

## **When must a university affiliate position be created in Workday?**

At this time, a university affiliate designated as a Research Affiliate (Research Affiliate Senior Research Fellow, Research Affiliate Research Fellow, Research Affiliate Postdoctoral, and Research Affiliate-Visiting Researcher/Scholar) must be managed in Workday, and many departments across campus are also required to manage Casual Employee positions in Workday. For other university affiliates, if the individual requires services or accesses that would have been granted through the creation of a 0% appointment or through an Official Visitor Letter, the university affiliate MUST be managed in Workday.

A university affiliate position and associated assignments can be created for the purpose of tracking workers, if a department wishes to do so.

## **What is a Research Affiliate?**

A Research Affiliate is a 0% assignment title that applies to individuals conducting temporary research related activities by virtue of using University laboratory facilities, libraries, or by collaborating with University faculty or researchers.

## **What are the types of Research Affiliate titles?**

### **Research Affiliate titles:**

Research Affiliate Senior Research Fellow (A012)

Research Affiliate Research Fellow (A011)

Research Affiliate Postdoctoral (A010)

Research Affiliate-Visiting Researcher/Scholar (A006).

## **What are the qualifications of assignment as a Research Affiliate?**

The qualifications for each of the four Research Affiliate titles:

**Research Affiliate Senior Research Fellow (A012):** Senior Research Fellows have established research careers at other institutions, to which they plan to return after brief collaboration at the university. They are self-funded or independently funded by a third-party source such as a grant or other institution. Senior Research Fellows are typically recruited by a member of the university's faculty or research body to further university research endeavors. Senior Research Fellows may request co-Principal Investigator status from the Office of Sponsored Projects.

**Research Affiliate Research Fellow (A011):** Research Fellows have at least three years of research experience (post-Ph.D.), and plan to return to their home institutions after brief collaborations at the university. They are self-funded or independently funded by a third-party source such as a grant or other institution. Research Fellows are typically recruited by a member of the university faculty or research body to further university research endeavors. Research Fellows may request co-Principal Investigator status from the Office of Sponsored Projects.

**Research Affiliate Postdoctoral (A010):** Recent Ph.D. graduates (within three years) who are self-funded or independently funded by a third-party source such as a grant or other institution. Postdoctoral Fellows are typically recruited by a member of the university's faculty or research body to further the university's research endeavors.

**Research Affiliate-Visiting Researcher/Scholar (A006):** Visitors from corporations or academic institutions who are self-funded or independently funded by a third-party source such as a grant or other institution. Visitors typically initiate request for nomination and collaborate on research that further the University's mission and may also benefit their own research endeavors. A bachelor's degree is required for use of this title.

### **Who approves Research Affiliate titles?**

Each dean's office or overseeing vice president office can final approve a Research Affiliate assignment request.

### **What are the requirements for assigning a Research Affiliate?**

1. Cleared background check on file. For procedures, visit the Human Resource Services website at [http://www.utexas.edu/hr/manager/hiring/background\\_check.html](http://www.utexas.edu/hr/manager/hiring/background_check.html). A vendor background check is required. See the reference chart at: <https://hr.utexas.edu/manager/hiring/request-background-check#ref>
2. to determine which type of check will be conducted for your position.
3. Prior approval from the Office of Sponsored Projects if assignee is working on an existing sponsored project (if applicable, contact Export Control Officer David Ivey: [IVEY@austin.utexas.edu](mailto:IVEY@austin.utexas.edu)). More on Export Control can be found here: <https://research.utexas.edu/osp/manage-awards-and-subawards/export-control/>
4. Visual Compliance check (<https://www.visualcompliance.com/>). Check with your dean's or VP's office HR representative for current internal procedures, or email: [vp-research-sr@austin.utexas.edu](mailto:vp-research-sr@austin.utexas.edu).
5. Justification statement for scholar's work at the University (added to Workday Assignment Details field). This information is especially critical for individuals working in UT laboratories, but required for all assignments.
6. Copy of signed offer letter should be kept on file in the personnel records of the sponsoring department. A template of the offer letter can be found at: <https://research.utexas.edu/resources/visiting-researchers-and-scholars/>. Procedures for Research Titles are located at <https://research.utexas.edu/resources/policies/>.

### **How do I get access to Visual Compliance?**

The HR representative for your department must send a request for employees to receive VC access to The Office of the Vice President for Research at [vp-research-sr@austin.utexas.edu](mailto:vp-research-sr@austin.utexas.edu) and include the reason access is needed.

### **What is Visual Compliance?**

Visual Compliance is a background check system that taps into export controls regulations and national/international areas of concern. The Visual Compliance check is a quick task requiring the name of the scholar as well as their business/research affiliation. If the results are clear, upload the VC report and ID as one file on the Workday contingent worker assignment. In the event there is a warning on the VC report, contact The Office of the Vice President for Research Office at [vp-research-sr@austin.utexas.edu](mailto:vp-research-sr@austin.utexas.edu).

### **What if I have a visitor who is not eligible for any of the Research Affiliate titles?**

There are non-research University Affiliate titles available to use as applicable, but all options should be considered before opting for the “Other” University Affiliate title. A background check and Visual Compliance check are both required if the visitor needs access beyond publicly accessible areas, such as entry to offices/labs, or access to restricted/proprietary information.

**For more information, please refer to the following:**

Handbook of Operating Procedures on Research Titles: <http://www.policies.utexas.edu/policies/research-titles>

Help: <http://www.utexas.edu/business/erp/hrms/help/UniversityAffiliateTypes.php>

Procedures for Research Titles: <https://research.utexas.edu/resources/policies/>