

ADDING DOCUMENTS AND CERTIFYING PACKET

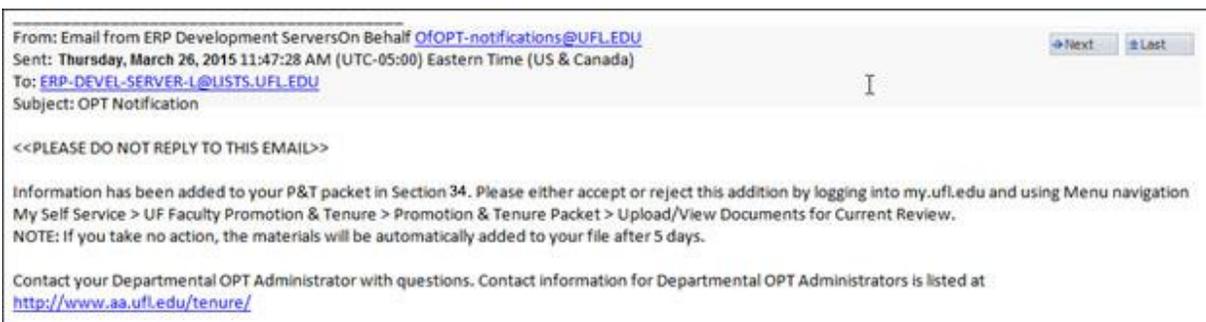
You may need to add additional documents to the Candidate Packet once it reaches the College level. Any documents added at this point will appear in Section 34 – Further Information and will require Candidate approval.

NOTE: It is important not to add bio-sketches or evaluation letters until the Candidate has made his/her waiver decision.

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

EMAIL NOTIFICATION

This is the example of the email that is sent to the Candidate notifying him/her that documents have been added to Section 34 of the Packet and that action is required.



NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion and Tenure.

Click the **OPT College Admin** link.

SEARCHING FOR THE CANDIDATE

1. On the OPT College Admin screen, enter the appropriate search criteria to bring up the desired Candidate.
2. Click the **Search** button.
3. Select the desired Candidate row.

Search Results

View All First 1 of 1 Last

Set ID	Case Number	Empl ID	Promotion and Tenure Year	Department ID	Name	Last Name	OPT Review Status	Status
UFLOF	120120	03972700	2012-2013	13030000	Poole, Gene	Poole	College Admin	Coll. Admin Review

NOTE: If only one record is found, it will open automatically.

ADDING DOCUMENTS

- Click on the **Packet** tab.

Promotion & Tenure Cover Sheet | Dept Review | **Packet** | Event Log

Candidate **Poole, Gene** Empl ID **85200000** Promotion and Tenure Year **2014-2015**
 Review Status **College Admin Review** Case Number **140264**

Certify for College Review
View Candidate's Template
View All

Upload Documents

Category Subject Upload

Comment

From this screen you can view the documents that have already been added by either clicking the View button next to the associated document in the Documents section or by clicking View All button to see all the documents together.

- Click **View All** button.

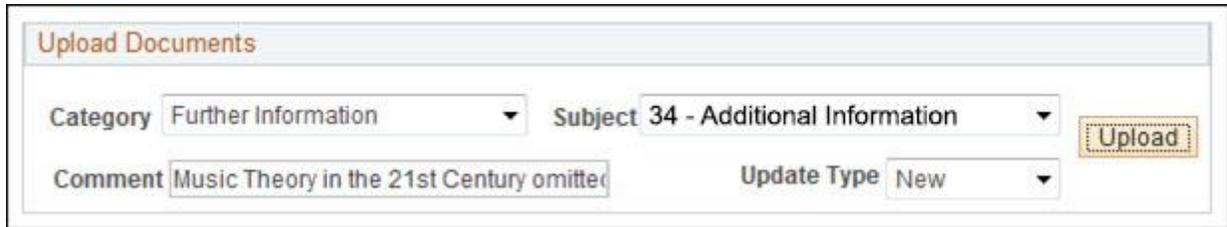


Online Promotion and Tenure

Cover Sheet.....	2
Faculty Packet: Faculty Packet.....	3
P&T Criteria: 08 - Tenure & Prom. Criteria.....	33
Letter: 29 - Chair's Letter.....	46
Letter: 31 - Sample Letter.....	59
Letter: 32 - Biosketch and Letter.....	72
Annual Evaluation: 33 - Annual Evaluations.....	85
Further Information: 34 - Publications.....	98
Response: Department Review.....	111

NOTE: This page will open in a separate browser window. Click the Browser's Close button to return to the OPT System.

6. Click the **Category** drop down field and choose **Further Information**.
7. Click the **Subject** drop down field and choose the appropriate subject of the document you are adding.
8. Enter comments explaining the added document in the **Comment** field.
9. Click the **Update Type** dropdown field and indicate whether this document is a new one or a correction.



The screenshot shows a form titled "Upload Documents". It contains the following fields and controls:

- Category:** A dropdown menu with "Further Information" selected.
- Subject:** A dropdown menu with "34 - Additional Information" selected.
- Comment:** A text input field containing "Music Theory in the 21st Century omitted".
- Update Type:** A dropdown menu with "New" selected.
- Upload:** A button with a dashed border.

10. Click the **Upload** button to find and attach the additional document.
11. If your browser initially blocks the addition of the document, click the **Open** button from the message window.
12. Click **Browse...** button.
13. Find and select the desired file you wish to add.
14. Click **Open** button.
15. Click **Upload** button.
16. Click **OK** to the message that indicates this uploaded document will not officially be added to the Packet until you click the Add Document button.
17. Scroll down, if needed.
18. Click **Add Document** button.
19. Click **OK** to the message that indicates an email will be sent to the Candidate and he/she must approve the addition.
20. This is an example of the email that is sent to the Candidate:



VIEWING THE EVENT LOG

The Event Log displays all actions, when those actions occurred and those who completed those actions to the Packet since it opened.

21. Click **Event Log** button.



The screenshot shows a web interface with four tabs: "Promotion & Tenure Cover Sheet", "Dept Review", "Packet", and "Event Log". The "Event Log" tab is highlighted in yellow. Below the tabs, the following information is displayed:

Candidate	<u>Poole, Gene</u>	Empl ID	85200000	Promotion and Tenure Year	2014-2015
Review Status	<u>College Admin Review</u>	Case Number	140264		

22. View the **Event Log** as desired.

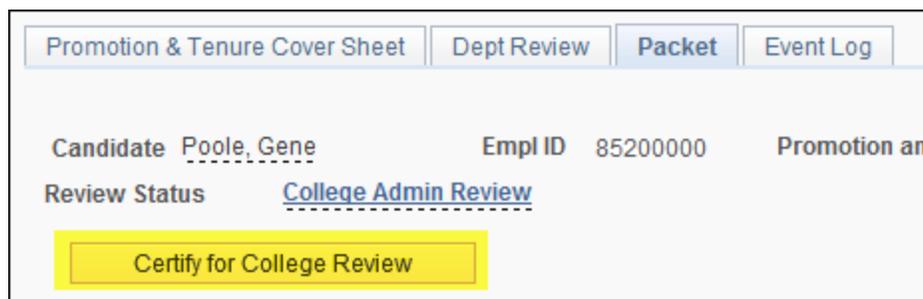
NOTE: This log is available at any time via the Event Log tab and you can also download this log as an Excel file, if desired.

CERTIFYING THE PACKET

Once all needed documents have been reviewed and added and you are ready to move the Packet to the next level, you will certify the Packet.

23. Click the **Packet** tab.

24. Click the **Certify for College Review** button.



The screenshot shows the same web interface as above, but with the "Packet" tab selected. A yellow box highlights the "Certify for College Review" button located below the candidate information.

25. Click the **OK** button.

26. Click **OK** to the message indicating an email has been sent to those on the College OPT Faculty Review Committee indicating the Packet is now available to them.

NOTE: The Review Status has changed to **College Faculty Review** and the Certify for College Review button is now inactive.