Faculty Affairs Orientation
**Housekeeping**

1. Attendees will be muted during the presentation, but chat will be monitored.
2. When reactions of the spoken variety are invited, use the “👋 Raise Hand” feature.
3. We will be asking you to interact with our website at various points during the orientation.

[feinberg.northwestern.edu/fao/](http://feinberg.northwestern.edu/fao/)
Agenda

1. FAO Team Introduction
2. FAO Website
3. Shared Goals
4. Creating an Environment for Success
5. The Aftershow
Goals

1. Orientation for new administrators and refresher for existing administrators

2. Orientation to new processes and procedures
Why now?
Addressing engagement between FAO and Institutes/Centers

• New staff in institutes, centers, and FAO
• Understanding the interdependence of our work will help us make systemic improvements
• Building collaboration with institutes and centers to allow for new initiatives and procedures
Meet the

FAO Team
Faculty are our most valuable resource.

At Northwestern University Feinberg School of Medicine, we believe that our faculty are critical to achieving and maintaining a leadership position among academic medical centers. Learn how we support our faculty in the work they do today and in developing personalized and rewarding careers.

feinberg.northwestern.edu/fao/
FAO Website

• Encyclopedia of faculty affairs processes

https://www.feinberg.northwestern.edu/fao/

• Designed to help you find information at the time you need it

• Don’t navigate by searching! To find administrative processes:
  - Go to For Administrators tab
  - Select the appointment type you are working on
  - Then select the process you need to execute
Challenge
You are processing the appointment of a new Postdoctoral Fellow. You navigate to the New Appointment process for postdocs.

Where in the document order does the Years of Experience Calculator belong?

First? Second? Third? Seventh?
Download at:
For Administrators > Administrative References > Recent News & Announcements
feinberg.northwestern.edu/fao/docs/admin-general/FAO-Key-Resources-Insts-Ctrs.pdf
Improve the FAO Website

• FAO Website is a community resource
• Answers to most questions are located on the website. If you can't find what you're looking for, please notify FAO and describe how you navigated the website to attempt to answer the question yourself:
  - This will help us to identify missing content or additional resource needs.
• Report broken links or out-of-date content to fao@northwestern.edu
New Content Based on Your Questions

• Years of Experience Calculator for postdoctoral scholar appointments
• Process for changing a regular Postdoc to a NRSA Postdoc
Shared Goals
from Reactive to Proactive
Currently: Reactive

Please expedite, this is URGENT! Dr. Smith started yesterday and doesn’t have a NetID ... or a computer ... or an office!

Ideally: Proactive

Ah, all deadlines are on track and new hires starting in the next month already have their NetIDs.
Shared Goals

From Reactive to Proactive

• Introduce standardized timelines for appointment processing
• Establish a priority timeline for Visa-related OnBase Transactions
• Centralize information to improve accessibility
• Deliver equitable service across campus
• Provide a high-quality experience for all candidates
Standard Timeline for OnBase Transactions

• Transactions should be submitted at least three weeks before the effective date
• FAO will generate appointment letters without receiving a reminder from you
• FAO cannot make changes to OnBase submissions. Submissions containing errors will be rejected and must be resubmitted at least three weeks before the effective date

Please do not contact FAO to request status updates or to request appointment letters unless more than three weeks have passed after you submit a complete and correct OnBase transaction.
OnBase Transactions
Slow down in order to speed up

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<tbody>
<tr>
<td>• Incomplete submissions, name and date errors, incorrect codes, and data discrepancies between documents lead to repeat rejections/submissions for transactions</td>
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<tr>
<td>• Unrelated forms copied from prior submissions lead to further rejections</td>
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<tr>
<td>• Repeat rejections/submissions slow down the standard workflow for everyone</td>
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<table>
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<tr>
<td>• Careful attention to resources and checklists reduces errors</td>
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<tr>
<td>• Downloading forms from website ensures most current information</td>
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<tr>
<td>• Transactions are submitted at least three weeks before the effective date</td>
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<td>• Lessons learned from prior cases are applied to future cases</td>
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Priority Timeline for Visa-related Transactions

• If the candidate has a visa, put "VISA" in the Comments and Notes section in OnBase as well as at the top of the first page of the submitted documents instead of sending an email
• FAO will expedite processing and appointment letters for visa-related transactions

Please note that OnBase transactions may route through several other offices after FAO for approval.
## Priority Processing

**From Reactive to Proactive**

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| • Visa-related requests involve a high volume of *individual communication*  
• Appointment Letters are requested on an individual basis, leading to *unhelpful email clutter*  
• Visa-related requests are a major pressure point for units and FAO | • Visa-related requests are handled through a *consistent, priority workflow*  
• Visa-related appointment letters are sent *as soon as they are available*, without the need for email requests  
• Visa-related requests become a *standard process* and *involve trust* between FAO and units |
Centralize Information to Reduce Emails

• Faculty Affairs Website
  - Utilize the FAO Website as an existing resource for administrative processes
  - Collaborate to identify missing content and navigation issues

• FAO Central Email Account (fao@northwestern.edu)
  - Reduce excess Email communication
  - Look for ways to increase the value rather than the volume of communication
## Communication

**Increase the Value of Communication, Not the Volume**

### Currently

- Repeat urgent requests, requests for info already on website, and duplicate questions from the same unit cause **delays for everyone**
- Failure to share info among staff within the same unit leads to **errors, duplicate requests**, and a slower workflow
- Emails copied to individual FAO staff
- Vague or imprecise messages generate **extra clarification emails**

### Ideally

- Staff seek answers via [FAO website](#) first
- Requests are sent routinely to [fao@northwestern.edu](mailto:fao@northwestern.edu)
- Emails contain **case/ID numbers**, names, and clear position information
- **Institutional knowledge** retained in units
Delivering Equitable Service Across Units

- Standardizing the FAO workflow supports an equitable distribution of resources and efforts across all units
- Exception requests divert resources and efforts to one unit and temporarily create an inequitable distribution
- Repeated exception requests delay the standard workflow and affect all units
- Proactively identify internal procedures that may be forcing you to submit repeated exception requests
## Issues in Equity Caused by Exceptions/Rushes

### Currently

- Rush/Exception requests **divert resources** and efforts away from the standard workflow.
- Unrealistic effective dates cause **onboarding issues** for candidates, processing issues for HR.
- The standard workflow is being **slowed down** by emergency triage.

### Ideally

- Transactions are submitted **three weeks** before the effective date.
- Rush/Exception requests are **carefully checked** prior to submission.
- Unrealistic effective dates discouraged.
- The standard workflow can operate at optimal capacity while still accommodating occasional rushes.
High-Quality Experience for All Candidates

- Standardizing the FAO workflow ensures a high-quality experience for all candidates.
- Exceptions and rush requests that are expedited through FAO may not be expedited through other approving departments, delaying the appointment.
- Potential issues for incoming candidates caused by requests outside of the standard timeline could include:
  - Issues with NetID Access
  - Issues with Email Access
  - Payroll Delays
Supporting Our Faculty and Staff

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| • Unrealistic effective dates cause **delays in access** to NetIDs and email accounts  
• Poor onboarding experience for candidates when HR processing is not complete before their start date  
• **Paychecks are delayed** | • Transactions are submitted **three weeks** before the effective date  
• All candidates receive NetIDs, email access, and various clearances **prior to their start date**, allowing them to begin work immediately and effectively  
• Onboarding presents a **positive experience** for the beginning of a candidate’s career at Northwestern |
Creating an Environment for Success
Process Improvement Update
Work Smarter, Not Harder

• **Breaking News!** Research Staff and Postdoctoral Fellow appointments no longer require an appointment recommendation form (fewer forms for PIs/Chairs to sign)
Everyone’s work and success is intertwined at a system level.
The Aftershow