

OPT-Post Tenure Review

Overview

The following document describes the steps on how to download the new Post Tenure Review template along with the steps needed for document upload and completion.

Downloading Post Tenure Packet – Faculty Self Service

Description

Faculty will be able to access and download the new Post Tenure Review template with Activity by navigating to the following location found through HR Self Service:

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure

Click the Promotion & Tenure Packet link.

Promotion & Tenure Packet Actions

View the Promotion & Tenure template packet. Upload documents and view the status of reviews tracked in Online Promotion & Tenure.

Promotion & Tenure Packet

DOWNLOADING TEMPLATE


Specific sections of the Packet Template will be automatically populated with data (i.e., Effort Reported, Teaching Evaluations, Graduate Committee Activities, etc.). Other areas will need your input.

1. Click the Packet Template with Activity link.

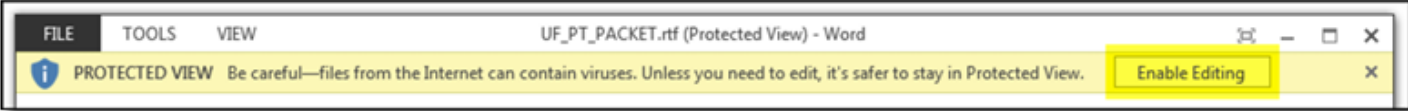
Post Tenure Review Document

Post Tenure Review with Activity

Open the post tenure review document populated with available data such as teaching evaluations, graduate committees and sponsored projects.

 **UF_PO_PACKET.rtf**
368 KB • Done

2. If your browser initially blocks the display of the Packet Template, click Open from the message window.
3. If your browser displays the Packet Template in Protected View, click the Enable Editing button to open for editing.



Downloading Post Tenure Packet – Annual Review Admin Page

Description
<p>Department Admins will be able to access and download the new Post Tenure Review template with Activity by navigating to the following location found through the following navigation:</p> <p>NAVIGATION Login into myUFL and navigate to: Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion and Tenure > Annual Review Admin</p>

Promotion and Tenure Document

[OPT Packet Template with Activity](#)

Post Tenure Review

[Post Tenure Review with Activity](#)

Annual Report Pilot

Type

[Annual Report Template](#)

Distinguished Professor Application

[Distinguished Professor Template](#)

[Return to Search](#)

DOWNLOADING TEMPLATE

Specific sections of the Faculties Post Tenure Template will be automatically populated with data (i.e., Effort Reported, Teaching Evaluations, Graduate Committee Activities, etc.). Other areas will need your input.

1. Click the Packet Template with Activity link.

Post Tenure Review Document

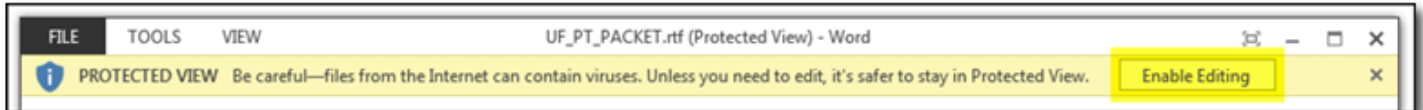
[Post Tenure Review with Activity](#)

Open the post tenure review document populated with available data such as teaching evaluations, graduate committees and sponsored projects.



UF_PO_PACKET.rtf
368 KB • Done

2. If your browser initially blocks the display of the Packet Template, click Open from the message window.
3. If your browser displays the Packet Template in Protected View, click the Enable Editing button to open for editing.



Opening Post Tenure Review Case – Department Administrators

Description

OPENING CASE FOR POST TENURE REVIEW

Department Administrators will navigate to the PTR Department Admin Page to open up a Case for Faculty Members Post Tenure Review.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

Click on the “Add a New Value” tab.

Enter in the Faculty Members UFID along with the Year range the review will be associated to.


Click "Add"

Post Tenure Review - Dept Adm

Find an Existing Value

Add a New Value

*Empl ID 

*Promotion and Tenure Year 


Add

[Find an Existing Value](#) | [Add a New Value](#)

Once created, a new page will be generated in the "Open" status.

Post Tenure Review

Candidate

Status 

NOTE: To create the case number, the page must be saved once created.

← Switch UserPTR Department Admin

Post Tenure Review

Candidate Empl ID Case Number **999999**
Status OPT Year 2023-2024

Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Chair/Director
*College HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director

Certified Date

Upload Documents

Category

Personalize Find First 1 of 1 Last			
Category	Filename	Added Date/Time	Added By
1			

Uploading and Certifying Post Tenure Packet – Faculty Self Service

Description

UPLOADING AND CERTIFYING YOUR TEMPLATE PACKET

After downloading, accurately completing, and saving the Post Tenure template as a .pdf file, you will have the ability to upload the Post Tenure template, along with your Resume and 3 optional Narrative documents.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure

Post Tenure Review

Candidate [redacted] Empl ID [redacted] Case Number 7
Status Open OPT Year 2023-2024
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Chair/Director [redacted]
*College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director [redacted]

Certified Date

Certify for Dept. Review

Upload Documents

Category [dropdown] Upload

- Annual Review Letters
- Dean's Letter
- Dept Chair/Director's Letter
- Disciplinary Documentation
- Faculty Response to Dean
- Optional Narrative (up to 3)
- Post-Tenure Review
- Resume

Category	Per	Added
1		

Save Re

NOTE: You can upload it as many times as you like prior to Certifying for Department Review. However, we strongly recommend working closely with your faculty mentor(s) and Department OPT Administrator prior to certification. Once certified, the original packet template cannot be changed/deleted.

Once Post Tenure Review template, Resume and optional Narratives have been uploaded, and are ready to move forward, Click on the "Certify for Dept Review" button.

A message will appear for the user to confirm the documents are ready to submit to the next step in the process.

Message

Are you sure the documents are complete and ready for department review? (24000,1063)

OK Cancel

Once the "OK" button is pressed, Post Tenure Review Status will then update to Certified.
 The date will be captured when Certified.

Post Tenure Review

Candidate Empl ID Case Number 7
 Status OPT Year 2023-2024

Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Chair/Director
 *College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director

Certified Date 02/07/2024

Upload Documents

Category

Category	Filename	Added Date/Time	Added By
1 Resume	TestPDFfile.pdf	02/07/24 12:35:39PM	Woods,Adam J
2 Optional Narrative (up to 3)	TEST.pdf	02/07/24 12:35:59PM	Woods,Adam J
3 Post-Tenure Review	UF_PO_PACKET(5).pdf	02/07/24 2:31:52PM	Woods,Adam J

NOTE: All documents on the page at that point will be View Only. No documents at that point can be deleted.

Adding Faculty Annual Evaluation – Department Administrators


Description

ADDING ANNUAL EVALUATIONS AND DEPARTMENT CRITERIA FOR FACULTY MEMBERS

Once the Post Tenure Case is in Certified Status, Department Administrators will have the ability to upload 5 years' worth of Annual Letters of Evaluations, along with any additional Department Criteria for faculty members.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

NavBar: Menu 

- Identify APB Members
- UF Faculty Designee Access
- OPT University Admin
- APB Queries
- Publication Import
- Annual Review Admin
- PTR Department Admin**

As the Department Admin, Select Annual Review Letters and/or Department Criteria from the Upload Documents grid, select Letter(s) and click upload.

Upload Documents

Category

- Annual Review Letters**
- Dean's Letter
- Department Criteria**
- Dept Chair/Director's Letter
- Disciplinary Documentation
- Faculty Response to Dean
- Optional Narrative (up to 3)
- Post-Tenure Review
- Resume

Category	Filename	View
1 Post-Tenur	TEST.pdf	<input type="button" value="View"/>

Once uploaded and no additional documents need to be uploaded for the Faculty member, Department will update the Status on the case from Certified to Department Admin Reviewed.

Candidate	Proctor, Julian J	Empl ID	0177802	Case Number	7
Status	Certified			OPT Year	2023-2024
Department	HLTH PSYCHOLOGY			Chair/Director	Jonathan, David
*College	HLTH PSYCHOLOGY			Dean/Director	Christy, David L
Certified Date					

A dropdown menu is open from the Status field, showing the following options: Certified, College Reviewed, Department Admin Reviewed (highlighted), Department Reviewed, Open, Review Complete, and Withdrawn.

Post Tenure Review

Candidate

Status Department Admin Reviewed ▼

Empl ID

Case Number 7

OPT Year 2023-2024

Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY

*College HP-CLINICAL / HLTH PSYCHOLOGY

Chair/Director

Dean/Director

Certified Date 02/07/2024

Upload Documents

Category ▼

Upload

Category		Filename
1 Resume	View	TestPDFfile.pdf
2 Optional Narrative (up to 3)	View	TEST.pdf
3 Post-Tenure Review	View	UF_PO_PACKET(5).pdf
4 Annual Review Letters	View	TestPDFfile.pdf

Save

Return to Search

NOTE: This will show that their step is complete and ready for the Department Chair to Review.

Adding Chairs Letter – Department Chairs

Description
<p>ADDING CHAIRS LETTER FOR FACULTY MEMBERS</p> <p>Once the Post Tenure Case is in Department Admin Reviewed, the Department Chairs will have the ability to upload their Chairs Letter.</p>

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Chair/Director

In the Upload Documents section, Department Chair can select the Dept Chair/Director's Letter

Select the File Attachment (as PDF) and click upload.

Upload Documents

The screenshot shows a web interface for uploading documents. At the top, there is a section titled "Upload Documents" with a "Category" dropdown menu and an "Upload" button. The dropdown menu is open, showing a list of categories: Annual Review Letters, Dean's Letter, Department Criteria, Dept Chair/Director's Letter (highlighted in blue), Disciplinary Documentation, Faculty Response to Dean, Optional Narrative (up to 3), and Post-Tenure Review. Below the dropdown, there is a table with columns for "Category" and "Filename".

Once Department Chair/Director's Letter has been uploaded, the Department Chair can mark the review as complete by pressing the Chair/Director Review Complete Button.

[Switch User](#)

Post Tenure Review

Candidate Woods,Adam J	Empl ID 87738921	Case Number 7
Status <input type="text" value="Department Admin Reviewed"/>		OPT Year 2023-2024
Department 33070000	HP-CLINICAL / HLTH PSYCHOLOGY	Chair/Director Janicke,David
*College <input type="text" value="33070000"/>	HP-CLINICAL / HLTH PSYCHOLOGY	Dean/Director Virnig,Beth A
Certified Date 02/07/2024		
Chair/Director Reviewed	<div style="background-color: #fff9c4; padding: 2px 5px; border: 1px solid #ccc;">Chair/Director Review Complete</div>	
Dean/Director Reviewed		

A message will appear for the user to confirm the documents are ready to submit to the next step in the process.

Message

Are you sure the department review is complete? (24000,1065)

OK

Cancel

Once the "OK" button is pressed, Post Tenure Review Status will then update to Department Reviewed.
The date will be captured and reflect in the Chair/Director Reviewed Section.

[Switch User](#)

Post Tenure Review

Candidate Woods,Adam J	Empl ID 87738921	Case Number 7
Status Department Reviewed ▼		OPT Year 2023-2024
Department 33070000	HP-CLINICAL / HLTH PSYCHOLOGY	Chair/Director Janicke,David
*College <input type="text" value="33070000"/>	HP-CLINICAL / HLTH PSYCHOLOGY	Dean/Director Vrnlg,Beth A
Certified Date 02/07/2024		
Chair/Director Reviewed 02/08/2024	Chair/Director Review Complete	
Dean/Director Reviewed		

Upload Documents

Category <input type="text"/>	<input type="button" value="Upload"/>
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NOTE: The Department Chair Step is now complete. Dean/Director Step is now ready for Review.

Adding Deans Letter – College Dean/Director

Description

ADDING DEANS LETTER FOR FACULTY MEMBERS

Once the Department Chair/Director has uploaded their Chair's Letter and Case is now in Department Reviewed status, the College Dean can now navigate to the PTR College Dean/Director page to add in their Deans Letter.

Disciplinary Documents can also be uploaded by the Dean at this Step.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR College Dean/Director

The screenshot shows a navigation menu titled "NavBar: Menu" with a gear icon. On the left, there are three sections: "Recently Visited" with a clock icon, "Favorites" with a heart icon, and "Menu" with a hamburger icon. The main content area shows a breadcrumb trail: "Menu > Human Resources > Workforce Development > Faculty Events". Below this, a section titled "Online Promotion and Tenure" contains a list of items, each with a hamburger icon: "OPT Overview and Resources", "Promotion & Tenure Review", "College Dean/Director Review", "UF Faculty Designee Access", and "PTR College Dean/Director".

In the Upload Documents section, College Deans/Directors can select the following document to upload:

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Categories:

Dean's Letter

Disciplinary Documentation

Post Tenure Review

Candidate	[REDACTED]	Empl ID	[REDACTED]	Case Number	7
Status	Department Reviewed			OPT Year	2023-2024
Department	33070000	HP-CLINICAL / HLTH PSYCHOLOGY		Chair/Director	[REDACTED]
*College	33070000	HP-CLINICAL / HLTH PSYCHOLOGY		Dean/Director	[REDACTED]
Certified Date	02/07/2024				
Chair/Director Reviewed	02/08/2024				
Dean/Director Reviewed	Dean/Director Review Complete				

Upload Documents

Category	<input type="text" value=""/>	Upload
	<ul style="list-style-type: none">Annual Review LettersDean's LetterDept Chair/Director's LetterDisciplinary DocumentationFaculty Response to DeanOptional Narrative (up to 3)Post-Tenure Review	
<input type="text"/>	<input type="text"/>	<input type="text"/>
Category		Filename

Once Dean's Letter has been uploaded (and Disciplinary Documentation if needed), the College Dean can mark the review as complete by pressing the Chair/Director Review Complete Button.

Post Tenure Review

Candidate	[REDACTED]	Empl ID	[REDACTED]	Case Number	7
Status	Department Reviewed			OPT Year	2023-2024
Department	33070000	HP-CLINICAL / HLTH PSYCHOLOGY		Chair/Director	[REDACTED]
*College	33070000	HP-CLINICAL / HLTH PSYCHOLOGY		Dean/Director	[REDACTED]
Certified Date	02/07/2024				
Chair/Director Reviewed	02/08/2024				
Dean/Director Reviewed	Dean/Director Review Complete				

Upload Documents

Category	<input type="text"/>	<input type="button" value="Upload"/>
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A message will appear for the user to confirm the documents are ready to submit to the next step in the process.

Are you sure the college review is complete? (24000,1066)

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>
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Once review has completed, the date will be captured and reflect in the Dean/Director Reviewed Section. In addition, the Status will update from Department Reviewed to College Reviewed.

Post Tenure Review

Candidate	[Redacted]	Empl ID	[Redacted]	Case Number	7
Status	College Reviewed			OPT Year	2023-2024
Department	33070000	HP-CLINICAL / HLTH PSYCHOLOGY	Chair/Director	[Redacted]	
*College	33070000	HP-CLINICAL / HLTH PSYCHOLOGY	Dean/Director	[Redacted]	
Certified Date	02/07/2024				
Chair/Director Reviewed	02/08/2024				
Dean/Director Reviewed	02/09/2024				
			Dean/Director Review Complete		

Upload Documents

Category	[Dropdown]	Upload
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NOTE: The Dean/Directors Step is now Complete. The faculties response to the Deans Letter is now ready.

Adding Faculty Response to Deans Letter– Faculty Self Service

Description

ADDING FACULTY RESPONSE TO DEANS LETTER

Faculty will have 5 days to upload their response to the Dean's Letter once the case is College Reviewed Status. This response can be done through the UF Faculty Promotion & Tenure page through the Promotion & Tenure Packet Hyperlink found in HR Self Service.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure

In the Upload Documents section, an option will be present for the candidate to upload their Response to the Dean.

Post Tenure Review

Candidate XXXXXXXXXX Empl ID XXXXXX
Status College Reviewed ▼
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY
*College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY
Certified Date 02/07/2024
Chair/Director Reviewed 02/08/2024
Dean/Director Reviewed 02/09/2024

Upload Documents

Category ▼

- Annual Review Letters
- Dean's Letter
- Dept Chair/Director's Letter
- Disciplinary Documentation
- Faculty Response to Dean**
- Optional Narrative (up to 3)
- Post-Tenure Review
- Resume

Category	View
1 Resume	View
2 Optional N	View

Faculty Response to the Deans letter will be uploaded storing the date in which it was added, and who added it.

Category	Filename	Added Date/Time	Added By
1 Post-Tenure Review	TEST.pdf	02/12/24 4:13:11PM	Bechtold, Kurt M
2 Resume	TestPDFfile.pdf	02/12/24 4:13:31PM	Bechtold, Kurt M
3 Annual Review Letters	TEST.pdf	02/12/24 4:15:28PM	Bechtold, Kurt M
4 Dept Chair/Director's Letter	TEST.pdf	02/12/24 4:21:08PM	Bechtold, Kurt M
5 Dean's Letter	TEST.pdf	02/12/24 4:25:32PM	Bechtold, Kurt M
6 Faculty Response to Dean	TEST.pdf	02/12/24 4:27:25PM	Bechtold, Kurt M

Once review has completed, the date will be captured and reflect in the Dean/Director Reviewed Section. In addition, the Status will update from Department Reviewed to College Reviewed.

Post Tenure Review

Candidate [Redacted] **Empl ID** [Redacted] **Case Number** 7
Status College Reviewed **OPT Year** 2023-2024
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY **Chair/Director** [Redacted]
***College** 33070000 HP-CLINICAL / HLTH PSYCHOLOGY **Dean/Director** [Redacted]
Certified Date 02/07/2024
Chair/Director Reviewed 02/08/2024
Dean/Director Reviewed 02/09/2024 **Dean/Director Review Complete**

Upload Documents

Category [Dropdown] **Upload**

NOTE: The Faculty Response is now Complete. The Deans Assessment to the Faculty response is now ready. If the case is deemed complete, the Department Admin can then update the case to mark the faculties Post Tenure Review as Complete.

Completing Post Tenure Review – Department Administrators

Description

COMPLETING POST TENURE REVIEW CASE

Once the Post Tenure Case has been reviewed by the Dean/Department Admins, the case status can now be updated to reflect "Complete".

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

As the Department Admin, they will be able to confirm all three reviewers (Faculty, Chair and Deans) have completed their reviews by verifying the dates are present and confirm all required document are uploaded.

Once everything has been confirmed, the Department Admin can update the Status on the Case to Complete.

Post Tenure Review

Candidate: [Redacted] Empl ID: [Redacted] Case Number: 7

Status: Review Complete OPT Year: 2023-2024

Department: L / HLTH PSYCHOLOGY Chair/Director: [Redacted]

*College: Certified L / HLTH PSYCHOLOGY Dean/Director: [Redacted]

Chair/Direct: Department Admin Reviewed

Dean/Direct: Department Reviewed

Open

Review Complete

Withdrawn

Upload D

Category: [Dropdown] Upload

NOTE: From College Reviewed Status to Review Complete Status

Department Administrators will be greeted with the following Pop up once they attempt to Save:

Are you sure you are ready to update the review to 'Complete' status? (24000,1067)

OK Cancel

Once saved, the Upload button will now be locked in all areas, including the Faculty Self Service navigations. No other items can be uploaded.

Post Tenure Review

Candidate [REDACTED] Empl ID [REDACTED] Case Number 7
Status **Review Complete** OPT Year 2023-2024
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Chair/Director [REDACTED]
*College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director [REDACTED]
Certified Date 02/07/2024
Chair/Director Reviewed 02/08/2024
Dean/Director Reviewed 02/09/2024

Upload Documents

Category Dept Chair/Director's Letter