

SACSCOC Qualifications

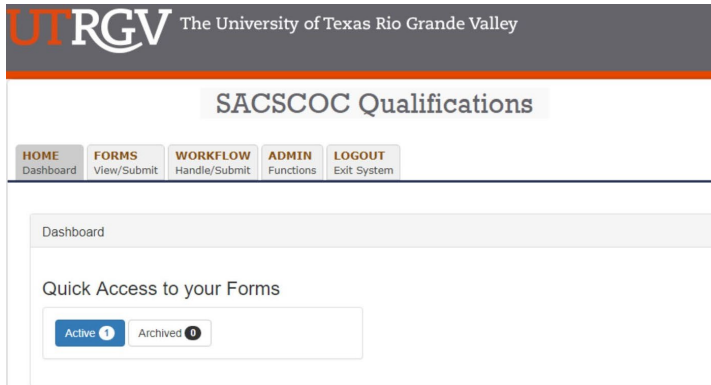
Online Faculty Teaching Validation Form Guide

Revised: November 1, 2021

Purpose: The online validation form is replacing the paper form previously used by the colleges. You will learn how to create and submit the electronic validation form for approval.

Logging in to the system

1. Log in to the [Online Faculty Teaching Validation Form](#) using your UTRGV credentials.
2. Once logged in, your home screen should look similar to the one below.



Creating a New Validation Form Request

1. Under the **Forms** tab, click on **Create New Form** to start a new validation form.



2. Fill out the form with the corresponding faculty information and include the degrees relevant to the courses they will be scheduled to teach. If the degree you are looking for is not showing in the drop-down menu, select "Other" and specify in the secondary box.

The screenshot displays the "View/Edit Form" page. It features a "Back" button in the top right corner. The form is organized into several sections: "Salutation" with a dropdown menu; "First Name", "Mid Init", and "Last Name" text input fields; "Academic Title" with a dropdown menu; "Highest Degree Earned" section with a "Degree" dropdown (set to "Other"), "Major", "Institution", and "Year Degree Awarded" (4 Digit YEAR required) fields; and "Other Degree Earned" section with a "Degree" dropdown, "Major", "Institution", and "Year Degree Awarded" (4 Digit YEAR) fields.

3. Enter the courses the faculty will be teaching under the 'Proposed Courses to be taught at UTRGV' section. You will select the course prefix from the drop-down menu and enter the 4-digit course number and the course title. If more than one course is to be taught, please click on **Add Another** each time you want to add another course.

Proposed Courses to be taught at UTRGV			+ Add Another
Course Prefix	Course #	Title	
ACCT	1234	Accounting I	
ACCT	5678	Accounting II	Remove

4. Fill out the additional academic course work and qualification boxes.

Academic Coursework

If the graduate degree is not a terminal degree in the teaching discipline, faculty members could have taken courses related to courses to be taught at UTRGV. Include this specific graduate coursework including course number, the course title that appears on the transcript and the institution where the course was taken. A minimum of 18 graduate semester hours in the teaching discipline is required.

If the qualifications are based on licensures or work experience, please list them in the section below under 'Other Qualifications/Credentials and Comments'. Include here any other comments from the initiator that could be helpful for the reviewers.

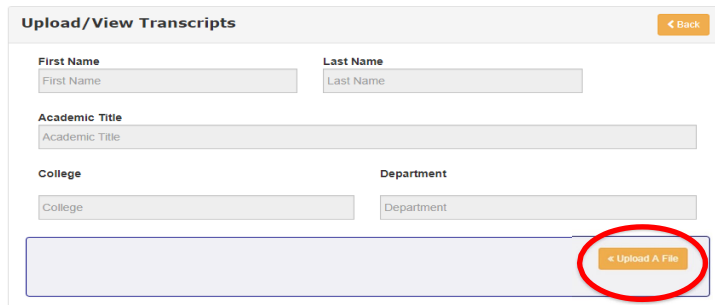
Other Qualifications/Credentials and Comments

5. Once you have entered the information in the sections above, the 'Attach Document' and 'Save' buttons will be enabled. The next step will be to attach all copies of transcripts or you can select the 'save' option to continue the form at a later time.

Attach Document	SAVE (edit again later)	CANCEL
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Attaching Documents to the form

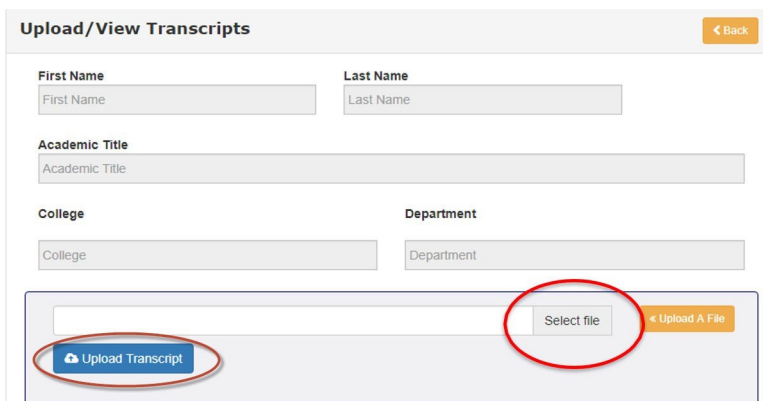
1. Click on “Attach Document” at the bottom of the page to attach all transcripts related to the faculty member’s coursework. Make sure that the faculty information is correct and matches the documents you are uploading. Select the “Upload a File” button.



The screenshot shows a web form titled "Upload/View Transcripts" with a "Back" button in the top right. The form contains several input fields: "First Name" and "Last Name" (each with a sub-label and a text box), "Academic Title" (with a text box), "College" and "Department" (each with a text box). At the bottom right of the form, there is a button labeled "Upload a File" which is circled in red.

2. Click on **Select file** to select the transcript from the destination where you have it stored on your computer. Submit one PDF file for every degree and name them using faculty name, degree and institution.

Please note: The file must be in PDF format in order for it to be uploaded.



The screenshot shows the same "Upload/View Transcripts" form. In addition to the "Upload a File" button, there is now a "Select file" button and a blue "Upload Transcript" button at the bottom left. Both the "Select file" and "Upload Transcript" buttons are circled in red.

3. Once you have selected the file, click on **Upload Transcript** which will prompt you to return to the form request page.

Please note the following when submitting a transcript:

- A transcript is required to submit the form for review.
- Transcripts attached to the validation form do not substitute for the submission of original/official hard copy transcripts with hiring packet to the Office of the Provost. This is a SAACSCOC requirement for faculty records.
- Review every page of the document and redact Social Security Numbers (Some institutions use SSN as student IDs).

4. After reviewing the information, click on **Submit for Review** at the bottom of the page to submit to the Chair for approval.

Files Associated with this Form

[View](#)

✔ SUBMIT for Review SAVE (edit again later) CANCEL DELETE

5. Click on **Yes** at the bottom of the confirmation screen to submit the form to the Chair.

After every submission, the approver and initiator will receive an email notification with the subject **“Teaching Validation Form - SACSCOC System Message”**.

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HOME
DashboardFORMS
View/SubmitWORKFLOW
Handle/SubmitADMIN
FunctionsLOGOUT
Exit System

Logged in as: DAVID.GRANADO@UTRGV.EDU

Submit Form

You are about to submit this form to your CHAIR. Do you wish to proceed?

Last Name

College

Title

First Name

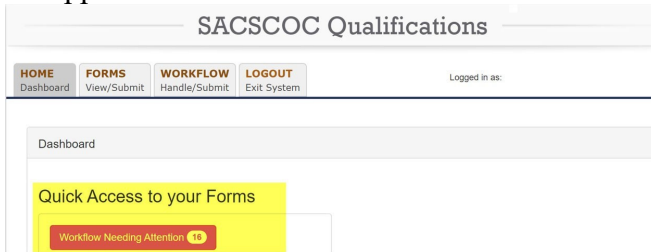
Department

Submitting to the following Chair:

✔ Yes ✘ No

Reviewing Forms for Approval

1. After logging in, your home page dashboard will indicate when you have an **Active** form for approval.



The screenshot shows the SACSCOC Qualifications dashboard. At the top, there are navigation tabs: HOME (Dashboard), FORMS (View/Submit), WORKFLOW (Handle/Submit), and LOGOUT (Exit System). The user is logged in as LAURA.HERNANDEZ04@UTRGV.EDU (99). Below the navigation, there is a 'Dashboard' section with a 'Quick Access to your Forms' box. A yellow notification box indicates 'Workflow Needing Attention' with a count of 18.

2. Select the form you want to review by clicking on **View**.



The screenshot shows the 'Viewing Submitted Forms' page. It includes a search bar and a table of submitted forms. The table has columns for Last Name, First Name, Submission Status, and Actions. Two forms are listed: one by Laura Hernandez (Submitted to Chair) and one by Maria Lopez (Approved by EVP). Each form has 'View' and 'History' buttons.

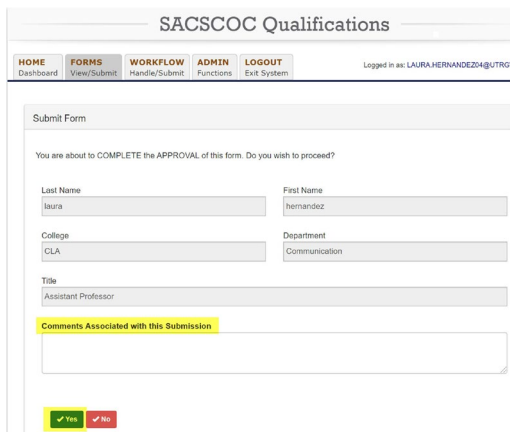
Last Name	First Name	Submission Status	Actions
hernandez	laura	Submitted to Chair	View History
Lopez	Maria	Approved by EVP	View History



The screenshot shows the 'Files Associated with this Form' section. It contains a placeholder for a file and a 'View' button.

[APPROVE](#) [REJECT](#) [CANCEL](#)

4. You will be taken to a confirmation page where you can include additional comments.



The screenshot shows the 'Submit Form' confirmation page. It asks the user if they wish to proceed with the approval. The form includes fields for Last Name, First Name, College, Department, and Title. Below these fields is a 'Comments Associated with this Submission' section with a text area for input. At the bottom, there are 'Yes' and 'No' buttons.

Please Note: When a form is rejected, the original form is sent back to the initiator. The system will keep all the information of the form and allow the initiator to edit the requested fields and resubmit as a new form.

Tracking forms in the workflow

1. Go to the “Workflow” tab to see a table with all forms currently in the workflow for your college. To see a quick look of the details and status click on the top left menu button of the table.

SACSCOC Qualifications

HOME Dashboard | FORMS View/Submit | WORKFLOW Handle/Submit | ADMIN Functions | LOGOUT Exit System | Logged in as: LAURA.HERNANDEZ04@UTRGV.EDU

My Active Workflow Q Archived Workflow Export CSV Files

Last Name	First Name	Department	Submitted By	Actions								
167	Black	Joe	Economics & Finance	teresa.ferlaarroyo	Q View History							
<table border="1"><thead><tr><th>Date Submitted</th><th>Current Stage</th><th>Last Status Date</th><th>Status</th></tr></thead><tbody><tr><td>Apr 9, 2020 @ 9:57 AM</td><td>EVP</td><td>Apr 9, 2020 @ 10:27 AM</td><td>Approved by EVP</td></tr></tbody></table>					Date Submitted	Current Stage	Last Status Date	Status	Apr 9, 2020 @ 9:57 AM	EVP	Apr 9, 2020 @ 10:27 AM	Approved by EVP
Date Submitted	Current Stage	Last Status Date	Status									
Apr 9, 2020 @ 9:57 AM	EVP	Apr 9, 2020 @ 10:27 AM	Approved by EVP									
168	Moon	Clifford	Economics & Finance	clifford.moon	Q View History							
<table border="1"><thead><tr><th>Date Submitted</th><th>Current Stage</th><th>Last Status Date</th><th>Status</th></tr></thead><tbody><tr><td>Apr 10, 2020 @ 9:03 AM</td><td>Dean</td><td>Apr 23, 2020 @ 8:20 AM</td><td>Rejected by Dean</td></tr></tbody></table>					Date Submitted	Current Stage	Last Status Date	Status	Apr 10, 2020 @ 9:03 AM	Dean	Apr 23, 2020 @ 8:20 AM	Rejected by Dean
Date Submitted	Current Stage	Last Status Date	Status									
Apr 10, 2020 @ 9:03 AM	Dean	Apr 23, 2020 @ 8:20 AM	Rejected by Dean									

For further review, you can also run a report to extract all validation forms submitted under your college. These reports are in CSV format and include every data field of the validation form.

2. Click on the right button “Export CSV Files” to the upper right corner. Click on the “SACSQUAL CSV”

SACSCOC Qualifications

HOME Dashboard | FORMS View/Submit | WORKFLOW Handle/Submit | ADMIN Functions | LOGOUT Exit System | Logged in as: LAURA.HERNANDEZ04@UTRGV.EDU

Administer Users Export CSV Files

CSV Files Back

SACSQUAL CSV

SACSCOC Qualifications

HOME Dashboard | FORMS View/Submit | WORKFLOW Handle/Submit | ADMIN Functions | LOGOUT Exit System | Logged in as: LAURA.HERNANDEZ04@UTRGV.EDU

Administer Users Export CSV Files

Enter Date Criteria for CSV File Back

To filter this report fill in the Start and End Date. Leaving it blank will select ALL records

Start Date 01-Jan-20

End Date 31-May-20

Submit

Calendar: 31-May-20, 17:00, 18:00, 19:00, 20:00, 21:00, 22:00

The full list will appear as a table. Click on “CSV” on the top of the table to get an Excel file.

SACSCOC Qualifications

HOME Dashboard FORMS View/Submit WORKFLOW Handle/Submit ADMIN Functions LOGOUT Exit System Logged in as: LAURA.HERNANDEZ04@UTRGV.EDU

Records

Show 10 entries Copy **CSV** PDF Search:

recid	ACADEMIC_COURSEWORK	APPROVED_BY	CHAIRCOMMENTS	DEANCOMMENTS	PRC
167	Acad Coursework test	TERESA.FERIAARROYO@UTRGV.EDU		Test Dean comments	EVP
168	ac	CLIFFORD.MOON@UTRGV.EDU		This was rejected because it was missing information	
169	test academic course	ALICIA.QUIROZ@UTRGV.EDU			
170		LAURA.HERNANDEZ04@UTRGV.EDU			

User groups description

- **Administrator:** The administrator is the overall application manager and can grant and remove user access. Although it is not part of the workflow as reviewer, the administrator can approve forms if needed. It can also track all forms in the workflow and run CSV reports to work with all fields of the submitted forms.
- **Initiator:** The initiator can prepare and submit forms to the chair and can only track and view history of the form he/she submitted.
- **Assistant Dean:** The assistant dean role is not part of the workflow but can track all forms under their college and run CSV reports to work with all fields of the submitted forms. The Assistant Dean can also prepare and submit a form to the chair.
- **Chair:** The Chair role is the first college reviewer of the workflow and can submit, reject, and return a form back to the initiator if further editing is needed, and/or approve a form for Dean's review. The Chair can view the details and history of the validation forms that have been submitted to their college Chair level and can only approve on its own behalf.
- **Dean:** The Dean role is the last reviewer at the college level of the workflow and can directly submit a form to the Chair, reject and return a form to the initiator if further editing is needed, or approve forms for Provost review. The Dean will be able to view the details and history of the validation forms that have been submitted to their college Dean level and can only approve on its own behalf.
- **Provost:** The Provost role is the last reviewer in the workflow and can approve or reject a form. If a form is rejected, it is returned to the initiator. Some users at the provost level will serve as administrators and can track all forms currently in the workflow and can also run reports which include the information that was included in a validation form.

Workflow

