

# FACULTY CREDENTIALING GUIDE

STEPHEN F. AUSTIN STATE UNIVERSITY

## OVERVIEW AND NOTES

This guide provides technical instructions for using pertinent functionalities of Faculty Success to complete the Faculty Credentialing Review Process: logging in, updating credentials, and running the Course Credentialing Review report.

The Faculty Credentialing Review Process will be comprised of different phases and will take place over a matter of months. It is likely that different phases of the process will require credentialing steps to be performed in varying orders or for reports to be run for different groups or individuals. This guide includes a linked Table of Contents for quick reference. It is a good idea to skim over the guide and become familiar with its sections before beginning the Faculty Credentialing Review Process.

Most phases of the Faculty Credentialing Review Process will require a report to be run and reviewed prior to evaluating or updating faculty credentials. Instructions for running reports under varying conditions are available in the *Running the Report* section.

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# CREDENTIALING

## LOGGING IN

To log in to Faculty Success:

1. Log in to MySFA.
2. Navigate to the Faculty tab.
3. Click "Faculty Success - FAR."

When a typical user enters Faculty Success, he or she will land on the Home page. Clicking the Activities button in the top left allows faculty to navigate directly to their Activities page. Here, faculty members may keep track of their own teaching, research, and service activities. The Activities page includes links to each of the data collection screens in the Faculty Success system.

Users with permission to manage activities *for* faculty members may make changes to faculty activities on their behalf by clicking the "Manage Data" button. (Steps 1 through 6 of *Updating Teaching Qualifications* below detail how to manage data *for* faculty members.)

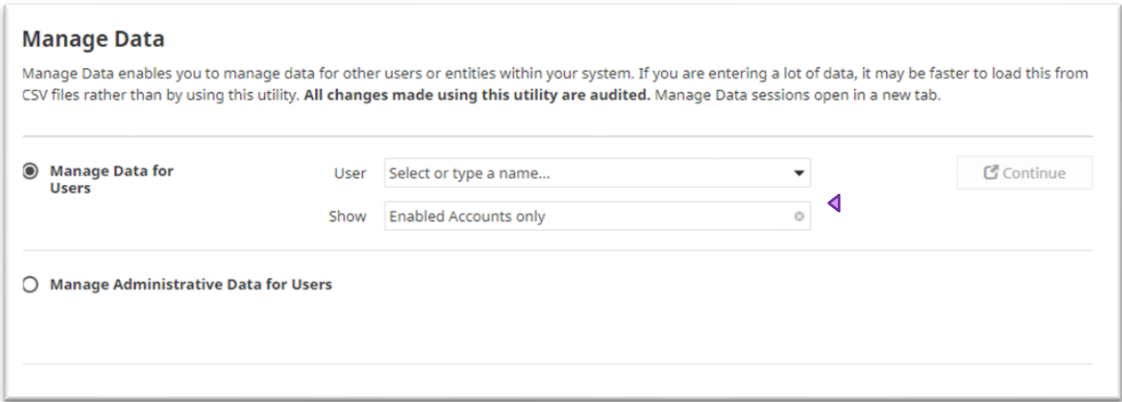
## UPDATING TEACHING QUALIFICATIONS

The *Teaching Qualifications* screen in Faculty Success plays a key role in the Faculty Credentialing Process. This screen determines which credentials qualify faculty members to teach each of their courses. Each field of the Teaching Qualifications screen has an important part to play, and this section of the *Faculty Credentialing Guide* demonstrates how to use each one.

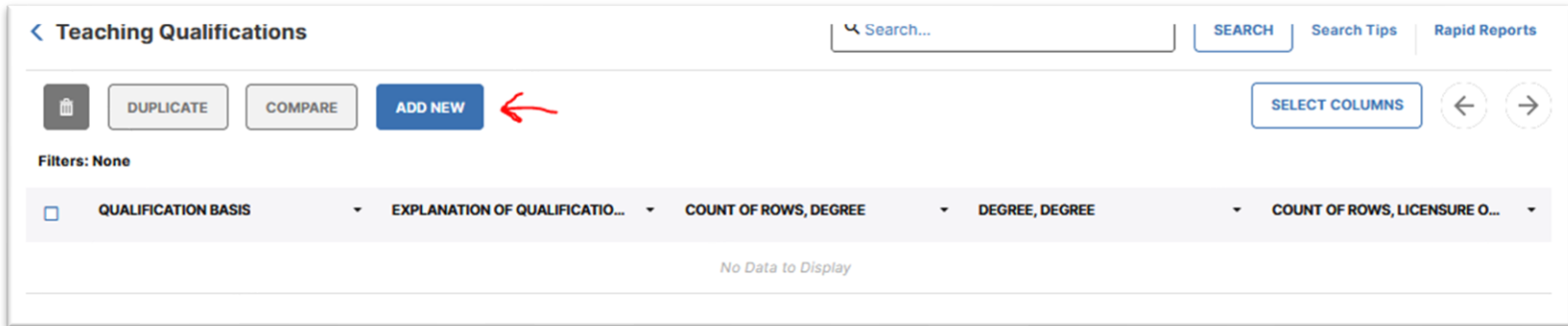
## MANAGING DATA: THE BASICS

After reviewing the faculty member's credentials via the Course Credentialing Review report, it may be necessary to edit or add credentials in Faculty Success.

1. Click "Manage Data."
2. From the "User" drop-down menu, select the name of the faculty member whose credentials need to be updated.

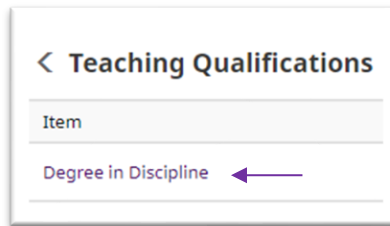


3. Click "Continue."
4. Under the Faculty Credentials heading, click "Teaching Qualifications."
5. It is possible to edit previously entered credentials **OR** enter new credentials.
  - (a) If **no credentials** have been added to this screen previously for this faculty member, there will be a grayed out message that reads "No Data to Display."



To add credentials, click "Add New."<sup>1</sup>

- (b) In order to **update previously added credentials**, click the title of the credentialing item that needs to be updated.



- i. On the *Edit Teaching Qualifications* screen, select the check box next to the Qualification Basis that best describes the faculty member's teaching qualification(s).

<sup>1</sup> If a faculty member has qualifications in multiple subject areas or disciplines, use the "Add New Items" feature to indicate separate qualification details for each course or course discipline needed. (See *Designating Qualifications by Course* for more information.)

- ii. Select the appropriate credentials from the drop-down menus for each type of qualification.<sup>2</sup>

The screenshot shows a form with five sections, each for a different type of qualification. Each section includes a red 'R' icon, a record reference dropdown menu, and a 'Select the number of rows to add' field with a '+Add' button.

- Degree:** Record reference dropdown: 'Please select...'. Add rows: 1.
- Licensure or Certification:** Record reference dropdown: 'Please select...'. Add rows: 1.
- Professional Employment:** Record reference dropdown: 'Academic, Government, Military and Professional Position'. Add rows: 1.
- Honor/Award:** Record reference dropdown: empty. Add rows: 1.
- Intellectual Property:** Record reference dropdown: empty. Add rows: 1.

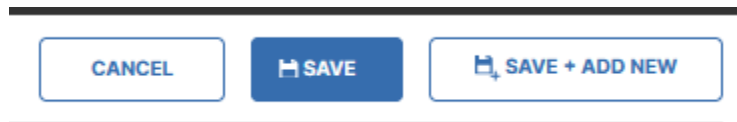
- iii. If documents which support the faculty member’s credentials are available, they may be uploaded as “Supporting Documentation.” For example, if the faculty member has a completed Faculty Certification of Credentials form on file, it may be uploaded here. However, please note that uploading supporting documentation merely augments the credentials in Faculty Success and *does not* eliminate the need to enter faculty members’ credentials manually.

To upload supporting documents, click “Drop file here...,” then browse and select the appropriate document. Add additional rows using the “Add Row” button, if needed, to add additional supporting documents.

The screenshot shows the 'Supporting Documentation' section. It has a dropdown menu for 'Actions' and a table with one row. The row contains a 'Document' field with a red 'R' icon and a dashed box with the text 'Drop file here or select to upload'. An 'ADD ROW' button is at the bottom.

<sup>2</sup> If the appropriate qualifications are not available through the record reference drop-down menus, it will be necessary to add the qualifications to the appropriate reference screen. See [Appendix A](#) to determine how to add records to each screen.

- iv. Once all updates have been made to the *Teaching Qualifications* screen, click "Save."



Once changes made to the Teaching Qualifications screen have been saved, the updates can be checked by running (or re-running) the Course Credentialing Review report. (For instructions, see *Running the Report* below.)

## CREDENTIALING BY COURSE

As mentioned above, credentials are used to determine whether faculty members are qualified to teach specific courses. Faculty Success makes linking qualifications to courses easy by allowing users to associate courses with qualifications directly in the *Teaching Qualifications* screen.

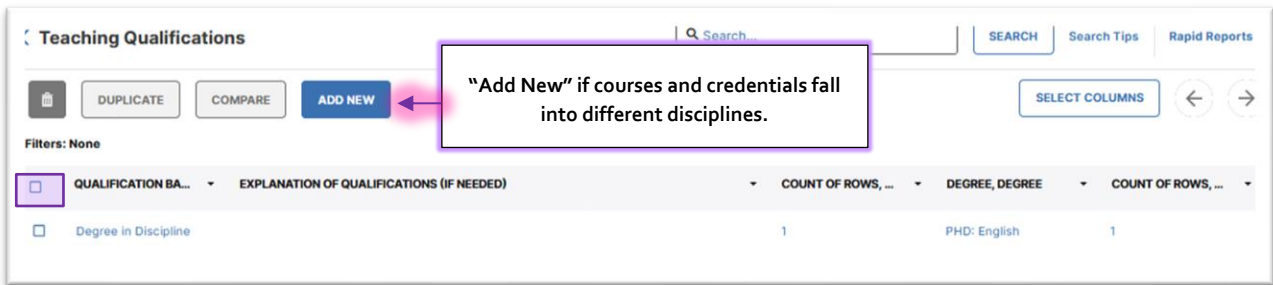
The "Course" section is found at the bottom of the *Teaching Qualifications* screen.

A screenshot of a web interface showing a section titled "Course (1)" with a downward arrow. Below the title is a form with a header "1st Course" and an "Actions" dropdown menu. The form contains two input fields: "Course Prefix" with a red "R" and a dropdown arrow, and "Course Number" with a red "R". Below the form is a blue "ADD ROW" button with a plus icon.

After qualifications have been added into the *Teaching Qualifications* screen, it is important to add each course the faculty member teaches and link them to the appropriate credentials. This allows SFA to ensure all faculty are qualified to teach their assigned courses.

The faculty credentialing process will be ongoing as faculty teach more and more classes with each passing semester. As faculty members teach new courses, the new courses will need to be added to the *Teaching Qualifications* screen and linked to the appropriate credentials.

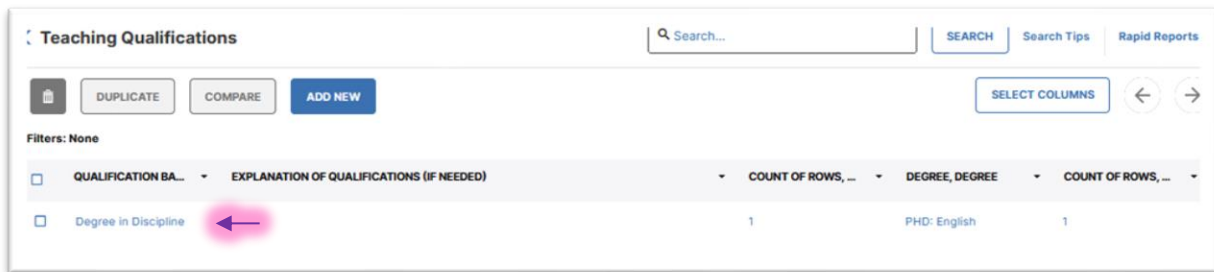
Individual faculty members often teach a variety of courses. Therefore, a single degree or a single professional position may not be sufficient to qualify the faculty member to teach every course he or she is assigned. Faculty Success allows users to create different "Items" or groups of qualification records in the *Teaching Qualifications* screen. Since courses are linked to individual "Item" records for credentialing, these Item records can be used to compartmentalize credentials and courses by subject.



QUALIFICATION BASIS	EXPLANATION OF QUALIFICATIO...	COUNT OF ROWS, DEGREE	DEGREE, DEGREE	COUNT O
<input type="checkbox"/> Degree in Discipline		2	MFA: Creative Writing	1
<input type="checkbox"/> Degree in Discipline, Degree in Related Discipline		3	MED: Elementary Education	1
<input type="checkbox"/> Degree in Related Discipline, Other Qualification		2	MA: Literature	1

To add courses to the *Teaching Qualifications* screen:

1. Note any courses missing from the faculty member's *Teaching Qualifications* screen.
2. Determine which credentials qualify the faculty member to teach the course(s).
3. Click the title of the Item to which courses need to be added.



If a new Item (group of credentials) needs to be added to accommodate qualifications and courses in a different subject or discipline, follow the instructions under Step 6 of [Managing Data: The Basics](#).

4. In the Course section, click "+Add " to add as many blank course rows as needed.



The screenshot shows a form titled "Course (1)" with a section labeled "1st Course". Below this section, there are two input fields: "Course Prefix" and "Course Number", both marked with a red "R". The "Course Prefix" field is a dropdown menu, and the "Course Number" field is a text input. To the right of the "1st Course" section is an "Actions" dropdown menu. At the bottom of the form is a blue "ADD ROW" button.

5. Type in the appropriate Course Prefix and Course Number or select them from the drop-down menu for each applicable course.

This screenshot shows the same "Course (1)" form, but with the "Course Prefix" dropdown menu open. The dropdown menu displays a list of options: "A", "AAS", "ACC", and "ACCT". The "A" option is currently selected. The "Course Number" field remains empty. The "ADD ROW" button is still visible at the bottom right of the form.

6. Click "Save."
7. Repeat this process as needed to link all courses with the appropriate credentials.

Once changes made to the Teaching Qualifications screen have been saved, the updates can be checked by running the Course Credentialing Review report. (For instructions, see *Running the Report* below.)

## RUNNING THE REPORT

Run the Course Credentialing Review report.

**< Run Course Credentialing Review** RUN REPORT

[Download this report's template](#)

**1 Date Range**

Start Date: January 1 2018

End Date: December 31 2018

**2 Whom to Include**

Groups to Include: **All groups selected**  
[Change Selection](#)  
 Users must be enrolled in all selected groups to be in this report.

Individuals to Include: **All individuals selected**  
[Change Selection](#)

Include These Accounts: Enabled Only

**3 Report Options**

a) Qualification Categories to include?\*

Complete  
 Partially Complete  
 Incomplete

**4 File Format**

File Format: Microsoft Word (.doc)  
Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size: Letter

1. Click "Reports."
2. Click "Course Credentialing Review."
3. In the Date Range, change the Start Date to August 01, YYYY, and change the End Date to December 31, YYYY.
4. In Section 2, click "Change Selection."
  - (a) If running the report for a **single faculty member**, click the "Change Selection" link under "Individuals to Include" to see a list of available faculty members. (It may be necessary to change the selection from "Enabled Only" to "Enabled and Disabled" in the drop-down menu to view all faculty for this date range.)

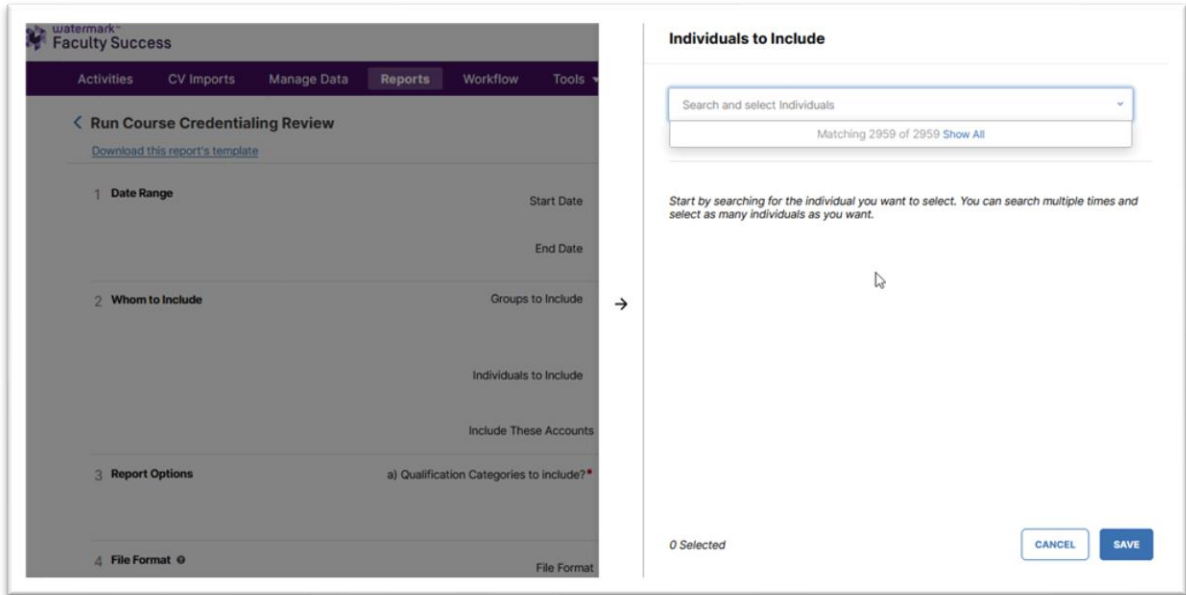
**2 Whom to Include**

Groups to Include: **All groups selected**  
[Change Selection](#)  
 Users must be enrolled in all selected groups to be in this report.

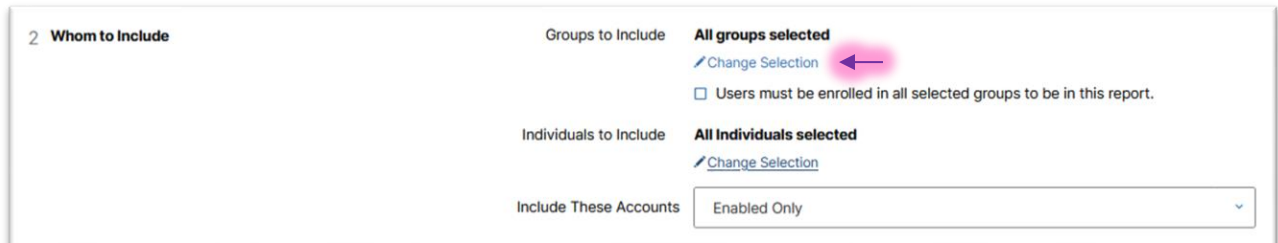
Individuals to Include: **All individuals selected**  
[Change Selection](#)

Include These Accounts: Enabled Only

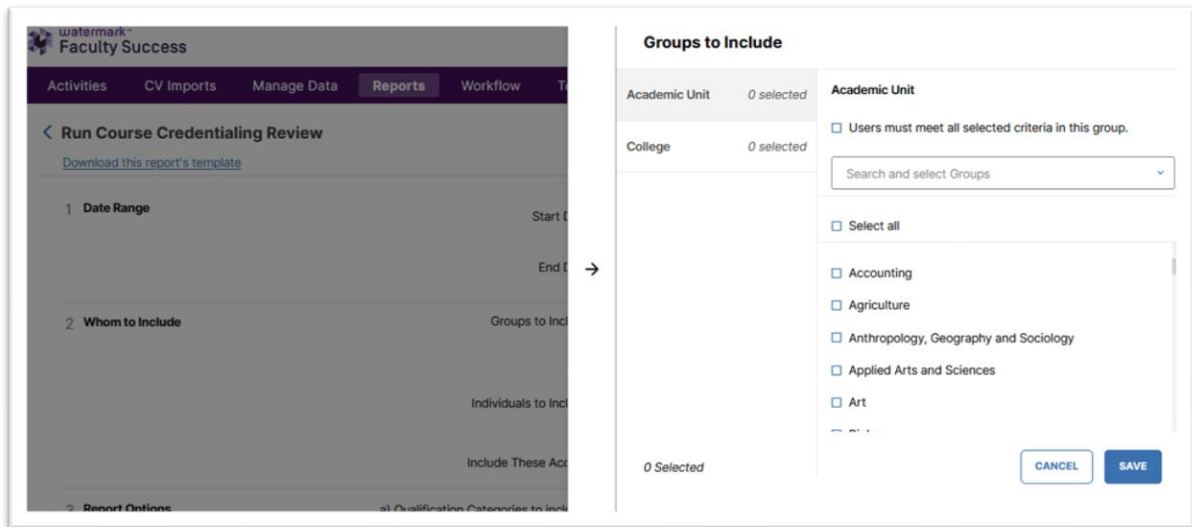
- (b) A new dialog box will appear in your browser. Type the name of the faculty member whose report is being run, then click their name in the drop-down menu. This will add them to your report selection. Then click "Save."



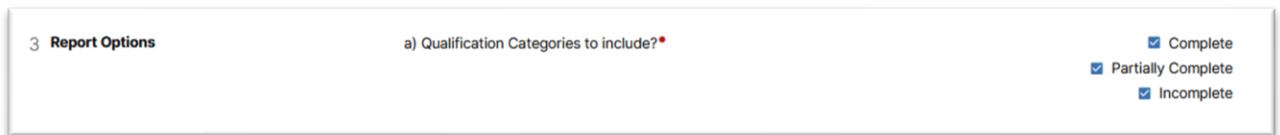
- (c) If running the report for an academic unit, college, or any combination of multiple units or colleges, click the "Change Selection" link under "Groups to Include."



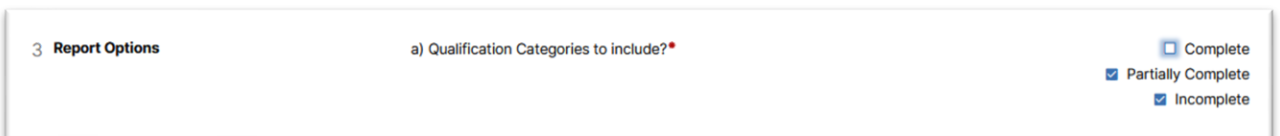
- (d) A new dialog box will appear in your browser. Check the boxes next to the Academic Units and/or Colleges you would like to select in order to add them to your report selection. Once the appropriate selection has been made, click "Save." It may be necessary to change the selection from "Enabled Only" to "Enabled and Disabled" in the drop-down menu to view all faculty for this date range.



5. (a) If running the Course Credentialing Review report for an **individual**, leave all three Qualification Category check boxes selected.

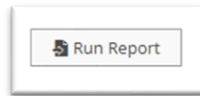


- (b) If running the Course Credentialing Review report for an **academic unit or college**, it is possible to pull the reports only for individuals within those groups whose current credentialing statuses fall into the categories "Complete," "Partially Complete," or "Incomplete."<sup>3</sup> To use this report option, check the box next to at least one desired Qualification Category. At least one Qualification Category must be checked. Selecting *all* Qualification Category check boxes will include all faculty from all categories in the report.



<sup>3</sup> For definitions and examples of Qualification Categories, see [Appendix C](#).

6. Be sure the report file format is set to "Microsoft Word (.doc)," then click "Run Report" in the top right corner. The report will download as a Word document.



## APPENDIX A—MANAGING DATA: ENTERING CREDENTIALS

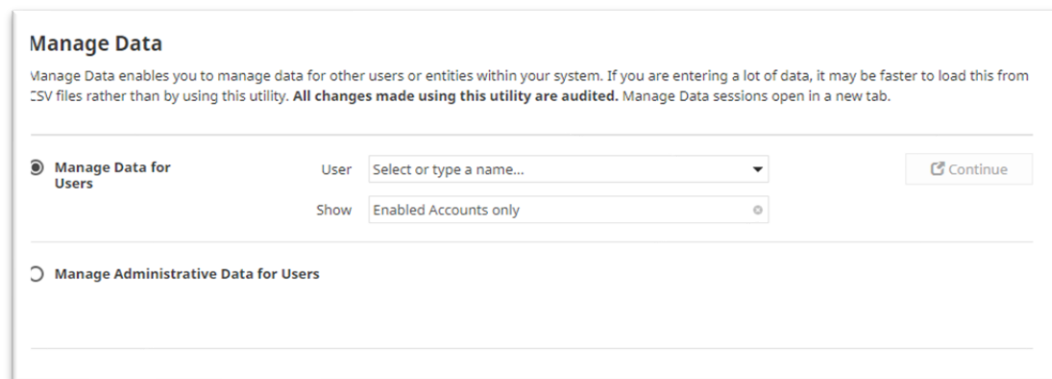
Sometimes credentials or activities are missing from the drop-down menu fields in faculty members' Teaching Qualifications screens. If the missing credentials or records qualify the faculty to teach a course, it may be necessary to add the credentials or activities to the appropriate *activity* screen.

See the instructions below to learn how to enter credential and activity information into different screens tied to *Teaching Qualifications*.

### DEGREE

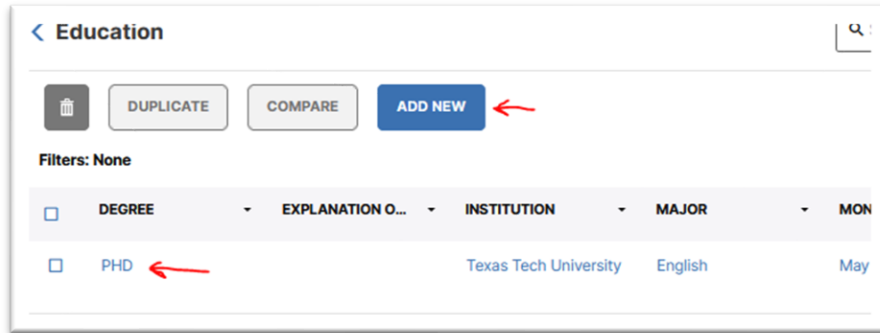
★ An actual transcript must be consulted when entering the required education fields. The official transcript must be on file, as prescribed by [SFA policy](#).

- a. Click "Manage Data."
- b. Select the name of the faculty member whose information is being updated from the drop-down menu, then click continue.

A screenshot of a web application interface titled "Manage Data". Below the title is a paragraph of explanatory text: "Manage Data enables you to manage data for other users or entities within your system. If you are entering a lot of data, it may be faster to load this from CSV files rather than by using this utility. All changes made using this utility are audited. Manage Data sessions open in a new tab." Below this text are two sections. The first section is titled "Manage Data for Users" and contains a "User" dropdown menu with the text "Select or type a name..." and a "Continue" button. Below the dropdown is a "Show" dropdown menu with the text "Enabled Accounts only". The second section is titled "Manage Administrative Data for Users" and is currently collapsed.

- c. Under the Faculty Credentials heading, click "Education."

- d. To enter a new degree, click "Add New." To edit a degree that has already been added, click the title of the degree.



Once in the *Education* screen, enter or edit values in the appropriate fields.

**Required education fields include:**

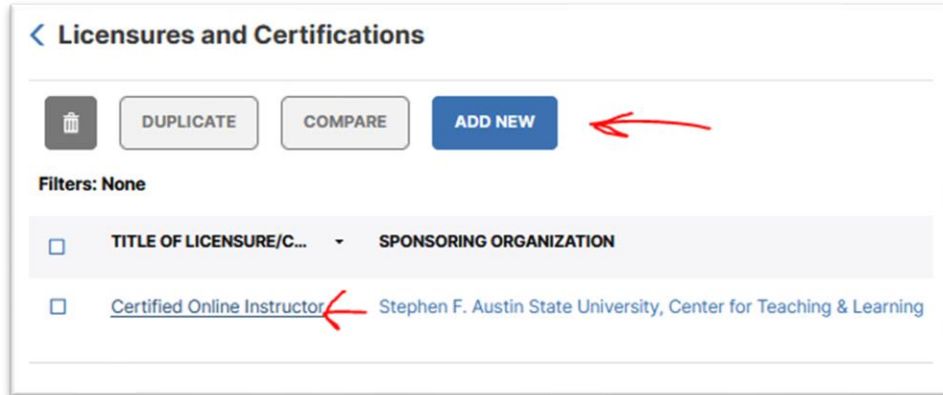
- Degree
- Institution
- Major
- Full Date (Month, Day, Year)

- e. Once the necessary changes have been made, click "Save."

Faculty education records in Faculty Success are read-only for faculty members and may not be updated by the faculty members themselves. Only individuals with certain reporting permissions may make changes in this screen. Contact the Office of Institutional Research with questions.

## LICENSURES AND CERTIFICATIONS

- Click "Manage Data."
- Select the name of the faculty member whose information needs to be updated from the drop-down menu, then click continue.
- Under the General Information heading, click "Licenses and Certifications."
- To enter a new licensure or certification, click "Add New." To edit a licensure or certification that has already been added, click its title.



- Once in the *Licenses and Certifications* screen, enter or edit values in the appropriate fields.

The screenshot shows a form titled "Edit Licenses and Certifications". The form has several fields, each with a red asterisk indicating it is required:

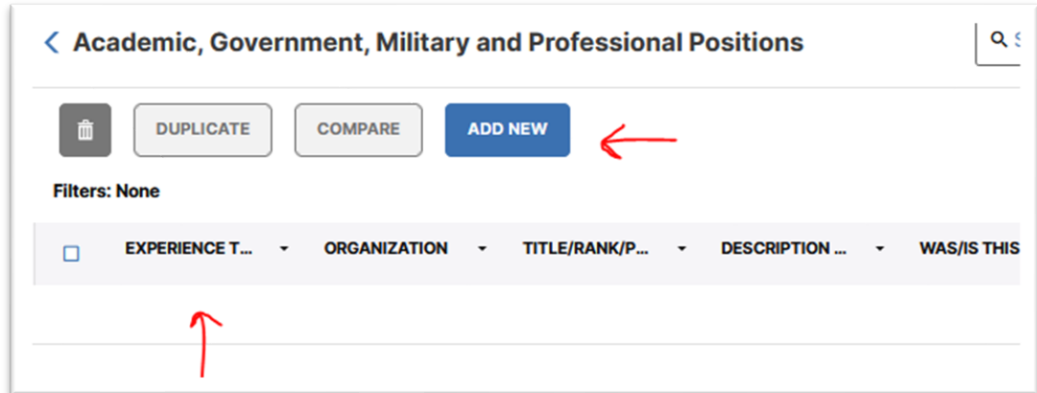
- Title of Licensure/Certification: A text input field.
- Sponsoring Organization: A text input field.
- Scope: A dropdown menu.
- Description: A large text area.
- Date Obtained: A date picker with a dropdown for the month and two input boxes for the day and year.
- Expiration Date: A date picker with a dropdown for the month and two input boxes for the day and year.

- Once the necessary changes have been made, click "Save."

## PROFESSIONAL EMPLOYMENT (ACADEMIC, GOVERNMENT, MILITARY, AND PROFESSIONAL POSITIONS)

- Click "Manage Data."
- Select the name of the faculty member whose information needs to be updated from the drop-down menu, then click continue.

- c. Under the General Information heading, click “Academic, Government, Military and Professional Positions.”
- d. To enter a new professional position, click “Add New.” To edit a professional position that has already been added, click its title.



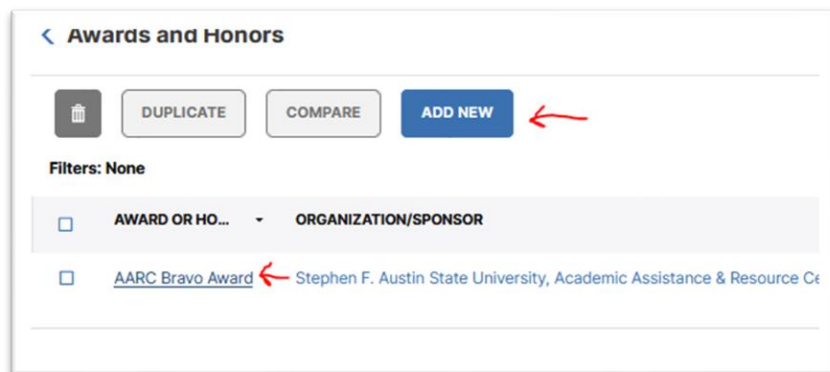
- e. Once in the *Academic, Government, Military and Professional Positions* screen, enter or edit values in the appropriate fields.

- f. Once the necessary changes have been made, click “Save.”

## HONORS AND AWARDS

- a. Click “Manage Data.”
- b. Select the name of the faculty member whose information needs to be updated from the drop-down menu, then click continue.
- c. Under the General Information heading, click “Awards and Honors.”
- d. To enter a new honor or award, click “Add New.” To edit an honor or award that has already been added, click its title.



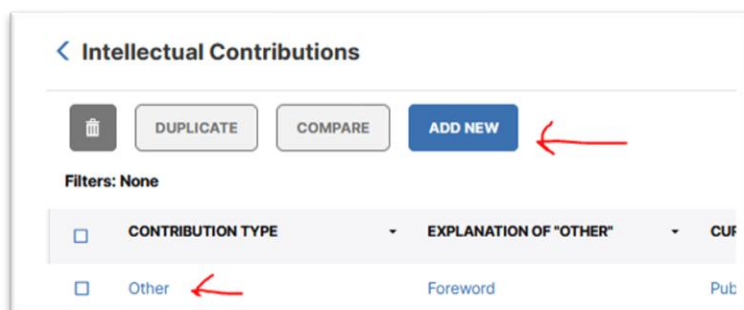


- e. Once in the *Awards and Honors* screen, enter or edit values in the appropriate fields.

- f. Once the necessary changes have been made, click "Save."

## INTELLECTUAL CONTRIBUTIONS

- Click "Manage Data."
- Select the name of the faculty member whose information needs to be updated from the drop-down menu, then click continue.
- Under the Scholarship/Research heading, click "Intellectual Contributions."
- To enter a new intellectual property record, click "Add New." To edit a record that has already been added, click its title.



- e. Once in the *Intellectual Contributions* screen, enter or edit values in the appropriate fields.
- f. Once the necessary changes have been made, click "Save."

## APPENDIX B—CREDENTIAL EXAMPLES

Find examples of different categories of credentials below.

### DEGREE

"Full-time and part-time faculty members teaching credit-earning courses leading toward the baccalaureate degree, other than activity courses, normally must have completed at least 18 graduate semester hours in the content discipline and, at a minimum, hold a master's degree from an accredited institution."

"Each faculty member teaching courses at the master's degree level normally must hold a terminal degree from an accredited institution, usually the earned doctorate, in the content or related discipline. A master's degree in the content discipline coupled with a doctoral degree in a related discipline may be appropriate. It is the responsibility of the academic unit head to justify the master's degree, or master's degree in the content discipline coupled with a related doctorate, as the terminal degree for faculty members teaching in those disciplines. All faculty members teaching courses at the doctoral degree level normally must hold a terminal degree from an accredited institution in the content or related discipline."

SFA Policy 7.1 retrieved from <http://www.sfasu.edu/policies/>

## LICENSURES AND CERTIFICATIONS

### Examples of Licensures and Certifications:

1. Member of the American Bar Association
2. Standard Certificate, Principal EC-12
3. CPR Certification
4. Certified Public Manager
5. Licensed Dietitian
6. Licensed Professional Counselor
7. Certified Forester
8. Licensed Clinical Social Worker
9. Registered Nurse
10. Elementary Education K-8

### Questionable Licensures and Certifications:

1. Member of Graduate Faculty
2. SFA Property Management Training
3. Driving Safety Course (SFA)
4. Purchasing Workshop (SFA)

## PROFESSIONAL EMPLOYMENT (ACADEMIC, GOVERNMENT, MILITARY, AND PROFESSIONAL POSITIONS)

Common Academic, Government, Military, and Professional Position entries include:

1. Academic employment – Post-secondary
2. Academic employment – K-12
3. Professional employment
4. Military employment
5. Government employment
6. SFA Area coordinator
7. SFA Dean (including associate)
8. SFA Chair (including associate/assistant)
9. SFA Director

### Examples of Academic, Government, Military & Professional Positions:

1. Associate Professor
2. Secondary School Teacher
3. General Counsel
4. Department Chair
5. Assistant Principal
6. Probation Officer
7. Business Owner

### Questionable Entries for Academic, Government, Military & Professional Positions:

1. Guest Speaker
2. SFA Committee Member
3. Local representative for national
4. Student organization advisor
5. Honor society member

## HONORS AND AWARDS

Common categories of awards/honors include:

1. Leadership
2. Teaching
3. Scholarship/Research
4. Service/Community
5. Service/Professional
6. Service/University

### Examples of Awards and Honors:

1. Regents Professor
2. Purple Heart
3. Educator of the Year
4. Distinguished Professor
5. UPW Woman of the Year
6. Years of Service Award

### Questionable Awards and Honors:

1. Faculty Tenure and Rank Promotion
2. Graduate Faculty Membership
3. Nomination to Faculty Senate
4. ADA Advisory Committee Appointment

## INTELLECTUAL PROPERTY

Common intellectual contribution activities include:

1. Book review
2. Book, Chapter in Non-Scholarly or Scholarly Book
3. Book, Chapter in Textbook
4. Book, Non-Scholarly or Scholarly
5. Book, Textbook
6. Broadcast Media
7. Conference Proceeding
8. Instructor's Manual
9. Encyclopedia Entry
10. Journal Article
11. Law Review
12. Magazine/Trade Publication
13. Manuscript
14. Material Regarding New Courses/Curricula
15. Monograph
16. Newsletter
17. Newspaper
18. Column in Journal or Newspaper
19. Research Report
20. Software
21. Software, Instructional
22. Study Guide
23. Technical Report
24. Translation or Transcription

### Example Intellectual Contributions:

1. Conference proceeding
2. Manuscript
3. Textbook
4. Academic journal article
5. Instructional Software
6. Newsletter
7. Instructor's Manual
8. Revised textbook

### Questionable Intellectual Contributions:

1. Accreditation self-study documents
2. Student research
3. Presentations
4. On-line course development
5. Course syllabi
6. Consultation
7. Artistic products

## APPENDIX C—DEFINITIONS AND EXAMPLES OF CREDENTIALING QUALIFICATION CATEGORIES

Credentialing Qualification Categories refer to a faculty member’s level of credentialing completeness per course.

### COMPLETE

Faculty members whose current credentials in Faculty Success qualify them to teach **ALL** of their courses as listed in the Course Credentialing Review report are considered **Complete**. Our goal is for 100% of SFASU faculty members to be considered completely credentialed.

Course	Qualification Reason	Credential	Other Experience
GOL 101 Fundamentals of Earth Science (3 cr.)	Degree in Discipline	PHD, Geology. Case Western Reserve Universit.	
GOL 131 Introductory Geology (3 cr.)	Degree in Discipline	PHD, Geology. Case Western Reserve Universit.	
GOL 471 Local Field Trip (1 cr.)	Degree in Discipline	PHD, Geology. Case Western Reserve Universit.	

### PARTIALLY COMPLETE

Faculty members whose current credentials in Faculty Success qualify them to teach **SOME** of their courses as listed in the Course Credentialing Review report are considered **Partially Complete**. These faculty members require further credentialing.

Course	Qualification Reason	Credential	Other Experience
ELE 441 Student Teach in Ele School (6 cr.)	Degree in Discipline	MED, Educational Leadership. Stephen F Austin St University.	
SED 442 Std Teach SED Learn Community (6 cr.)	Degree in Discipline	MED, Educational Leadership. Stephen F Austin St University.	
SED 541 PBIC Intern/First Semester (2 cr.)	<b>MISSING QUALIFICATION</b>		
SED 542 Field Intern/Second Semester (1 cr.)	<b>MISSING QUALIFICATION</b>		

### INCOMPLETE

Faculty members whose current credentials in Faculty Success **DO NOT** qualify them to teach **ANY** of their course as listed in the Course Credentialing Review report are considered **Incomplete**. These faculty members require full credentialing.

Course	Qualification Reason	Credential	Other Experience
HIS 133 U.S. History Survey, 1000-1877 (3 cr.)	<b>MISSING QUALIFICATION</b>		
HIS 134 U.S. History, 1877-Present (3 cr.)	<b>MISSING QUALIFICATION</b>		