

## UPLOADING AND CERTIFYING YOUR TEMPLATE PACKET

After downloading, accurately completing, and saving your packet template as a .pdf file, you will upload it back into the OPT system. Note that you can upload it as many times as you like prior to certification. 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, and all changes will have to be made to Section 34.

As soon as your Department OPT Administrator tells you that you have been assigned a case number in the OPT system, you should enter your waiver decision within the OPT system. Once this decision is made, you can upload and certify your packet template, upload & view additional documents, and packet details, and certify your packet.

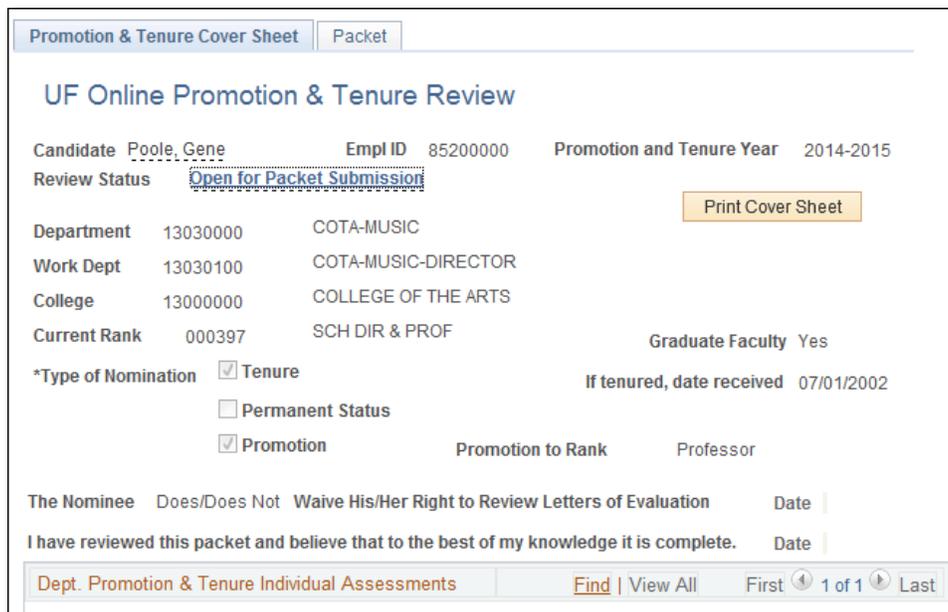
### NAVIGATION

Login into myUFL and navigate to:

**Nav Bar > Main Menu > My Self Service > Faculty Promotion & Tenure**

Click the **Promotion & Tenure Packet** link. Then click the **Promotion & Tenure Cover Sheet** tab.

The Cover Sheet contains pertinent details on your packet. This screen contains packet review status, your department & college, type of nomination, waiver choice and date, the date you certify the packet, department/college review assessment results and chair/director/dean endorsements.



The screenshot shows the 'Promotion & Tenure Cover Sheet' interface. At the top, there are two tabs: 'Promotion & Tenure Cover Sheet' (selected) and 'Packet'. Below the tabs is the title 'UF Online Promotion & Tenure Review'. The main content area displays candidate information: Candidate Name (Poole, Gene), Empl ID (85200000), and Promotion and Tenure Year (2014-2015). The Review Status is 'Open for Packet Submission', with a 'Print Cover Sheet' button to the right. Below this, departmental information is listed: Department (13030000 - COTA-MUSIC), Work Dept (13030100 - COTA-MUSIC-DIRECTOR), and College (13000000 - COLLEGE OF THE ARTS). Current Rank is 000397 (SCH DIR & PROF) and Graduate Faculty is Yes. Under '\*Type of Nomination', 'Tenure' and 'Promotion' are selected with checkboxes, while 'Permanent Status' is not. 'If tenured, date received' is 07/01/2002. The 'Promotion to Rank' is Professor. At the bottom, there are fields for 'The Nominee Does/Does Not Waive His/Her Right to Review Letters of Evaluation' and 'I have reviewed this packet and believe that to the best of my knowledge it is complete.', both with 'Date' input fields. A navigation bar at the very bottom includes 'Dept. Promotion & Tenure Individual Assessments', a 'Find' button, 'View All', and pagination controls showing '1 of 1'.

## REVIEW STATUS

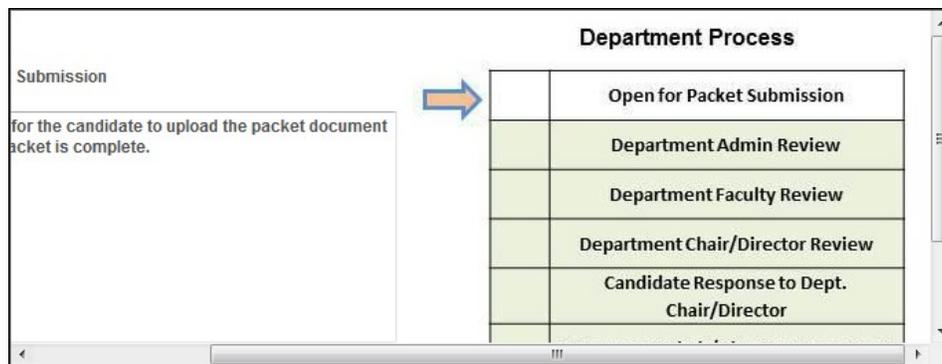
By default, your packet will be in an “Open for Packet Submission” status.

There are eight packet status levels which you can observe:

- Open for Packet Submission
- Department Admin Review
- Department Faculty Review
- Department Chair/Director Review
- Candidate Response to Dept. Chair/Director
- Department Chair/Director Assessment
- College Faculty Review
- Dean/Director Review
- Candidate Response to Dean/Director
- College Dean/Director Assessment
- University Level

After passing the final departmental status level, your packet is released to the college level.

**NOTE:** Notice you can mouse over the Review Status link to view the eight available status levels.



1. Click the **Packet** tab.



### Waiver Statement

You must indicate whether you do or do not waive your right to review letters of evaluation submitted as part of your packet submission. Until this step is completed, the department admin cannot solicit the evaluation letters or upload bio-sketches.



2. Click the **Submit** button after making your choice.  
**NOTE:** Your waiver decision cannot be changed once submitted.

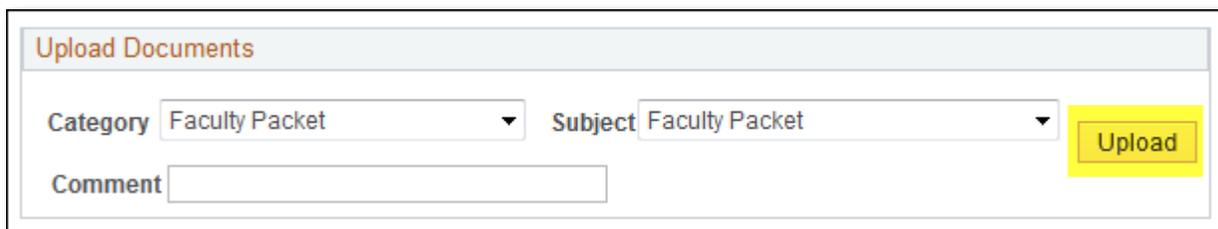


Notice that the Submit button will grey out once you have submitted your decision.

## UPLOADING PACKET TEMPLATE

Once you have made your waiver decision you can now upload your packet template.

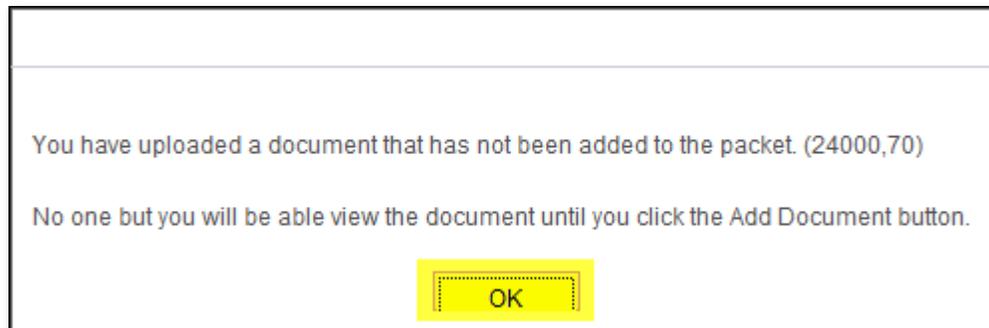
3. Click the **Category** drop down field in the Upload Documents section and choose the **Faculty Packet** option (this may be the default option).
4. Click the **Subject** drop down field and choose the **Faculty Packet** option (this may be the default option).
5. Click the **Upload** button.



6. Click the **Browse** button and select the .pdf packet template file.
7. Click the **Upload** button.

**NOTE:** You will receive a message notifying you that the uploaded document must be officially added to the packet.

- Click the **OK** button.



- The Faculty Packet should now appear in the Review Documents section.

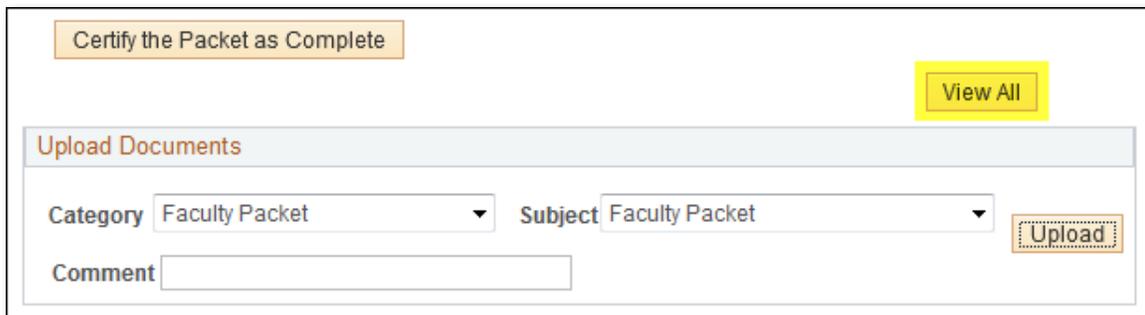
Review Documents		Personalize   Find   		First	1 of 1	Last
Category	Subject	Comment	Approved	Update Type		
1 Faculty Packet	Faculty Packet		n/a	<b>View</b>	Delete	Add Document

- If you wish to view the packet after uploading it, simply click the **View** button. You can also delete any added document by clicking the **Delete** button if necessary.
- Click the **Add Document** button to officially add the document to your Faculty Packet.  
**NOTE:** Only you will be able to view the document until you click the **Add Document** button. Additionally, you cannot certify your packet until all documents have been officially added.

## VIEWING ALL DOCUMENTS

The View All button will display all currently uploaded documents into one table of contents. This document will allow you to scroll to see all documents or you may click on each document title to immediately go to that item.

- Click the View All button to view all documents currently uploaded.

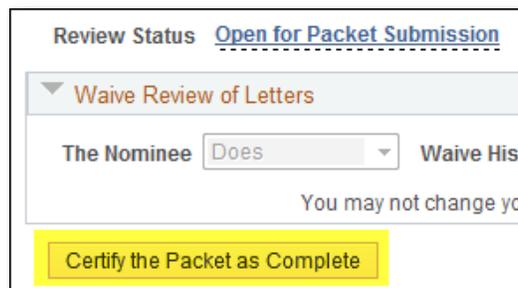


<b>UF UNIVERSITY of FLORIDA</b>	<b>Online Promotion and Tenure</b>
Cover Sheet.....	2
Faculty Packet: Faculty Packet.....	3

**CERTIFYING FACULTY PACKET**

Once you have made your waiver statement, uploaded and added all necessary documents, and done a final review for accuracy, you will certify the packet as complete. Once you certify the packet, the Review Status will change to Department Admin Review and it will move to the department admin level. Once at this level it will be available for the department admin review & certification process.

13. Click the **Certify the Packet as Complete** button.



Review Status [Open for Packet Submission](#)

▼ Waive Review of Letters

The Nominee  Waive His/

You may not change yo

**Certify the Packet as Complete**

14. Click the **OK** button.
15. Click **OK** button to the department admin notification email notice.

**NOTE:** An automatic email will be sent to your department admin notifying him or her that you have certified your packet and it is now ready for review.

Department admin email notification:

From: Email from ERP Development Servers On Behalf [OfOPT-notifications@UFL.EDU](mailto:OfOPT-notifications@UFL.EDU)  
 Sent: Wednesday, March 25, 2015 11:36:05 AM (UTC-05:00) Eastern Time (US & Canada)  
 To: [ERP-DEVEL-SERVER-L@LISTS.UFL.EDU](mailto:ERP-DEVEL-SERVER-L@LISTS.UFL.EDU)  
 Subject: OPT Notification

Poole, Gene has certified a P&T packet for review.

Note that you can work off-line with your Department OPT Administrator prior to certification until you are

satisfied with the packet. The return step described here provides a final avenue for changes to the packet in case the Department OPT Administrator finds an overlooked error that needs correcting prior to certification.

Your Department OPT Administrator will now carefully review your packet for accuracy and completeness. If there are any areas that need your attention, he or she will return the packet to you in the system and notify you offline of the needed edits/corrections.

If corrections are needed, the OPT system will generate a generic email to tell you the packet has been returned.

From: Email from ERP Development Servers On Behalf Of [OPT-notifications@UFL.EDU](mailto:OPT-notifications@UFL.EDU)  
Sent: Thursday, March 26, 2015 2:55:31 PM (UTC-05:00) Eastern Time (US & Canada)  
To: [ERP-DEVEL-SERVER-L@LISTS.UFL.EDU](mailto:ERP-DEVEL-SERVER-L@LISTS.UFL.EDU)  
Subject: OPT Notification

<<PLEASE DO NOT REPLY TO THIS EMAIL>>

The Departmental OPT Administrator has reviewed your P&T packet and returned it for additions or corrections. Please log on to the OPT System to address any necessary changes and recertify your packet. NOTE: Your packet will not move forward until you recertify.

To recertify, please log on to the OPT system at [my.ufl.edu](http://my.ufl.edu) and use Menu navigation My Self Service > UF Faculty Promotion & Tenure > Promotion & Tenure Packet > Upload/View Documents for Current Review.

Contact your Departmental OPT Administrator with questions. Contact information for Departmental OPT Administrators is listed at <http://www.aa.ufl.edu/tenure/>

Get in touch with your Department OPT Administrator if you have not heard from them to discuss necessary changes.

After receiving notification, you will need to make the necessary edits/corrections and re-upload the corrected documents as soon as possible by following the steps listed above. Only when the Department OPT Administrator is comfortable certifying your packet can the department faculty review process begin.

**BEST PRACTICE!**

Carefully reviewing all of your uploaded documents for accuracy and completeness will help expedite the Department OPT Administrator review and certification process.