Digital Measures

UTSA Annual Faculty Workload Verification Manual

For Deans/Associate Deans, Department Chairs, and Department/College Administrative Staff

Revised: 5/22/18
In this manual you will find:

- How to log in to Digital Measures.
- How to generate and check workload reports in Digital Measures.
- How to assign released time workload credits in Digital Measures.
- How to input workload credits and justifications for underload in Digital Measures.
- How to verify workload reports in Digital Measures.
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Introduction

This manual is to be used by administrators in the colleges and departments to verify that their faculty workload reports are in compliance with UT System’s Regents’ Rules and Regulations, Rule 31006 – Academic Workload Requirements. Each fall and spring semester, colleges and departments are asked to review and verify their faculty workload reports to ensure that all faculty meet the minimum workload requirements based on their faculty title and percent appointment on state funds. The repository for this information is Digital Measures.

Log in to Digital Measures

- In the address field of your preferred browser, type: http://my.utsa.edu.
- Click Digital Measures under Faculty/Staff Resources.
- You will be taken to the UTSA Digital Measures site. (You may wish to save this page to your Favorites or Bookmarks in your preferred browser.)
- From the landing page, click the orange UTSA Digital Measures button on the upper right side of the page to reach the Digital Measures log-in page:

![UTSA Digital Measures](image)

- Log in using your myUTSA ID (abc123) and passphrase.

Generate the UTSA Faculty Workload Summary Report

The UTSA Faculty Workload Summary report is a college/department faculty list that displays workload information for each faculty member. There are two UTSA Faculty Workload Summary reports – one for fall term and one for spring term. Please be sure that you select the report for the appropriate term. These reports can be run to display summary information about an individual (or individuals), an entire department or an entire college.
Click **Reports** in the top menu bar.

Choose the **UTSA Faculty Workload Summary – Fall Term** or **UTSA Faculty Workload Summary – Spring Term** report from the displayed list, as appropriate. (You may need to scroll down to locate the report.)

**Step 1: Date Range.** The Start Date and End Date will default to the appropriate dates for the report term you selected, fall or spring. (Check to make sure the year is correct.)
Step 2: Whom to Include.

This step has two elements:

By default, the report will include All (all faculty members/departments/colleges to which you have access, based on your level of permission). If you wish to change that, click on Change selection… to select whom you would like to include in the report.

A new dialog box will open where you will specify College, Department, or Individual(s). If you click on the caret to the left of each section, a drop-down list will display, where you can further specify your choice. For instance, if you choose “Individual”, then you must check the box by the individual(s) for whom you want to run a report. Click [Save] once you have made your selection(s).

Then, still under Step 2, select “Enabled Only” from the drop-down list beside the label “Include these accounts.” DM will default to this selection. (If you choose the “Disabled Only” or “Enabled and Disabled” option, the report will include those faculty members who are no longer at the university.)

Step 3: File Format. Choose your file format and page size. For this report, you would leave the default options of 'Microsoft Word' and 'Letter'.

Click on [Run Report] at the top right side of page. Your report will open as a Word document. Save this report and print it out for reference as you complete and approve the “Requests for Released Time Workload Credits” form. WARNING: The Word document you have generated is NOT in Digital Measures. Do not make edits to this document, as they will not appear in Digital Measures. If information on the report is incorrect, it must be changed in Digital Measures.

Check the UTSA Faculty Workload Summary Report

The UTSA Faculty Workload Summary reports display faculty workload information for your department/college based on your search parameters, including:

- the requested term
- the requested department(s)
• the requested faculty members’:
  o BANNER ID
  o Name
  o Percent appointment
  o Tenure status
  o Faculty title
  o Total workload
  o Met min (whether the faculty member has met the minimum workload requirements)
  o Hours short (if any)
  o Justification for underload (if needed).

1. Colleges/departments should make certain that each faculty member’s appointment information is correct on this report. If it is not, update the information in BANNER or PeopleSoft as appropriate. Note: Colleges/departments should update faculty members’ information in BANNER and/or PeopleSoft once the appointments are finalized each semester. This information will then refresh to the Digital Measures system.

2. The Met Min (Met Minimum) column will automatically display “Yes” for every faculty member who meets the minimum workload requirements, given his/her appointment. Reports that have a “Yes” in the Met Min column need no further action by the department/college, other than insuring that the displayed information is correct. A “No” in the column indicates a faculty member who is below the minimum workload requirement. If there is a “No,” review the Hrs Short (Hours Short) column.

3. The Hrs Short column indicates the number of workload hours short a faculty member is, based on his/her percent appointment. This column is used to determine the number of hours of workload credits that faculty members should receive to account for other work they are doing.

4. The Justification for Underload column displays the reasons that a faculty member would be short workload hours but not given a course release (for example, if the faculty member is on FMLA). These justifications are entered directly into Digital Measures; see pages 5-8 for instructions on inputting justifications for underload.

Workload Credits and Justifications for Underloads

Assign Released Time Workload Credits

The appropriate UTSA Faculty Workload Summary report should be referenced when assigning workload credits. Administrative staff should work with department chairs to determine the reasons for each faculty member who needs workload credits based on the Hrs Short column. Tenured and tenure track faculty members as well as full-time and part-time continuing (appointed at least twice in the last four semesters) NTT faculty members who receive workload credits should have a workload distribution agreement uploaded to Digital Measures that outlines the duties and deliverables that are expected with the lighter teaching load.
**Note:** The paper “Requests for Released Time Workload Credits” form is no longer required. However, the form is still available on the Workload Information screen in Digital Measures for colleges and departments to use when finalizing workload credits and obtaining approval from their deans. Colleges are free to establish their own internal approval processes, including whether to use this form. Colleges can begin entering workload credits in Digital Measures once their Dean has approved them.

The **UTSA Faculty Workload Credits** report in Digital Measures is used when auditing the workload credits for compliance with Regents’ Rule 31006. Colleges and departments can also use this report in lieu of the paper forms if desired.

When deans and department chairs sign off on the ‘Workload – Chair/Dean Verifications’ screen, they are signing off on both their faculty workloads in the appropriate **UTSA Faculty Workload Summary** report and the workload credits listed on the **UTSA Faculty Workload Credits** report. Deans and department chairs should run these two reports and review them before signing off on the workload.

**Input Workload Credits and Justifications for Underload**

1. In order to input workload credits and/or justifications for underload in Digital Measures, return to the **Manage Data** screen, and select the faculty member who needs workload credits or a justification for underload from the **Manage Data for Users** drop-down list.

2. Once you have selected the faculty member, click on “Workload Information” on the main page under the **Teaching** section (screen shot on next page).
3. Click [+ Add a New Item] if you have not begun adding workload credits for the faculty member for the current academic year, OR click on the existing record if you have been working on workload credits for the faculty member and need to make an update. (Note: You should only have ONE record per academic year; each record includes both fall and spring semesters. Normally, you will create a record in fall and edit that same record to add information for the spring semester.)
4. The “Workload Information” screen will display. (Partial screen shot displayed below.) *Please note that links for many of the documents you may find helpful in calculating and reviewing workload are listed at the top of this screen for your convenience.*

- Select the desired **Academic Year** from the drop-down list. For example, for the fall 2018 semester, you would select 2018-2019.

- Please note that both fall and spring activity will be entered on the same record. There are sections for both terms on the same screen, with **Fall – Released Time Teaching Workload Credits** in the top half of the screen and **Spring – Released Time Teaching Workload Credits** in the bottom half of the screen. Please be sure you are entering data under the appropriate semester.

- Under the section for the appropriate semester, select the Activity from the drop-down list based on the type of release being assigned to the faculty member. There are three different subsections of activities: **Instructional-Related Activity**, **Administrative-Academic-Related Activity**, and **Non-Sponsored Research Activity**. The minimum and maximum number of workload credits that can be assigned are displayed next to the workload course release description in parentheses. For example, Visiting Faculty (1-3) means that the minimum workload credit that can be assigned for Visiting Faculty is 1 and the maximum is 3.

  Please note that when selecting the Faculty Development Leave option under **Non-Sponsored Research Activity**, you must upload documentation for the Faculty Development Leave, using the [Choose File] button below the Activity field.

- Select the number of Credit Hours being assigned to the faculty member for that particular activity. Credit hours are listed in whole and half numbers (i.e., 1, 1.5, 2, 2.5, etc.).

- If no workload credits are being assigned to the faculty member and a **Justification for Underload** is needed, select the appropriate justification from the drop-down box. If one of the available options does not accurately describe the justification for underload, you may choose “Other” from the drop-down list; when “Other” is selected, you must provide an explanation of
“Other” in the corresponding text field to the right. This option should be used sparingly and only if one of the existing drop-down options will not suffice.

Please note that when selecting one of the FMLA options, you must upload documentation for the FMLA, using the [Choose File] button below the justification field.

- Click [Save] in the upper right portion of the screen to preserve your entry. Once entered and saved on the Workload Information screen, workload credits and justifications for underload will appear in the “UTSA Faculty Workload Summary” when the report is run again.
- Click on “Manage Data” (left side of screen) to return to your faculty list and select the next faculty member. Repeat the steps in this section of the user’s manual until all faculty workload credits and justifications have been entered and saved.

Verifying the UTSA Faculty Workload Reports

Generate the UTSA Faculty Workload Detail Report

The UTSA Faculty Workload Detail report is the individual faculty member’s workload report. It can be run to display one individual faculty member’s workload report, an entire department’s workload reports in alphabetical order by tenure status, or an entire college’s workload reports in alphabetical order by tenure status.

Follow the steps beginning on page 1 of this document to generate a report. Choose the UTSA Faculty Workload Detail report from the displayed list. (You may need to scroll down to locate the report.)

- **Step 1: Date Range.** Choose the Start Date and End Date for the term of the report from the drop-down lists. For the fall term, use September 1 as the start date and December 31 as the end date. For the spring term, use January 1 as the start date and April 30 as the end date. Variations from these dates could bring in data from other terms to populate the report.

- **Step 2: Whom to Include.** Choose whom you want included in your report. The default setting is All (all faculty members/departments/colleges to which you have access, based on your level
of permission). To change that, click on Change selection… to select whom you would like to include in the report. A new dialog box will open where you will specify the College, Department(s), or Individual(s) you would like to include. Click [Save] once you have made your selection(s).

Then, still under Step 2, select “Enabled Only” from the drop-down list beside the label “Include these accounts.” DM will default to this selection. (If you choose the “Disabled Only” or “Enabled and Disabled” option, the report will include those faculty members who are no longer at the university.)

- **Step 3: File Format.** You will use the default options of “Microsoft Word” and “Letter” in this step. Note: the report will print in landscape orientation.

Click the [Run Report] button on the upper right side of screen. This generates a Word document containing workload information on the faculty member(s) within the parameters of your search.

You may view, print and/or save this report. **WARNING:** The Word document you have generated is NOT in Digital Measures. Do not make edits to this document, as they will not be made in Digital Measures.

**Check the UTSA Faculty Workload Detail Report**

The **UTSA Faculty Workload Detail** report displays faculty workload information by term and individual, including:

- Course-Related Activity (workload for courses taught)
- Instruction-Related Activity (workload credits)
- Administrative/Academic-Related Activity (workload credits)
- Research Activity (workload credits)
- Justification for Underload (if any)
- Summary of All Activities (total calculated workload)

Faculty members should be encouraged to view their workload reports for accuracy but they are not required to verify them. Departments/colleges should verify that the information on their faculty members’ reports is accurate.

Once the **UTSA Faculty Workload Detail** report has been checked for accuracy by departments/colleges and the appropriate **UTSA Faculty Workload Summary** report displays all faculty members with a “Yes” (meaning that they have met the minimum workload requirements) or there is a justification for underload indicated, then the department chairs and deans/associate deans must verify their faculty workloads in Digital Measures.

**Chair/Dean Verification**

Department chairs and deans must verify their faculty workload reports and the workload credits assigned each fall and spring semester by signing off on them in Digital Measures at the end of the
workload verification period. In order to verify their faculty workload reports and workload credits, department chairs/deans need to:

1. Review the appropriate **UTSA Faculty Workload Summary** report (fall term or spring term). You can get this report from your administrative staff who have access to Digital Measures or you can generate the report in Digital Measures. (See instructions for running the report under *Generate the UTSA Faculty Workload Summary* report on page 1.)

2. Review the **UTSA Faculty Workload Detail** report (if desired, but not required). You can get this report from your administrative staff who have access to Digital Measures or you can generate the report in Digital Measures. (See instructions for running the report under *Generate the UTSA Faculty Workload Detail* report on page 8.)

3. Review the **UTSA Faculty Workload Credits** report. You can get this report from your administrative staff who have access to Digital Measures or you can generate the report in Digital Measures through custom reports. (To generate this report, follow the instructions for generating the **UTSA Faculty Workload Summary** report on page 1, but choose the **UTSA Faculty Workload Credits** report from the available reports displayed.)

4. If you haven’t already done so, log in to Digital Measures using the log-in instructions on page 1 of this manual. You should be at the main page for entering your own activities in DM (**Activities**). You will verify and sign off on all workload reports for your faculty for the term from your own Activities page. You will sign only one time and do NOT need to go into each faculty member’s individual profile (“Manage Data”) to verify/sign off on his/her workload.

   *All remaining steps for electronically signing your workload reports (with screen shots) are displayed on the following pages.*
5. Click “Workload – Chair/Dean Verifications” under Faculty Reports and Evaluations.

The “Workload – Chair/Dean Verifications” screen will display (screen shot on next page).

6. Click [+ Add New Item].
Select **Evaluator Rank** from the drop-down list.

Select the current **Term** from the drop-down list and type in the **Year**.

Select the appropriate **College** from the drop-down list.

Select the appropriate **Department** from the drop-down list. **Note:** Deans should leave this field blank when signing off for their colleges.

Type in your **Electronic Signature**. Please type your full name, as you would sign it, using upper and lower case. Please do not enter initials only.

Enter the **Electronic Signature Date** by choosing the month from the drop-down list and typing in the day and year.

Click [Save] in the upper right portion of the screen to preserve your entry.

Once this screen is completed, the department chair/dean’s signature will populate the appropriate **UTSA Faculty Workload Summary** report and **UTSA Faculty Workload Credits** report and will display the next time the reports are run (department chair signatures with department reports and dean signatures with college reports).

**Note:** These reports will be archived in the Digital Measures Archive site in SharePoint at the end of the workload verification period.

***FACULTY WORKLOAD VERIFICATION IS COMPLETE***