



SPOL User's Manual
Credentialing Module

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The Credentialing Module: Introduction

SPOL Credentialing is a highly secure module intended for use by curriculum leaders, academic officers, and accreditation liaisons. The module provides functionality to:

- Review faculty artifacts to identify and document the specific credentials each faculty member possesses that qualifies him or her to teach specific courses.
- Organize, store, maintain, and provide easy access to volumes of paperwork, including faculty source documents.
- Route credentialing documents through the proper approval channels and provide sufficient backup for your credentialing recommendations.
- Help you make teaching assignments.
- Produce both comprehensive and targeted faculty rosters on demand, with speed and accuracy.

The Credentialing Module allows you to establish Faculty as SPOL records, add to each Faculty record the credentials the instructor possesses, match those Credentials to the Courses they qualify the instructor to teach, and then route the resulting Credentials Certificate through the Discipline leadership for approval.

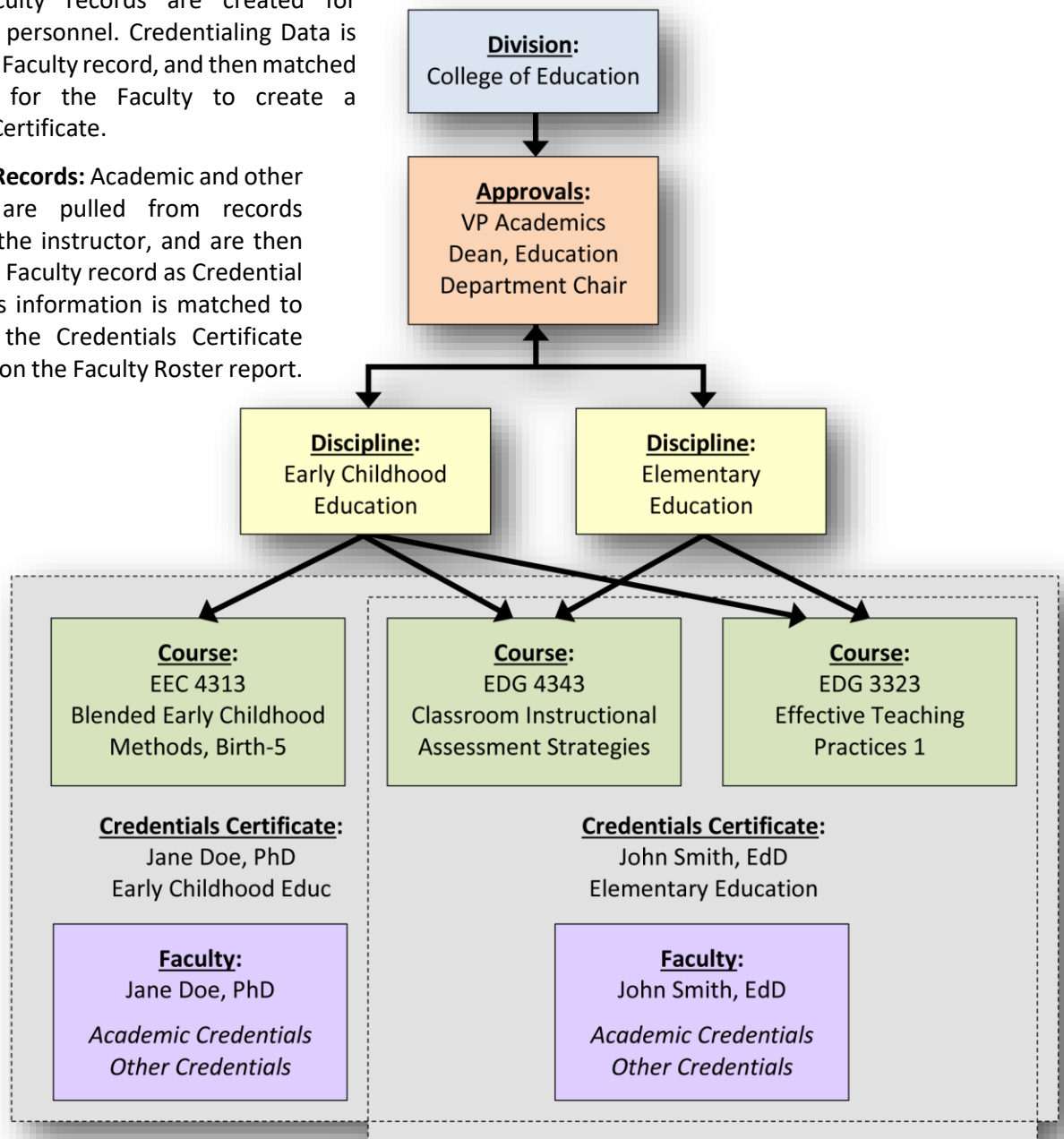
As with all SPOL modules, the Credentialing Module allows credentialing officials to accomplish their work through the application. SPOL Credentialing provides a workspace to create new Faculty, document their credentials, and get the necessary sign-off as needed. Consequently, we need to establish this robust workspace during implementation. In addition, your institution already has credentialed faculty that must be entered in SPOL with all of their qualifications. This historic data can be added to SPOL through data imports.

Data Overview

The data required to operate the Credentialing Module fall into three areas. The data sets are described below.

System Data	Academic Data
Users	Divisions
Planning Units	Disciplines
Planning Years (and Terms)	CIP Codes/CIP Families
Semesters	Courses
Credentialing Data	Course Types
Faculty Degrees	Hour Types
Faculty Institutions	Classes
Accrediting Bodies	Faculty
Activity Types	Faculty Ranks

- **Divisions:** Divisions serve as organizing units for Disciplines. Approval Roles are established for each Division to identify the levels of approval required for faculty credentialing within the institutional division.
- **Disciplines:** Disciplines represent fields of study for which faculty are credentialed. Approval Roles are fulfilled for each Discipline by assigning the appropriate Planning Units, the Managers of which are the approvers. Courses are added to Disciplines to enable matching of faculty credentials to courses.
- **Courses:** Courses denote units of study as represented in the institution's catalog. Courses are assigned to Disciplines. Faculty within each discipline are credentialed to teach specific courses.
- **Faculty:** Faculty records are created for instructional personnel. Credentialing Data is added to the Faculty record, and then matched to Courses for the Faculty to create a Credentials Certificate.
- **Credentials Records:** Academic and other credentials are pulled from records supplied by the instructor, and are then added to the Faculty record as Credential Records. This information is matched to Courses on the Credentials Certificate and appears on the Faculty Roster report.



- **Credentials Certificate:** Credential Records for Faculty are matched to Courses within a Discipline to create a Credentials Certificate, which is then routed for approval. The Credentials Certificate documents the courses that an instructor is qualified to teach and the specific credentials that support this qualification.

Module Functions – Credentialing Homepage

- **Create New Faculty:** Navigates to the *Faculty Detail* page in edit mode where the user can enter the basic identifying information for a faculty member. Upon save, the user will navigate to the *Faculty Details* page for the faculty record, where the user can add credentials records and create Credentials Certificates.
- **View All Faculty:** Navigates the user to the *Faculty Search* page where the user can search for specific faculty records by instructor name and ID, faculty rank, division, discipline, and courses the instructor is credentialed to teach. Double-click on a faculty record to navigate to the *Faculty Details* page. The user can also launch the *Faculty Detail* page in edit mode to create a new faculty record from this page.

The screenshot shows a white rectangular area with a blue dotted line at the top. It contains five navigation options arranged in two rows. Each option has a blue title and a brief description in black text.

Create New Faculty To create a new faculty record in SPOL	View All Faculty View all Faculty or search for a specific faculty record	View All Credential Certificates View all Faculty, or search for a specific Faculty and make your necessary updates
Document Repository Document Repository.	Print Report Bring up the reporting interface to generate an informative report in minutes.	

- **View All Credential Certificates:** Navigates to the *View All Credentials Certificates* page with default filter settings to display all faculty. The user can click a faculty record to expand and display courses added to a Credentials Certificate for this instructor, click the course to expand and display the specific Credentials Certificate for the course, and then double-click the Credentials Certificate to navigate to the *Credentials Certificate Details* page. The user can also search for faculty by discipline(s) and course(s) taught in a specific planning year and term, and can filter for Credential Certificates that have been fully approved or partially/not approved.
- **View All Courses:** Navigates to the *View All Courses* page where the user can search for Courses by Course Number and Course title. The user can double-click on a course to navigate to the *Course Details* page. The user can also navigate to the *Create a New Course* page from the *View All Courses* page.
- **Document Repository:** This selection launches the Document Management window for the *Faculty Documents* library, where the user can upload, access, and maintain source documents to support faculty credentials. The *Faculty Document* library can also be accessed from the *Faculty Details* page.
- **Print a Report:** Navigates the user to the *SPOL Reports* page, where the user can access the Faculty Roster and other reports within the Credentialing Module.

Credentialing Module Implementation Explained

To implement the Credentialing Module, we will divide our work into seven phases:

1. Creating the SPOL operating environment
2. Creating the Credentialing operating environment
3. Adding Faculty
4. Uploading source Documents
5. Adding Credentialing Data and Credentials Records for each Faculty
6. Matching Faculty Credentials to Courses to create individual Credential Certificates
7. Importing Classes and running the Faculty Roster report.

To provide an overview of the data, **let's examine these seven phases in reverse.**

Phase 7 – Importing Classes and Running the Faculty Roster Report

Ultimately, the goal is to run the Faculty Roster report for specific terms. The Faculty Roster queries the system to identify the course sections (aka Classes) taught in the selected Term, the Discipline to which each Course belongs, the Faculty assigned to each Class, and the Credentials that qualify the Faculty to teach the Courses taught. One half of this query draws upon Faculty records (described more fully below), but the other half draws upon course sections taught. To enable this second half, Classes are imported each Term, identifying the course sections taught and the instructor assigned. If your institution uses the Assessment Module, you may already be importing Classes on a regular basis.

Phase 6 – Creating Credentials Certificates

The essential faculty data needed for the report come from the Credentials Certificates. When creating a Credentials Certificate for a Faculty, the user selects the Discipline in which the instructor will teach, which populates a list of Courses within the chosen Discipline. The user selects one or more Courses from this list, and then selects from a second list the specific Credentials that qualify the instructor to teach the selected courses. Once the match has been completed, the Credentials Certificate is saved and is ready for approval. The users designated to approve the Credentials Certificate are determined by the Discipline identified on the certificate.

Phase 5 – Adding Credentialing Records to Faculty Records

To support the match of courses to credentials, Credentials Records must be added to each Faculty record. Credentials Records may include degrees held, relevant coursework, professional experience, licensures and certifications, and other scholarly activities. Each distinct credential is entered into SPOL as a separate record associated to the Faculty record. This detailed approach enables greater specificity in matching, searches, and reports.

Phase 4 – Uploading Source Documents

Credentials Records are pulled from the documents presented by the instructor during the hiring and/or credentialing process. Credential source documents might include proof of earned degrees, college/university transcripts, CV, and copies of professional licenses or certificates held. These documents can be uploaded to SPOL and associated to the Faculty record.

Phase 3 – Adding Faculty

The beginning point for credentialing an individual instructor is the creation of the Faculty record, which includes name, faculty rank, date of hire, and email address. Once created, this record can be viewed and edited through the Faculty Details page. The Faculty Detail page serves as the center of activity relative to the instructor:

- Credentials Records are added to the Faculty Details page (PHASE 5), which makes it available for selection when creating a Credentials Certificate (PHASE 6).
- Source documents can be uploaded and accessed through the Data Management section of the Faculty Details page (PHASE 4).
- Credentials Certificates are created directly from the Faculty Details page for this Faculty, and are accessible from this page (PHASE 6).
- The faculty data, including credentialed Courses and Disciplines, are searchable and are used in reports (PHASE 7).

Phase 2 – Creating the Credentialing Operating Environment

Both the Faculty Details page and the Credentials Certificate include drop-down lists and multi-select frames to enable the user to create the faculty and credentials records within the context of your institution. As with other SPOL modules, these lists must first be populated with relevant data. In general, these lists will describe Academic Data, which represent the academic framework of your institution, and Credentialing Data, which represent common attributes for the credentials presented by your faculty.

As your faculty come from all walks of life, Credentialing Data will vary greatly, although some commonalities will exist. For instance, you may have many faculties with degrees from the same institution. Once a "Faculty Institution" has been entered, it is then available for selection for other Faculty records. SPOL uses Credentialing Data only within the Credentialing Module.

Academic Data is used by both the Credentialing and the Assessment modules. If you have implemented the Assessment Module, you are likely already using Courses and Classes. The Credentialing Module brings some modification to these two data stores, as well as adding several others, which will greatly enhance the Assessment Module. For instance, Courses are now associated with Disciplines and Divisions to enable the routing of Credentials Certificates to Discipline-specific approvers.

Phase 1 – Creating the SPOL Operating Environment

Approval Roles are assigned to Planning Units, which enables the Unit Manager (who is a User) to access Faculty records and approve Credentials Certificates. If you are already using the SPOL Planning Module, you have likely already defined the necessary Planning Units to support these assignments. If not, new Planning Units and, perhaps, new Users must be added to SPOL before adding Academic Data.

Planning Years, which also include Planning Terms, must also be added to your SPOL system. If you have already implemented other SPOL modules, existing Planning Years must be updated with Planning Terms, creating the framework for adding new Planning Years and Terms in the future.

Creating the Credentialing Operating Environment

As with other SPOL Modules, the templates used by the Credentialing Module employ **drop-down lists** and **multi-select frames** when creating new records. These **selection lists** are populated with institution-specific records, which are created within data stores found on the Admin Homepage. The Credentialing Module is supported by data found in both the Credentialing and Academic Data sections.

Academic Data needed for the Credentialing operating environment include:

- CIP Codes & CIP Families
- Courses, Course Types, & Hour Types
- Disciplines & Divisions
- Faculty Ranks.

The only Credentialing data store needed for the operating environment is Activity Types. The remaining data stores in the Credentialing section exist to collect instructor-specific data that may be shared by multiple instructors, such as the names of degrees earned and the institutions granting these degrees. **Credentialing data** covered in this section includes only:

- Activity Types.

CIP Codes & CIP Families

SPOL Academic Data is pre-populated with CIP Families and CIP Codes from the National Center for Education Statistics (NCES) website. The NCES website describes CIP Codes as follows:

The Classification of Instructional Programs (CIP) provides a taxonomic scheme that supports the accurate tracking and reporting of fields of study and program completions activity. CIP was originally developed by the U.S. Department of Education's National Center for Education Statistics (NCES) in 1980, with revisions occurring in 1985, 1990, and 2000 (found online at <https://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>, May 2015).

CIP Codes cannot be imported or changed in SPOL, but they can be exported to a CSV file, and any codes not relevant to your institution can be made inactive.

SPOL allows you to identify academic Disciplines and Courses with one or more CIP Code. This can be done by using the multi-select dialog box on the Discipline or Course detail page, or through the Discipline/CIP Code Association and Course/CIP Code Association imports.

CIP Codes are relevant only to the Credentialing Module, and are not required for either Disciplines or Courses.

Faculty Ranks

Faculty Ranks in SPOL denote the academic ranks for professors and instructors within an institution. When creating a new Faculty record in SPOL, the user identifies the Faculty Rank assigned to that faculty member.

Faculty Rank Data

Faculty Ranks are located on the Admin Homepage, within the Academic Data section. The following data stores are provided on the Faculty Rank Detail page.

Rank: The name or title of the Faculty Rank, such as Master Instructor, Clinical Preceptor, or Professor. Part-time faculty do not necessarily have to be treated as a separate rank, as the Faculty itself will be identified as either full- or part-time.

Sort Order: The order in which the Faculty Ranks would appear in your roster of academic ranks, typically ordered from lowest to highest.

ERP ID: The unique identifier for the Faculty Rank record, commonly populated with the full name or a short name of the full Rank text.

Active: Check box to indicate that the Faculty Rank record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Default data is provided (shown in the table below), but Faculty Ranks should be updated to reflect those of your institution

Sort Order	Rank	ERP ID	Active
1	Instructor	Instructor	Y
2	Master Instructor	Master_Instructor	Y
3	Assistant Professor	Assistant_Professor	Y
4	Associate Professor	Associate_Professor	Y
5	Professor	Professor	Y

Activity Types

The Faculty Details page contains a section for records pertaining to Other Scholarly Activities. These activities are categorized by Activity Type to allow for searching and reporting on faculty accomplishments.

Activity Type Data

Activity Types are located on the Admin Homepage, within the Credentialing section. The following data stores are provided on the Activity Type Detail page.

Activity Type Name: The name for the general Activity Type, such as Award or Publication.

ERP ID: The unique identifier for the Activity Type record, commonly populated with the name or a short name for the Activity Type.

Active: Check box to indicate that the Activity Type record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Activity Type is populated with the following default data:

Activity Type Name	ERP ID	Active
Award	Award	Y
Publication	Publication	Y
Certification	Certification	Y

Disciplines and Divisions

Disciplines in SPOL denote a field of study or branch of scholarly instruction. Disciplines serves as an organizing unit for Courses, meaning that when Disciplines are created, you can add to them the **Courses** that fall within that Discipline. A Discipline would include multiple Courses, and a Course can belong to multiple Disciplines.

Disciplines are organized into **Divisions**, which represent the organizational structure of the disciplines and/or academic departments at your institution. Example of divisions would include the College of Arts & Letters, Applied Science & Technologies, the Business School, and Health Sciences. Divisions must be created in SPOL before creating Disciplines.

Division Data

Divisions are located on the Admin Homepage, within the Academic Data section. The following data stores are provided on the Division Detail page.

Division Title: The name of the Division, for example:

- College of Arts & Letters
- Health Sciences
- Business College.

ERP ID: The unique identifier for the Division record, commonly populated with a short name or acronym for the Division Title.

Active: Check box to indicate that the Division record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Discipline Approval Roles: The levels of approval that a Discipline-specific record would flow through, as determined by the parent Division. When a record is created at the Discipline-level, such as a Credentials Certificate, that record flows through an approval process specific to the Discipline. However, the stages of that process are dictated at the Division-level, which is the parent record for Disciplines. Discipline Approval Roles are created one at a time after the Division record has been saved, and the data structure is described below.

No default data is provided for Divisions.

Discipline Approval Role Data

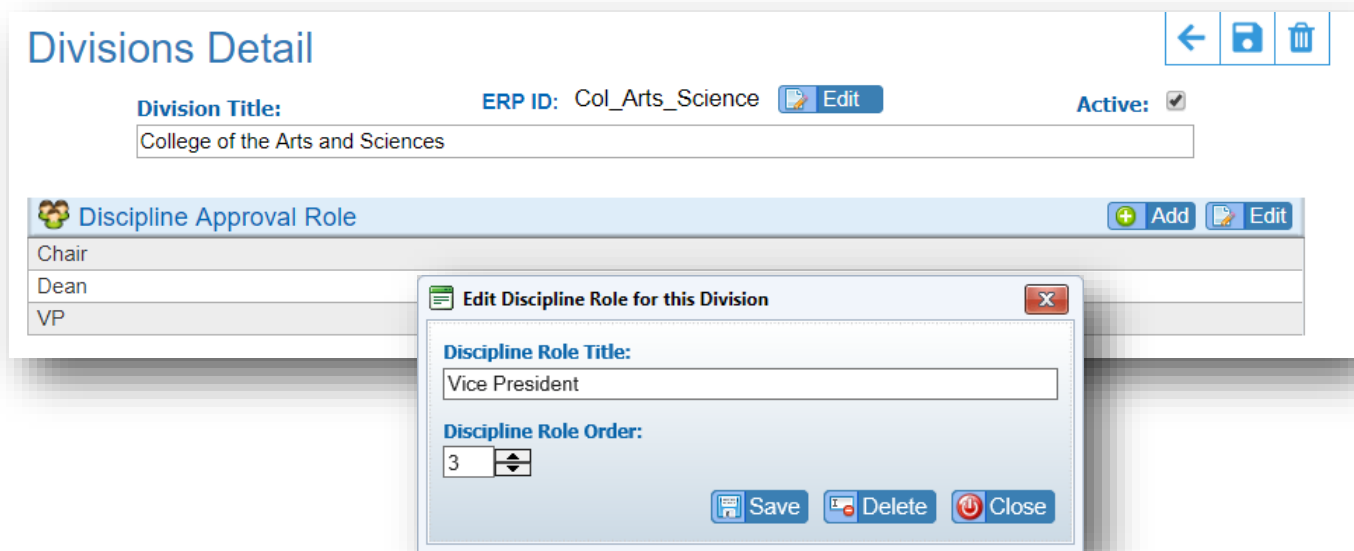
Discipline Role Title: The name of the position that occupies the Discipline Approval Role, but not specific to a person or department. For example:

- Department Chair
- Dean
- Vice President.

Discipline Role Order: Designates the order in which the Discipline Approval Role is encountered in the approval chain, relative to the other Discipline Approval Roles. For example:

- 1 = first approver of the record
- 2 = second approver.

No default data is provided for Discipline Approval Roles.



Discipline Data

Disciplines are located on the Admin Homepage, within the Academic Data section. When creating a new Discipline, SPOL will launch the New Discipline Wizard, described in the following section. The following data stores are used by the New Discipline Wizard and are provided on the Discipline Detail page.

Division: The Division to which the Discipline belongs. Divisions are created in Admin, and selected from a drop-down list. The Division governs the Approval Roles for which assignments are made at the Discipline level.

Discipline Title: The name of the Discipline, as reflected in your catalog. For example:

- Mathematics
- English & Modern Languages
- Civil Engineering

Discipline Code: A short name or code for the Discipline. If your institution assigns codes to academic disciplines, you might use your institutional coding system. This field will accept letters, numbers, limited special characters¹, and a combination of these three. For instance:

- CivEngr
- Engr145
- 10.145

Discipline Approval Roles: Identifies the specific individuals responsible for approving Credentials Certificates for Faculty teaching within the Discipline. The Approval Roles themselves are created for the Division, and then when the Division is assigned to the Discipline, the Approval Roles populate on the Discipline Detail page, but are not yet assigned. On the Discipline Detail page, the user selects the Planning Unit responsible for approvals at each level. The Unit Manager of each Planning Unit is then assigned as the individual user responsible for approval. If an individual approver changes – for instance, the Dean of Business retires and another individual assumes the position – changing the Unit Manager for the Planning Unit from the retired user to the new User will now place the new individual in the approval chain for all future approvals. As an example, Discipline Approval Roles might look like this:

¹ Limited special characters include the period, short dash, and underscore. The long dash is an illegal character.

Discipline Approval Role	Planning Unit Assigned	Unit Manager	User Title
<i>Division Data</i>	<i>Discipline Data</i>	<i>Planning Unit Data</i>	<i>User Data</i>
Department Chair	Marketing	Jane Doe	Chair of Marketing
Dean	College of Business	John Smith	Dean of Business
Provost	Provost's Office	Henry Jones	Provost

Associated CIP Codes: CIP Code(s) appropriate to the Discipline can be associated to the Discipline. It is not required to select CIP Codes for the Discipline, but may be useful in matching Faculty for credentialing.

Associated Courses: The Courses identified by your catalog as being part of the course of study for this Discipline. A Discipline would include many Courses, and a Course can belong to multiple Disciplines.

ERP ID: The unique identifier for the Discipline record, commonly populated with the Discipline Code.

Active: Check box to indicate that the Discipline record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

When creating a new Discipline, SPOL will automatically engage the New Discipline Wizard. The New Discipline Wizard is a multi-step process that guides the user through the stages in creating a new Discipline, including allowing the user to make the many data associations required or suggested for the Discipline record. The steps of the New Discipline Wizard are described below.

No default data is provided for Disciplines.

New Discipline Wizard

When you click the <**New Discipline**> button at the upper right of the Discipline Search page, you will navigate to the Create a New Discipline wizard. The data to be entered is described in the table below. See the previous section for explanations of each of these data elements.

1. Select a Division	<i>single-select from a drop-down list</i>	<i>REQUIRED</i>
2. Enter Discipline Data		
a. Discipline Code	<i>text field</i>	<i>REQUIRED</i>
b. Discipline Title	<i>text field</i>	<i>REQUIRED</i>
3. Select Approval Planning Units	<i>single-select for each Approval Role from a drop-down list of Planning Units</i>	<i>REQUIRED</i>
4. Select Associated CIP Codes	<i>multi-select from a searchable list frame</i>	<i>OPTIONAL</i>
5. Select Courses	<i>multi-select from a searchable list frame</i>	<i>OPTIONAL in the wizard, but REQUIRED to support the creation of Credentials Certificates</i>
6. Finish		

Faculty

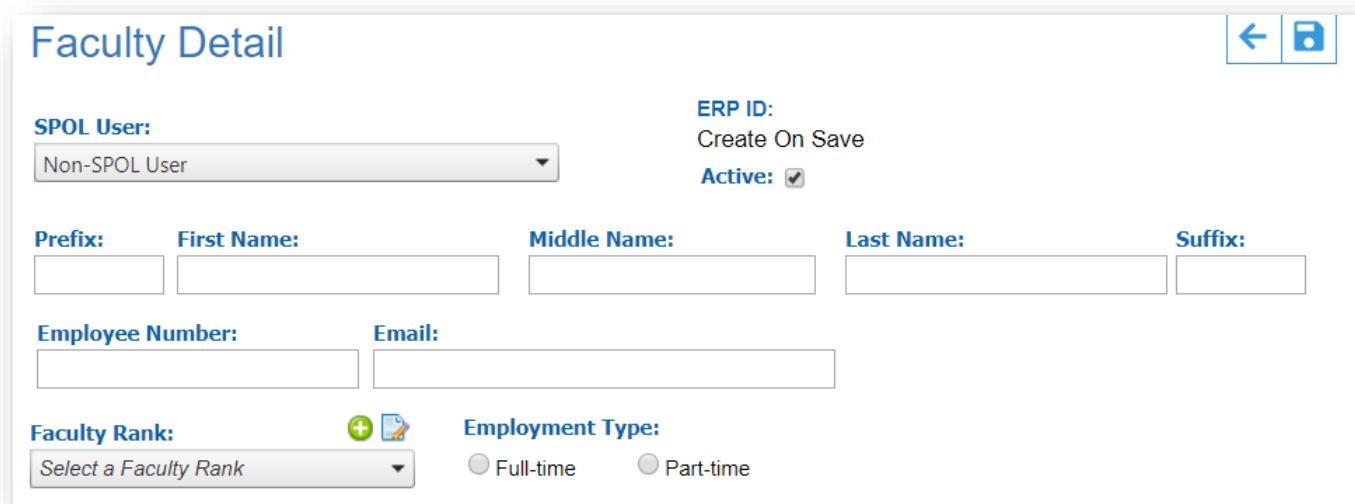
Faculty records are used by SPOL in both the **Credentialing and Assessment modules**. In general, individual Faculty records should be created for all instructional personnel. For the Credentialing Module, this can be interpreted as all individuals to be credentialed to teach. In addition to instructors and professors, credentialed personnel may also include clinical preceptors, teaching assistants, librarians, counselors, and others designated by your institution and/or accrediting body. Within the Assessment Module, Faculty must include all teaching personnel assigned as the instructor of record for any Class or course section.

Entering or importing Faculty data creates a Faculty Details page for each individual; Faculty data are in the header of this page. See **The Faculty Details Page: Introduction** for a full description of this page and additional data to be added.

Faculty Data

When implementing the Credentialing Module, most (if not all) of your existing faculty will be imported. However, as new faculty are added to your ranks, you should create a new Faculty record in SPOL as matter of course, and then use SPOL to document the instructor's credentials. Faculty are Academic Data and can be entered from these locations:

- Credentialing Homepage > Create New Faculty
- Admin Homepage > Academic Data > Faculty.



Faculty Detail



SPOL User: Non-SPOL User

ERP ID: Create On Save

Active:

Prefix: **First Name:** **Middle Name:** **Last Name:** **Suffix:**

Employee Number: **Email:**

Faculty Rank: Select a Faculty Rank  

Employment Type: Full-time Part-time

SPOL User: If the Faculty to be entered has already been created as a user in SPOL, the user can be selected from a drop-down list of all SPOL users, which will cause the <First Name>, <Last Name>, and <Email> fields to be populated with data from the user record. Once a Faculty record has been created for a user, the name will still appear in the list, but will be grayed out and cannot be selected.

While the user record captures only the first and last names of an individual, the Faculty records provides five fields for the instructor's name: 1) prefix, 2) first name, 3) middle name, 4) last name, and 5) suffix.

Prefix: Any title that should come before the Faculty's name, such as Dr., Col., Rev., Ms., etc. Faculty data also includes a Suffix field; you may choose to use Prefix, Suffix, both, or neither. You are welcome to populate both,

as each may be used for different purposes. When populating both, the Faculty record will appear, for example, as "Dr. John Smith, Ph.D." The Prefix field is OPTIONAL.

First Name: The instructor's first name, which might be his or her given or more commonly used first name. If you identified a user for this Faculty, the First Name will be inherited from the user profile. Because the information on the user profile is not necessarily official, it would not be unusual to find the more commonly used first name, rather than the given name. If you would like to use the given name for this user's Faculty record, first update his or her first name on the user Detail page. First Name is REQUIRED.

Middle Name: The instructor's middle name, middle initial, or commonly used name, which you might place within quotation marks. The Middle Name is OPTIONAL.

Last Name: The instructor's last name, which may be hyphenated where applicable. If you identified a user for this Faculty, the Last Name will be inherited from the user profile. Last Name is REQUIRED.

Suffix: A descriptor following the instructor's last name that provides additional information about this person. Most commonly the Suffix would include post-nominal letters (such as Ph.D. or C.P.A.) or generational titles (such as Jr. or III).

Employee Number: A unique identifier specific to an instructor. The Employee Number is REQUIRED and is primarily used by SPOL Credentialing and Assessment modules to identify the Faculty as the instructor of record for imported Classes. Consequently, the Employee Number can be any unique identifier used by your registration system for instructional assignments. ***SPOL Data Security Policy prohibits the use of an individual's Social Security Number on cloud installations of SPOL.***

Faculty Rank: The rank this instructor currently holds or will hold upon employment, such as Instructor, Professor, Clinical Preceptor. Faculty Rank is selected from a drop-down list; contents of the list can be changed for the Faculty Rank data store on the Admin Homepage > Academic Data section. Faculty Rank is REQUIRED.

Employment Type: Radio-button selection to indicate if the instructor is or will be a full- or part-time employee. When importing Faculty data, the column header is "Full-Time," with the expectation that you will indicate yes or no. All "no" answers will be interpreted as "Part-Time." Entry in this field should be either Y or N. Employment Type is REQUIRED.

ERP ID: The unique identifier for the Faculty record, commonly populated with the content of the Employee Number.

Active: Check box to indicate that the Faculty record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Importing and Entering Faculty

To import Faculty data:

1. Go to Admin > Data Management > **Import Data**
2. Under Academic Data Import > Academic Import Wizard, select **<Academic Faculty Data Import>**
3. Populate the Faculty import template file and save

COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (or Employee Number repeated)	ERP_ID	Yes
Column B	Employee Number	EmployeeNumber	Yes
Column C	Prefix or Title	Prefix	No
Column D	Last Name	LastName	Yes
Column E	First Name	FirstName	Yes
Column F	Middle Name or Initial	MiddleName	No
Column G	Suffix	Suffix	No
Column H	Date of Birth (MM/DD/YYYY format)	DOB	No
Column I	Email Address	Email	Yes
Column J	SPOL Username (if the Faculty is a SPOL User)	SPOLUserName	No
Column K	Faculty Rank	FacultyRank	Yes
Column L	Is the Faculty full-time? ("Y" = yes, "N" = no)	FullTime	Yes
Column M	Active (use Y or N)	Active	Yes

Refer to *Data Import Basics* in the SPOL Support Center and the Appendix of the *SPOL Credentialing User's Manual* for detailed instructions on downloading import template files and importing data.

Faculty Ranks is a list import, so any Faculty Rank not recognized during the import will be added to the Faculty Rank data store.

My SPOL > Import Faculty Data

Academic Import Wizard

- Welcome Page
- Export CIP Codes
- Import Courses
- Import Course / CIP Code Association
- Import Divisions
- Import Disciplines
- Import Discipline / CIP Code Association
- Import Discipline / Course Association
- Import Faculty**
 - List Faculty Ranks**
 - Update Faculty
 - Insert New Faculty
 - List Exceptions
- Import Classes
- Import Students
- Finish Page

List Faculty Ranks

This is a list import of an attribute to be assigned to the records being imported. Listed below are all of the attributes of this type currently used in this import. If the attribute does not currently exist in your system, the record will be created as indicated by the label "Will Be Created." If the attribute already exists in your system, the record will be labeled "Exists." Records that exist will not be created again, but may be updated with any changes indicated in this import file. If you are concerned by any status listed, cancel this import and review the existing attribute records in the corresponding data store found on the Admin page.

Faculty Rank	Sort	Entered
Clinical Preceptor	0	Will Be Created

1 Record Listed

Buttons: Cancel Import, Back, Next


Updating Faculty

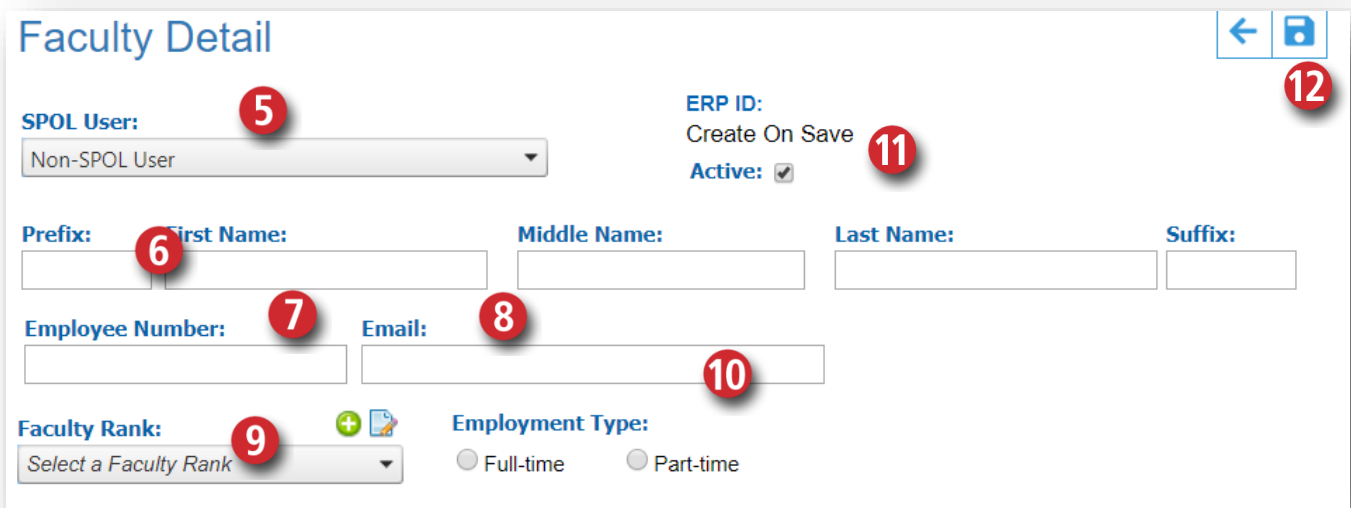
While you will import your existing Faculty, you will likely enter new Faculty and update existing Faculty through the user interface.

1. Go to Admin > **Academic Data** and select <Faculty> to access the **Faculty Search** page
2. If updating an existing Faculty record, locate the Faculty record using one of the following options: a) enter search criteria, and then click the <Search> button or b) click on the **page numbers** at the bottom of the page to move to another page of Faculty
3. Double-click the Faculty record to navigate the Faculty Detail page in edit mode
4. To enter a new Faculty record, click the <New Faculty> button at the upper right of the page to open the Faculty Detail page

The screenshot displays the 'Faculty Search' interface. At the top right, there are three buttons: 'Back', 'Search', and 'New Faculty'. Below these are search filters for 'Last Name', 'First Name', and 'Employee Number'. Further down are dropdown menus for 'Faculty Rank' (set to 'All Faculty Ranks'), 'Division' (set to 'All Divisions'), 'Institutional Discipline' (set to 'All Institutional Disciplines'), and 'Credentialed Courses' (set to 'All Credentialed Courses'). The 'Active Status' section has radio buttons for 'Active', 'Inactive', and 'Both'. Below the filters, there is a 'Hide Search' link, a 'Display: 15 Records' dropdown, and a 'Displaying 1 - 15 of 61 results' indicator. A table of results is shown with columns for 'Last Name', 'First Name', and 'Email'. The first three rows are: Adams, Karen; Alexander, Susan; and Alvarez, Linda. A red circle with the number '3' is overlaid on the 'Adams' row, and another red circle with the number '4' is overlaid on the 'Employee Number' input field.

Last Name	First Name	Email
Adams	Karen	support@strategicplanningonline.com
Alexander	Susan	support@strategicplanningonline.com
Alvarez	Linda	support@strategicplanningonline.com

5. If the Faculty is a SPOL user, find the individual in the <SPOL User> list and click to select; if the user's name is grayed-out on the list, a Faculty record has already been created for the user, so the user cannot be selected again
6. Enter the name of the Faculty using the following fields:
 - a. **Prefix**
 - b. **First Name** (will auto-populate if a SPOL User has been selected)
 - c. **Middle Name** or Middle Initial
 - d. **Last Name** (will auto-populate if a SPOL user has been selected)
 - e. **Suffix**
7. Enter a unique identifier in the <Employee Number> field; rather than the employee ID, you might use the identifier used by your registration system to identify the instructor of record for course offerings; if the instructor is pre-employment, you can use a temporary unique identifier, such as the instructor's email address
8. Enter the email address in the <Email> field; this field will auto-populate if a SPOL User has been selected
9. Click the drop-down list to select the <Faculty Rank>; if the faculty rank you need is not listed, click the <Add New List Record> icon  located above the drop-down arrow
10. Click the appropriate radio button under <Employment Type> to indicate if the instructor is **Full-Time** or **Part-Time**
11. The <Active> indicator should be checked
12. Click the <Save> icon in the icon tray at the upper right
13. Upon save, you will navigate to the **Faculty Details page** where you can add records regarding the credentials the instructor has presented; click the <Edit> button to the far right of the **Faculty Details header** to open the Faculty record in edit mode, and then enter the **ERP ID**



The screenshot shows the 'Faculty Detail' form with the following elements and callouts:

- 5**: SPOL User dropdown menu (currently showing 'Non-SPOL User')
- 6**: Prefix text input field
- 7**: First Name text input field
- 8**: Email text input field
- 9**: Faculty Rank dropdown menu (with a plus icon for adding new records)
- 10**: Employee Number text input field
- 11**: ERP ID text input field
- 11**: Active checkbox (checked)
- 12**: Save icon in the top right corner

Other visible fields include Middle Name, Last Name, and Suffix text input fields, and Employment Type radio buttons for Full-time and Part-time.

14. To add the ERP ID, click the <Edit> button on the upper part of the page; enter the ERP ID, and then click the <Save> button.



The Faculty Details Page

The Faculty Details page is the **primary artifact** of the SPOL Credentialing Module, and serves as the organizing point for all data and credentials regarding each instructor. The Faculty Details page allows properly permissioned users to view a Faculty record and all of the data associated with it – including Credentials Certificates – in one interface.

SPOL Credentialing is a **"closed" module**, meaning that users must have specific permissions to access the Credentialing Module and the records contained within. Without this access, the user will not see any footprint of the Credentialing Module.

Users may have **edit access** to the Faculty Details page if they've been assigned responsibility for adding, reviewing, and/or approving Faculty records and/or the Credentials Certificates created for faculty. Responsibility is primarily defined through the establishment of **Approval Roles for Divisions**. A **Planning Unit** is assigned to each Approval Role for each **Discipline** within the Division. The Planning Units assigned are typically those used for normal SPOL operations (e.g., Planning, Budget, Assessment), but additional Planning Units may be added to support the process of reviewing and approving credentials. When Planning Units are assigned to Approval Roles, only the **Unit Manager** is granted access to Credentialing records; the Planning Unit Members are not. Moreover, the Unit Manager does not gain access purely through this assignment, but must be granted specific permissions either through his or her User Profile or the **Permission Group** to which the Unit Manager belongs.

If you've been assigned responsibility for Faculty Credentials, your work can be broken down into a few steps, as described below. Specific guidelines regarding credentialing of faculty should be established by your institution or division.

Role of Chair or Lead

- Adding **new Faculty**, which creates a Faculty Detail page
- **Uploading files** to the Faculty Detail page for the CV, transcripts, and other faculty documents
- Reviewing these document to determine the **relevant data** to be added to the Faculty record
- Entering these credentials records on the **Faculty Detail page**
- Creating a **Credentials Certificate** to match the relevant Credentials to Courses
- **Approving** the Credentials Certificate to the next level

Role of Reviewer or Approver

- **Reviewing** the Credentials Certificate and supporting documents
- Commenting on the sufficiency of the Credentials presented for the instructor (i.e., **providing feedback**)
- **Approving** the Credentials Certificate to the next level or rejecting to the previous level

The Faculty Details page includes a variety of data stores that combine to provide the complete framework to perform these tasks.

The screenshot shows the 'Faculty Details' page for Linda Alvarez. The page is organized into several sections:

- Faculty Information:** Name: Linda Alvarez, Employee Number: 965675, Faculty Rank: Instructor, Employment Type: Full-time, SPOL User: lalvarez.
- Credentials Certificate:** Discipline: English Literature, Effective Date: 12/7/2018.
- Degrees Earned:** Earned Degree: Master of Arts, Granting Institution: University of Central Florida, Discipline: English Literature, Is Highest Degree: Yes, Date Conferred: 06/18/2002.
- Relevant Course Credit Earned:** A table listing courses and credit hours:

Course	Credit Hours
ENCS337 - Rhetorical Theory	3
CRW6025 - Adv Graduate Writing Workshop	3
ENC6261 - Tech Writing Theory & Practice	3
LIT6216 - Issues in Literary Study	3
LIN5675 - English Grammar and Usage	3
- Professional Experience:** Location: Orlando, FL, Employer: Valencia College, Description: Professor of English Literature, Begin Date: 01/05/2004, End Date: 01/08/2016.
- Other Scholarly Activities:** Activity Date: 09/14/2013, Activity Type: Publications, Sponsor: Readers Digest, Description: Short Stories - Making a Friend.
- Licensure or Certification:** Awarded By: American Library Association, Location: Online, Description: Library Science Certification, Date Awarded: 04/18/2016, Date Expired: N/A.
- Document Management:** There are no records to display.
- Faculty History:** A table showing actions taken on the record:

Date / Time	Action	Modified By
12/07/2018 03:21 PM	Create Credentials Certificate	Alvarez, Linda
12/07/2018 03:20 PM	Created Licensure or Certification	Alvarez, Linda
12/07/2018 03:15 PM	Created Scholarly Activity	Alvarez, Linda
12/07/2018 03:14 PM	Created Professional Experience	Alvarez, Linda
12/07/2018 03:12 PM	Add Course 'LIN5675' to Faculty "	Alvarez, Linda

Faculty Details

1

Linda Alvarez 			+		-
Employee Number: 965875	Employment Type: Full-time	SPOL User: lalvarez			
Faculty Rank: Instructor					
Credentials Certificate				+	
Discipline: English Literature		Effective Date: 12/7/2018			

I. Faculty Details

When a new Faculty record is created, the user adds basic information about the instructor, including the individual's **Name**, **Email** address, **Employee Number**, **Faculty Rank**, and **Employment Type** (whether he or she is a full-or part-time instructor), and his or her SPOL Username, if the instructor is a **SPOL User**. This information appears on the header of the Faculty Details page.

2. Credentials Certificate

Once data has been added to the remainder of the page, the user can create a Credentials Certificate for this instructor. The Credentials Certificate is specific to a **Discipline**, and matches Credentials presented by the instructor to Courses within the Discipline that he/she is qualified to teach. The Certificate is then routed for **approval** by the leaders of the Discipline selected. An instructor may have multiple Credentials Certificates as a result of being qualified to teach in more than one discipline or earning additional credentials that qualify him to teach additional courses. Credentials Certificates are created and viewed from this data store.

Degrees Earned		+	
Earned Degree: Master of Arts	Is Highest Degree: Yes		
Granting Institution: University of Central Florida	Date Conferred: 06/18/2002		
Discipline: English Literature			
Relevant Course Credit Earned		+	
Degree: Master of Arts			Credit Hours: 3
Course: ENC5337 - Rhetorical Theory			Credit Hours: 3
Course: CRW6025 - Adv Graduate Writing Workshop			Credit Hours: 3
Course: ENC6261 - Tech Writing Theory & Practice			Credit Hours: 3
Course: LIT6216 - Issues in Literary Study			Credit Hours: 3
Course: LIN5675 - English Grammar and Usage			Credit Hours: 3

3. Degrees Earned

The primary credential the instructor will present is evidence of any degrees earned. Each earned degree is added here as an individual record, along with relevant details, including the **Earned Degree Title**, the name of the **Granting Institution**, the **Discipline** in which the degree was earned, the **Date Conferred**, and an indication if this degree is the **Highest Earned** by this instructor. Multiple degrees may be added for this instructor. Assuming that duplication can be expected among the earned degrees, granting institution, and faculty disciplines, these fields are not open-entry, but are all selected from drop-down lists. New records can be added to these lists when necessary.

4. Relevant Course Credit Earned

The instructor will present transcripts as documentation of credentials, and courses taken by the instructor can be pulled from the transcripts and added as individual records within this data store. Each course record includes the **Earned Degree** to which it is tied, the **Course Number** and **Course Name**, the **Hours Earned** and the **Hour Type**, and then SPOL will display the **Credit Hour Conversion** (most relevant when courses are presented in contact hours, quarter hours, etc.). It's not unusual for an instructor to have earned relevant course credit without having completed the degree. In such cases, the user should create a record in Degrees Earned representing the area of study and the incomplete status, for instance "Doctoral Coursework ABD."

5	Professional Experience	Location: Orlando, FL Employer: Valencia College Description: Professor of English Literature	Begin Date: 01/05/2004 End Date: 01/08/2016
7	Other Scholarly Activities	Activity Date: 08/14/2013 Description: Short Stories - Making a Friend	Activity Type: Publications Sponsor: Readers Digest
6	Licensure or Certification	Awarded By: American Library Association Location: Online Description: Library Science Certification	Date Awarded: 04/18/2016 Date Expired: N/A

5. Professional Experience

Taken from the instructor's curriculum vitae (CV), prior employment may present professional experience relevant to the courses to be taught. Each instance of professional experience is entered as an individual record, and includes the **Begin/End Dates**, the name of the **Employer** and **Location**, and a **Description** of the experience.

6. Licensure or Certification

The instructor may present proof of earned licensures or certifications that are relevant to the courses to be taught. Each licensure or certification is entered in SPOL as an individual record, and includes the **Date Awarded** and the **Date Expired** (meaning the expiration data for the licensure or certification), the organization the licensure or certification was **Awarded By**, the **Location** of the organization or where the licensure or certification was earned, and a **Description** of the credential.

7. Other Scholarly Activities

The instructor may present other scholarly activities relevant to his or her teaching credentials, such as awards received, publications, research, public service, etc. Each scholarly activity is entered in SPOL as an individual record, and includes the **Activity Date**; **Activity Type** (selected from a drop-down list); the **Sponsor** of the activity, such as the name of the journal, the organization granting the award, etc.; and the **Description** of the scholarly activity. The Activity Type serves to categorize these entries, so the Other Scholarly Activities data store can be used to document any credential that does not fit elsewhere.

The screenshot shows a software interface with two main sections. The top section is titled 'Document Management' and contains the text 'There are no records to display'. The bottom section is titled 'Faculty History' and contains a table with three columns: 'Date / Time', 'Action', and 'Modified By'. The table lists five actions performed by 'Alvarez, Linda' on 12/07/2018. Red circles with numbers 8 and 9 are overlaid on the 'Document Management' header and the 'Faculty History' table header, respectively.

Date / Time	Action	Modified By
12/07/2018 03:21 PM	Create Credentials Certificate	Alvarez, Linda
12/07/2018 03:20 PM	Created Licensure or Certification	Alvarez, Linda
12/07/2018 03:15 PM	Created Scholarly Activity	Alvarez, Linda
12/07/2018 03:14 PM	Created Professional Experience	Alvarez, Linda
12/07/2018 03:12 PM	Add Course 'LIN5675' to Faculty "	Alvarez, Linda

8. Document Management

The instructor's CV, transcripts, licenses, and any **documents presented as evidence of credentials** can be uploaded to the Faculty Document Directory and placed within the instructor's dedicated folder.

9. Faculty History

This section provides a condensed list of the **actions taken** on the Faculty Details page, including the name of the user taking the action, the date, time, and indication of whether the user taking the action was being impersonated by another user. Click the **<View Full History>** button to see a complete list of all actions.

Credentials Records and Credentials Data

The faculty credentialing process deals with a vast amount of information describing the educational and experiential details of your faculty. The larger your faculty body, the more information to be managed. The SPOL **Faculty Details page** contains several data stores that provide an **organizing schema** for the credentialing information specific to an individual instructor. Because this information falls into **common categories**, SPOL can provide efficiencies and reduce redundant data where it makes sense to do so. To that end, SPOL allows you to store **Credentials Records** for individual faculty, which may pull from **Credentialing Data** where commonalities can be anticipated to exist.

Credentials Recordings

Credentials Records represent specific pieces of information about individual faculty. Credentials Records are added to the Faculty Details page for an instructor and are organized by the data stores provided on the page:

- **Degrees Earned**
- **Relevant Course Credit Earned**
- **Professional Experience**
- **Licensures and Certifications**
- **Other Scholarly Activities**

Each discrete entry in one of these data stores, as shown below, is considered a Credentials Record.

Professional Experience		+	✎
Location: Orlando, FL	Begin Date: 01/05/2004		
Employer: Valencia College	End Date: 01/08/2016		
Description: Professor of English Literature			

The majority of these Credentials Records are so specific to an instructor's unique experience that they cannot be generalized across the faculty body. Consequently, such records employ open-text entry in the user interface.

SPOL does not provide an Admin data store for these Credentials Records; they exist solely as sub-records to the Faculty record. However, SPOL does provide an import for these records, which is particularly useful when loading historic Credentials Records for existing faculty during implementation. See *Importing Credentials Records* for more information on importing these records.

Credentialing Data

Credentialing Data is found on the Admin Homepage. These data provide the content of drop-down lists used by the data stores on the **Faculty Details page** when it can be anticipated that commonalities will exist in the data across the faculty. The drop-down lists are intended to create efficiencies in data entry and to provide possible parameters for reporting on faculty.

Most of the data sets in Credentialing Data support the creation of the Faculty Record type **Degrees Earned**.

Degrees Earned		+	✎
Earned Degree: Master of Arts	Is Highest Degree: Yes		
Granting Institution: University of Central Florida	Date Conferred: 06/18/2002		
Discipline: English Literature			

The Credentialing Data supporting Degrees Earned includes:

- **Faculty Earned Degrees**
- **Faculty Granting Institutions**
 - **Accrediting Bodies**
- **Faculty Disciplines**

The remaining Credentialing Data store, **Activity Types**, serves to categorize Credentials Records added to the Other Scholarly Activities data store on the Faculty Details page.

Other Scholarly Activities			+	✎
Activity Date: 08/14/2013	Activity Type: Publications	Sponsor: Readers Digest		
Description: Short Stories - Making a Friend				

After initial implementation, Credentialing Data will be added as needed to describe characteristics of a Faculty Record not previously encountered. Historic Credentialing Data for existing credentialed faculty can be imported into SPOL. Attributes of the Credentialing Data are described below. See *Importing Credentialing Data* for more information on importing these records.

Faculty Earned Degrees

The earned degree is described here in general terms, including:

Degree Title: Name of the degree, such as Doctor of Philosophy.

Degree Acronym: Letters representing the degree, such as Ph.D. (aka post-nominal letters).

Is Terminal: Check box to indicate if this is a terminal degree.

ERP ID: The unique identifier for the Faculty Degree record, commonly populated with a short name or acronym for the Degree Title.

Active: Check box to indicate that the Faculty Degree record is active, meaning that it is included in drop-down lists and is used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Faculty Earned Degrees is populated with the following default data as an example:

Degree Title	Degree Acronym	Is Terminal	ERP ID	Active
Doctor of Philosophy	PhD	✓	PhD	✓

Faculty Granting Institutions

The granting institution is identified by name, but includes other information, including accredited status:

Institution Name: The name of the college or university, such as Florida State University.

Address 1-2: Two lines are provided for street address (OPTIONAL).

Country: Drop-down list to select the country where the institution is located (OPTIONAL, but must be selected in order to select the State).

State: Drop-down list to select the state where the institution is located; the content of this list is dependent upon the selection made in Country (OPTIONAL).

City: The name of the city in which the institution is located (OPTIONAL).

Zip Code: Used in the mailing address of the institution (OPTIONAL).

Accredited: Check box to identify that the institution is accredited (OPTIONAL).

Accrediting Body: The body that has granted the institution its accredited status (REQUIRED); this is selected from a pre-populated drop-down list, but additions to the list can be made directly from the page.

ERP ID: The unique identifier for the Faculty Institution record, commonly populated with a short name or acronym for the Institution Name.

Active: Check box to indicate that the Faculty Institution record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

No default or sample data is provided in SPOL for Faculty Institutions.

Accrediting Bodies

Typically, only degrees earned from institutions accredited by recognized accrediting bodies can be used as unqualified academic credentials for faculty. When the institutions conferring faculty degrees are added to the Granting Institution data store, it is required that the record reflect the Accrediting Body that granted accredited status. Accrediting bodies are identified by:

Accrediting Body Name: The name of the accrediting association or organization, including commission where appropriate; for instance, Southern Association of Colleges and Schools, Commission on Colleges.

Accrediting Body Acronym: The acronym or letters representing the accrediting body, such as SACSCOC.

ERP ID: The unique identifier for the Accrediting Body record, commonly populated with the Accrediting Body Acronym or a short version of the Accrediting Body Name.

Active: Check box to indicate that the Accrediting Body record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Accrediting Bodies is populated with the following default data:

Accrediting Body Name	Accrediting Body Acronym	ERP ID	Active
Accrediting Commission for Schools: Western Association of Schools and Colleges	ACSWASC	ACSWASC	✓
Middle States Commission on Higher Education	MSCHE	MSCHE	✓
North Central Association of Colleges and Schools: Higher Learning Commission	NCAHLC	NCAHLC	✓
New England Association of Schools and Colleges	NEASC	NEASC	✓
Northwest Commission on Colleges and Universities	NWCCU	NWCCU	✓
Southern Association of Colleges and Schools: Commission on Colleges	SACSCOC	SACSCOC	✓

Faculty Disciplines

Although less generalizable than the Faculty Earned Degrees and the Faculty Granting Institution, the disciplines in which faculty earned their degrees are also added to a data store to populate a drop-down list. The Faculty Discipline data includes:

Discipline Title: The name of the discipline or field of study, such as Chemical Engineering.

ERP ID: The unique identifier for the Faculty Discipline record, commonly populated with a short name or acronym for the Discipline Title.

Active: Check box to indicate that the Faculty Discipline record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

No default data is included for Faculty Disciplines.

Activity Types

When adding Other Scholarly Activities records to the Faculty Details page, each record is classified by Activity Type. These Activity Types would allow you to run reports on all faculty awards received, all journal publications, etc. Activity Types can be as simple or detailed as required to make data entry efficient and to give you useful information. You may wish to include a "Miscellaneous" or "Other" type for unique activities that can't be otherwise classified. Activity Type records include:

Activity Type Name: Name of the activity classification, such as Award

ERP ID: The unique identifier for the Activity Type record, commonly populated with a short name or acronym for the Activity Type.

Active: Check box to indicate that the Activity Type record is active, meaning that it is included in drop-down lists and used by reports. Once made inactive, the record cannot be chosen as an attribute for new records.

Activity Types is populated with the following default data:

Activity Type Name	ERP ID	Active
Award	Award	✓
Publication	Publication	✓
Certification	Certification	✓

Importing Credentialing Data

When first implementing the Credentialing Module, you may wish to import the credentialing information that your institution has been collecting and reporting for current faculty. This information may exist in an Access database, Excel spreadsheets, Word documents, or other proprietary system. The more linear the data (i.e., it exists on spreadsheets or in tables), the easier it will be to convert the format required by the SPOL import file templates. But even if you only have your last published faculty roster to work from, the data can be converted to the appropriate format.

Credentialing Data Imports take three forms:

1. **Importing** Credentialing Data to populate the Admin data stores
2. **Associating** the Credentialing Data to the appropriate Faculty
3. **Importing** the remaining Credentials Records directly to the appropriate Faculty.

In most cases, credentialing data to be associated to faculty will exist in its current form as a "one off," meaning that the degree earned by *Instructor A* may be the same as that of *Instructor B*, but rather than having a single degree related to both instructors, the current data describing the degree exists twice: once for *Instructor A* and again for *Instructor B*. Relational databases like SPOL allow you to eliminate redundant data by creating a single record in a list table that can be related to multiple records in another table. This first set of imports for Credentialing Data will create unique records in the list tables to be associated later to specific Faculty records. These imports apply only to data that can reasonably be expected to be encountered more than once with regard to your many faculty:

- **Faculty Degrees** – the degrees your faculty have earned, such as Doctor of Philosophy
- **Faculty Institutions** – the institutions granting these degrees
- **Faculty Disciplines** – the disciplines in which these degrees were earned, such as Mathematics
- **Faculty Discipline/CIP Codes Association** – the CIP Codes associated to these disciplines

These records are added to SPOL data stores within the Admin > Credentialing section in order to populate drop-down lists to be used when adding new Credentials Records through the user interface on the Faculty Details page. Use of drop-down lists creates efficiencies and ensures conformity in data entry, and facilitates searches and reporting. For ultimate functionality, your comprehensive list of Faculty Degrees, Disciplines, and Institutions should be winnowed down to unique records, although SPOL will tolerate duplication in these data.

NOTE that while these import files will contain unduplicated records, the second set of imports will associate these Credentials Data to Faculty records. Preserve the original files identifying faculty with these data to enable the creation of the association import files.

Credentialing Data

To import Credentialing data:

1. Go to Admin > Data Management > **Import Data**
2. Under Credentialing Data Import, select the <**Credentialing Import Wizard**>
3. Using the **left sidebar progress page**, click on each import one at a time to select the import, and then export the file formats for each

Refer to *Data Import Basics* in the SPOL Support Center and the Appendix of the *SPOL Credentialing User's Manual* for detailed instructions on downloading import template files and importing data

Add the appropriate data to each file and save. The data and file format requirements are provided in the following tables.

IMPORT FACULTY INSTITUTIONS			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may be Institution acronym)	ERP_ID	Yes
Column B	Accrediting Body ERP ID	ACCREDITINGBODY_ERP_ID	Yes
Column C	Institution Name	InstitutionName	Yes
Column D	Country Code (two-letter) <i>For reference, open the Faculty Institution Detail page or use the spreadsheet provided</i>	CountryAbbr	No
Column E	Address 1 (first line of street/mailling address)	Address1	No
Column F	Address 2 (second line of street/mailling address)	Address2	No
Column G	City	City	No
Column H	State Code (two-letter) <i>For reference, open the Faculty Institution Detail page or use the spreadsheet provided</i>	StateAbbr	No
Column I	Zip Code	ZipCode	No
Column J	Is the institution accredited? Y or N	IsAccredited	Yes
Column K	Active (Y/N)	Active	Yes

IMPORT FACULTY DEGREES			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may be degree acronym)	ERP_ID	Yes
Column B	Degree Acronym (letters representing the degree)	DegreeAcronym	Yes
Column C	Degree Title (name of the degree)	DegreeTitle	Yes
Column D	Is the degree terminal? Y or N	IsTerminal	Yes
Column E	Active (Y/N)	Active	Yes

IMPORT FACULTY DISCIPLINES			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID	ERP_ID	Yes
Column B	Discipline Title (name of the discipline)	DisciplineTitle	Yes
Column C	Active (Y/N)	Active	Yes

IMPORT FACULTY DISCIPLINE / CIP CODE ASSOCIATION			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	Discipline ERP ID (to identify the Discipline)	ERP_ID	Yes
Column B	CIP Code ERP ID (to identify the CIP Code)	CIPCODE_ERP_ID	Yes

Importing Credentials Records

Credentials Records are specific to the instructor, so these data are attached directly to the Faculty record. Most imports of Credentials Records simply contain open-entry text fields to be populated from existing records. All of the imports refer to a Faculty record, but three of the imports refer to **Credentialing Data** or **Credentials Records** already created or imported:

- **Faculty Degrees Earned**
 - Faculty Institution
 - Faculty Degree
 - Faculty Discipline
- **Faculty Relevant Courses**
 - Faculty Degrees Earned
- **Faculty Other Scholarly Activities**
 - Activity Types

For ease in data compilation, *these are not list imports*, but simply refer to existing records by their ERP IDs.

Credentials Records

To import Credentialing Records:

1. Go to Admin > Data Management > **Import Data**
2. Under Credentialing Data Import, select the <**Credentials Association Import Wizard**>
3. Using the **left sidebar progress page**, click on each import one at a time to select the import, and then export the file formats for each

Refer to *Data Import Basics* in the SPOL Support Center and the Appendix of the *SPOL Credentialing User's Manual* for detailed instructions on downloading import template files and importing data.

Add the appropriate data to each file and save. The data and file format requirements are provided in the following tables.

IMPORT FACULTY DEGREES EARNED			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (concatenate columns B, C, D, and E, separating with underscores)	ERP_ID	Yes
Column B	ERP ID of Faculty record	FACULTY_ERP_ID	Yes
Column C	ERP ID of Faculty Institution granting degree	FACULTY_INSTITUTION_ERP_ID	Yes
Column D	ERP ID of Faculty Degree earned by this Faculty	FACULTY_DEGREE_ERP_ID	Yes
Column E	ERP ID of Faculty Discipline in which the degree was earned	FACULTY_DISCIPLINE_ERP_ID	Yes
Column F	Date degree was conferred (DD/MM/YYYY)	DateConferred	Yes
Column G	Is this degree the highest earned by this Faculty? (Y = yes, N = no)	IsHighestDegreeEarned	Yes

IMPORT FACULTY RELEVANT COURSES			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may use Degree Earned ERP ID)	ERP_ID	Yes
Column B	ERP ID from the Degree Earned (see table above)	DEGREE_EARNED_ERP_ID	Yes
Column C	Course Number or Course ID	CourseNum	Yes
Column D	Course Title	CourseTitle	Yes
Column E	Hours earned for the course (number field, but can include up to four decimal places)	Hours	Yes
Column F	ERP ID of the Hour Type	HOUR_TYPE_ERP_ID	Yes

IMPORT FACULTY PROFESSIONAL EXPERIENCE			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may use Faculty ERP ID + record # of this type)	ERP_ID	Yes
Column B	ERP ID of Faculty record	FACULTY_ERP_ID	Yes
Column C	Date experience began (DD/MM/YYYY)	BeginDate	Yes
Column D	Date experience ended (DD/MM/YYYY)	EndDate	No
Column E	Name of Employer	Employer	Yes
Column F	Location of employer or experience	Location	No
Column G	Description of experience	Description	Yes

IMPORT FACULTY LICENSURES OR CERTIFICATIONS			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may use Faculty ERP ID + record # of this type)	ERP_ID	Yes
Column B	ERP ID of Faculty record	FACULTY_ERP_ID	Yes
Column C	Date credential was awarded (DD/MM/YYYY)	DateAwarded	Yes
Column D	Date credential will expire (DD/MM/YYYY)	DateExpired	No
Column E	Name of licensing/certifying organization	AwardedBy	Yes
Column F	Location of organization or where earned	Location	No
Column G	Description of credential	Description	Yes

IMPORT FACULTY OTHER SCHOLARLY ACTIVITIES			
COLUMN	DATA	REQUIRED COLUMN HEADER	REQUIRED?
Column A	ERP ID (may use Faculty ERP ID + record # of this type)	ERP_ID	Yes
Column B	ERP ID of Faculty record	FACULTY_ERP_ID	Yes
Column C	Date activity occurred (DD/MM/YYYY)	ActivityDate	Yes
Column D	Name of Activity Type (from Activity Type list)	ActivityTypeName	Yes
Column E	Name of organization affiliated with activity	ActivitySponsor	No
Column F	Description of activity	ActivityDescr	Yes

Adding Credentials to the Faculty Details Page

When implementing the Credentialing Module, the **Credentials Records** will be added to the **Faculty Details page** for each instructor through imports. You can always add new Faculty and Credentials Records through additional imports, but it may be most expedient to add new records from the **user interface**.

Once the Faculty record has been created, you will then add Credentials Records to the Faculty Detail page based upon information found in the individual's transcripts, CV, and other supporting documents. These supporting documents can be uploaded to the Faculty Document Library, and then assigned to the Faculty Detail page. Finally, the Faculty Detail page serves as the typical entry point for creating a Credentials Certificate for the instructor.

More detail about the Faculty Details page can be found on *The Faculty Detail Page: Introduction*.

Adding New Credentials Records

The Faculty Details page contains the following data stores to be populated with individual records regarding the instructor's credentials:

- Degrees Earned
- Relevant Course Credit Earned
- Professional Experience
- Licensures or Certifications
- Other Scholarly Activities

An **<Add>** and **<Edit>** button are located at the far right of the title bar of each data store.



Degrees Earned		+	✎
Earned Degree: Master of Arts	Is Highest Degree: Yes		
Granting Institution: University of Central Florida	Date Conferred: 06/18/2002		
Discipline: English Literature			


To add a new record:

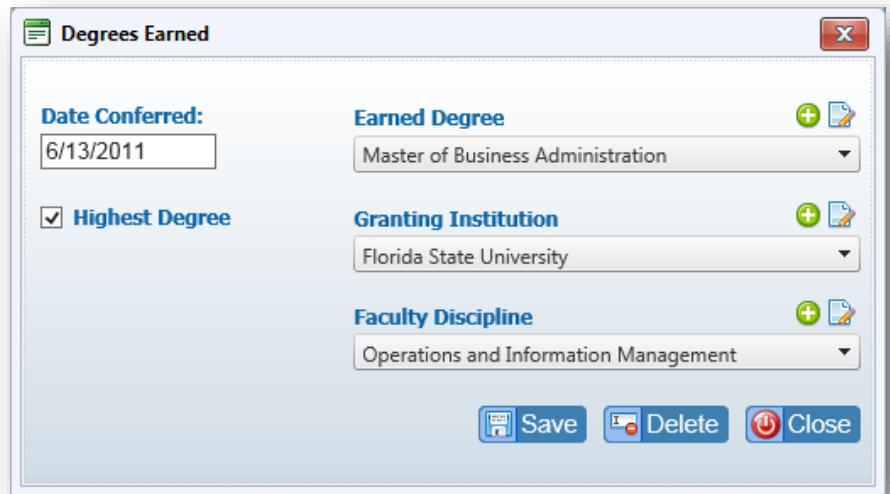
1. Click the **<Add>** button to open the data entry form
2. Enter text or select from the drop-down list for each of the fields
3. Click the **<Save>** button to close and add the record to the Faculty Details page
4. Repeat from step 1 to add another record in the same or another data store.

To edit an existing record:

1. Either double-click on a record or single-click a record to select, and then click the **<Edit>** button to open the data entry form and display the data
2. Make any changes desired
3. Click the **<Save>** button to close and record the changes on the Faculty Details page
4. Repeat from step 1 to edit another record in the same or another data store.

Degrees Earned

The Degrees Earned records largely draw from drop-down lists populated in **Admin > Credentialing Data**. If no match exists in the drop-down list for the record you're entering, you can add a new record by clicking on the  icon to the upper right of the field.



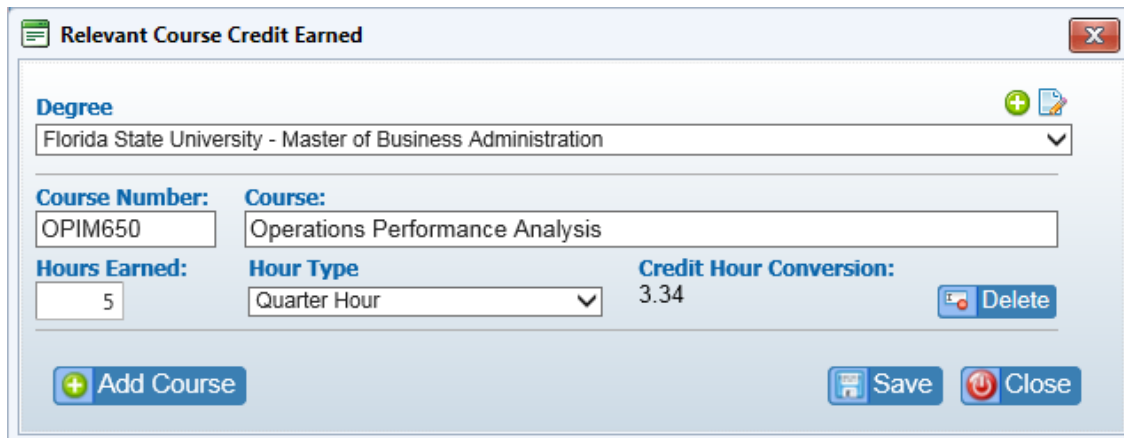
The screenshot shows a window titled "Degrees Earned" with a close button (X) in the top right corner. The form contains the following fields:

- Date Conferred:** A text input field containing "6/13/2011".
- Earned Degree:** A dropdown menu with "Master of Business Administration" selected. A plus icon and a document icon are to the right.
- Highest Degree**
- Granting Institution:** A dropdown menu with "Florida State University" selected. A plus icon and a document icon are to the right.
- Faculty Discipline:** A dropdown menu with "Operations and Information Management" selected. A plus icon and a document icon are to the right.

At the bottom right, there are three buttons: "Save" (with a floppy disk icon), "Delete" (with a trash can icon), and "Close" (with a power icon).

Relevant Course Credit Earned

When adding relevant coursework, first select a degree from those added to the Faculty record. Click the **<Add Course>** button to expand the page with the required fields for a specific course. Continue to click the **<Add Course>** button to **add multiple courses to the record**.



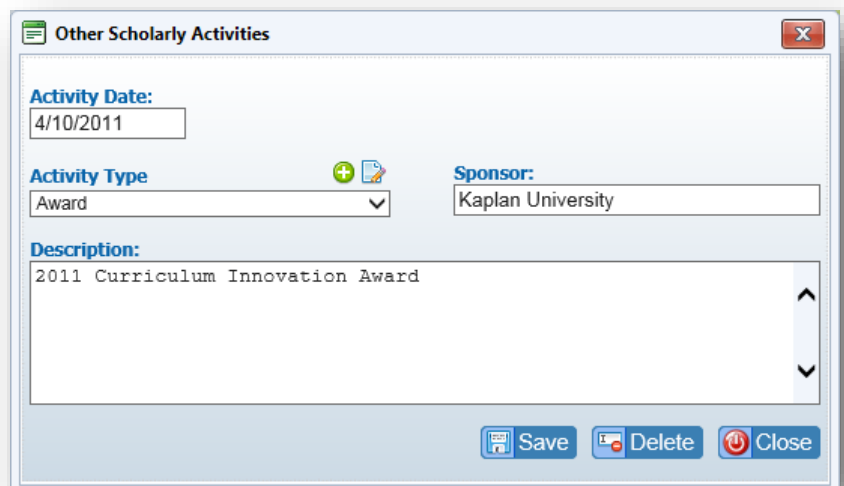
The screenshot shows a window titled "Relevant Course Credit Earned" with a close button (X) in the top right corner. The form contains the following fields:

- Degree:** A dropdown menu with "Florida State University - Master of Business Administration" selected. A plus icon and a document icon are to the right.
- Course Number:** A text input field containing "OPIM650".
- Course:** A text input field containing "Operations Performance Analysis".
- Hours Earned:** A text input field containing "5".
- Hour Type:** A dropdown menu with "Quarter Hour" selected.
- Credit Hour Conversion:** A text input field containing "3.34".

At the bottom left, there is a button labeled "+ Add Course". At the bottom right, there are three buttons: "Save" (with a floppy disk icon), "Delete" (with a trash can icon), and "Close" (with a power icon).

Professional Experience, Licensures or Certifications, & Other Scholarly Activities

The remaining data stores are open entry, meaning you enter text into each field. Date fields can be populated by clicking on a date on the web calendar or by entering the date in the MM/DD/YYYY format. Other Scholarly Activities contains a drop-down list for the **<Activity Type>** field to organize these records into categories.



The screenshot shows a window titled "Other Scholarly Activities" with a close button (X) in the top right corner. The form contains the following fields:

- Activity Date:** A text input field containing "4/10/2011".
- Activity Type:** A dropdown menu with "Award" selected. A plus icon and a document icon are to the right.
- Sponsor:** A text input field containing "Kaplan University".
- Description:** A text area containing "2011 Curriculum Innovation Award".

At the bottom right, there are three buttons: "Save" (with a floppy disk icon), "Delete" (with a trash can icon), and "Close" (with a power icon).

The Credentials Certificate

The SPOL Credentials Certificate demonstrates the courses within a discipline that an instructor is qualified to teach, and the credentials the instructor possesses that provide the qualification. Qualifications may consist of both academic and other credentials, including professional experience, licensures, certifications, and/or other scholarly activities.

Once created, the Credentials Certificate is routed through SPOL for approval. The required approvals are determined by the Discipline selected for the Credentials Certificate.

Credentials Certificate Detail

3 **Awaiting Approval by Baldwin, Frank**

No Approval Notes
Approval Status: ● ● ●

Note Options
Approval Options

Linda Alvarez

Discipline: English Literature 1
Effective Date: 12/07/2018 2

Courses - Credentials Match

Discipline Courses 4

Courses
ENC 1101 - English Composition I
ENC 1102 - English Composition II
ENC 1930 - Beginning Creative Writing
ENL 2012 - English Literature to 1798
ENL 2022 - English Literature after 1798

Relevant Credentials 5

Degrees Earned
Master of Arts, University of Central Florida, 06/18/2002
Relevant Course Credit Earned
ENC5337 - Rhetorical Theory
CRW6025 - Adv Graduate Writing Workshop
ENC6261 - Tech Writing Theory & Practice
LIT6216 - Issues in Literary Study
LIN5675 - English Grammar and Usage
Professional Experience
01/05/2004 - 01/08/2016 -- Valencia College, Professor of English Literature - Orlando, FL
Licensures and Certifications
04/18/2016 -- American Library Association, Library Science Certification - Online
Tested Experience
08/14/2013 -- Publications, Readers Digest, - Short Stories - Making a Friend

Credential Certificate History 6

Date / Time	Action	Modified By
12/07/2018 03:21 PM	Approve Certificate	Alvarez, Linda

Version 4.6

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1. Discipline

Each Credentials Certificate is associated with a Discipline, which determines the list of Courses eligible to be added to the certificate. The Discipline also dictates the Approval Roles and the approver assigned to each role.

2. Effective Date

The Effective Date identifies when this Credentials Certificate takes effect, after which the instructor is credentialed to teach the Courses identified on this certificate.

3. Approvals

The Approval Status indicates where in the approval process this Credentials Certificate stands. If you mouse-over the dots, a tool-tip will display the name of the Approval Role, the Planning Unit assigned, and the Unit Manager, who is the individual responsible for applying approval actions for that Approval Role. An approver will select from the Approval Options drop-down list to either approve the certificate, sending it to the next approver, or to reject the certificate back to the previous approver. The approver can add Approval Notes when approving or rejecting the certificate, which creates a record of any dialog among approvers about the substance and adequacy of the credentials presented.

4. Discipline Courses

Within the Courses - Credentials Match section, the Discipline Courses are listed in the section to the left, indicated the specific Courses the instructor is being credentialed to teach.

5. Relevant Credentials

The section to the right within the Courses - Credentials Match displays the academic and other credentials possessed by the instructor that qualify him or her to teach the courses listed. The Relevant Credentials are divided into Credentials Records categories.

6. Credentials Certificate History

The History data store records when changes are made to the Credentials Certificate page, including the type of change, when the change was made, and user who made the change. If a change was made to the certificate by someone impersonating another user, the identity of both the logged on user and the impersonated user will be recorded.

Creating and Approving Credentials Certificates

A Credentials Certificate is created for a specific Faculty record, so the creation process typically begins from the Faculty Details page.

To create a new Credentials Certificate:

1. Navigate to the **Faculty Details page** for the instructor to be credentialed
2. Click on the **<Add>** button on the right end of the title bar of the **Credentials Certificate data store**

Faculty Details

Teresa Baker ✉

Employee Number: 100035 Employment Type: Full-time SPOL User: tbaker

Faculty Rank: Instructor

Credentials Certificate

There are no records to display.

The **Faculty Credentials Certificate** data entry frame will open, displaying the in the **Relevant Credentials** pane the **Credential Records** previously added to the Faculty Details page

3. Today's date will be entered in the **Effective Date** field, but can be changed; when you click in the data field, the web calendar will launch; click on date in the calendar to add, or type a date in the field using MM/DD/YYYY format.
4. Select a Discipline from the dropdown list.

Faculty Credentials Certificate

Effective Date: 12/13/2018 ERP ID: Create On Save

Discipline: Select a Discipline

Courses - Credentials Match

Discipline Courses: There are no records to display

Relevant Credentials

- Degrees Earned
 - Master of Arts, University of Central Florida, 06/18/2002
- Relevant Course Credit Earned
 - ENC5337 - Rhetorical Theory
 - CRW6025 - Adv Graduate Writing Workshop
 - ENC6261 - Tech Writing Theory & Practice
 - LIT6216 - Issues in Literary Study
 - LIN5675 - English Grammar and Usage
- Professional Experience
 - 01/05/2004 - 01/08/2016 - Valencia College - Orlando, FL - Professor of English Literature
- Licensures and Certifications
 - 04/18/2016 - American Library Association - Online - Library Science Certification
- Other Scholar Activity
 - 08/14/2013 - Publications - Readers Digest

Save Delete Close

5. Courses associated to the Discipline will populate in the **Discipline Courses** pane
6. **Courses** for which the instructor is already credentialed will be **grayed-out** and cannot be selected for another Credentials Certificate
7. Using the check boxes in the Discipline Courses pane, **select the Courses** for which this instructor is being credentialed
8. Using the check boxes in the **Relevant Credentials** pane, **select the Credentials Records** that qualify this instructor to teach the Course selected
9. Click the **<Save>** button to navigate to the **Credentials Certificate Details** page
10. If assigned to the first Approval Role, **approve** the record to route it to the next approver for review and approval

Faculty Credentials Certificate

Effective Date: 12/13/2018 ERP ID: Create On Save

Discipline: ENG - English Literature

Courses - Credentials Match

Discipline Courses

Course Title
<input type="checkbox"/> AML 2010 - American Literature to 1865
<input type="checkbox"/> AML 2020 - American Literature after 1865
<input type="checkbox"/> CRW 2001 - Creative Writing I
<input type="checkbox"/> CRW 2002 - Creative Writing II
<input type="checkbox"/> CRW 2003 - Creative Writing III
<input type="checkbox"/> CRW 2004 - Creative Writing IV
<input type="checkbox"/> ENC 0001 - Fundamentals of Writing
<input type="checkbox"/> ENC 0080 - Basic English Review
<input type="checkbox"/> ENC 1101 - English Composition I
<input type="checkbox"/> ENC 1102 - English Composition II
<input type="checkbox"/> ENC 1107 - Advanced College Writing
<input type="checkbox"/> ENC 1930 - Beginning Creative Writing
<input type="checkbox"/> ENC 1933 - Special Topics in Writing
<input type="checkbox"/> ENC 2133 - Research Writing
<input type="checkbox"/> ENC 2200 - Business Communications

Relevant Credentials

Degrees Earned
<input type="checkbox"/> Master of Arts, University of Central Florida 06/18/2002
Relevant Course Credit Earned
<input type="checkbox"/> ENC5337 - Rhetorical Theory
<input type="checkbox"/> CRW6025 - Adv Graduate Writing Workshop
<input type="checkbox"/> ENC6261 - Tech Writing Theory & Practice
<input type="checkbox"/> LIT6216 - Issues in Literary Study
<input type="checkbox"/> LIN5675 - English Grammar and Usage
Professional Experience
<input type="checkbox"/> 01/05/2004 - 01/08/2016 - Valencia College - Orlando, FL - Professor of English Literature
Licensures and Certifications
<input type="checkbox"/> 04/18/2016 - American Library Association - Online - Library Science Certification
Other Scholar Activity
<input type="checkbox"/> 08/14/2013 - Publications - Readers Digest -

Save Delete Close

10 Awaiting Approval by Baldwin, Frank

No Approval Notes Approval Status: ● ● ●

Note Options Approval Options

Credentials Reports

The Credentialing section on the SPOL Reporting Homepage contains reports that will allow you to select Disciplines and related data based upon various attributes. The Credentialing Reports are described below.

Faculty Roster Report

Purpose

Identify the **Faculty** who taught **Courses** within a range of **Planning Terms**, and display the **Credentials Records** identified as qualifying the Faculty to teach the Courses. This report is commonly used to provide evidence of highly qualified faculty for accreditation purposes.

Filter

- Planning Year
 - Planning Term(s)
- Discipline(s)

Included Data

- Header
 - Institution
 - Discipline
 - Term(s)
- Faculty Name
 - Employment Type
- Courses Taught
 - Term
 - Course Number
 - Course Title
 - Credit Hours
 - Course Type

- Academic Credentials
 - Degree(s) Earned
 - Relevant Courses Taken
 - Credit Hours
 - Total Credit Hours
- Other Credentials
 - Professional Experience
 - Licensures and Certifications
 - Other Scholarly Activities

Faculty Roster Form
Qualifications of Full-Time and Part-Time Faculty

Name of Institution: Think State College
 Name of Primary Department, Academic Program, or Discipline: OrgMgt - Organizational Management
 Academic Term(s) Included: Fall Date Form Completed: 06/10/2015

NAME (F, P)	COURSES TAUGHT Including Term, Course Number & Title, Credit Hours (D, UN, UT, G)	ACADEMIC DEGREES & COURSEWORK Relevant to Courses Taught, Including Institution & Major List specific graduate coursework, if needed	OTHER QUALIFICATIONS & COMMENTS Related to Courses Taught
Michelle Cohen (F)	2012 Fall Semester MAN 2021 - Principles of Management, 3.00 (UT) MAN 2300 - Human Resource Management, 3.00 (UT) MAN 3303 - Management and Leadership, 3.00 (UT) MAN 4120 - Leadership Challenges and Supervision, 3.00 (UT) MAN 4504 - Operations Management, 3.00 (UT) MAN 4900 - Capstone Project in Organizational Management, 3.00 (UT)	MBA (Operations and Information Management), Florida State University Included the following coursework: OPIM650 - Operations Performance Analysis (3) OPIM651 - Problem Solving, Design, and System Improvements (3) OPIM654 - Product Design and Development (3) OPIM655 - Integrating Marketing and Operations (3) OPIM658 - Service Operations Management (3) OPIM661 - Systems Analysis, Design, and Implementation (3) OPIM697 - Retail Supply Chain Management (3) Total: 21.00 Graduate Semester Hrs	2006-2012, West End Lumber Co., Lafayette, LA Warehouse Operations Manager: created procedures for daily warehouse operations; supervised receiving, warehousing, and distribution operations; maintained inventory for \$2.48 annual sales.

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