

# *SACSCOC Qualifications*

## **Online Faculty Teaching Validation Form Guide**

Revised: September 2024

**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.

The screenshot shows the UTRGV SACSCOC Qualifications dashboard. At the top is the UTRGV logo and the text "The University of Texas Rio Grande Valley". Below this is a navigation bar with tabs: HOME (Dashboard), FORMS (View/Submit), WORKFLOW (Handle/Submit), ADMIN (Functions), and LOGOUT (Exit System). The main content area is titled "Dashboard" and includes a section "Quick Access to your Forms" with buttons for "Active" (1) and "Archived" (0).

## Creating a New Validation Form Request

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

This screenshot shows the "Viewing Active Forms" page. The "FORMS" tab is highlighted in the navigation bar. In the main content area, the "Create New Form" button is circled in yellow. The page also shows a table with columns for Last Name, First Name, Department, and Actions, and a search bar.

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.

This screenshot shows the "View/Edit Form" page. It contains several form fields for faculty information: Salutation (SELECT), First Name, Mid Init (Middle Initial), Last Name, Academic Title (SELECT), Highest Degree Earned (Degree: Other, Major, Institution, Year Degree Awarded), and Other Degree Earned (Degree: SELECT, Major, Institution, Year Degree Awarded). The "Other" option is selected for the Highest Degree Earned field.

3. Enter the courses the faculty will teach 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 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			<a href="#">+ Add Another</a>
Course Prefix	Course #	Title	
ACCT	1234	Accounting I	
ACCT	5678	Accounting II	<a href="#">Remove</a>

4. Fill out the additional academic coursework 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.

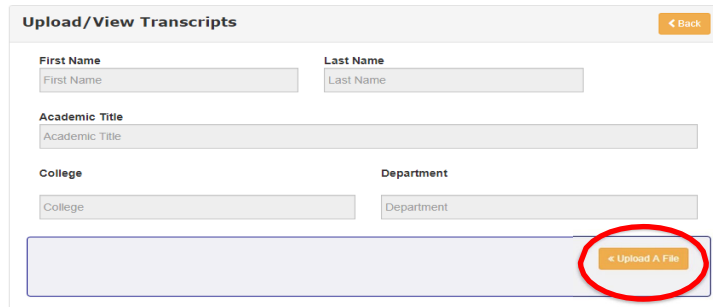
**Other Qualifications/Credentials and Comments**

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](#)

## Attaching Documents to the form

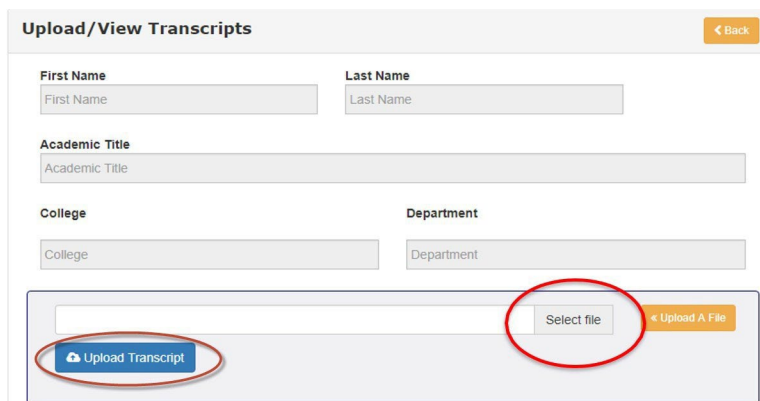
1. Click on “Attach Document” at the bottom of the page to attach all transcripts related to the faculty member’s coursework. Make sure that the faculty information is correct and matches the documents you are uploading. Select the “Upload a File” button.



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 sub-label and a text box), "College" (with a sub-label and a text box), and "Department" (with a sub-label and a text box). At the bottom of the form, there is a large, empty rectangular box. To the right of this box, the text "< Upload A File" is circled in red.

2. Click on **the 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 as before. In addition to the input fields, there is now a file selection area at the bottom. This area includes a text box, a "Select file" button (circled in red), and an "< Upload A File" button. Below the text box, there is a blue button labeled "Upload Transcript" with a cloud icon, which is also 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 the 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  
Dashboard

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LOGOUT  
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  
John

First Name  
Doe

College  
VCOBE

Department  
Accountancy

Title  
Assistant Professor

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's a navigation bar with links: HOME (Dashboard), FORMS (View/Submit), WORKFLOW (Handle/Submit), and LOGOUT (Exit System). Below this, a 'Dashboard' section contains a yellow box labeled 'Quick Access to your Forms' with a red button indicating 'Workflow Needing Attention 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, a table of submitted forms, and a 'View Active Forms' button. 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 row has 'View' and 'History' links.

Last Name	First Name	Submission Status	Actions
hernandez	laura	Submitted to Chair	<a href="#">View</a> <a href="#">History</a>
Lopez	Maria	Approved by EVP	<a href="#">View</a> <a href="#">History</a>

The screenshot shows the 'Files Associated with this Form' section. It displays a document preview with a 'View' button at the bottom right.

Three buttons are shown: 'APPROVE' (blue with a checkmark), 'REJECT' (red with an X), and 'CANCEL' (orange with a circle and slash).

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 completing the approval. Below the question are input fields for Last Name, First Name, College, Department, and Title. A 'Comments Associated with this Submission' section is also present, followed by '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 at the details and status click on the top left menu button of the table.

The screenshot shows the 'SACSCOC Qualifications' dashboard. The 'WORKFLOW' tab is selected. The 'My Active Workflow' section displays a table of active forms. The first form (ID 167) is highlighted with a red circle around its icon. Below the table, there are details for the selected form, including 'Date Submitted', 'Current Stage', 'Last Status Date', and 'Status'.

Last Name	First Name	Department	Submitted By	Actions	
167	Black	Joe	Economics & Finance	teresa.feriaarroyo	<a href="#">View</a> <a href="#">History</a>

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 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 to 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”

The screenshot shows the 'SACSCOC Qualifications' dashboard. The 'EXPORT CSV FILES' button is highlighted with a red circle. Below it, the 'CSV Files' section is visible, showing a list of CSV files. The 'SACSQUAL CSV' file is highlighted with a red circle.

The screenshot shows the 'SACSCOC Qualifications' dashboard. The 'Enter Date Criteria for CSV File' dialog is open. The 'Start Date' is set to '01-Jan-20' and the 'End Date' is set to '31-May-20'. The 'Submit' button is highlighted with a red circle. A calendar widget is visible below the date fields, showing the month of May 2020.

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

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Logged in as: LAURA.HERNANDEZ04@UTRGV.EDU

Records

Show10▼entries

CopyCSVPDF

Search:

recid	ACADEMIC_COURSEWORK	APPROVED_BY	CHAIRCOMMENTS	DEANCOMMENTS	PRO
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 a 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 the 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 behalf.
- **Provost:** The Provost's 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 that include the information that was included in a validation form.

### *Workflow*

