Unit Liaison at the College level.

Recent changes:

- Courses from Banner will now be displayed even if there are no registered students.
- The ability to modify a completed Assignment now exists.
- Language has been changed from Accepting/Declining an Assignment to Acknowledging Receipt with or without a request for consultation.

Upcoming changes:

- Due to curricular consolidation, Spring 2022 courses are not yet in Banner so cannot be displayed.
- Assignments not actioned by a faculty member will be able to be completed by the department without input if necessary in a future release. We are working with IT to include this functionality.

Background Information

Based on the USF Consolidation Academic & Student Success Handbook Volume 2
(<https://www.usf.edu/sacscoc-consolidation/documents/consolidation-handbook-vol2-web.pdf>)

All faculty members (9-month and 12-month) are required to have written annual assignments. The purpose of this document is to provide individuals responsible for faculty assignments, typically a Chair/Director or Dean, with information and guidance for making annual assignments for tenured/tenure-track, instructional, research, and clinical faculty members who hold regular, visiting, or joint appointments. It is not applicable to assignments for those on adjunct and courtesy appointments, who are typically provided with a letter of agreement or employee contract that outlines assignment at the time of appointment.

Relevant Documents:

- Ø Florida Statutes 1012.945 Required number of classroom teaching hours for university faculty members. – (aka “The 12-Hour Rule”) <http://www.flsenate.gov/Laws/Statutes/2019/1012.945>
- Ø University of South Florida/United Faculty of Florida Collective Bargaining Agreement (2016-2019) – Article 9 Assignment of Responsibilities <https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>

Ø USF Regulations

Number		URL
10.014	Benefits and Hours of Work (Faculty)	https://usf.app.box.com/v/usfregulation10104
10.018	Evaluation (Faculty)	https://usf.app.box.com/v/usfregulation10108
10.016	Promotion and Change in Assignment (Faculty)	https://usf.app.box.com/v/usfregulation10106

Guiding Principles:

The professional responsibilities of faculty members comprise both scheduled and nonscheduled activities. Florida Statutes 1012.945, also known as the “12-hour Law”, requires that each full-time equivalent faculty member who is funded by state funds teach a minimum of 12 classroom contact hours per week (or 100% of effort) or equivalent assignments each term in furtherance of the mission of the university. Effective July 1, 2020,

- Provides fair and equitable opportunities to fulfill any applicable criteria for merit salary increases;
- Considers the needs of the program or department/units;
- Meets the minimum full academic assignment in terms of 12 contact hours of instruction or equivalent assignments in research and service (and, if applicable, clinical and/or administrative assignments).

Categories of Assignment and General Expectations for FTE Assignments:

Annual faculty assignments, expressed in percentage of effort, are made in one of five “general” categories, as shown in the table below. Also shown are the sub-categories which are required for mandated effort reporting described briefly later in this document. The Annual Assignment module in the Faculty Information System (FIS) allows for assignment to “general” high-level or to “sub-categories”.

General Category	Sub-Categories
Teaching/Instruction	Undergraduate Organized Sections
	Undergraduate Individual Instruction
	Graduate Organized Sections
	Graduate Individual Instruction
	Other Instructional Effort
	Academic Advising
	MCOM – Medical Student Instruction
	MCOM – House staff Instruction
	MCOM – Health Professional Instruction
Research	Department Research Sponsored Research

Category	Tenure-Earning	Tenured - Research Productive	Tenured - Not Research Productive	Instructional (Not TT)	Research (Not TT)	Clinical (Not TT)
Teaching	0-55%	0-55%	70-95%	80-95%	0-5%	See USF Health Guidelines
Research	40-95%	40-95%	0-20%	0-10%	90-95%	
Service	5-10%	5-10%	5-10%	0-10%	0-10%	

The above guidelines assume that most tenure-track, tenured faculty in a unit that offers doctoral education teach, on average a 2-2 organized section teaching load. It also assumes that Instructional, non

of Service. This category does not include direct administrative effort related to a specific course, which should be reflected in the appropriate instruction category. Direct administrative effort related to a specific project and funded by sponsored research, should be reflected in the "Sponsored Research Category".

Assignment of effort in Academic Administration should only occur when an individual has a formal administrative appointment.

Note on Associate Chairs, Program Directors, Undergraduate/Graduate Coordinators, Center/Institute Directors: Typically, individuals in these roles do not have a formal administrative appointment. Effort associated with the activities of associate chairs, program directors and undergraduate/graduate coordinators will normally be included under Teaching/Instruction, Other Instructional Effort. Effort for directing of an officially recognized center/institute can be included under Departmental Research or Other Instructional Effort depending on the mission of the center/institute.

In those cases where an individual is assigned effort under Academic Administration, the Annual Evaluation must include evaluation, at a minimum, by the Department Chair/School Director or Dean, as applicable. It is recommended that Faculty Evaluation Committees also provide an evaluation, but when not done the numerical evaluation by the Department Chair/School Director or Dean will be utilized for comprehensive assessment purposes.

Note on assignments in Other: When assignment to Other is for a Leave of Absence (LOA) with pay for professional development leave/sabbatical leave, the category will require assessment during Annual Evaluation. For release time for union activities, the annualized assignment will not count associated effort for the purposes of annual evaluation. LOA without Pay (such as FMLA or other instances) should not be included in a faculty member's assignment. Please contact the Office of Decision Support for questions about assignment and effort reporting in the "Other" category.

Using FIS for Faculty Assignments

- ∅ Academic Year assignments for 2021-22 will be delivered to the faculty electronically through the Archivum Faculty Information System (FIS).
 - You are encouraged to use FIS for Summer 2021 assignments
- ∅ The Chair/Director (or equivalent) of the academic unit bears the primary responsibility to make assignments and should review the information in the

[https://www.usf.edu/sac\(a\)-3reWBt/FunBT/FunBT/Fun Tm@{ \)JTET@M](https://www.usf.edu/sac(a)-3reWBt/FunBT/FunBT/Fun Tm@{)JTET@M)

and clicking NEXT, a prompt will be shown asking you to confirm the selection through a (c) YES/NO response.

- ∅ WAIT for FIS to process and then a TASK will be assigned to you within the Archivum Platform, as shown here:
 - An unattended setup Task will expire in 3 days! Once expired, the process will need to be restarted.
- ∅ Once the Task is accepted, the next step is to VERIFY the faculty members' (a) Supervisor and (b) Home Campus. (

- ∅ A faculty member can be excluded from the Assignment process by (d) de-selecting the row with the leftmost checkbox.

∅ Note: When you click Next, there is a reminder to remove anyone who should not receive an assignment. Click Yes to continue.



- ∅ The next step allows for a Setting Up or Updating Unit Specific Assignment Instructions. Entering instructions is an optional step but a value must be typed. Examples: N/A, or Department assignment guidelines forthcoming. Click ENTER to continue.
 - Assignment Instructions: These instructions are directed at the individual who will be entering the effort and would reflect any departmental/unit guidelines in place, typically in governance documents, for making assignments. For example, a unit may have guidelines for effort that is typically given for departmental research, effort given for certain service activities, effort for individual student mentoring, etc.
 - Pre-Assignment Instructions: Enter instructions here if using the P.A.N. process. For example, a unit might request that the Faculty Member provide information about the anticipated number of students who will be supervised in credit-bearing research/creative scholarship activities, any known commitments to committee work, planned research activities, etc. to assist in determining the percentage of effort to assign in each category.

- ∅ The next step is a Review of Assignment Preferences. Once reviewed and the form Submitted, the Action cannot be undone!
 - Tick the box at the bottom of the page to indicate the review was completed, and then hit Submit.
 - Please give the system time to process the submission BEFORE trying to proceed. Be patient as this step may take a few minutes. A new Task will not be generated. Instead, the Enter Assignments grid on the Dash Board will be populated.

ENTERING THE ASSIGNMENT

- ∅ After the submission form is processed, the Unit Head or Unit Liaison, can begin entering the

- ∅ Select the Faculty Member for whom the Assignment will be entered by clicking on the Faculty Member's name and then click Assign to me to enter the Assignment.

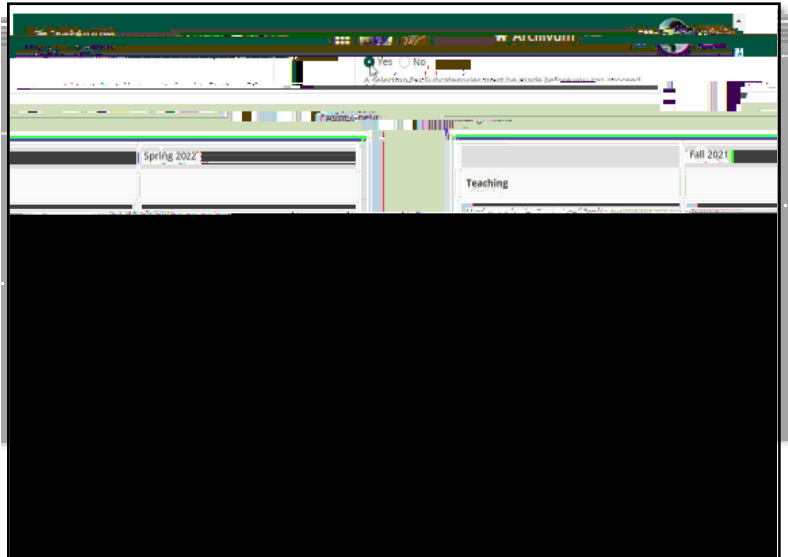
- ∅ Once this action is done, others who have access to enter Assignme }

∅ Courses assigned to a Faculty Member in Banner in future semesters will populate. (*Note that in FIS there is a statement that the information is coming from the FAIR system, but actually FAIR pulls the information from Banner which is the source system for course scheduling.*)

∅ While teaching assignments may change, it is expected that all courses a Faculty Member will teach in the upcoming Academic Year (or Summer if applicable) will be entered in Banner as soon as possible so that Faculty know their teachi.54 TthD Tc(c)-6()3(Y4 Tm0 g0p)-5(lic)-7(ab)-3(le)-3()-4()TJET@.00000912

- ∅ Terms can be deselected at this stage if there is no assignment. Summer can be removed by clicking No on Enter Assignment if faculty were not under summer contract.
- ∅ The next step is to Assign Effort.

- Sub-categories expand to provide many of the same categories that are seen in FAIR AFD-FAR, as illustrated here. While the sub-categories are needed for state-level effort reporting, they are not required for Annual Assignments. Use of the sub-categories for Annual Assignment is at the unit's discretion. Appendix B includes the list of the sub-categories and the alignment with FAIR Workload used in effort reporting.

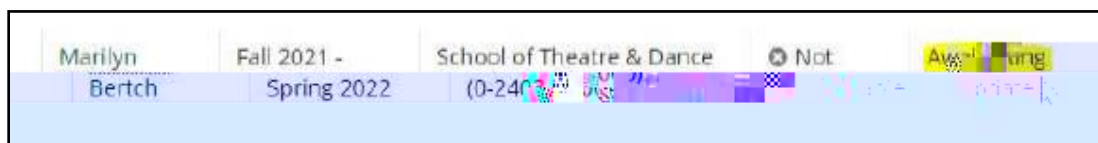


- Once the Assignment is Submitted it will automatically be sent to the Faculty Member. The assignment sent to the faculty member will indicate the courses that the Faculty Member will be assigned to teach in future semesters. The Faculty Member must then take action to Acknowledge Receipt of the assignment, with or without consultation. Acknowledging Receipt with request for consultation should be interpreted as a request from the faculty member to adjust the assignment.

- The Assignment and Evaluation dashboard will show which Faculty Members need to Acknowledge Receipt of their assignment, under the Process Complete column



- If the Faculty Member Acknowledged Receipt with request for consultation, the assignment will show in the Enter Assignments list as Awaiting Update



- ∅ College Deans in multi-campus colleges are responsible for ensuring equity of assignment on all campuses with delegation of the responsibility to a Department Chair/School Director, as appropriate.
- ∅ Assignments for branch campus faculty must be made in collaboration with the "*RC or designee... to reach decisions on assignment that are maximally aligned with the strategic priorities and goals of the University.*"
- ∅ As described above, the default "supervisor" for the purposes of FIS Assignment processes is the GEMS Supervisor, who typically is the Department Chair/School Director (or equivalent).
- ∅ As should be codified in a unit's governance documents, the GEMS Supervisor may (but is not required to) further delegate the responsibility for completing the Assignment process within FIS to a Campus Dean or Campus Chair.
- ∅ Documentation of collaboration is done outside the Faculty Information System.

Appendix A
High Level Categories used in FIS and Types of Activities Included

Category	Examples of Types of Activities
Teaching	<ul style="list-style-type: none"> • Credit-bearing organized sections • Credit-bearing laboratory course sections • Credit-bearing individual student instruction, including theses, dissertations, independent studies, directed research, supervision of clinical activity and internships. • Other Instructional effort, e.g., <ul style="list-style-type: none"> ○ Development/improvement/revision of teaching methods ○ Mentoring graduate teaching assistants. ○ Secondary instructional site travel if over 2-hours per course meeting ○ Program planning, development, evaluation, and oversight, such as that assigned to Program Directors. (<i>Effort for directing a program may be assigned to Teaching or to Service but may not count more than once.</i>) ○ Participation on student committees when student not registered for individual credit-bearing course with faculty member. • Academic student advising • Travel to a secondary site if more than 2-hours away • Supervision of co-operative education
Research	<ul style="list-style-type: none"> • Conducting research • Developing creative works • Preparing articles, books, chapters for publication • Grant writing, development of contracts and proposals • Performing or exhibiting works • Presenting at professional meetings or conferences • Maybe externally funded or funded through the Department (Or equivalent unit)
Service	<ul style="list-style-type: none"> • Activities in support of professional, academic, student or community associations • Includes contributions to the department/school, unit, university, State, K-12 education, professional associations, discipline-related community organizations, and governmental boards, agencies, committees • Contributions can be on the local, state, regional, national, and international levels • Effort for department/school, college and university governance activities (e.g., Faculty Senate) should be recorded here¹
Administration ²	<ul style="list-style-type: none"> • Supervisory and management activities related to the administration of a department/school, college, or the university
Clinical	<ul style="list-style-type: none"> • Time spent instructing, supervising, and advising residents, interns or other post-doctoral trainees who are not formally registered students³ • Paid Patient care³ •

FIS Sub-Categories of Assignment and Relation to FAIR Workload

FIS Assignment Category	Workload Activity Categories
Teaching	
Undergraduate Organized Sections	Course Related - Course Title
Undergraduate Individual Instruction	Course Related - Course Title
Graduate Organized Sections	Course Related - Course Title
Graduate Individual Instruction	Course Related - Course Title
Other Instructional Effort	Instruction Related - Supervision of Co-op Instruction Related - Other Instructional Effort - Non Credit
Academic Advising	Instruction Related - Academic Advising
MCOM - Medical Student Instruction	Instruction Related - Course Title
MCOM - Housestaff Instruction	Clinical Instruction
MCOM - Health Professions Instruction (Non-Housestaff)	Clinical Instruction
Research	
Departmental Research	Non-Instruction Related - Departed Research/Creative Activity
Sponsored Research (Optional)	Sponsored Activities - List of individual contract, grant, or project
Creative Activity	Non-Instruction Related - Departed Research/Creative Activity
Service	
Professional & Public Service	Non-Instruction Related - Public Service Non-Instruction Related - State Mandated Service
University Governance	Non-Instruction Related - University Governance (<i>Note this is</i>
Administration	
Academic Administration	Non-Instruction Related - Academic Administration
Clinical	
Paid Patient Care	Non-Instruction Related - Paid Patient Care
Clinical Service - Non-reimbursable	Non-Instruction Related - Clinical Service
Other	
Leave of Absence with Pay/Professional Development	Non-Instruction Related - Leave of Absence with Pay
Release Time	Non-Instruction Related - Release Time

Important to Remember for Effort Reporting: In order for the University of South Florida to be in compliance with Florida Statutes 1012.945, the "12-Hour" rule, no more than 8.33% effort can be assigned for each credit of an organized section. Thus, the maximum effort that can be associated with a 3-credit course is 25%. Variance in assignment of effort for organized course sections should take into account factors such as, but not limited to:

- New vs. repeated course
- Class size
- Class level
- Required vs. elective course
- Number and variation of course preparations
- Number of Teaching Assistants
- Delivery method

Appendix C
List of College Liaisons (as of 3/19/2021)

College of Arts & Sciences	Michelle Maldonado
College of Behavioral & Community Sciences	Jennifer Lister
College of Education	Kathy Bradley-Klug
College of Engineering	Veronica Jo
College of Graduate Studies	
College of Marine Science	Renate Jurden
College of Nursing	Anne Phillips
College of Pharmacy	
College of Public Health	Nolan Kimball
College of The Arts	Barton Lee
Honors College	Benjamin Young
Morsani College of Medicine	Patricia Barrett
Muma College of Business	Jacqueline Reck
Patel College of Global Sustainability	Shirley Boyd