

**ISSUE: FUNDING AND EFFORT**

Extracting the appropriate assigned effort values as of November 1, 2020.

**BACKGROUND:**

Employees can have multiple Assigned Effort records. In previous years, the extraction has pulled the top of stack data, even if the effective date occurred after November 1. For example, if an employee is assigned as 100% Academic as of November 1, 2020, and then changes to 100% Administrative on January 1, 2021 then the previous extraction process would have counted this person as **100% Administrative** on the IPEDS reports.

**SOLUTION:**

Activity percent fields from the Assigned Effort records (ffe table) will be tied to each tenure data record based on their effective date. Only records with an effective date of November 1, 2020 or earlier will be extracted. Using the same example as above, if an employee is assigned as 100% Academic as of November 1, 2020, and then changes to 100% Administrative on January 1, 2021 then this person will be counted as **100% Academic**.

See screenshot below for the relevant data fields.

*Navigation: funding and effort → workforce development → faculty events → track events → assigned effort*

Tenure/Home Dept	Empl ID
Academic Rank	Annual Rate
	Tenure Status Tenure
Company	
<b>Assigned Effort</b> Find   View All First 1 of 1 Last	
*Effective Date 11/28/2018	EFT 1.000
<b>Salary %</b>	<b>Activity %</b>
State Salary 100	Instruction Activity 100
Sponsored Salary	Administrative Activity
Contract Salary	Research Activity
	Service Activity
	Clinical Activity

**IMPLICATION FOR IPEDS HR REPORTS:**

Effort percent assignments affect the designation of instructional staff for IPEDs reporting. IPEDS defines instructional staff as

“An occupational category that is comprised of staff who are either: 1) [Primarily Instruction](#) or 2) [Instruction combined with research and/or public service](#). The intent of the Instructional Staff category is to include all individuals whose primary occupation includes instruction at the institution.”

See the ‘Requires Review’ guidance document for further explanation on how effort percentages affect the categorization of Instructional and Non-Instructional Staff. See also the IPEDS HR Report Descriptions and Data Definitions document.

**IMPLICATION FOR DIGEST HR REPORTS:**

This extraction change will not affect how the instructional staff categorization for the Digest HR reports as the definitions for instructional staff in the Digest HR reports do not take activity percent into account. See Digest HR Definitions document for more information.