

DOWNLOADING AND COMPLETING THE PACKET TEMPLATE

This instruction guide covers the steps to download the OPT packet template from the OPT system and the directions on how to complete it.

The packet template will contain a large part of the information that will be considered during the promotion and tenure process. As such you should complete it accurately and according to University guidelines before uploading it back into the OPT system or certifying it as complete and ready for review.

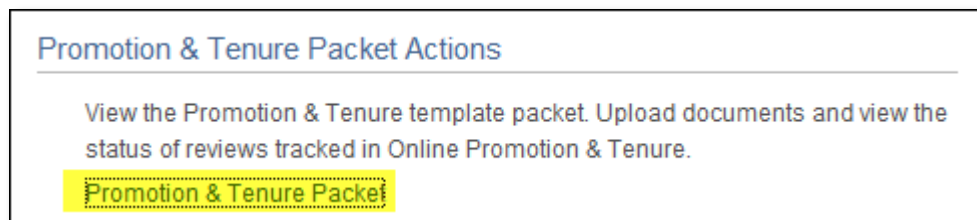
Note: To avoid any issues with pop-ups, please turn off the Pop-Up Blocker on the machine you are using. If you need assistance with this, please contact the UF Help Desk on 352-392-4357.

NAVIGATION

Login into myUFL and navigate to:

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

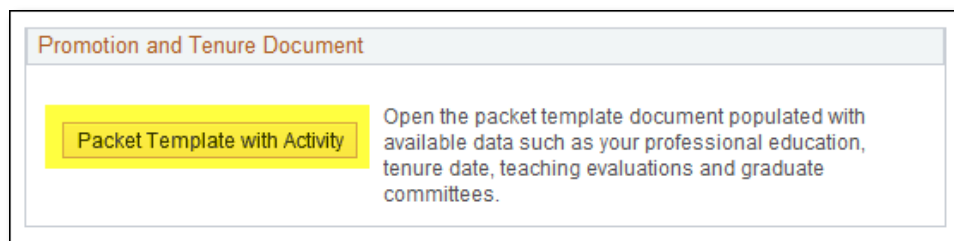
Click the **Promotion & Tenure Packet** link.



DOWNLOADING TEMPLATE

Specific sections of the Packet Template will be automatically populated with data (i.e., professional education, tenure date, teaching evaluations, graduate committee activities, etc.). Other areas will need your input.

1. Click the **Packet Template with Activity** link.



2. If your browser initially blocks the display of the Packet Template, click **Open** from the message window.

Do you want to open or save UF_PT_PACKET.rtf from hrqat9.erp.ufl.edu?

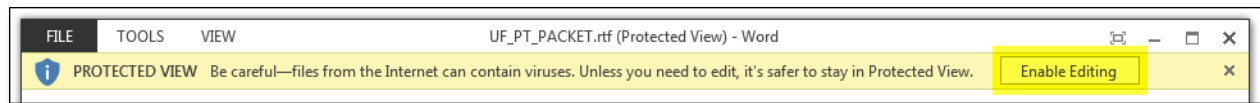
Open

Save

Cancel



- If your browser displays the Packet Template in Protected View, click the **Enable Editing** button to open for editing.



PROMOTION, TENURE, & PERMANENT STATUS

TEMPLATE 2020-21

VERSION DATE February 24, 2020

This template must be used by all candidates for promotion, tenure or permanent status.

Please fill in the template with appropriate information related to promotion, tenure, and/or permanent status nominations. Note that some sections will auto-populate with available data from several University sources; you must verify accuracy as indicated. Once all sections are filled in, you may delete the explanatory information in the template, including this page, prior to saving as a PDF file to uploading into the OPT system.

The template includes guidelines on specific content for those portions of the packet that are not auto-populated. All items in the packet must have the materials in the same order and titled as shown. **Items should be listed in reverse chronological order.** If a category does not apply, please write “N/A” by that heading; if you have nothing to report, use “None.” Information should cover your professional career, unless otherwise noted.

The final version of your packet should contain only those things specifically required in this template or noted in the “Guidelines and Information Regarding the Tenure, Permanent Status and Promotion Process” available online at <http://www.aa.ufl.edu/tenure>.

- Save** the .rtf file to a location on your computer where you can easily access it.

NOTE: Files with an .rtf file extension can easily be read and edited in Microsoft Word or any other word processing application.

BEST PRACTICE!

Carefully review the content that is auto-populated or entered by someone other than you into your packet template for accuracy *prior* to entering further data and certifying. Immediately contact the appropriate office/person for correction if a discrepancy is noticed.

- Fill in the information requested within each section of the packet template as appropriate.
Sections that will require your input are:
Sections 1-3, 6, 9, 11, 13-28

Certain sections of the template will be either automatically completed or manually completed by either your Department or College OPT Administrator.

Auto-populated in OPT system	Entered manually
Section 5 & Section 7 by UFHR: opt@admin.ufl.edu	Section 8 by Department OPT Administrator
Section 10 by University's online evaluation Database: evaluations@ufl.edu and GatorEvals-Support@ufl.edu	Section 29 by Department OPT Administrator
Section 12 by Graduate Information Management System (GIMS): graddata@ufl.edu	Section 30 by College OPT Administrator
	Sections 31-33 by Department OPT Administrator

6. If you make any corrections to the original databases that are the sources for the previously noted auto-populated sections, you will need to download the packet template again from the OPT system in order to capture the new data, and use the corrected version to enter the rest of the requested information.
7. Once all required content has been added to the packet template, complete a final review for accuracy and completeness.
NOTE: If you have not already done so, this would be a good time to ask your faculty mentor(s) and/or the Department OPT Administrator for feedback on your template.
8. **Save** the completed packet template as a .pdf file.
NOTE: Your packet template may only be uploaded into the OPT system as a .pdf file. The OPT system will not accept any other file type. Please confirm that the three character .pdf file extension is lower-case only.

Please note that the template formatting & fonts may not be consistent. You may manipulate the .rtf file as needed.