

# 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.
- Clarification on how to handle Sabbatical leave has been added to Appendix A.

### For Help With:

- **Training:** Please self-register for the FIS course in CANVAS at the following link: <https://usflearn.instructure.com/enroll/GGFXX4>
- **Procedural Questions:** Department/School FIS Liaisons and Chairs/Directors (or equivalent) should reach out to their College Liaison (see Appendix C) and Dean's Office. Additional guidance for interpretation of the CBA or Faculty Affairs guidelines can be directed to Senior Vice Provost Dwayne Smith, Vice Provost Jim Garey, or in USF Health Colleges, Dr. Javier Cuevas.
- **FIS Functional Questions:** Contact the Office of Decision Support [FacultyHelp@usf.edu](mailto:FacultyHelp@usf.edu)
- **Archivum Technical Questions:** Contact Information Technology [Help@usf.edu](mailto:Help@usf.edu)

## 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:**

- **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>
- **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>
- **USF Regulations**

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

### **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, with consolidation of SACSCOC accreditation, faculty assignments on all campuses will be in furtherance of USF’s mission as a Florida Preeminent and Carnegie classified Highest Research Activity (R1) University.

The annual evaluation of faculty and the evaluations for promotion and tenure are based on assigned duties. Faculty assignments must provide equitable opportunities (in relation to other faculty in the same department/school and college) to meet the required Department/School, College and University standards for annual evaluations and for tenure and/or promotion.

Supervisors responsible for making the assignments will ensure that the assignment:

- Aligns with USF’s mission as research intensive, preeminent, R1 university;
- Provides fair and equitable opportunities to applicable faculty members to progress toward meeting the criteria and standards for promotion and tenure;
- Is consistent with the faculty member’s qualifications; experience, including professional growth and development; and preferences, to the extent practicable;

- 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
	Creative Activity
Service	Professional & Public Service
	University Governance
Administration	Academic Administration
Clinical <sup>1</sup>	Paid Patient Care
	Clinical Service (Non-Reimbursable)

<sup>1</sup> Only used by those with clinical licenses providing patient care

**IMPORTANT NOTE:** 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: class size, class level, required/elective course, number and variation of course preparations, distance learning, etc.

The following table provide guidelines for the **expected range** of effort for a” typical” faculty member in the General Categories of Teaching, Research, and Service for different types of faculty. (note that the values shown for Teaching differ slightly from those in the Consolidation Handbook)

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-tenure track faculty teach a 4-4- load and non-tenure track Research faculty have no expectation for teaching of organized sections. Examples of how a “typical” faculty member’s effort may vary based on number of organized sections taught in-load is provided below.

Course In-Load	Teaching	Research	Service
4/4	90%	0%	10%
4/3	79%	11%	10%
3/3	68%	23%	10%
3/2	56%	34%	10%
2/2	45%	45%	10%
2/1	34%	56%	10%
1/1	23%	68%	10%
1/0	11%	79%	10%
0/0	0%	90%	10%

Units are expected to develop guidelines for equitable and fair assignments that meet the general guidelines below. While there may be unit-level variances based on factors such as number and level of degree programs (e.g., bachelors, masters, doctoral) offered in a unit, specialized accreditation, etc., **there can be no variances due to geographic location.** Units whose guidelines deviate from the general guidelines above must have approval by the Provost & Executive Vice President or the Senior Vice President for USF Health, as applicable.

**Note on Clinical Assignments:** While it is expected that the majority of faculty members in USF Academic Affairs will have assignments ONLY in the categories of Teaching, Research, and Service, the recommended percentages will need to be adjusted for USF Health Colleges to include clinical assignments. If a unit in Academic Affairs houses programs which require clinical experiences, typically due to specialized accreditation, unit guidelines should account for clinical service assignments, with the approval of the Provost & Executive Vice President.

**Note on Administrative Assignments:** Academic Administration refers to administrative services benefitting common or joint departmental/college/university activities. This activity provides administrative support and management direction to instructional, research, and public service programs. This category is generally restricted to individuals with formal administrative appointments. Effort related to university, college, department committees, councils, etc. should be reflected under University Governance in the general category

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.

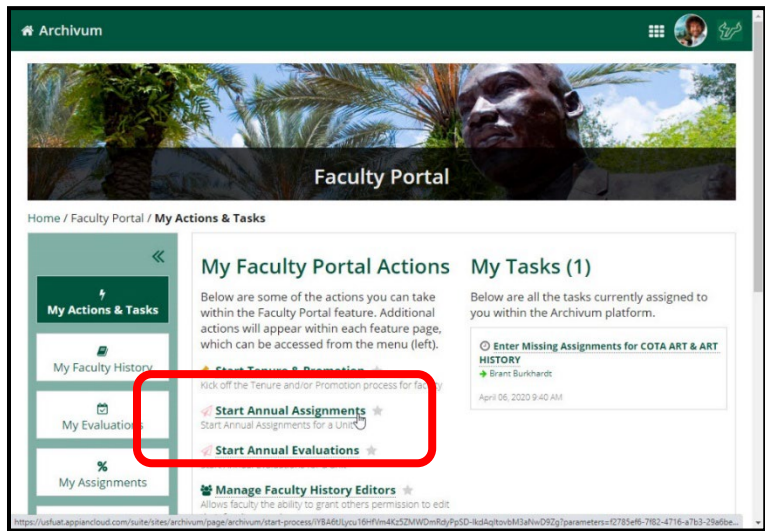
**Note on assignments in Other:** When assignment to Other is for a Leave of Absence (LOA) with pay for professional development leave/sabbatical leave, the category will require assessment during Annual Evaluation. For release time for union activities, the annualized assignment will not count associated 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 *USF Consolidation Academic and Student Success Implementation Handbook, Volume 2* <https://www.usf.edu/sacscoc-consolidation/documents/consolidation-handbook-vol2-web.pdf>, Section 1, Pp 32-39, for review of faculty assignment principles, processes, categories and the relation between *Assignment* and *Effort Reporting*. (Note that presently USF will continue to use FAIR for State required Effort Reporting)
- **Faculty assignments for the new academic year need to be made at least six weeks prior to the beginning of the academic year** and there must be a process in place to allow consultation and discussion between the chair and the faculty member.
  - This process is normally carried out prior to the end of the spring semester prior to the upcoming academic year.

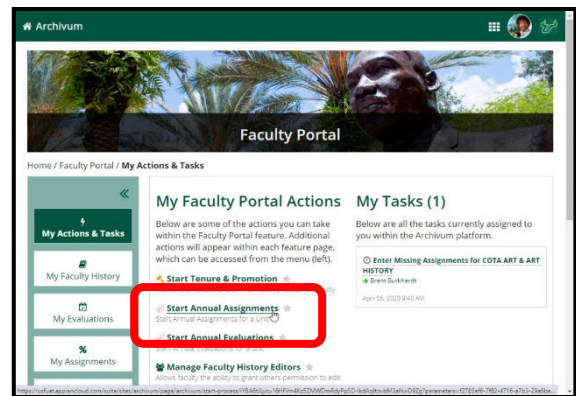
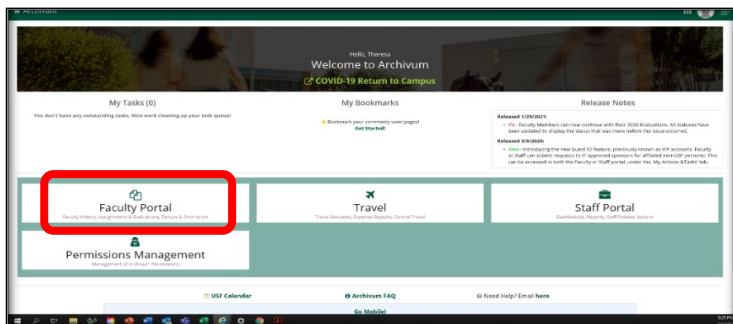
- The **Assignment Process** (whether for the Annual Assignment or for Summer) can be started by one of several individuals:

- **Unit Head** (i.e., the *Chair/Director or equivalent; currently in FIS this group is labelled T&P Chair group*) -OR-
- **Unit Liaison** (i.e., typically *an Administrative Staff member in a department/school or College if applicable; currently labelled T&P Liaison group in FIS*)

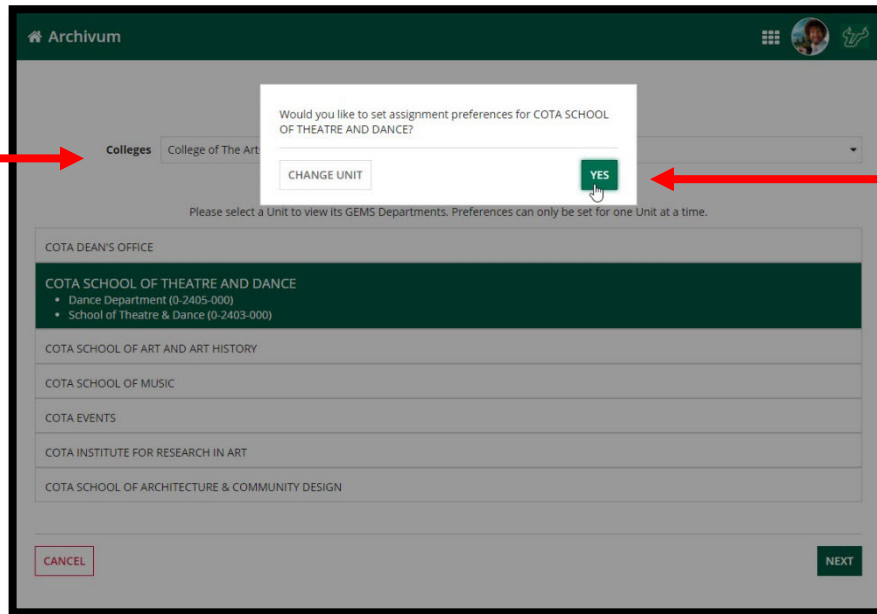


### GETTING STARTED

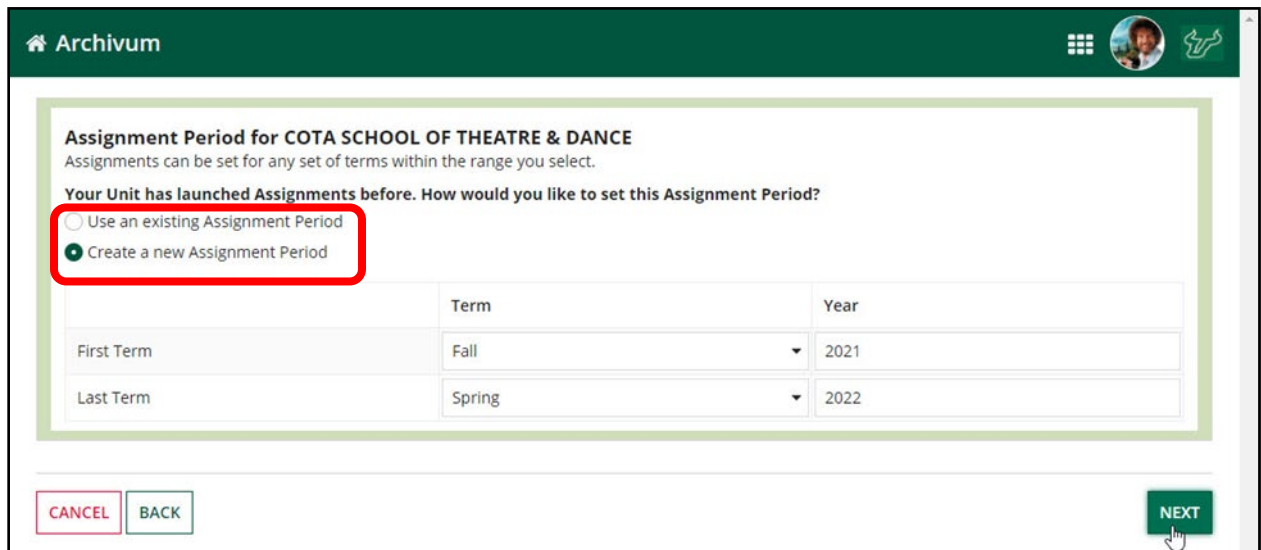
- After logging into <https://my.usf.edu> and selecting **Archivum** under the **Business Systems**, enter the **Faculty Portal**.
- In the Faculty Portal, select **Start Annual Assignments**, under **My Actions & Tasks**



- Select the **College** and the **Department/School** for which you will set assignments. (Note that for Colleges without Departments/Schools, you select College twice). Once selected, **CLICK NEXT**, and then



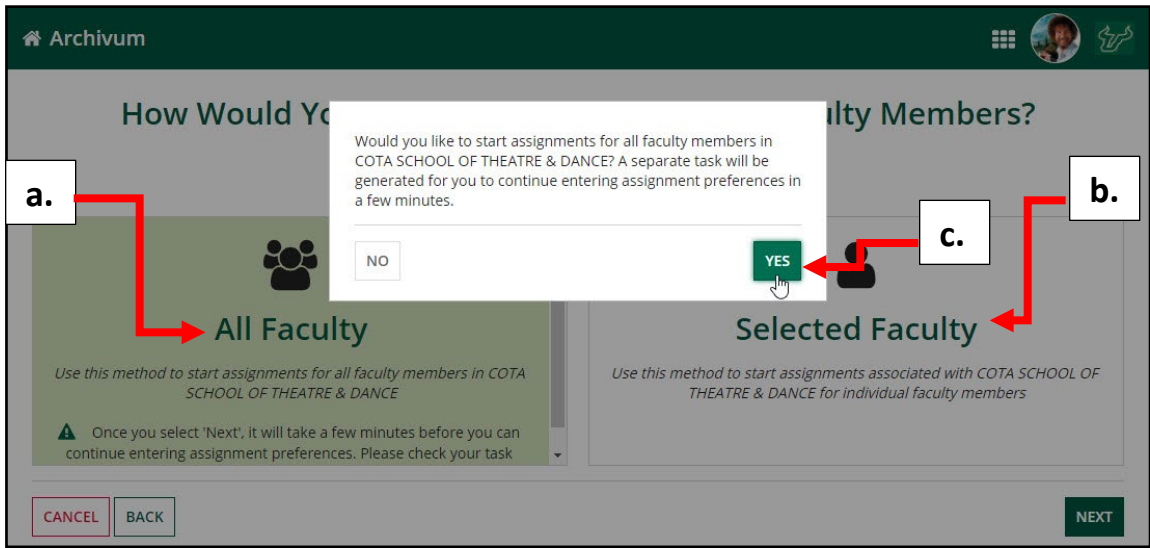
- Initially you will **Create a New Assignment Period**, which can be One (1) Term up to Four (4) Terms, by selecting the First Term (Fall, Spring, Summer) and the Year. (Note that once an Assignment Period is created, when returning to the Assignments Module to assign, begin by selecting "Use an Existing Time Period"). After selecting, click **NEXT**.



- A **prompt** will be given asking if assignments will be made for **(a) All Faculty** in a unit or for **(b) Selected Faculty** member in a unit for Assignment. After clicking on All Faculty or Selected Faculty,



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

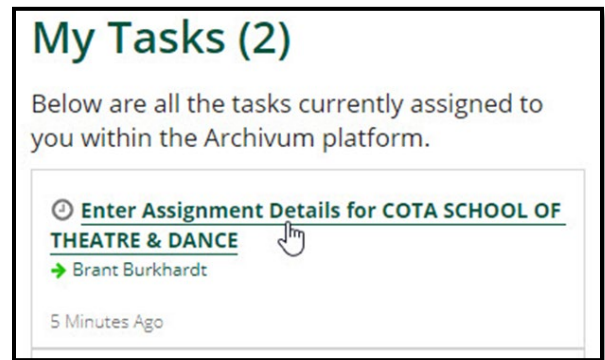


- **WAIT** for FIS to process and then a **TASK** will be assigned to you within the Archivum Platform, as shown here:



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**. *(This information is pre-populated and pulled from GEMS and the Supervisor will be the person to whom the Faculty Member reports. **The person who will make the Assignment is not always the same as the Faculty Member's Supervisor of Record in GEMS. If this is the case, please change in this screen to the person who will be completing the Assignment on behalf of the GEMS supervisor of record**).* In addition, on this page, select whether a faculty member will be given an opportunity to submit a (c) **Pre-Assignment Narrative (P.A.N)**.





- 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.**

**Annual Assignments Participants for COTA SCHOOL OF THEATRE & DANCE**

Use the grid below to select which faculty members may fill out an optional Pre-Assignment Narrative and to set a Supervisor and Home Campus. You can also remove any faculty members who should not receive an assignment at this time.

**Task Deadline**  
2/07/2021 8:09 PM  
This task will expire at the indicated time.  
If you do not respond to this task by the specified date and time, this task will expire and the assignments process will not be started.

**Quick Actions**

**Pre-Assignment Narrative**  
Enable for COTA SCHOOL OF THEATRE & DANCE  
Disable for COTA SCHOOL OF THEATRE & DANCE

**Set Supervisor**  
Type Name or UID  
Set for COTA SCHOOL OF THEATRE & DANCE

**Set Home Campus**  
--Select Home Campus--  
Set for COTA SCHOOL OF THEATRE & DANCE

**Filters**  
Faculty: Type Name or UID  
GEMS Departments: --Select GEMS Department(s)--  
Clear Filters Apply Filters

**d** **c** **a** **b**

Click the checkbox to remove that faculty member from the assignments process. Please click **Yes** at the box "Remove" will appear on the current page.  
Use the buttons above to select or deselect all faculty in COTA SCHOOL OF THEATRE & DANCE.

<input checked="" type="checkbox"/>	Name	UID	GEMS Department	P.A.N.?	Supervisor	Campus
<input checked="" type="checkbox"/>	Andrew Carroll	U46496349	Dance Department (0-2405-000)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Marc Powers	Tampa
<input checked="" type="checkbox"/>	Michael Foley	U50384588	Dance Department (0-2405-000)	<input type="radio"/> Yes <input checked="" type="radio"/> No	Marc Powers	Tampa

- 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.

**Set/ Update Unit Specific Assignment Instructions for CAS ENGLISH**

**Task Deadline**  
2/06/2021 10:20 AM  
This task will expire at the indicated time.  
If you do not respond to this task by the specified date and time, this task will expire and the assignments process will not be started.

**Assignment Instructions**  
Please enter an assignment instructions for the faculty member.

**Pre-Assignment Narrative Instructions**

BACK SAVE NEXT

➤ 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 **Assignments** by clicking on the **Enter Assignments** button.
- Remember that submission of a **P.A.N.** is **optional**, and the **status** will be seen on this screen.
- If a **P.A.N.** is **submitted**, the row for the faculty member will look like this:

Faculty	Assignment Period	GEMS Department	P.A.N. Status	Status	Assigned To
Christopher Pyfrom	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	
Stephen Hiett	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	
Douglas Hall	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	
Fanni Green	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	
Daniel Granke	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	
Patrick Finelli	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Submitted	Awaiting Assignment	

<a href="#">Dora Arreola</a>	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	✔ Submitted	Awaiting Assignment
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- 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.

Assign Marilyn Bertch - Assignment 23 (Fall 2021 - Spring 2022) to yourself to proceed.  
Only one user can act on an Assignment at a time.

[Assign to me](#)

- Once this action is done, others who have access to enter Assignments will be “locked out” of doing so for a particular Faculty Member,
- The **individual who is to enter the Assignment for each Faculty Member is shown in the last column of the view below.**

Faculty	Assignment Period	GEMS Department	P.A.N. Status	Status	Assigned To
<a href="#">Christopher Pyfrom</a>	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	✘ Not Submitted	Awaiting Assignment	Brant Burkhardt

- If as the person identified to do the assignment, you **CANNOT complete the task**, you can “return” the task to the “pool”, by selecting **Unassign**.

Assignment Not Fully Entered

⚠

This assignment is not fully entered.

This assignment cannot be sent to the faculty for affirmation until an assignment value is entered for the following term(s): Fall 2021, Spring 2022.

CANCEL
**UNASSIGN**
SAVE
SUBMIT

- Once the **Faculty Member** is selected for **Assignment**, **GEMS Faculty Information** will be presented. If there are any errors, please work with HR to resolve.

Faculty Information (GEMS)

### Faculty Info



**Marilyn Bertch**  
appian\_test@example.com  
813/949-6177

Gender F  
Ethnicity WHITE

**Campus** TAMPA

**College** College of the Arts

**Department** School of Theatre & Dance

**Position** Instructor III

**Supervisor** Marc Powers  
College Dean

**USF Hire Date** Aug 7, 2009

**Rank** Instructor

**Rank Effective Date**

**Tenure Status** Non Tenure Not On Track

**Tenured Effective Date**

**Appointment** 12-Month Contract Period

This data comes from GEMS PeopleSoft. If any of this data is missing/incorrect please work with your supervisor to have it corrected.

- **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 teaching assignments for the academic year.

Courses Scheduled				
Term	Title	Prefix	Course Number	Level
Spring 2020	Intro to Technical Theatre II	TPA	2211	UG
Spring 2020	Directed Studies	THE	4905	UG
Spring 2020	Production Involvement II	TPA	4293	UG
Spring 2020	Production Involvement I	TPA	2292	UG
Spring 2020	Studio Theatre Performance II	TPP	4193	UG
Spring 2020	Studio Theatre Performance I	TPP	2190	UG
Spring 2020	Production Involvement II	TPA	4293	UG
Spring 2020	Production Involvement II	TPA	4293	UG
Spring 2020	Production Involvement I	TPA	2292	UG
Spring 2020	Production Involvement I	TPA	2292	UG

<< < 1 - 10 of 28 > >>

- If the **Faculty Member** has been given the opportunity **to complete a P.A.N.**, the **courses requested** for the next year will be shown.

Courses Requested				
Prefix	Course Number	Course Title	Course Level	Comment
TPP	3155	Acting II	Undergraduate	Split load with Dora
TPP	4310	Directing I	Undergraduate	Take over from Benson

- 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**. There are two options for Assigning Effort –
  - **High Level Categories** (default)
  - **Include “Sub-Categories”** (select PRIOR to beginning to enter Effort)

**Assignment Preferences**

**Select Terms to Enter an Assignment For**  
Each term selected must have an assignment value that is greater than 0 percent and less than or equal to 100 percent.

Term	Enter Assignment
Fall 2021	<input checked="" type="radio"/> Yes <input type="radio"/> No
Spring 2022	<input checked="" type="radio"/> Yes <input type="radio"/> No

**Use Subcategories?**  
 Yes  No

A selection for Subcategories must be made before you can proceed.

- The **High-Level** categories are **Teaching, Research, Service, Administration (Academic), Clinical, and Other**. Please see **Appendix A** for descriptions of the type of activities that are included in each category.
  - Enter the portion of a 100% Effort assignment in each of the categories as illustrated below.

**Archivum** Enter Assignment

Term: Fall 2021, Spring 2022

**Complete Entering Assignment**  
This assignment will be sent to the faculty for affirmation.

Assignment	Fall 2021	Spring 2022
Teaching	50	50
Research	40	30
Service	10	20
Admin	0	0
Clinical	0	0
Other	0	0
<b>Total</b>	<b>100</b>	<b>100</b>

- **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.

Assignment	Fall 2021	Spring 2022
<b>Teaching</b>		
Undergraduate Organized Sections	0	0
Undergraduate Individual Instruction	0	0
Graduate Organized Sections	0	0
Graduate Individual Instruction	0	0
Other Instructional Effort	0	0
Academic Advising	0	0
MCOM - Medical Student Instruction	0	0
MCOM - Housestaff Instruction	0	0
MCOM - Health Professions Instruction (Non-Housestaff)	0	0
<b>Teaching Total</b>	<b>0</b>	<b>0</b>
<b>Research</b>		
Departmental Research	0	0

**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

Merry Lynn Morris	U16187852	Fall 2021 - Spring 2022	Awaiting Acknowledgement	College of The Arts	COTA SCHOOL OF THEATRE AND DANCE	—	Tampa
Dora Arreola	U26388565	Spring 2018 - Fall 2018	Awaiting Acknowledgement	College of The Arts	COTA SCHOOL OF THEATRE AND DANCE	✓	Tampa
Paula Nunez	U00396941	Fall 2021 - Spring 2022	Awaiting Assignment	College of The Arts	COTA SCHOOL OF THEATRE AND DANCE	—	Tampa

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

Marilyn Bertch	Fall 2021 - Spring 2022	School of Theatre & Dance (0-2403-000)	Not Applicable	Awaiting Update
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- And the **reason** the Faculty Member **requested consultation** will show up on the **Assignments Audit History** section, as shown here:

Actor	Action	Comment	Timestamp
Merry Lynn Morris	Faculty Requested Consultation	Spring should be same as fall.	5/25/2021 1:46 PM EDT

- Although currently a faculty member can **request consultation** multiple times in FIS, the Office of the Provost has asked that FIS Assignments be modified to limit the number of times that a Faculty Member can select **request consultation**. **If the Unit Head determined that the adjustments to assignment that that the faculty member requested cannot be made, and the faculty member selects request consultation again, this will be recorded. However, the Assignment process will be considered completed at this point, unless the Unit Head decides to make additional changes.**
- Once the **Faculty Member Acknowledges Receipt with no consultation**, the Faculty Member’s **name disappears** from the **Enter Assignments** screen; and can then be **viewed** on either the **Assignment & Evaluations Dashboard** (see above) or on the **Faculty Member’s Record** as shown here.

Assignment Period	Status	Department	Home Campus	Supervisor	Submission date
Fall 2021 - Spring 2022	Process Complete	School of Theatre & Dance (0-2403-000)	Sarasota-Maratee	Marc Powers	Feb 4, 9:49 PM
Fall 2015 - Summer 2016	Awaiting Assignment	School of Theatre & Dance (0-2403-000)	Tampa	Marc Powers	Jan 22, 2016

- Once the Faculty’s Assignment is complete, it can be edited from the Faculty Records Assignments screen shown above. Click on the Eye to the right and select **Update Assignment**. Once updated, the Faculty will have the usual **Acknowledge Receipt with or without consultation** process.

## Merry Lynn Morris - Assignment 30 (Fall 2019 - Spring 2020)

UPDATE ASSIGNMENT

Summary News Related Actions

Awaiting Assignment

Awaiting Acknowledgement

Process Complete

### ASSIGNMENT FOR BRANCH CAMPUS FACULTY

- Per the **USF Consolidation Academic and Student Success Implementation Handbook, Volume 1, p. 16 and Volume 2, p. 42**, assignments for all Faculty Members within a “*Department/School or equivalent unit will be conducted in compliance with USF policies and procedures, and consistent with a single set of department/school, college, unit assignment.....guidelines...following a singular process*”.



- 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"> <li>• Credit-bearing organized sections</li> <li>• Credit-bearing laboratory course sections</li> <li>• Credit-bearing individual student instruction, including theses, dissertations, independent studies, directed research, supervision of clinical activity and internships.</li> <li>• Other Instructional effort, e.g.,               <ul style="list-style-type: none"> <li>○ Development/improvement/revision of teaching methods</li> <li>○ Mentoring graduate teaching assistants.</li> <li>○ Secondary instructional site travel if over 2-hours per course meeting</li> <li>○ 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>)</li> <li>○ Participation on student committees when student not registered for individual credit-bearing course with faculty member.</li> </ul> </li> <li>• Academic student advising</li> <li>• Travel to a secondary site if more than 2-hours away</li> <li>• Supervision of co-operative education</li> </ul>
Research	<ul style="list-style-type: none"> <li>• Conducting research</li> <li>• Developing creative works</li> <li>• Preparing articles, books, chapters for publication</li> <li>• Grant writing, development of contracts and proposals</li> <li>• Performing or exhibiting works</li> <li>• Presenting at professional meetings or conferences</li> <li>• Maybe externally funded or funded through the Department (Or equivalent unit)</li> </ul>
Service	<ul style="list-style-type: none"> <li>• Activities in support of professional, academic, student or community associations</li> <li>• Includes contributions to the department/school, unit, university, State, K-12 education, professional associations, discipline-related community organizations, and governmental boards, agencies, committees</li> <li>• Contributions can be on the local, state, regional, national, and international levels</li> <li>• Effort for department/school, college and university governance activities (e.g., Faculty Senate) should be recorded here<sup>1</sup></li> </ul>
Administration <sup>2</sup>	<ul style="list-style-type: none"> <li>• Supervisory and management activities<sup>2</sup> related to the administration of a department/school, college, or the university</li> </ul>
Clinical	<ul style="list-style-type: none"> <li>• Time spent instructing, supervising, and advising residents, interns or other post-doctoral trainees who are not formally registered students<sup>3</sup></li> <li>• Paid Patient care<sup>3</sup></li> <li>• Clinical Service<sup>4</sup></li> </ul>
Other	<ul style="list-style-type: none"> <li>• Leave of Absence with Pay for Sabbaticals and Professional Development<sup>5</sup></li> <li>• UFF activities (Performance of such is not subject to evaluation by administration)</li> </ul>

<sup>1</sup> For effort reporting university governance activities are coded as Administrative Effort.

<sup>2</sup> Restricted to individuals with formal administrative appointments (e.g., chairs/directors and above). For state effort reporting Academic Administration is reported as Administrative Effort.

<sup>3</sup> MCOM only. For state effort reporting activity is coded as Service Effort.

<sup>4</sup> Restricted to faculty with healthcare licenses. For state effort reporting this is coded as Service Effort.

<sup>5</sup> Professional/Sabbatical Leave activities must be evaluated in the Annual Evaluation process. This activity is coded as Other Effort for state effort reporting purposes. **If a faculty member is receiving a portion of their salary from external funding (contract/grant/etc.) they should have a percentage of effort proportionate to that salary amount assigned to research, with the balance in other.**

## Appendix B

### FIS Sub-Categories of Assignment and Relation to FAIR Workload

FIS Assignment Category	Workload Activity Categories
<b>Teaching</b>	
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
<b>Research</b>	
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
<b>Service</b>	
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>
<b>Administration</b>	
Academic Administration	Non-Instruction Related - Academic Administration
<b>Clinical</b>	
Paid Patient Care	Non-Instruction Related - Paid Patient Care
Clinical Service - Non-reimbursable	Non-Instruction Related - Clinical Service
<b>Other</b>	
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 2/23/2022)**

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 Gottsche
College of Nursing .....	Elizabeth Jordan
College of Pharmacy.....	
College of Public Health.....	Samantha Haylock/Jessica Grossman
College of The Arts .....	Barton Lee
Honors College.....	Benjamin Young
Morsani College of Medicine .....	Patricia Barrett/Aimee Klein
Muma College of Business .....	Jacqueline Reck
Patel College of Global Sustainability .....	Shirley Boyd