Instructor Checklist

Department and Faculty schedulers can use this checklist to ensure instructors are set up correctly in the system.

□ Instructor Advisor Table
□ Approved Courses
□ Maintain Schedule of Classes - Meetings Page
□ Instructors for Meeting Pattern
□ Instructor Role
□ Access
□ Workload

Changing the instructor status - Activate/Inactivate Instructor status

□ Instructor Advisor Table

For clarification, screen captures for each of the checklist items have been attached followed by a brief explanation of what each field pertains to.
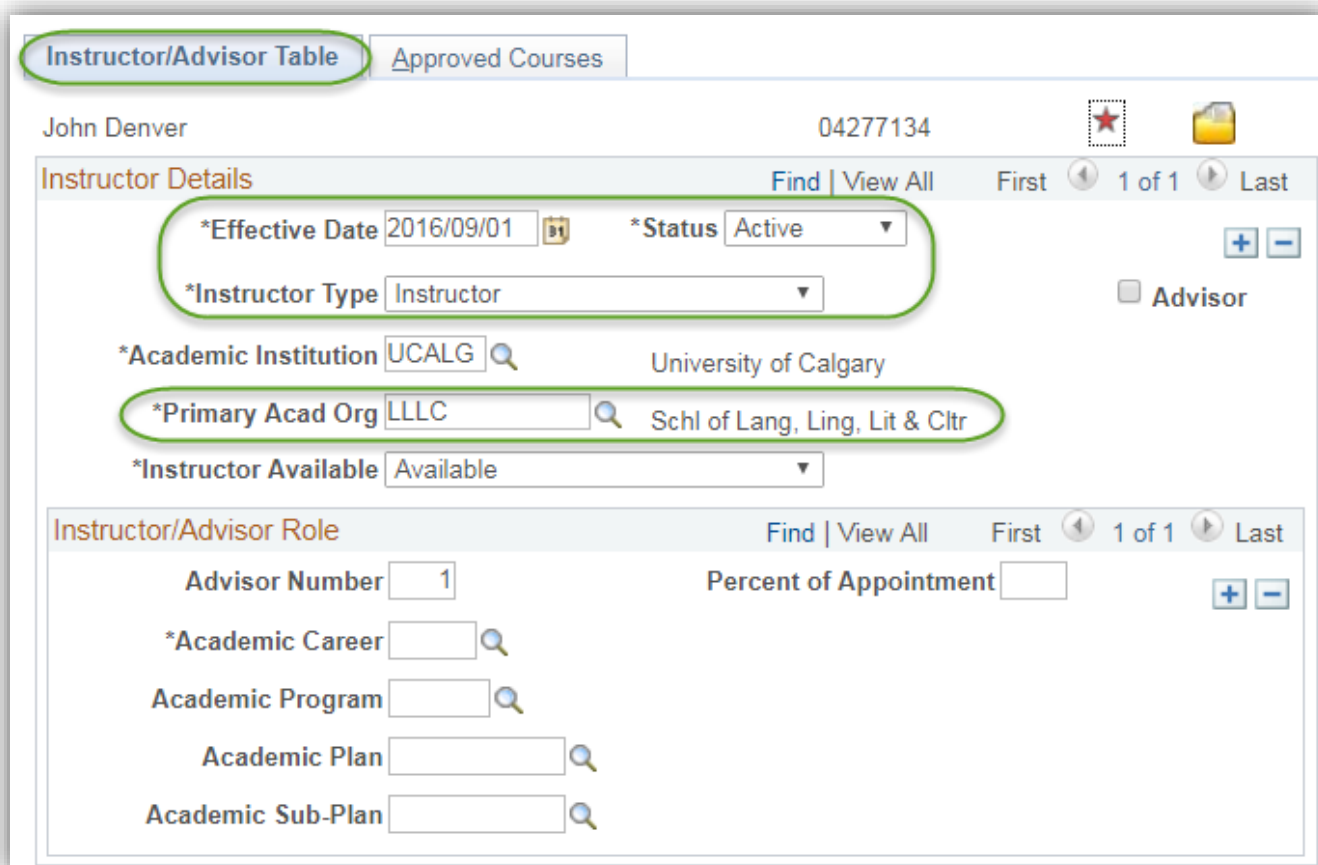
Please contact the Scheduling Office if you have any questions or concerns.

Instructor/Advisor Table

Instructors must first be set up in the Instructor/Advisor Table. If you do not add the Instructor to the Instructor/Advisor Table they will not display when you are assigning Instructors to the class sections.

Note: when the instructor has more than one ID, make sure they are set up with the appropriate ID number – use the Staff ID <u>not</u> the Student ID.

Navigation: **Curriculum Management > Instructor/Advisor Information > Instructor Advisor Table**

Effective Date – must be before the term 'begin date' in order for that instructor to be on the list to assign classes for that term. For example, January 1 for Winter, May 1 for Spring, July 1 for Summer or the beginning date of the Fall term.

Note: When adding the instructor <u>after</u> the term has started, the Effective Date must be changed to a date <u>prior to the term begin date</u> as noted above before saving the record. If the date is not changed and you have saved the record, contact the Scheduling Office to change the date for you.

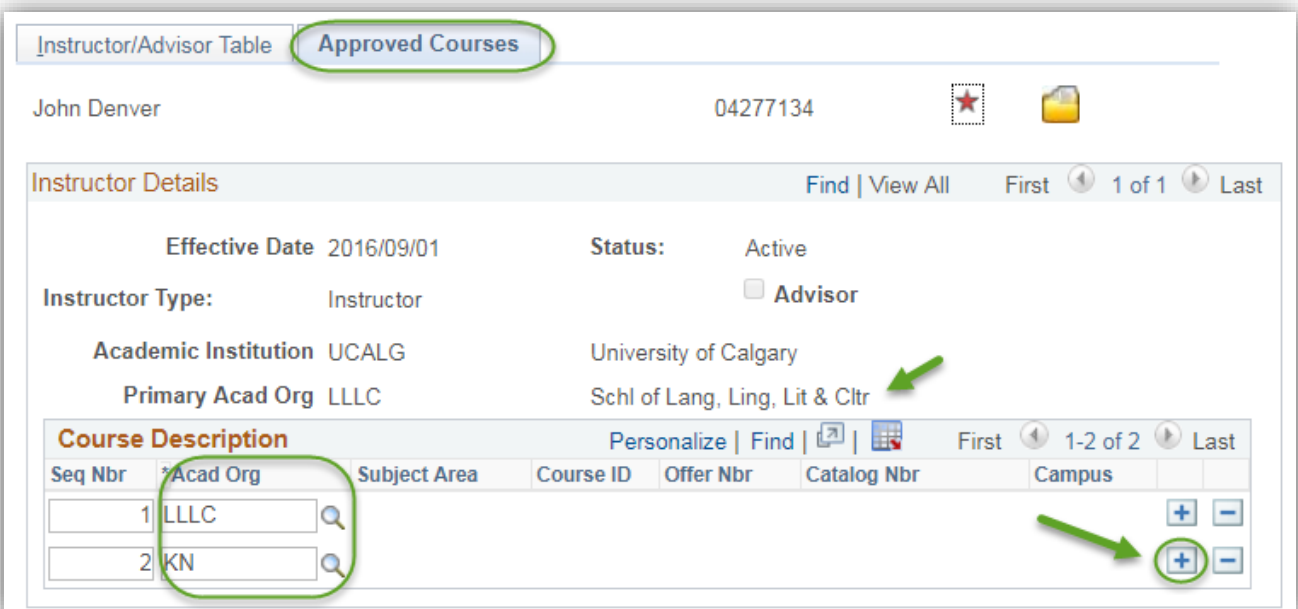If the Effective Date is not correct, you are unable to use the Instructor for that term.

Instructor Type – this field is used to select the appropriate type.
Primary Acad Org – this field is used to enter the 'home' Department or Faculty of the instructor.
Instructor Available – is simply for information purposes only and does not restrict scheduling assignments.

Approved Courses

This page is used to enter the Academic Organizations the instructor can be assigned to on the Schedule of Classes. If this page is left blank, the instructor will <u>not</u> show up on the list of available instructors.

Acad Org – this field is used to select the Academic Organizations the instructor can be assigned to. The course Academic Organization is displayed on both the Schedule A New Course and Maintain Schedule of Classes Basic Data page. See example next page.

Note: the instructor can be assigned to multiple Academic Organizations. Use the plus sign ➕ to add a new row and then select another Academic Organization.

Basic Data page

Maintain Schedule of Classes - Meetings Page
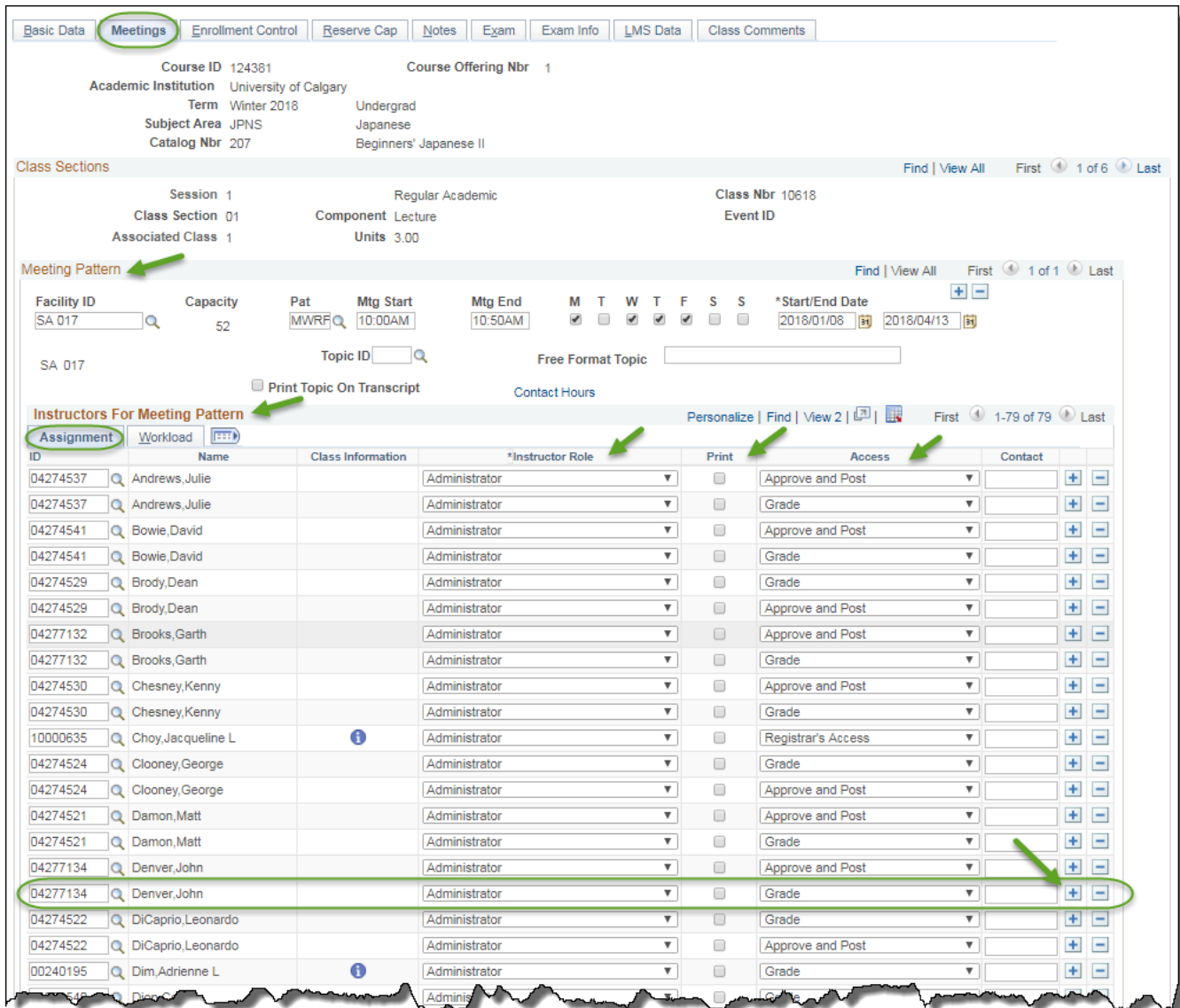
Instructors can be associated to classes on the pages noted below.

Navigation:

Curriculum Management > Schedule of Classes > Schedule A New Class

Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Curriculum Management > Schedule of Classes > Schedule Class Meetings

Instructors for Meeting Pattern – the instructors assigned to the class section are entered here. This can be as many as required, but please ensure that they are coded correctly with the proper workload assigned to each instructor. Please see next page for instructions on multiple instructors and workload.

Important Notes:
If a course is being taught on two different days, two different times, the instructors should be listed in both sequences.

Once your access is closed, you must do all updating of instructors in the Schedule Class Meetings tab. Please ensure that ALL instructors are input for the section(s) they are teaching.

Instructor Role – indicate if the instructor is the Primary Instructor, Alternate, Simultaneous or TA. These roles are all considered teaching roles (also see Appendix 1, page 9).

- Primary Instructor - only one instructor is teaching a section.
- Alternate - two or more instructors are teaching the same section, but they are not in the classroom at the same time.
- Simultaneous - two or more instructors are teaching the same section and are present in the classroom at the same time.
- TA - Can be used instead of PI in the case of a teaching assistant teaching a laboratory or tutorial section. Do not enter TA in sections where the TA is not teaching.

Note: CO - Coordinator is considered a non-teaching role and can be used for people who are lab coordinators. Non-teaching roles will not be included in reports of teaching activity**.**

Access
- must be set to **Grade** for **Instructors**. If this is not set to Grade, the instructors do not have access to the class roster through the Faculty Centre and do not have access to enter grades.
- must be set to **Approve and Post** for grade **Approvers**.

Note:
Course Instructors who are Approvers may have

a) '**Admin**' as their **Instructor Role** and '**App & Post**' as their **Access**
   AND '**Prim Instr**' as their **Instructor Role** and '**Grade**' as their **Access**

OR
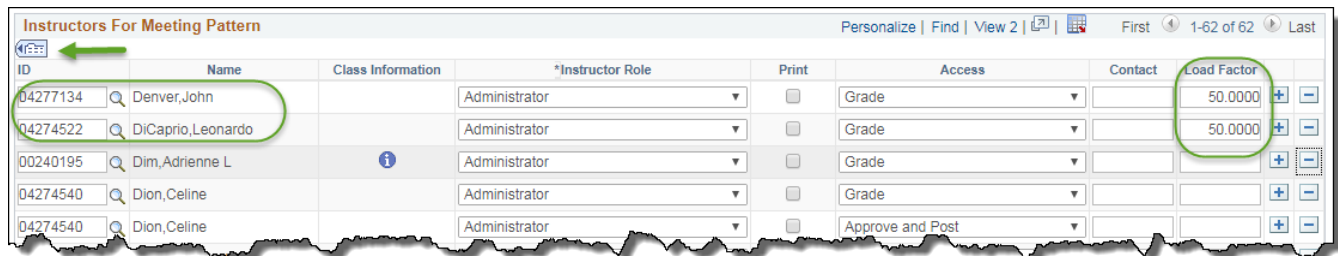
b) '**Prim Instr**' as their **Instructor Role** and '**App & Pos**t' as their **Access**.

In these cases, the Instructor will not be able to enter their own grades; their Grade Administrator will need to do so for them. Once the grade entry is completed by the Grade Administrator the Instructor can then go in as the Approver and 'approve and post' the grades.

To request Approver/Administrator access, contact the IT Support Center at 220-5555 option 2 or email itsupport@ucalgary.ca.

Workload
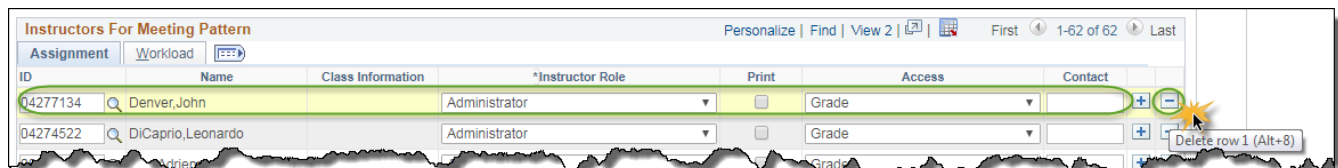
To view the Workload and additional columns, for ease of viewing, click the Show More Columns tab:

- Indicate the workload when entering more than one teaching instructor e.g. Alt Instr (AL) or Simultaneous (SI). This is important for the statistics for the Office of Institutional Analysis.
- It is also important how this data is entered. For example if the Load Factor is 50%, just enter the number **50** and press enter or tab to the next field.

Maintaining accurate instructor information is critical for purposes such as the University Student Ratings of Instructors (USRI) and instructional workload. Instructors no longer teaching a course must be removed from the Meetings page.
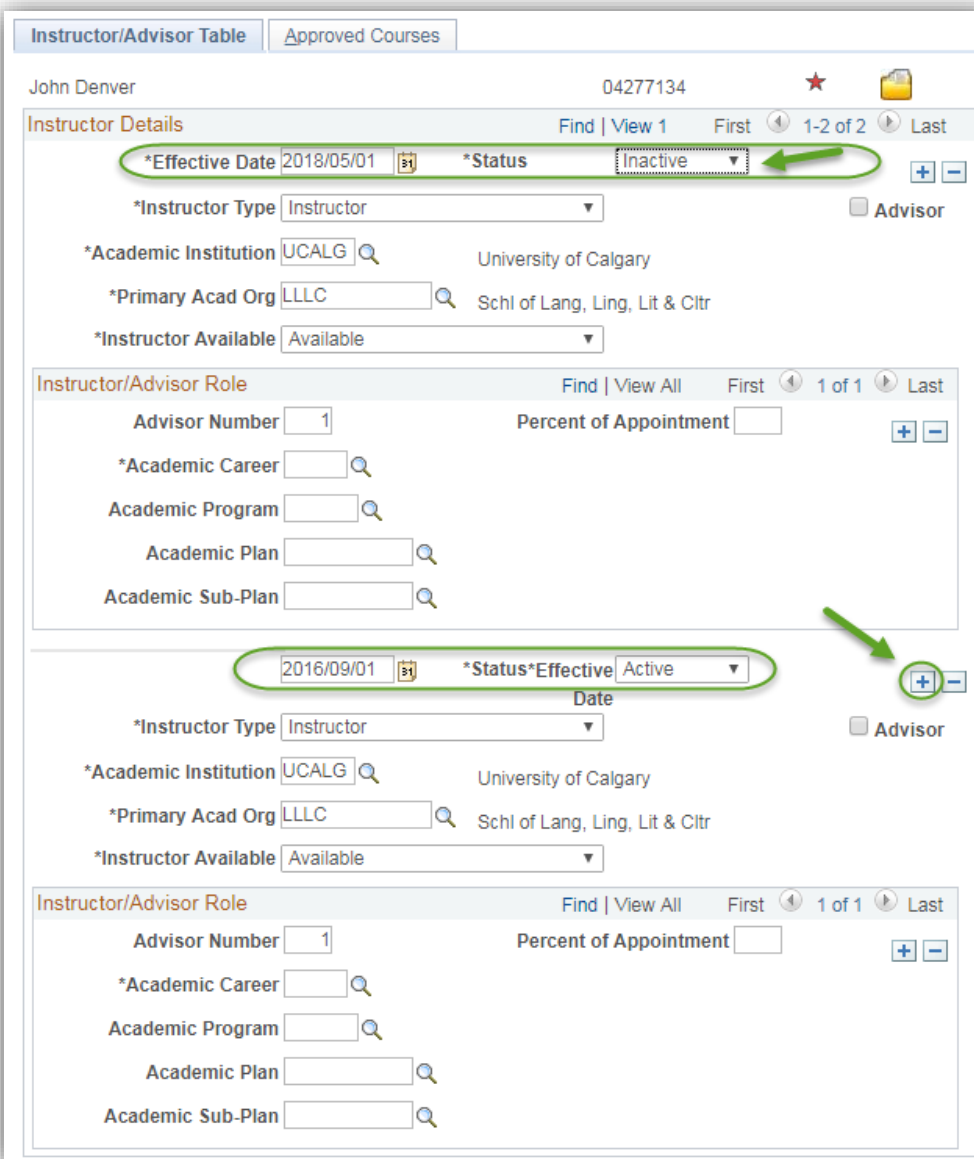
Inactivate Instructors/Advisors

Faculty/Department schedulers are responsible for updating the Instructor's 'Status' when required.

The Instructor's status is updated on the Instructor/Advisor Table mentioned in step 1.

Navigation: **Curriculum Management > Instructor/Advisor Information > Instructor Advisor Table**

This example illustrates changing the instructor status from 'Active' to 'Inactive' (for example, if they were to leave the U of C).

The instructor is not 'deleted' from the table. Instead the 'plus' sign ⊞ is used to add a new row so the history of the instructors record is maintained.

Effective Date – again the effective date must be set prior to the term begin date for the term the instructor's status is changed. For example, if the instructor's status needs to be changed mid-term the effective date would still be Jan. 1 for Winter, May 1 for Spring, July 1 for Summer or the first day of the Fall term.

Note: Keep in mind the Effective Date must be unique from the previous row. For example if the previous row Effective Date was Jan 1 and the instructor status changed mid-term, the Effective Date could be January 2nd but not January 1st.

Status – select the appropriate value to reflect the instructor's status; 'Active' or 'Inactive'.

Appendix I – Instructor Roles

Instructor roles are not tied to payroll information for a person. The application of an instructor role is based on the following guidelines.

A. Teaching Roles

The following instructor roles are considered teaching roles and apply to people who are involved in the teaching activity of a section. Do not use these instructor roles for people who need access to class lists for marking or are otherwise assisting the teaching instructor. People indicated with the following teaching roles **will be included in reports of teaching activity**.

PI   Primary
Used when only one instructor is teaching a section. **Don't enter more than one PI instructor per section**.

AL   Alternate
Used when two or more instructors are teaching one section, but are not in the classroom at the same time. Can also be used when instructors split the teaching of a section over time, for example, one teaches the first half of a term and the other teaches the second half of a term. **For each instructor attributed with an AL instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

SI   Simultaneous
Used when two or more instructors are teaching one section simultaneously. **For each instructor attributed with an SI instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

Used when the section is taught on a one-on-one basis with students (individual instruction). In this case enter 100% workload for each SI instructor listed.

TA   Teaching Assistant
Can be used instead of PI in the case of a teaching assistant teaching a laboratory or tutorial section. **Do not enter TA in sections where the TA is not teaching.**

In the cases where more than one TA is teaching one section, please indicate a percentage of time spent in the classroom teaching. Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

B.   Non-Teaching Roles

The following instructor roles are considered non-teaching roles and apply to people who are assisting with a section. This would include people who are markers, need access to class lists, Blackboard, etc. People indicated with these non-teaching roles will not be included in reports of teaching activity.

CO   Coordinator
Can be used for people who are lab coordinators.

RD   Reader/Demonstrator
Can be used for people who are markers or general assistants to the class.

<u>PERCENTAGE WORKLOAD</u>

Used for multiple entries of instructors (SI, AL or TA) in one section. A percentage workload reflects the amount of time an instructor is teaching a class. The following examples represent instructors entered in one section.

Example 1: Two instructors are teaching one section at the same time.

Smith, John   SI   100.0000
Roberts, Jane   SI   100.0000

Example 2: Two instructors are teaching one section at the same but Roberts is present only 50% of the time.

Smith, John   SI   100.0000
Roberts, Jane   SI   50.0000

Example 3: Four instructors are teaching one 3 hour section per week; different teaching workloads.

Smith, John   SI   100.0000 (3 hours per week for 13 weeks-entire term)
Roberts, Jane   SI   54.0000 (3 hours per week for 7 weeks)
Jones, Jack   SI   23.0000 (3 hours per week for 3 weeks)
Lee, Joe   SI   8.0000 (3 hours for one week

Example 4: Three TA instructors are teaching one section at the same but Jones is present only 25% of the time.

Smith, John   TA   100.0000
Roberts, Jane   TA   100.0000
Jones, Jack   TA   25.0000

Example 5: Three instructors are teaching one section alternately.

Smith, John   AL   33.0000
Roberts, Jane   AL   33.0000
Jones, Jack   AL   33.0000

Example 6: Three TA instructors are teaching one section alternately.

Smith, John   TA   33.0000
Roberts, Jane   TA   33.0000
Jones, Jack   TA   33.0000

Example 7: Two instructors are teaching one section alternately

Smith, John   AL   65.0000
Roberts, Jane   AL   35.0000