

## How to Designate Instructor Eligibility

### Getting Started:

The Designate Instructor Eligibility task automatically triggers during any HR hire-related business process for teaching positions, such as faculty members, lecturers, sessionals, emeritus appointments, and TAs.

Instructor eligibility is assigned at the course subject level.

### Workday Process:

Once an academic appointment is approved through HR, the **Designate Instructor Eligibility task** will appear in Workday for Department administrators to specify the course subject(s) that should be assigned.

No approval is required when completing this task.

*Note: Instructor eligibility and subsequent assignment to course sections is available after the academic appointment has been approved. The approval process follows the time periods laid out by the HR process and not by the processes for assignment to course sections.*

**Warning: Any data entry errors will significantly impact and prevent data from transferring from Scientia into Workday. Any data entry errors found and/or communicated to Departments must be corrected immediately.**

There are two ways to designate Instructor Eligibility:

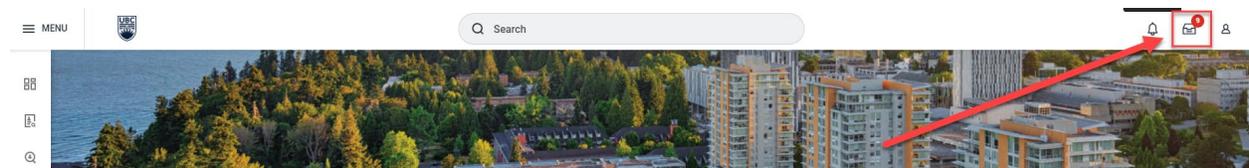
- (1) through the notifications in Teaching Assignment Specialists' inbox/My tasks
- (2) through the Designate Instructor Eligibility task

### Task Process: Notification in Workday Inbox - "My Tasks"

Department admin assigned the Teaching Assignment Specialists security role receive the task in their inbox. This notification is automatically triggered from the hire process in Workday.

#### Step 1: Go to 'My Tasks'

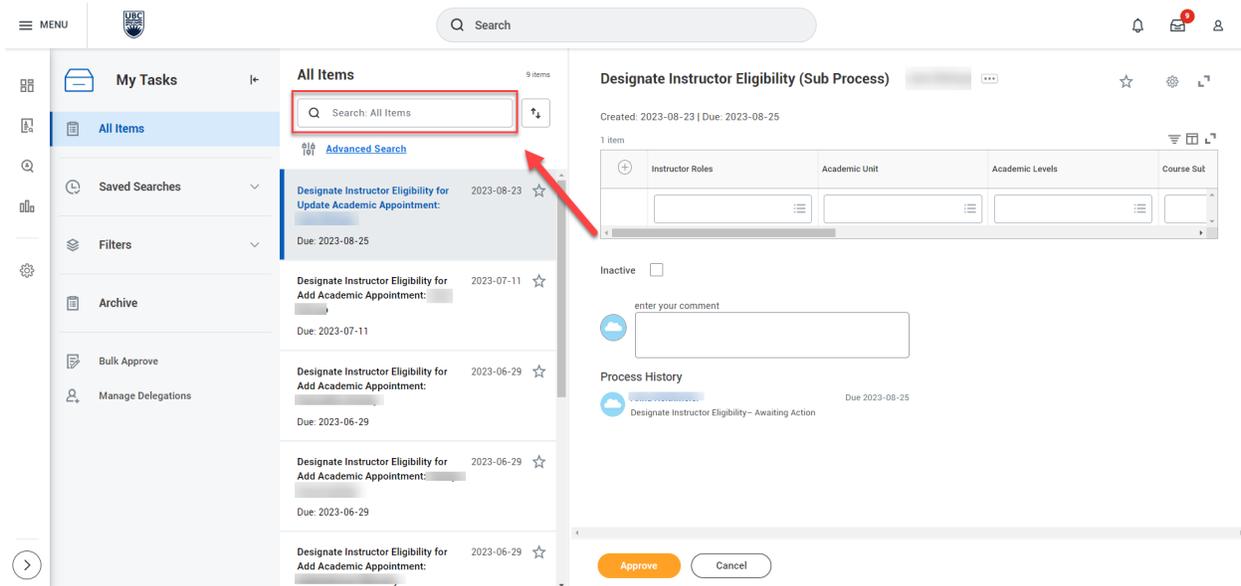
- a. On the Workday Homepage, click the "My Tasks" icon . (This icon is located on the top right corner of the Workday Homepage)



#### Step 2: [Optional] Search for the Task

- a. Use the **Search box** under "All Items" to find a specific name or task

b. Click on the task

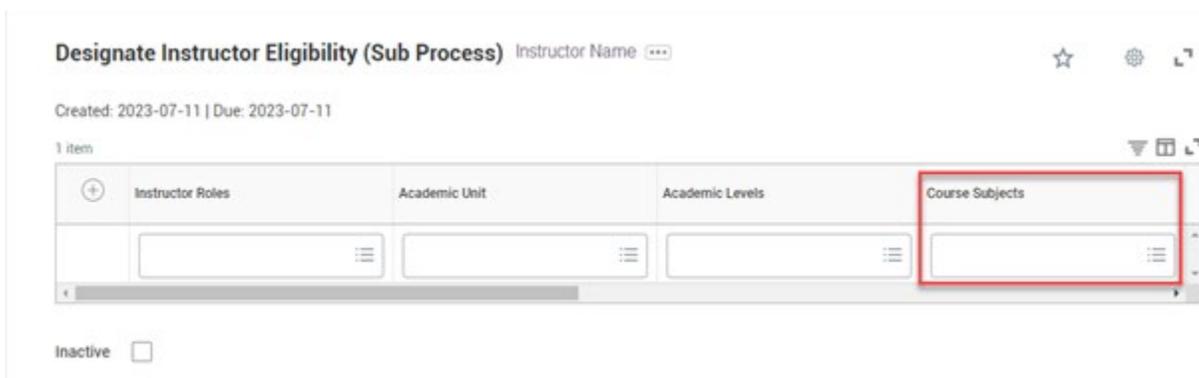


**Step 3: Complete the Task**

- a. Under the **Course Subjects** column, use the drop-down menu to select the course subject(s) for your campus (Okanagan)

*NOTE:* We are not using the other columns because we are restricting the eligibility to the Course Subject. Do not enter in specific course numbers that a person will teach.

*NOTE:* You may see course subjects without any campus code. These course subjects represent courses that existed prior to 2005 and are historical artifacts that cannot be hidden. In 2005, the UBC Okanagan campus was established. Thus, any course subject active after 2005 will always include Vancouver or Okanagan in brackets to delineate between the two campuses.



- b. Click **Submit** to finish the task.
- a. Upon submission:
- Instructor names and selected course subjects will be sent to Scientia for assignment in the scheduling process

**Designate Instructor Eligibility (Sub Process)** Instructor Name ...

Created: 2023-07-11 | Due: 2023-07-11

1 item

Instructor Roles	Academic Unit	Academic Levels	Course Subjects
			x Biology (Vancouver)

Inactive

enter your comment

**Process History**

Designate Instructor Eligibility - Awaiting Action Due 2023-07-11

**Submit** **Cancel**

### Receiving incorrect notifications?

If you are receiving incorrect notifications you can take the below actions:

1. Submit a ServiceNow ticket to report the incorrect routing issue
2. Cancel the notification to remove from your inbox as shown below

**Designate Instructor Eligibility (Sub Process)** ...

Created: 2023-12-13

1 item

Instructor Roles	Academic Unit	Academic Levels	Course Subjects	Courses	Delivery Modes

Inactive

enter your comment

**Cancel**  
**View Details**

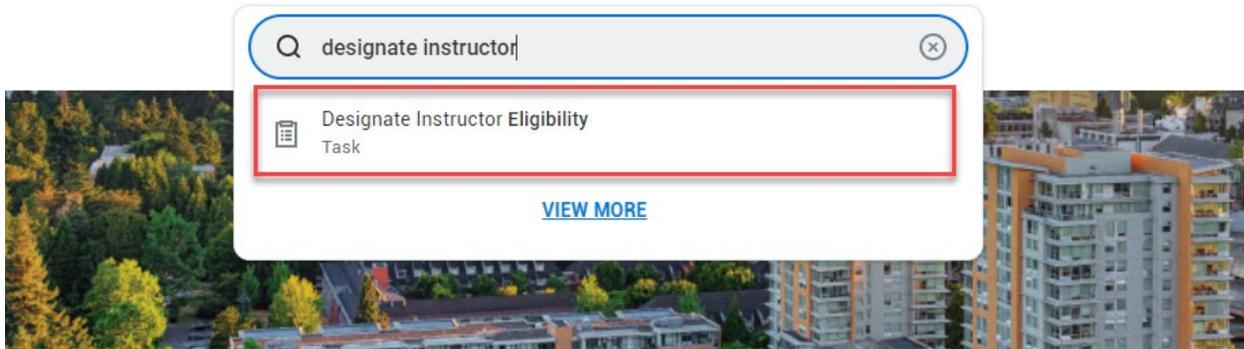
### Task Process: Designate Instructor Eligibility Task

This task can be run at any time to add, update, or remove instructor eligibility. If the instructor had an active academic appointment, Department admins with the Teaching Assignment Specialist security role can directly initiate the task on Workday.

#### Step 1: Find the Designate Instructor Eligibility Task

- a. On the **Workday home screen**, find the **Search Bar**
- b. Type **“Designate Instructor Eligibility”** in the **Search Bar**
- c. Select the **“Designate Instructor Eligibility”** task

*NOTE:* Alternatively, you can go to the Scheduling Dashboard > Teaching Assignments to access the task



## Step 2: Fill in the Prompts

- In the **Academic Appointee** field, enter the name or select from the list. If you cannot find the instructor here, it's likely that their appointment has not yet been processed.
- Effective Date** indicates the day on which eligibility takes effect. You can backdate it as needed
- Click "**OK**"

A screenshot of a form titled 'Designate Instructor Eligibility'. The form has two main input fields. The first is 'Academic Appointee', which is a dropdown menu with a search icon on the left and a list icon on the right. The second is 'Effective Date', which is a date picker showing the date '2023-09-01'. At the bottom of the form, there are two buttons: 'OK' (orange) and 'Cancel' (white with a grey border). The form is enclosed in a white box with a close button (X) in the top right corner.

## Step 3: Designate Instructor Eligibility Task

- In the **Academic Appoint Track Field**, if not pre-populated with a result, select one of the academic appointments.

*NOTE:* If there was more than one Academic Appointment Track in the drop-down menu, it doesn't matter which one is selected for this task.

- In the **Course Subject** column:
  - To add the course subject(s)– select the course subject(s) that staff can teach and select the campus specific subject (Okanagan) or (Vancouver)
  - To remove the course subject(s) – remove the course subject(s) by clicking X in front of the course subject title

- To update the course subject(s) – remove and/or add the course subject(s) using the steps noted in the prior bullets in this section

*NOTE:* Each department should only manage course subjects relevant to their department.

*NOTE:* Do not specify courses that the person will teach, only indicate subjects

- Do **NOT** check off the inactive box unless you are removing the eligibility.

*NOTE:* Clicking the “**Inactive button**” will remove the instructor's eligibility as of the selected effective date for all course subject(s). Use this checkbox when the instructor no longer needs eligibility.

#### Step 4: Submit the Task by clicking ‘OK’

- Once the required fields are filled, click **OK** to submit the task.

After clicking OK

- Instructor names and the course subjects will be sent to Scientia for assignment in the scheduling process

*NOTE:* Putting a sessional on leave does not trigger any changes to their academic appointment. The eligibility task will not pop up.

*NOTE:* Cross-Campus assignments of instructors to course sections need to be processed by Enrolment Services.

## Reports to assist with troubleshooting

### Academic Appointment for Instructor Eligibility – Central:

Teaching Assignment Specialists can use this report to determine if instructors have the required Academic Appointment needed for Instructor eligibility.

### Instructor Eligibility – Central:

Course Section Specialists and Scheduling Specialists can use this report to view Instructor Eligibility by Instructor or Course subject.

### Course Sections with Teaching Assignments – Central:

Course Section Specialists and Scheduling Specialists can use this report to identify teaching instructors, non-teaching instructors and/or teaching assistants that have been assigned to course sections.