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.

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Open the post tenure review document populated with available data such as teaching evaluations, graduate committees and sponsored projects.	
he display of the Packet Template, click Open from the messa	ige window.
ket Template in Protected View, click the Enable Editing butt	on to open for editing.
UF_PT_PACKET.rtf (Protected View) - Word Iternet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.	Enable Editing ×
	Open the post tenure review document populated with available data such as teaching evaluations, graduate committees and sponsored projects. he display of the Packet Template, click Open from the messa ket Template in Protected View, click the Enable Editing butt UF_PT_PACKET.rff (Protected View) - Word ternet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.

Downloading Post Tenure Packet – Annual Review Admin Page

Description

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:

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion and Tenure > Annual Review Admin

Promotion and Tenure Document
OPT Packet Template with Activity
Post Tenure Review
Post Tenure Review with Activity
Annual Report Pilot
Type College of Pharmacy w/IDP 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

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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.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing ×	FILE	TOOLS	VIEW	UF_PT_PACKET.rtf (Protected View) - Word	(3)	-		×
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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
Eind an Existing Value Add a New Value
*Empl ID Q
*Promotion and Tenure Year 2023-2024 Q
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 Open 🗸
NOTE: To create the case number, the page must be saved once created.

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st Tenure Review			
Candidate '	Empl ID Case	e Number <mark>999999</mark>	
Status Open	✓ OPT	Year 2023-2024	
partment 33070000 *College 33070000 Q	HP-CLINICAL / HLTH PSYCHOLOGY Chair/Dire HP-CLINICAL / HLTH PSYCHOLOGY Dean/Dire	ector	
Upload Documents Category	V Upload		
		Personalize Fin	d 🔃 🧱 First 🕢 1 of 1 🕢 Las
Category	Filename	Added Date/Time	Added By

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:

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Candidate	da, Autoria a	Empl ID	Case Number	7	
Status Oper	· · ·		OPT Year 2023-	-2024	
Department 330	70000 HP-CLINICAL/HL	HPSYCHOLOGY	Chair/Director		
College 3307	HP-CLINICAL / HL	TH PSYCHOLOGY	Dean/Director	india a	
ertified Date		Certify for Dept. Review	/		
Upload Docur	nents				
Category		Uplo	ad		
		2			
	Annual Review Letters				
0.1	Dean's Letter				Per
Category	Dept Chair/Director's Letter			Ad	ded
	Disciplinary Documentation				
	Faculty Response to Dean				
	Optional Narrative (up to 3)				
Save Re	Post-Tenure Review				
	Resume				
DTE: You can u orking closely wi cket template can nce Post Tenure	pload it as many times as you l ith your faculty mentor(s) and l nnot be changed/deleted. Review template, Resume and ant Paview" button	ike prior to Certifying Department OPT Adm optional Narratives ha	for Department Rev inistrator prior to ce ve been uploaded, as	view. How rtification. nd are read	ever, we strongly recomme Once certified, the origina ly to move forward, Click o
e Ceruiy for De	pt Kevlew button.				
message will apj	pear for the user to confirm the	documents are ready	o submit to the next	t step in the	e process.
Message					
Are you sure ti	he documents are complet	e and ready for dep	artment review?	(24000,1	063)

Status Certified	Emp	pl ID Case Number 7		
Certified	v	OPT Year 2023-2024		
Department 33070000 HP-CLI	NICAL / HLTH PSY	CHOLOGY Chair/Director		
*College 33070000 Q HP-CLI	NICAL / HLTH PSYC	CHOLOGY Dean/Director		
rtified Date 02/07/2024				
	Certify	y for Dept. Review		
Upload Documents				
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Category Post-Tenure Review	~	Opioad		
			Personalize Find	First 🕚 1-3 of 3 🕑 Las
			Added Date/Time	Added By
Category		Filename	Audeu Dater IIIIe	
Category 1 Resume	View	Filename TestPDFfile.pdf	02/07/24 12:35:39PM	Woods,Adam J
Category 1 Resume 2 Optional Narrative (up to 3)	View View	Filename TestPDFfile.pdf TEST.pdf	02/07/24 12:35:59PM 02/07/24 12:35:59PM	Woods,Adam J Woods,Adam J
Category 1 Resume 2 Optional Narrative (up to 3) 3 Post-Tenure Review	View View View	Filename TestPDFfile.pdf TEST.pdf UF_PO_PACKET(5).pdf	02/07/24 12:35:39PM 02/07/24 12:35:59PM 02/07/24 2:31:52PM	Woods,Adam J Woods,Adam J Woods,Adam J

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.

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NAVIGATION Login into myUFL and navigate to:

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

NavBar: Men	u		ť
0		Identify APB Members	
Recently Visited		UF Faculty Designee Access	
c		OPT University Admin	
Favorites		APB Queries	
=		Publication Import	
Menu	= ,	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 Docum	ents				
Category		~	Upl	load	
	Annual Review Letters	_			
	Dean's Letter				
	Department Criteria				
	Dept Chair/Director's Letter				
	Disciplinary Documentation				
Category	Faculty Response to Dean			Filename	
Category	Optional Narrative (up to 3)			rnename	
	Post-Tenure Review	16]	TEOT K	
1 Post-Tenu	I ^{II} Resume	view		TEST.pat	

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Once uploaded an case from Certifie	id no additional documents need to be up ed to Department Admin Reviewed.	loaded for the Faculty member	Department will update the Status on the
Candidate	Woods, Aslam J	Empl ID	Case Number 7
Status	Certified ~	Internet	OPT Year 2023-2024
Department	Certified College Reviewed	HLTH PSYCHOLOGY	Chair/Director
*College	Department Admin Reviewed	HLTH PSYCHOLOGY	Dean/Director
Certified Date	Department Reviewed Open Review Complete Withdrawn	₩ A	

Status Department Admin Reviewed partment 33070000 *College 33070000 *College 33070000 *HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director
partment 33070000 HP-CLINICAL / HLTH PSYCHOLOGY *College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY bean/Director
*College 33070000
tified Date 02/07/2024 Upload Documents Category Annual Review Letters V Upload Eilename
Category
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

Adding Chairs Letter – Department Chairs

Description

ADDING CHAIRS LETTER FOR FACULTY MEMBERS

Once the Post Tenure Case is in Department Admin Reviewed, the Department Chairs will have the ability to upload their Chairs Letter.

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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

	Annual Review Letters Dean's Letter Department Criteria			
Q	Dept Chair/Director's Letter Disciplinary Documentation	2		
Category	Optional Narrative (up to 3)		Filename	
_	Post-Tenure Review		ייייייייייייי	

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.

Şwitch User		
Post Tenure Review		
Candidate Woods,Adam J Status Department Admin Reviewed Department 33070000 HP-CLINICAL / *College 33070000 HP-CLINICAL	Empl ID 87738921	Case Number 7 OPT Year 2023-2024 mair/Director Janicke,David
Certified Date 02/07/2024 Chair/Director Reviewed Dean/Director Reviewed	Chair/Director Review Con	nplete
A message will appear for the user to confirm the	documents are ready to submi	t to the next step in the process.
Message		
Are you sure the department review is	complete? (24000,106	5)
OK Cancel		

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Once the "OK" button is pressed, Post Tenure Review Status will then update	e to Department Reviewed.
The date will be captured and reflect in the Chair/Director Reviewed Section.	
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Quille User	
Post Tepure Paview	
Candidate Meade Adam I Empl ID 97729004	Case Number 7
Status Department Reviewed	
	OP1 Year 2023-2024
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Cha	ir/Director Janicke,David
*College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Dea	n/Director Virnig,Beth A
Certified Date 02/07/2024	
Chair/Director Reviewed 02/08/2024 Chair/Director Review Comp	olete
Dean/Director Reviewed	
Upload Documents	
Category Vpload	
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 NavBar: Menu 6 Menu > Human Resources > Workforce Development > Faculty Events Recently Visited **Online Promotion and Tenure OPT** Overview and Resources Favorites **Promotion & Tenure Review** College Dean/Director Review Menu **UF Faculty Designee Access** PTR College Dean/Director In the Upload Documents section, College Deans/Directors can select the following document to upload:

Post Tenure Review User Guide, Page 15 of 23

Categories:							
Dean's Letter							
Disciplinary D	ocumentation	1					
Post Tenu	ire Review						
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Status	Department	Reviewed ~			OPT Year	2023-2024	
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*College	33070000	HP-CLINICAL	/ HLTH PSYCHOLOGY	,	Dean/Director	Service and the service of the servi	
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Chair/Direct	or Reviewed	02/08/2024					
Dean/Direct	or Reviewed		Dean/Directo	r Review Co	mplete		
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out							
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	Dept Disci	Chair/Director's Letter					
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Cat	egory Post-	Tenure Review		Filena	ime		
Once Dean's L complete by pr	etter has been ressing the Cl	n uploaded (and Discipl nair/Director Review Co	inary Documentation i omplete Button.	if needed), t	he College Dear	n can mark the review as	s
			1				

Post Tenu	Ire Review						
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*College	33070000	HP	-CLINICAL / HLTH	I PSYCHOLOG	Y	Dean/Director	No. of Concession, Name
Ce	ertified Date	02/07/2024					
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Once review has will update from	s completed, th 1 Department l	ne date will be capture Reviewed to College F	d and reflect in the De Reviewed.	ean/Director I	Reviewed Sectior	n. In addition,	the Status
Post Tenu	ire Review						
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Department	33070000	HP-CLINICAL	/ HLTH PSYCHOLOG	ΥY	Chair/Director	And the second	
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Ce Chair/Direct Dean/Direct	ertified Date or Reviewed or Reviewed	02/07/2024 02/08/2024 02/09/2024	Dean/Direc	tor Review Co	omplete		
Upload D	ocuments						
Cate	gory		~	Upload			
NOTE: The De	an/Directors S	tep is now Complete.	The faculties response	e to the Deans	s Letter is now re	ady.	

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.

Candidat Status Departmer *Colleg	te College nt 33070 le 33070 Certified I	e Review 000 000 Date	ved	HP-CLINI	∽ CAL / H	Empl ID	
Candidat Status Departmer *Colleg	te College nt 33070 le 33070 Certified I	e Review 000 000 Date	ved	HP-CLINI	∽ CAL / H	Empi ID	
Status Departmer *Colleg	certified I	e Review 000 000 Date	ved	HP-CLINI	CAL / H	LTH PSYCHOLOGY	(
Departmer *Colleg	nt 33070 e 33070 Certified I	000 000 Date		HP-CLINI	CAL / H	LTH PSYCHOLOGY	r
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Dean/Dire	ector Revi	ewed	02/09/20)24			
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		Annual	Review	Letters			
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1 R	tesume	Optiona	al Narrati	ive (up to :	3)	View	
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Category			Filename	Added Date/Time	Added By
1 Post-Tenure F	Review	View	TEST.pdf	02/12/24 4:13:11PM	Deformaciero
2 Resume		View	TestPDFfile.pdf	02/12/24 4:13:31PM	Participant, Sana
3 Annual Review	w Letters	View	TEST.pdf	02/12/24 4:15:28PM	Engran, Service M
4 Dept Chair/Di	rector's Letter	View	TEST.pdf	02/12/24 4:21:08PM	Realized Street P
5 Dean's Letter		View	TEST.pdf	02/12/24 4:25:32PM	Picture Institi
6 Faculty Respo	onse to Dean	View	TEST.pdf	02/12/24 4:27:25PM	Fortubura, Sona
Post Tent	ure Review				
Post Tenu Candidate	ure Review		Empl ID	Case Nun	nber 7
Post Tenu Candidate Status	ure Review	ewed	Empl ID	Case Num OPT Year	nber 7 2023-2024
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Post Tenu Candidate Status epartment *College	Ire Review College Revie 33070000 33070000	ewed HP-CLIN	Empl ID	Case Nun OPT Year Chair/Director Dean/Director	nber 7 2023-2024
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Faculty Response to the Deans letter will be uploaded storing the date in which it was added, and who added it.

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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.

Candidate Empl ID Case Number 7 Status Review Complete OPT Year 2023-2024 Department Certified I / HLTH PSYCHOLOGY Chair/Director Image: Chair/Director Im		ire Review					
Status Review Complete L/ Department Certified L / HLTH PSYCHOLOGY Chair/Director College Review Complete L / HLTH PSYCHOLOGY Dean/Director Department Admin Reviewed Department Reviewed Department Reviewed Department Reviewed Open Department Reviewed Department Reviewed College Review Complete Upload Withdrawn Upload Upload OTE: From College Reviewed Status to Review Complete Status partment Administrators will be greeted with the following Pop up once they attempt to Save: re you sure you are ready to update the review to 'Complete' status? (24000,1067) OK Cancel	Candidate	Review Complete	N	Empl II		Case Nun	nber 7
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Are you sure you are ready to update the review to 'Complete' status? (24000,1067)	OTE: From C epartment Adı	ollege Reviewed Sta ninistrators will be §	atus to Review Co greeted with the f	omplete Status following Pop up once	e they attempt t	o Save:	
OK Cancel	Are you sure	e you are ready t	o update the r	eview to 'Complet	te' status? (2	4000,1067)	
			OK	Cancel			

Once saved, the be uploaded.	Upload button	will no	w the locked in all areas, including the Faculty Self S	ervice navigations. No other items can
Post Tenu	Ire Review			
Candidate	The state of the state		Empl ID	Case Number 7
Status	Review Com	plete	• •	OPT Year 2023-2024
Department	33070000		HP-CLINICAL / HLTH PSYCHOLOGY	Chair/Director
*College	33070000	Q	HP-CLINICAL / HLTH PSYCHOLOGY	Dean/Director
С	ertified Date	02/0	7/2024	
Chair/Direc	tor Reviewed	02/0	8/2024	
Dean/Direc	tor Reviewed	02/0	9/2024	
Upload D	ocuments			
Cate	egory Dept	Chair/D	irector's Letter V Upload	-