OPT College Administrator:  
Instruction Guide to accompany simulation

This simulation will take you through the online promotion and tenure process in myUFL, for the College Administrator role.

In this example Dr. Andy Mann, an Assistant Professor in the Music Department, has applied for promotion and tenure.

You will look at the procedure for reviewing the Candidate Packet and adding additional documents through Section 33-Further Information. You will also identify the Dean (and Designee) and the College Review Committee and see how to enter the assessments received from the review process.

Note: To avoid any issues with pop-ups, please turn the Pop-Up Blocker Off on the machine you are using. If you need assistance with this, please contact the UF Help Desk on 352-392-4357.

<table>
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| 1.   | SECTION 1  
Add Documents to Candidate Packet |
|      | In this first section we will review the online Promotion & Tenure screens in myUFL.  
We will look at how to view the Packet and add documents through Section 33 - Further Information. |
| 2.   | Log on to myUFL using your gatorlink username and password.  
Click the Main Menu link. |
| 3.   | Click the Workforce Development link. |
| 4.   | Click the Faculty Events link. |
| 5.   | Click the Online Promotion and Tenure link. |
| 6.   | Click the OPT College Admin link. |
7. You can search for the Candidate using any of the fields shown on this screen, or you can use the **Search** button to show all Candidates currently in the promotion and tenure process.

   In this example click the **Search** button.

8. This example screen shows how the search could look. Note that all the current Candidates in your College will show in the search results. You can then select the Candidate from the list.

   This is also a useful way to check, or view, the status of each Packet. In our example we can see that the status for Dr. Mann is College Admin Review (arrowed).

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<tr>
<td>9.</td>
<td>The search shows the Packet Cover Sheet for Dr. Mann. Note the <strong>Review Status</strong> shows <strong>College Admin Review</strong>. The Review Status changes at each stage in the process. You can hover over the Review Status to see explanation and where the Packet is in the Promotion &amp; Tenure process.</td>
</tr>
<tr>
<td></td>
<td>Point to the Review Status: <strong>College Admin Review</strong>.</td>
</tr>
<tr>
<td>10.</td>
<td>When you hover over the Review Status, a screen will show with an explanation of the status message and where the Packet is in the process (as shown here).</td>
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<td>11.</td>
<td>Next we will review the Packet. Click the <strong>Packet</strong> tab.</td>
</tr>
<tr>
<td>12.</td>
<td>On this screen you can view and upload documents. You can see that the Faculty Packet, and other documents uploaded by the Department, are available for review, as they are shown in the <strong>Documents</strong> section. Note that the biosketch and letter can only be viewed by the Candidate if he/she has <strong>not</strong> waived their right to see them. You can choose to look at individual documents through the <strong>View</strong> button or the complete Packet through <strong>View All</strong>. You can also see further details on the documents, by clicking the <strong>More Detail tabs</strong> (arrowed).</td>
</tr>
<tr>
<td></td>
<td>In this example, click the <strong>View All</strong> button.</td>
</tr>
</tbody>
</table>
13. This screen shows the Packet table of contents. You can scroll through the pages or **highlight and click a title to see a specific page**.

14. Four sections will automatically populate (sections 5, 7, 10 & 12).

   This screen shows **section 5** (Educational Background) and **section 7** (Year Tenure/Permanent Status was Awarded at The University of Florida).

   Note that both sections autopopulated in the Template, from the Candidate's record in the Academic Personnel Office database.

15. This screen shows **section 10** (Teaching Evaluations) and **section 12** (Graduate Committee Activities). Again, these populated in the Template from the Candidate's records.

16. Let's look at how to add additional documents through Section 33 - Further Information.

   Click the **Category drop down list**.

17. You can see the options available to you for posting.

   In this example select **Further Information**.

18. Click the **Subject drop down list**.

19. The list shows the options available.

   In this example select **27 - Honors**.

20. To add a comment click in the **Comment field**.

21. In this example enter "**Teacher of Year omitted in pkt**".

22. Click the **Update Type drop down list**.

23. In this example select **New**.

24. Click the **Upload button**.

25. To find your document click the **Browse button**.
26. **Note that all documents to be uploaded must be .pdf files.**

In this example select the **HonorsAMann.pdf**.

27. Click the **Upload** button.

28. **This alert message states that the document you want to upload will not be added to the Packet until you have selected Add Document in the documents section.**

   We will look at that next. Click **OK**.

29. Click the **scrollbar**.

30. **You can view, delete, or add your document.**

    In this example, you have uploaded the document in error, therefore, click the **Delete** button.

31. You will see the document has been deleted from the list.

    Click the **Save** button.

### Step | Action
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32. **Note that the Candidate must approve all documents added through Section 33 - Further Information. An email will be sent to the Candidate advising that a document awaits approval and action is required.**

    Before we move on through the process, let's look at the Event Log tab, which is accessible from this page.

    Click the **scrollbar**.

33. **To see the packet status 'at a glance', click the Event Log tab.**

34. **From this screen you can see a log of all the actions taken so far and the date, and by whom. You can download the log as an excel spreadsheet, if required. This screen can be viewed at any time from the Event Log tab.**

    Let's now move on to identifying the College Review Committee.
### SECTION 2
Identify College Dean/Director & Designee
Add College Review Committee

In this previous section we looked at how to review the Packet and add documents through Section 33 - Further Information.

We will look at how to identify the Dean/Director and Designee, and add the College Review Committee.

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<tr>
<td>36.</td>
<td>You do not need to log out of myUFL to carry on with the process. By using the breadcrumb trail at the top of the page you can select your new navigation. Let's try this out. Hover over the <strong>Workforce Development</strong> link.</td>
</tr>
<tr>
<td>37.</td>
<td>Hover over the <strong>Faculty Events</strong> link.</td>
</tr>
<tr>
<td>38.</td>
<td>Click the <strong>Online Promotion and Tenure</strong> link.</td>
</tr>
<tr>
<td>39.</td>
<td>Click the <strong>Identify Dean/Review Committee</strong> link.</td>
</tr>
<tr>
<td>40.</td>
<td>To identify the Dean and College Review Committee you first have to ensure the relevant <strong>College</strong> is in the system. Click in the <strong>Department</strong> field.</td>
</tr>
<tr>
<td>41.</td>
<td>Note that the ID required is the <strong>College ID</strong> and not the Candidate's department. In this example enter &quot;13000000&quot;.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>43.</td>
<td>In this example the College details are not shown (message arrowed) and therefore must be added. Click the <strong>Add a New Value</strong> tab.</td>
</tr>
<tr>
<td>44.</td>
<td>Click in the <strong>Department</strong> field.</td>
</tr>
<tr>
<td>45.</td>
<td>Enter the College ID (not the Candidate's department ID). In this example enter &quot;13000000&quot;.</td>
</tr>
</tbody>
</table>
46. **Click the Add button.**

47. **The College ID is showing.** In this example, 13000000 COLLEGE - FINE ARTS.
You can now enter the Dean/Director details.

**Click in the Dean/Director field.**

48. **Enter the Dean/Director UFID.**

In this example enter "**12345678**".

49. **You can see the Dean/Director name has now been populated.**
To add a Designee you can enter the Employee ID or name.

In this example, enter "**Sally Ellis**".

50. **The Designee has now populated.**
Let's move on to enter the College Review Committee members. You can use the magnifying glass to look up and select your Reviewers, or you can enter the employee ID.

In this example, click in the **Employee ID** box.

51. **Add the Employee ID.** In this example, enter **66554433**.

52. **The first Reviewer is added.**
To add the next Reviewer, click the **+ button.**

53. **Click in the Employee ID box.**

54. **Enter the Employee ID.** In this example enter **44332211**.

55. **You can see the next Reviewer has been added.** Continue adding your Reviewers using the **plus sign** until you have the full Committee entered in the system.

**Note that you need only identify the College Review Committee once per current year, for all the Candidates in your College.**
56. This screen shows the Dean, Designee and four Review Committee Members have been identified.

Click the **Save** button.

57. The last stage is to certify the Packet so that it moves to the College Review Committee for the viewing and assessment process.

Once again, you can use the breadcrumb trail to navigate.

Click the **Workforce Development** link.

58. Click the **Faculty Events** link.

59. Click the **Online Promotion and Tenure** link.

60. Click the **OPT College Admin** link.

61. To find the Candidate you can search using any of the fields shown, or you can use the Search button to show all current Candidates within the College.

In this example click the **Search** button.

62. In this example the search brought up one Candidate, Dr Andy Mann. This is the Packet you need to certify.

Click the **Packet** tab.

63. You can view the Packet and add any further documents required through Section 33 - Further Information.

When you are satisfied the Packet is ready to certify, click the **Certify for College Review** button.

64. Click the **OK** button.

65. This message tells you that an email will now be sent to the College Review Committee.

Click the **OK** button.
| 66. | **SECTION 3**  
**Enter College Committee Review Assessment Results**  
In this previous section we looked at how to identify the College Review Committee, the Dean/Director and a Designee.  
We will now review the procedure to add the College Review Committee assessment results. |
| 67. | This is an example of the email sent to the College Review Committee, when you have certified the Packet for review.  
Let's now assume the review has taken place and you are ready to enter the assessment results in myUFL. |
| 68. | To enter the College Review Committee assessment log on to myUFL.  
Click the **Main Menu** link.  
Click the **Workforce Development** link.  
Click the **Faculty Events** link.  
Click the **Online Promotion and Tenure** link.  
Click the **OPT College Admin** link.  
Click the **Search** button to find your Candidate. |
| 71. | In our example, the search shows the Cover Sheet for the Candidate, Dr. Mann.  
You can now enter the College Review results.  
To reach the College assessment results section, click the **scrollbar**. |
| 75. | First, enter the results for **Tenure**.  
In this example, click in the **Meets Criteria** box.  
In this example enter "4". |
| 76. | When you have completed the Tenure assessment results, you can move on to the **Promotion** results.  
In this example click the **Meets Criteria** box.  
In this example enter "4." |
### 79. When you have completed entering the results, click the **College Committee Assessment Complete** button.

Note that if you entered an incorrect number of assessments versus the number of Committee Members, you will be advised through an alert message. In this case you can go back and amend the assessments to correct this error.

| College Committee Assessment Complete |

### 80. The alert message tells you an email has been sent to the **Candidate** stating that the results of the College Review Committee assessment have been entered.

**Note that any further changes/additions to the results can only be made by clicking the plus/minus signs (arrowed).** This will add/delete a row within the College Promotion & Tenure Individual Assessments section.

Click the **OK** button.

| OK |

### 81. Click the **Save** button.

| Save |

### 82. This is an example of the email to the Candidate, stating that the College Review Committee assessment results have been posted. The Candidate can choose to respond to the results and if so you will receive notification via email.

The Packet will automatically move to the next stage after 10 days if the Candidate does not respond.

The **Dean/Director** will then upload the evaluative letter. Once again, the Candidate can choose whether to respond. When the final Dean/Director's letter has been posted, the Dean/Director's endorsement recommendation will be uploaded.

Let's now look at the Packet Cover Sheet to see the endorsement.

### 83. The Cover Sheet shows the review status is Dean/Director Assessment.

Click the **scrollbar** to view the endorsement decision.

### 84. Here you can see the Dean/Director's endorsement statement.
The Packet now moves to the University Administrator for review and certification and is then routed to the Academic Personnel Board and Presidential Review.

Note that you can continue to add documents to the Packet through Section 33 - Further Information until University Administration advises that the review process is complete.

The recommendation decision for **Promotion** will be advised (by letter) by the President. The recommendation decision for **Permanent Status** or **Tenure** will be decided by the University Board of Trustees and advised (by letter) by the President.

**End of Procedure.**