# Instructional Effort Report Processing Guide

## Contents

## Objective

To compile a complete data source of course sections, faculty, and payroll for the ability to conduct analyses regarding program costs, faculty effort, course-level and student-level faculty ratios for use in both externally-mandated and internally-useful reports and analyses.

## Why is there an Instructional Effort Report?

The schedule of classes does not always contain a faculty assignment and there is no other source in the university's records of the percentage of time faculty members expend on each section they teach, nor of the account paying for that work when more than one payroll account exists. The IER process collects the missing instructor data as well as the pre-section funding and effort data.

## Key Information

- If a section has no information in the schedule of classes regarding its instructor, information for that section must be provided: Instructor, course FTE (CFTE), and account paying the instructor for that section.
- If a faculty member is designated in the schedule of classes as teaching a course and that person is also in payroll, an IER assignment record will have already been created for her or him for that course.
- The last entered CFTE for a course for a given faculty type is preserved and if we find a previous FTE, it will be filled in as well.
- From the schedule of classes if a person is assigned to a category classified as generic "Instructor," the appropriate generic ID and the default account is assigned. Therefore, the number of generic instructor types listed in the schedule of classes as teaching a course will have a corresponding auto assignment.
- Instructional Effort Reports are completed in the fall and spring.
- To access the IER application, you must be an active Kuali user in the review hierarchy for Instructional Effort Reports.
- The number of instructors assigned to a course is unlimited.
- Courses/Sections with zero enrollment and/or coded "C" in the cancelled box cannot be updated, and drop out during reporting.
- When courses are in the "R" status it is indicative that the courses have been reviewed.

# Processing Kuali Instructional Effort Reporting

1. Log into One.IU, search for "All Financial Services" and click the All Financial Services tile.
2. Expand the "Instructional Effort Reporting" module by clicking the triangle and click the "IER Selection" link.

▼ Instructional Effort Reporting

**Other Links**

- IER Selection

3. Move to the Instructional Effort Reporting Selection screen.

## Instructional Effort Reporting Selection

**Fiscal Year/Term:** 2015/4148 ▾ refresh

**Instructional Effort Reporting Document Open**

| | * Institution | * Subj | * Catalog | Action |
|---|---|---|---|---|
| | 🔍 | 🔍 show subject courses | 🔍 | refresh load document |
| **KFS Org:** | | | | |

**KFS Organization Reviewer Operations**

| | | | |
|---|---|---|---|
| org review/report | lock monitor | org pull up | org push down |

close

4. The Fiscal Year/Term box has a drop down arrow to allow selection of the proper semester.
   a. Fiscal Year/Term – 2015 (identified by the last year of the two calendar years involved), the 4 digits after the slash represent the term. The 4 refers to the century, the next two digits 14 refer to the calendar year, and the final digit 8 refers to the term (in this instance fall). Therefore, 2015/4148 is for Fall 2014 reporting.
5. Verify you are on the correct fiscal year and term then click **org pull up** [org pull up].
6. The "IER Pull Up Organization Selection" screen is displayed. Choose **Both** from the "Organization Sub-Tree" sub group's "Selected" dropdown menu and click **pull up** [pull up].

## IER Pull Up Organization Selection ▾ hide

**Current Point of View Organization Selection**

**Select Point of View:**   KO-KO ▾

**Currently Selected:**   KO - KO ( KOKOMO CAMPUS )

**Organization Sub-Tree**

| Selected | | Organization Sub-Tree | Action |
|---|---|---|---|
| Not Sel ▾ | KO - KO | KOKOMO CAMPUS | ↓ |
| Not Sel | | set org    set sub org    set org & sub org    clear all | |
| Both | | | |
| Org | | | |
| Sub Org | ...lidates ▾ hide | | |

**Pull Up Candidates**

| view | List Pullup Candidate Documents |
|---|---|

pull up   close

7. The message "The selected Pull Up was successful" will be displayed in the upper left hand corner of the page when the action is completed successfully.

8. Click **close** [close] to return to the IER Reports Organization Selection screen.

Important Note: Each semester you will only complete the pull up process the **FIRST** time you enter the IER application.

9. Click **org review/report** [org review/report] and the "IER Reports Organization Selection" screen will be displayed.



10. Under the "Organization Sub-Tree" subgroup in the "IER Reports Organization Selection" tab, click the check box
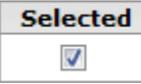


next to your organizational listing.

11. Click **view** [view] under the "Course Document List" subgroup under the "Reports" tab. This function will display in list form the courses which are your responsibility for completion.

## IER Course Select Lookup [?]

| | |
|---|---|
| **Academic Institution:** | |
| **Subject Area:** | |
| **Catalog Number (Leading Wildcard/Space Advised):** | * |
| **Status:** | |
| **Last Updated From:** | |
| **Last Updated To:** | |
| **Upd by:** | |
| **Organization Level Organization Code:** | |
| **Chart Of Accounts Code:** | |
| **Organization:** | |
| **Sections Unassigned Count:** | |

search    clear    cancel    reload

383 items found. Please refine your search criteria to narrow down your search.

| Actions | Academic Institution | Subject Area | Catalog Number | Status | Last Updated | Upd by | Organization Level Organization Code | Chart Of Accounts Code | Organization | Document Lock User Name | Sections Unassigned Count |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Load Document | IUBLA | BUS-C | 106 | ? | 02/12/2014 | KFS | 4 | IU | UNIV | | |
| Load Document | IUBLA | BUS-C | 155 | ? | 02/12/2014 | KFS | 4 | IU | UNIV | | |
| Load Document | IUBLA | BUS-C | 330 | ? | 02/12/2014 | KFS | 4 | IU | UNIV | | |
| Load Document | IUBLA | BUS-F | 262 | ? | 02/12/2014 | KFS | 3 | IU | UNIV | | |
| Load Document | IUBLA | BUS-F | 390 | ? | 02/13/2014 | KFS | 3 | IU | UNIV | | |
| Load Document | IUBLA | BUS-M | 429 | ? | 02/12/2014 | KFS | 3 | IU | UNIV | | |
| Load Document | IUBLA | BUS-P | 509 | ? | 02/12/2014 | KFS | 3 | IU | UNIV | | |

12. Click **Load Document** Load Document and the course information will be returned. To display all sections of this course, click **show** ▶ show on the "Course Sections" tab.

**Document Overview** ▼ hide

**Document Overview**

| | |
|---|---|
| * **Description:** KFS-IER: IUKOA CHEM-C121 2014 4142 | **Explanation:** Instructional Effort Report |
| **Organization Document Number:** | |

**System Information** ▼ hide

**System Information**

| | | |
|---|---|---|
| **Fiscal Year:** | 2014 | |
| **Term:** | 4142 | |
| **Institution:** | IUKOA | Kokomo |
| **Subject:** | CHEM-C | Chemistry |
| **Catalog:** | 121 | KO-SSCI |
| **Reports-To Chart/Org:** | KO | SSCI | SCHOOL OF SCIENCES |

**Approval Level Data**

| | | | |
|---|---|---|---|
| **Current Level:** | 5 | | |
| **Level Chart/Org:** | IU | UNIV | UNIVERSITY LEVEL |

**Controls**

| | |
|---|---|
| 4:KO-KO KOKOMO CAMPUS ▼ | push down |

**Course Sections (2)** ▼ hide

**Section Assignment** — hide detail

**Global Section Assignment Actions** — show unassigned sections

| * Class# | * Title | Coa | * Comp. | Sesn SPln | CrHr Grd | Enrolled * Obj | Status Cfte | Action |
|---|---|---|---|---|---|---|---|---|
| | * Instructor | | * Account | | | | | |
| 8877 | ELEMENTARY CHEMISTRY LAB 1 | | LAB Laboratory | 1 Regular | 2 | 9 | A Active | add instructor  add generic |
| | Professional Staff | KO KOKOMO | 0563156 SCIENCE, MATH & INFORMATICS | PAE | --- | 2400 PROF SAL | 12 | del instructor  del effort  add effort |
| 8890 | ELEMENTARY CHEMISTRY LAB 1 | | LAB Laboratory | 1 Regular | 2 | 5 | A Active | add instructor  add generic |
| | Professional Staff | KO KOKOMO | 0563156 SCIENCE, MATH & INFORMATICS | PAE | --- | 2400 PROF SAL | 12 | del instructor  del effort  add effort |

**Global Section Assignment Actions** — show unassigned sections

**Notes and Attachments (0)** ▶ show

**Route Log** ▶ show

save  close

a. All sections for the course will be displayed. As much information as possible will be pre-filled. If the pre-filled data is accurate no changes will be required.

13. Under the Action category there are several options:

a. If you need to add an instructor, click **add instructor** add instructor which will display the instructor lookup screen.

| **Fiscal Year:** | 2014 |
|---|---|
| **Term:** | 4142 |
| **University ID:** | |
| **Person Name:** | |

search  clear  cancel

- If you only know the instructor's last name, you can enter the last name and a wildcard, which will return all instructors with that last name.

| | Fiscal Year: | 2014 |
|---|---|---|
| | Term: | 4142 |
| | University ID: | |
| | Person Name: | Sullivan* |

<div align="center">( search ) ( clear ) ( cancel )</div>

| Return Value | Fiscal Year | Term | University ID | Person Name | Chart Of Accounts Code | Pay Account | Pay Account Name | Object Code | Salary Administration Plan | Salary Grade | Source of Funds FTE Quantity |
|---|---|---|---|---|---|---|---|---|---|---|---|
| return value | 2014 | 4142 | | Sullivan Jr,William J | IN | 4686274 | NIH-NIAID/5R01AI077502-10 /W.SULLIVAN | 2000 | AC1 | FTX | 45 |
| return value | 2014 | 4142 | | Sullivan,Paula DeRemer | IN | 4689634 | AHRQ-/1R24HS022434-01 /CARROLL,A. | 2000 | AC1 | FCX | 10 |
| return value | 2014 | 4142 | | Sullivan Jr,William J | IN | 4686297 | NIH-NIAID/5R21AI106435-02 /SULLIVAN | 2000 | AC1 | FTX | 20 |
| return value | 2014 | 4142 | | Sullivan,Paula DeRemer | IN | 1186066 | DEPT SPT-ADOL PROF FUND | 2000 | AC1 | FCX | 20 |
| return value | 2014 | 4142 | | Sullivan,Paula DeRemer | IN | 1186079 | DEPT SPT-DEVELOPMENTAL PEDS CLINICAL | 2000 | AC1 | FCX | 55 |
| return value | 2014 | 4142 | | Sullivan,W. Patrick | IN | 1290000 | SOCIAL WORK | 2000 | AC1 | FTX | 100 |
| return value | 2014 | 4142 | | Sullivan,Winnifred Fallers | BL | 1025500 | RELIGIOUS STUDIES | 2000 | AC1 | FTX | 100 |
| return value | 2014 | 4142 | | Sullivan Jr,Frank Edward | IN | 1291000 | LAW INDIANAPOLIS | 2000 | AC1 | FRP | 100 |
| return value | 2014 | 4142 | | Sullivan,Kathleen Mary | SB | 0757240 | ACADEMIC CENTER FOR EXCELLENCE | 2000 | AC1 | FLX | 100 |
| return value | 2014 | 4142 | | Sullivan Jr,William J | IN | 4086211 | UW/USF/A/ SULLIVAN | 2000 | AC1 | FTX | 1 |
| return value | 2014 | 4142 | | Sullivan,Diana Kay Buuck | IN | 2079158 | OFFICE OF LIFELONG LEARNING-NURSING | 2300 | AC2 | FAX | 41.25 |
| return value | 2014 | 4142 | | Sullivan,Daniel Lee | IN | 2781701 | MED SCHOOL EXPANSION-SOUTH BEND | 2300 | AC2 | FAX | 25 |
| return value | 2014 | 4142 | | Sullivan,Diana Kay Buuck | IN | 1279108 | NURSING - P/T CONSOLIDATED | 2300 | AC2 | FAX | 13.75 |
| return value | 2014 | 4142 | | Sullivan,Terrence Joseph | KO | 0563156 | SCIENCE, MATH & INFORMATICS | 2000 | AC1 | FTX | 100 |
| return value | 2014 | 4142 | | Sullivan,Mary Karen | IN | 1296800 | PUBLIC & ENVIRON AFFAIRS | 2300 | AC2 | FAX | 40 |
| return value | 2014 | 4142 | | Sullivan Jr,William J | IN | 1286200 | PHARMACOLOGY & TOXICOLOGY | 2000 | AC1 | FTX | 24 |
| return value | 2014 | 4142 | | Sullivan Jr,William J | IN | 4686200 | NIH-NIAID/1R21AI015786-01 /SULLIVAN,W. | 2000 | AC1 | FTX | 10 |
| return value | 2014 | 4142 | | Sullivan,Megan Renee | BL | 4624330 | NIH-NIDCD/5R01DC008963-05 /HURLEY,L | 2000 | AC1 | RSS | 100 |
| return value | 2014 | 4142 | | Sullivan,Paula DeRemer | IN | 4689608 | HRSA/5T73MC00015-22-00/MAIN | 2000 | AC1 | FCX | 15 |

19 items found, displaying all items.1
Export options: CSV | Excel | XML

- Click the return value link to the left on the line with the appropriate account number.
b. If the instructor for a course is a part-time instructor (AC2) you have the option of selecting them by name or selecting the appropriate Generic Instructor category.
c. If you are unable to locate the job information for the instructor you are searching for and the individual is not in the payroll file, they may be on leave of absence, a staff employee, or a volunteer, which will require you to use the "generic" category.
d. If a full-time instructor is receiving an overload for additional teaching effort, select the proper generic instructor for the overload by selecting the generic key.
- To add a generic instructor, click **add generic** [ add generic ] to return the list of generic instructor types to select from click the search button.

**Instructional Effort Reporting Generic Instructor Lookup** ?

* required field

| | | |
|---|---|---|
| **Code:** | | |
| **Generic Instructor Description:** | | |
| **Object Code:** | | |
| **Salary Administration Plan:** | | |
| **Salary Grade:** | | |
| **Active Indicator:** | Yes | |

search    clear    cancel

| Return Value | Code | Generic Instructor Description | Object Code | Salary Administration Plan | Salary Grade | Active Indicator |
|---|---|---|---|---|---|---|
| return value | GEN0000019 | ACP | 9999 | AC2 | FAX | Yes |
| return value | GEN0000009 | Adjunct Faculty (IRA_) | 2300 | AC2 | FAX | Yes |
| return value | GEN0000001 | Associate Instructor (IR81) | 2350 | AC3 | SIN | Yes |
| return value | GEN0000005 | Bi-Weekly Staff | 2500 | --- | --- | Yes |
| return value | GEN0000014 | CONSORTIUM | 9999 | AC2 | FAX | Yes |
| return value | GEN0000030 | CONTRACTOR | 9999 | AC2 | FAX | Yes |
| return value | GEN0000031 | Distance Instructor | 2300 | AC2 | FAX | Yes |
| return value | GEN0000011 | INTERN/FLLWSHP/VSTG SCHOLAR | 9999 | AC2 | FAX | Yes |
| return value | GEN0000012 | Librarian (LIXX) | 2000 | AC1 | LTX | Yes |
| return value | GEN0000010 | MEDIA INSTRUCTION | 9999 | AC2 | FAX | Yes |
| return value | GEN0000024 | MILITARY/AEROSPACE SCIENCE | 9999 | AC2 | FAX | Yes |
| return value | GEN0000007 | Non-Student Hourly | 3000 | HR | --- | Yes |
| return value | GEN0000002 | Other Grad Student(AA8_,IR93) | 2350 | AC3 | S-- | Yes |
| return value | GEN0000018 | Overload - Acad. Administrator | 2170 | AC1 | AA- | Yes |
| return value | GEN0000016 | Overload - Clinical Faculty | 2170 | AC1 | FCX | Yes |
| return value | GEN0000017 | Overload - Lecturer | 2170 | AC1 | FLX | Yes |
| return value | GEN0000015 | Overload - Professor | 2170 | AC1 | FTX | Yes |
| return value | GEN0000008 | Part-time Faculty (IRP_) | 2300 | AC2 | FPX | Yes |
| return value | GEN0000020 | Part-time Visiting Faculty | 2300 | AC2 | FVX | Yes |
| return value | GEN0000004 | Professional Staff | 2400 | PA | --- | Yes |
| return value | GEN0000022 | Professional Staff | 2400 | PAE | --- | Yes |
| return value | GEN0000023 | Professional Staff | 2480 | PAO | --- | Yes |
| return value | GEN0000026 | Professional Staff | 2480 | PAU | --- | Yes |
| return value | GEN0000013 | PURDUE-SWT | 9999 | AC2 | FAX | Yes |
| return value | GEN0000003 | Scientist/Scholar/Rsch Assoc | 2000 | AC1 | RS- | Yes |
| return value | GEN0000006 | Student Hourly | 3500 | HS | --- | Yes |
| return value | GEN0000021 | Student Undergraduate | 2383 | AC4 | --- | Yes |
| return value | GEN0000025 | VOLUNTEER | 9999 | AC2 | FAX | Yes |

28 items found, displaying all items.**1**
Export options: CSV | Excel | XML

- When the correct generic instructor description is located click the return value and this category will be populated in the effort reporting screen.
14. If you need to delete an instructor, click **del instructor** del instructor .
15. If the account is incorrect for the instructor, click **del effort** del effort . Click **add effort** add effort to select a new account.

## Document Overview ▾ hide

### Document Overview

| | | | |
|---|---|---|---|
| * Description: | KFS-IER: IUKOA MATH-M3 2014 4142 | Explanation: | Instructional Effort Report |
| Organization Document Number: | | | |

## System Information ▾ hide

### System Information

| | | | |
|---|---|---|---|
| Fiscal Year: | 2014 | | |
| Term: | 4142 | | |
| Institution: | IUKOA | Kokomo | |
| Subject: | MATH-M | Mathematics | |
| Catalog: | 3 | KO-SSCI | |
| Reports-To Chart/Org: | KO | SSCI | SCHOOL OF SCIENCES |

### Approval Level Data

| | | | |
|---|---|---|---|
| Current Level: | 5 | | |
| Level Chart/Org: | IU | UNIV | UNIVERSITY LEVEL |

### Controls

4:KO-KO KOKOMO CAMPUS ▼ [push down]

## Course Sections (31) ▾ hide

### Section Assignment [hide detail]

### Global Section Assignment Actions [show unassigned sections]

| * Class# | * Title | | * Comp. | Sesn | CrHr | Enrolled | Status | |
|---|---|---|---|---|---|---|---|---|
| | * Instructor | Coa | * Account | SPln | Grd | * Obj | Cfte | Action |
| 9127 | ALGEBRA SKILLS RECOVERY LAB | | LAB Laboratory | 1 Regular | 0 | 12 | A Active | [add instructor] [add generic] |
| | Sehr,Barbara Dinneen 📖 | KO KOKOMO | 0563156 SCIENCE, MATH & INFORMATICS | AC1 | FLX | 2000 ACAD SALARY | 3 | [del instructor] [del effort] [add effort] |
| 9128 | ALGEBRA SKILLS RECOVERY LAB | | LAB Laboratory | 1 Regular | 0 | 16 | A Active | [add instructor] [add generic] |
| | Sehr,Barbara Dinneen 📖 | KO KOKOMO | 0563156 SCIENCE, MATH & INFORMATICS | AC1 | FLX | 2000 ACAD SALARY | 3 | [del instructor] [del effort] [add effort] |

16. If the "Cfte" field has a value, verify that it is correct. If there is no value, you will need to enter the CFTE.

Note: The total CFTE for an instructor should **never** exceed 100%.

17. To display all sections that an instructor is listed as teaching, click the **book icon** 📖 under the instructor's name.
    a. All sections will be returned along with the CFTE for the instructor.

| Class Number | Academic Institution | Subject Area | Catalog Number | Course Title | Chart Of Accounts Code | Pay Account | Object Code | Salary Administration Plan | Salary Grade | Course Instructor FTE Quantity |
|---|---|---|---|---|---|---|---|---|---|---|
| 8741 | IUKOA | FOLK-F | 101 | INTRODUCTION TO FOLKLORE | KO | 0563138 | 2300 | AC2 | FAX | 23 |
| 9482 | IUKOA | HSS-E | 103 | TOPICS IN ARTS & HUMANITIES | KO | 0563138 | 2300 | AC2 | FAX | 23 |
| **TOTALS** | | | | | | | | | | **46** |

**Emplid:** ▮▮▮▮▮
**Instructor:** Garber,Carol Anne
**Instructor FTE Total:** 46

close

2 items found, displaying all items.1
Export options: CSV | Excel | XML

18. If a course has no enrollment, there will be no buttons in the action area with the ability to update the instructor or effort.

**Course Sections (1)** ▾ hide

**Section Assignment** — hide detail

**Global Section Assignment Actions** — show unassigned sections

| * Class# | * Title | | * Comp. | Sesn | CrHr | Enrolled | Status | |
|---|---|---|---|---|---|---|---|---|
| | * Instructor | Coa | * Account | SPln | Grd | * Obj | Cfte | Action |
| 27913 | POLITICAL PERSPECTIVES OF EDUC | | LEC Lecture | 1 Regular | 3 | 0 | A Active | |
| | Scribner,Samantha Matilde Paredes | IN INDIANAPOLIS | 1296300 EDUCATION | AC1 | FTX | 2000 ACAD SAL-NE | 25 | |

19. If the status of a course is "A" active the course needs to be updated. If the status is "K" the section has been removed from the schedule of classes and doesn't need to be completed.

**Course Sections (16)** ▾ hide

**Section Assignment** — hide detail

**Global Section Assignment Actions** — show unassigned sections

| * Class# | * Title | | * Comp. | Sesn | CrHr | Enrolled | Status | |
|---|---|---|---|---|---|---|---|---|
| | * Instructor | Coa | * Account | SPln | Grd | * Obj | Cfte | Action |
| 1225 | BASIC ACCOUNTING SKILLS | | LEC Lecture | 8W1 Eight Wk 1 | 1 | 145 | A Active | add instructor  add generic |
| | 0001824687 - NotFound | KO KOKOMO | 0563138 | AC1 | FTX | 2000 ACAD SALARY | 50 | del instructor  del effort  add effort |
| | ACP | BL BLOOMINGTON | 1031400 PSYCHOLOGY | AC2 | FAX | 9999 | | del instructor  del effort  add effort |
| 1226 | BASIC ACCOUNTING SKILLS | | LEC Lecture | 8W1 Eight Wk 1 | 1 | 144 | K Section Removed | add instructor  add generic |
| 1227 | BASIC ACCOUNTING SKILLS | | LEC Lecture | 8W1 Eight Wk 1 | 1 | 140 | A Active | add instructor  add generic |
| 1228 | BASIC ACCOUNTING SKILLS | | LEC Lecture | 8W1 Eight Wk 1 | 1 | 144 | A Active | add instructor  add generic |
| 1229 | BASIC ACCOUNTING SKILLS | | LEC Lecture | 8W2 Eight Wk 2 | 1 | 140 | A Active | add instructor  add generic |

20. When the updates for your area of responsibility have been completed, verify all courses have been updated.

21. Return back to the "IER Course Select Lookup" screen and click **reload**  reload .
   • Courses have not been reviewed if there is an "?" in the status column.

| Actions | Academic Institution | Subject Area | Catalog Number | Status | Last Updated | Upd by | Organization Level Organization Code | Chart Of Accounts Code | Organization | Document Lock User Name | Sections Unassigned Count |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Load Document | IUBLA | BUS-C | 330 | ? | 02/12/2014 | KFS | 4 | IU | UNIV | | |

- Courses have been reviewed if there is an "R" in the status column.

| Actions | Academic Institution | Subject Area | Catalog Number | Status | Last Updated | Upd by | Organization Level Organization Code | Chart Of Accounts Code | Organization | Document Lock User Name | Sections Unassigned Count |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Load Document | IUKOA | AHLT-A | 491 | R | 03/25/2014 | PYEBEI | 5 | IU | UNIV | | |

22. Verify the "Sections Unassigned Count" column is blank for every row. If there is a row containing a number in the "Sections Unassigned Count" column, the number represents the number of unassigned sections that needs to be assigned.

| Actions | Academic Institution | Subject Area | Catalog Number | Status | Last Updated | Upd by | Organization Level Organization Code | Chart Of Accounts Code | Organization | Document Lock User Name | Sections Unassigned Count |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Load Document | IUINA | DENT-T | 672 | ? | 02/12/2014 | KFS | 4 | IU | UNIV | | 2 |

## Reports

When all courses/sections are in the "R" status and there are no remaining unassigned courses/sections, you are ready to print the Instructor CFTE report for your organization. Click the Selected box beside your organization. Click **view** [view] in the "Instructor CFTE" row within the "Reports" tab to begin. The printed report will return only AC1 and AC2 instructors.



## *Applying Thresholds*

To apply threshold settings for your reports, check the "Use Threshold Settings" checkbox. The CFTE threshold will allow you to enter a numerical threshold and to select reports less than or greater than or equal to the threshold.

**Instructor CFTE Report**

Backdoor Id **pyebei** is in use

- Enter any optional threshold criteria and click the Submit button to run the Organization Courses Instructor CFTE Report.

| CFTE Amount Threshold |  |
|---|---|
| Setting an CFTE Amount threshold runs the report for records based on the threshold settings below. | |
| Use Threshold Settings: | ☐ |
| CFTE Amount Threshold: | |
| Include records that are: | ⦿ greater than or equal to threshold ○ less than or equal to threshold |

submit    close

# Exiting the Application

After verifying there are no unassigned courses for your organization and the reports have been printed you are ready to exit the IER application. Click **close** close until you have arrived at the "Instructional Effort Reporting Selection" screen.

# Indiana University Instructional Effort Reporting System

## *Definition of Instruction:*

Teaching includes the time spent in preparation and presentation of classroom materials, meeting with students concerning the course, supervising additional instructors and assistants, evaluating course materials, and completing research connected with currently assigned instruction. Teaching also includes supervision of reading and research courses, theses, dissertations, as well as committee assignments connected with teaching responsibilities for specific courses.

## *Generic Instructor Guidelines*

The generic instructors are divided into two categories, those receiving compensation from the university and those who do not.

### Compensated Instructors

The following generic instructors assume some type of "appointment" and associated cost to Indiana University:

- Overload – Academic Administrator, AC1
- Overload – Clinical Faculty, AC1
- Overload – Lecturer, AC1
- Overload – Professor, AC1
- Librarian, AC1
- Part-time Faculty, AC2
- Adjunct Faculty, AC2
- Associate Instructor, AC3
- Graduate Student, AC3
- Contractor – A contractor is a person or business paid for contractual services.
- Professional Staff, PAE, PAO, PAU
- Service/Support Staff, CL, SS
- Student Hourly, HS Non-Student Hourly, HR

### Non-Compensated Instructors

The following generic instructors assume no cost to the university and **zero** teaching effort should be indicated. For rare instances of associated cost, you would then indicate teaching effort.

- ACP – If the course/section is taught as a part of the Advanced College Placement program through a local high school.
- CONSORTIUM - When another institution is bearing the responsibility of instruction, administration, and the associated cost for the course. IU bears no cost, but accepts the credits. Examples of this would be agreements with Earlham, the Indiana College Network (ICN), Metro University at IUS, NICE at IUSB, Overseas Studies, and Distance Education.
- INTER/FLLWSHP/VSTG SCHOLAR - This generic instructor was developed for courses/sections taught by student teaching interns, other teaching interns, and visiting scholars.
- MEDIA INSTRUCTION - Examples of courses/sections to be assigned this generic instructor include Interactive TV, World Wide Web (WWW), two-way interactive, Virtual Indiana Classroom (VIC), and Indiana Higher Education Television Services (IHETS).
- MILITARY/AEROSPACE SCIENCE – Utilized for military science and aerospace science courses/sections. Do not confuse aerospace science with aviation technology courses/sections taught as part of Purdue Statewide Technology.
- PURDUE-SWT - Courses/sections taught as part of the SWTE program and include taped TV courses/sections identified as part of SWTE. Do not confuse aviation technology courses/sections with aerospace science, which is explained below as part of generic instructor GN0000024.
- VOLUNTEER - Volunteer instructors include those people teaching courses/sections for IU without compensation. Examples included retired faculty, hospital employees, and those people simply teaching without stipend.

## *Salary Plan and Grade Listing*

| Salary Plan | Salary Grade Description | Salary Grade Code |
|---|---|---|
| AC1 | President | AAA |
| AC1 | Vice President | AAB |
| AC1 | Associate Vice President | AAC |
| AC1 | Assistant Vice President | AAD |
| AC1 | Chancellor | AAE |
| AC1 | Vice Chancellor | AAF |
| AC1 | Associate Vice Chancellor | AAG |
| AC1 | Assistant Vice Chancellor | AAH |
| AC1 | Dean | AAI |
| AC1 | Associate Dean | AAJ |
| AC1 | Assistant Dean | AAK |
| AC1 | Director | AAM |
| AC1 | Provost | AAP |
| AC1 | University Chancellor | AAU |
| AC1 | Clinical Faculty | FCX |
| AC1 | Acting Faculty | FGX |
| AC1 | Lecturer Full-time | FLX |
| AC1 | Part-time Faculty | FPX* |
| AC1 | Professor of Practice | FRP |
| AC1 | Faculty - Tenure Eligible | FTX |
| AC1 | Visiting Faculty/Scholar | FVX |
| AC1 | Part-time Librarian | LPX* |
| AC1 | Librarian | LTX |
| AC1 | Visiting Librarian | LVX |
| AC1 | Post-Doctoral Fellow | RSP |
| AC1 | Research Associate | RSS |

| AC1 | Scientist/Scholar | RSX |
|------|---------------------------|------|
| AC1 | Academic Specialist | UAS |
| AC1 | Teacher | UCH |
| AC1 | Health Center Physician | UMD |
| AC2 | Adjunct Faculty | FAX |
| AC2 | Part-time Faculty | FPX |
| AC2 | Visiting Faculty/Scholar | FVX |
| AC2 | Adjunct Librarian | LAX |
| AC2 | Visiting Librarian | LVX |
| AC3 | Faculty Assistant | SFS |
| AC3 | Graduate Assistant | SGR |
| AC3 | Associate Instructor | SIN |
| AC3 | Research Assistant | SRS |
| AC3 | Academic Intern | STN |
| ACNP | Academic No Pay | |

*Historical appointments only.