



# UFCD Faculty Toolkit General Guide

Updated April 2022

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## Overview

This document is intended to guide faculty members through the steps required to complete an annual evaluation packet. Generic terminology is used to describe roles in the Faculty Toolkit. Please see the below basic glossary of terms.

Toolkit Login: <https://facultytoolkit.esf.edu/ufhealth.org/home>

## Glossary of Terms

**Annual Evaluation Packet** – the cumulative sections included in the faculty toolkit and all applicable assessments.

**Data Source “Rolled Over”** – sections of the toolkit which data entry will roll over from the previous annual evaluation packet such as departmental affiliation. See [Data Source Guide](#). These sections should be updated/edited yearly with changes.

**Data Source “Campus Source”** – sections of the toolkit which data will import from a source such as myUFL. These sections of the toolkit will not be editable except from the source. Example: Certified Effort will import directly from myUFL Effort Reporting. See [Data Source Guide](#).

**Data Source “Mixed”** – sections of the toolkit which certain data will import from a campus source such as myUFL and faculty will also have the option to enter text or upload a document. Example: Teaching Evaluations will upload from Gator Evals for DMD courses and faculty will also have the option to upload evaluations from residents, continuing education courses or other course evaluations.

**Faculty** – a person who has an annual evaluation packet. This person may or may not have a supervisory role in addition to their own annual evaluation packet.

**Supervisor** – the person who performs primary assessment of one or more faculty members.

**Countersigner** – someone who provides additional required assessment of a faculty due to second level supervision, dotted line reporting, dual appointments, or other arrangements specific to that faculty.

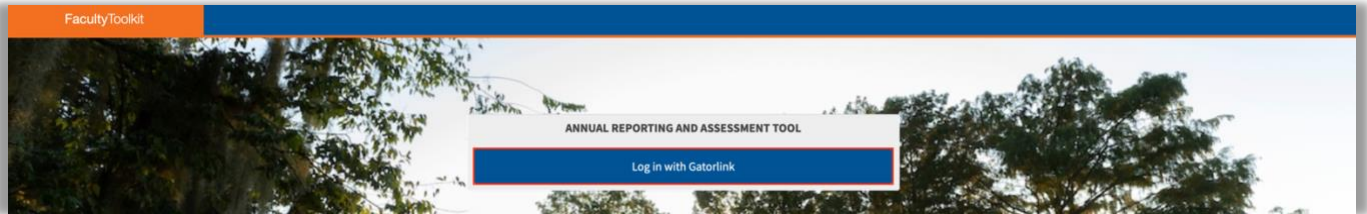
**Unit executive** – the highest level in a unit. This person can see packets for anyone in the unit.

## The Evaluation Process

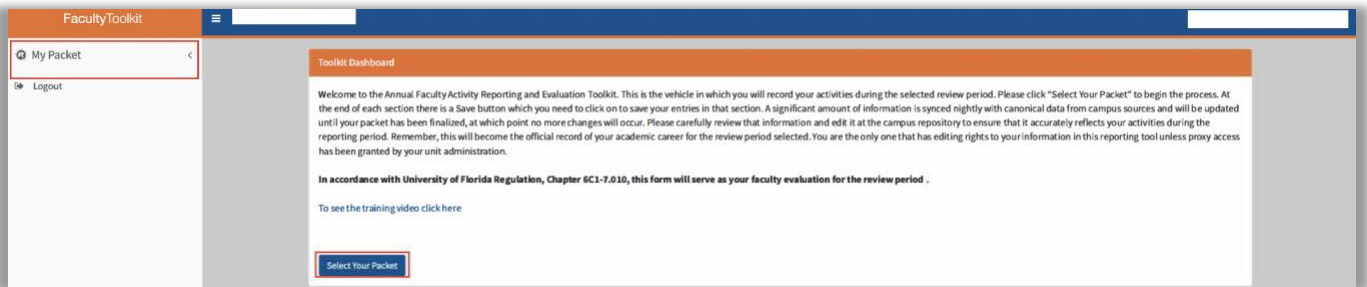
Log in to the toolkit at <https://facultytoolkit.esf.edu/health.org/> to begin the assessment process.

**Preferred Browsers: Firefox, Safari and Chrome.**

Click login and use your gatorlink username and password.



To begin your annual evaluation packet click on either **“My Packet”** on the left menu or **“Select Your Packet”** in the middle of the page.



On the next screen click on the drop down menu **“Select a Packet”**.

The screenshot shows the 'Packet Selection' form. It has an orange header. Below the header is a red asterisk indicating a required field. The form has a label '\*Select a packet' and a dropdown menu with the text 'Select a packet'. A blue button labeled 'Select' is at the bottom left of the form.

Select the annual evaluation packet cycle year that you wish to view or fill out.

The screenshot shows the 'Packet Selection' form with the dropdown menu open. The dropdown menu lists three options: 'Dentistry : College of Dentistry Evaluation 18-19 : (05/19/2018 - 05/17/2019)', 'Dentistry : College of Dentistry Evaluation 19-20 : (05/19/2019 - 05/17/2020)', and 'Dentistry : College of Dentistry Evaluation 21-22 : (05/19/2021 - 05/17/2022)'. The third option is highlighted in blue.

Then click on **“Select”**.

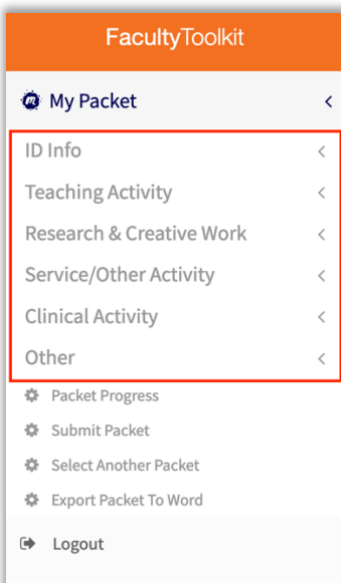


You will have the following options on the main screen:

- Click on **“Packet History”** to view all actions for the annual evaluation cycle.
- Click on **“Packet Progress”** to view sections completed/incomplete.
- Click on **“Select a Different Packet”** in future years to move between different annual evaluation packet years.

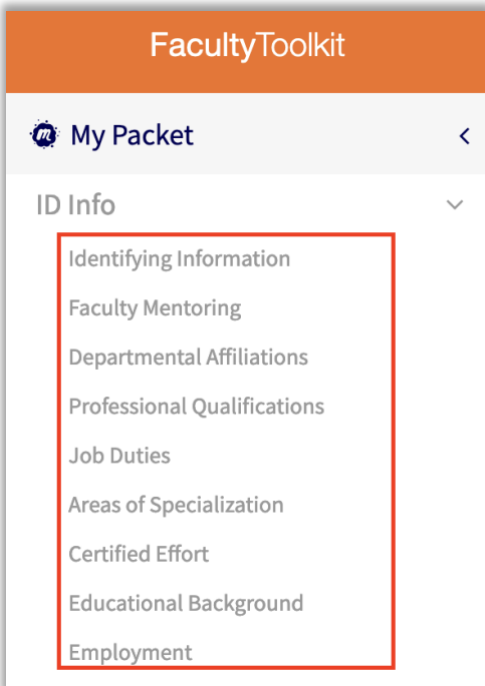
To begin filling out your annual evaluation packet click on one of the sections on the left menu bar:

- **“ID Info”**
- **“Teaching Activity”**
- **“Research & Creative Work”**
- **“Service/Other Activity”**
- **“Clinical Activity”**
- **“Other”**



Note: For your packet to be fully complete you must navigate through each section. It is recommended that you begin with “ID Info”, “Identifying Information” which is the first subsection.

Each of the section is broken down into further subsections. For example “ID Info” has the below subsections.



The screenshot below shows “Identifying Information”. Once information is entered in the required fields you can click “Save & Next Section” at the bottom of each page.

The screenshot displays the 'IDENTIFYING INFORMATION' form. At the top, it states: 'In accordance with University of Florida Regulation, Chapter 6C1-7.010, this form will serve as your faculty evaluation for the review period of (05/19/2021 - 05/17/2022)'. Below this, it instructs the user to 'Select all Miscellaneous options from the dropdown appropriate to you.' and includes a legend: '\* Indicates a required field'. The form is divided into two columns. The left column, titled 'Titles and Degrees', contains five required fields: '\*Degrees', '\*Faculty Track' (a dropdown menu), '\*Academic Rank' (a dropdown menu), '\*Date Hired', and '\*Date Appointed to Current Rank'. The right column, titled 'Faculty Status', contains two required fields: 'Year Tenure Awarded' and 'Administrative Title'. At the bottom left, there are two buttons: 'Save' and 'Save & Next Section'. The 'Save & Next Section' button is highlighted with a red rectangular box.

## Data Imported from Campus Source(s)

Certain sections of the annual evaluation packet will import from various campus sources. This will require data input at the source rather than in the Faculty Toolkit. See [Data Source Guide](#).

The following sections will import directly from myUFL using the self service “**Faculty Activity**” module of the myUFL Online Promotion and Tenure (OPT) system:

- Patents and Copyrights
- Publications
- Conference Presentations
- Honors

In order for data to import into the Faculty Toolkit, faculty will need to enter information into the OPT system.

### Instructions:

- **Patents and Copyrights**
  - Follow this [Instruction Guide](#) to enter Patents and Copyrights for the annual evaluation review period.
- **Publications**
  - Follow this [Instruction Guide](#) to enter publications for the annual evaluation period.
  - Faculty with a large number of publications can contact Human Resources to request use of pubmed import tool instead of manually inputting each publication.
    - Faculty will need to review publications imported into OPT for accuracy and designate author role as well as the appropriate self/mentee relationship for each publication in the review period.
- **Conference Presentations**
  - Follow this [Instruction Guide](#) to enter Presentations for the annual evaluation review period.
- **Honors**
  - Follow this [Instruction Guide](#) to enter Honors for the annual evaluation review period.

Note: For faculty who intend to be nominated for promotion and/or tenure in the future it is recommended that you enter all information in the myUFL “Faculty Activity” module of the OPT system for these sections. This will allow for your eventual promotion and/or tenure packet to be auto populated with required information.

Faculty who have already achieved Full Professor rank or those who do not intend to go up for promotion and/or tenure can enter data for the current annual review period only.

## Marking Sections as N/A

If a particular section either does not apply to you at all, or you do not have any data to add during the evaluation cycle, you can select not applicable by checking the “**N/A**” box.

Note: N/A is only an option on certain pages. When N/A is an option it is highlighted in yellow at the top of the screen.

OTHER INFORMATION

< PREV NEXT >

☐ N/A

Check the box to mark this section as N/A – not relevant for this review period.

Submit your Other Information

There are two ways to submit Other Information.

- Copy and paste a Other Information from another document, such as a Word document.
- Upload a Other Information file.
  - File extensions allowed: .doc, .docx, .rtf, .pdf, .txt
  - Maximum file size allowed: 20 MB
  - Note: the same document name cannot be uploaded multiple times.

• Indicates a required field

Create a new Other Information

or

Browse...

No file selected.

Upload

Saved Other Information

Show 10 entries

Filter search results

Otherinformation Type	Text File Name	Created	Actions
No data available			

Showing 0 to 0 of 0 entries

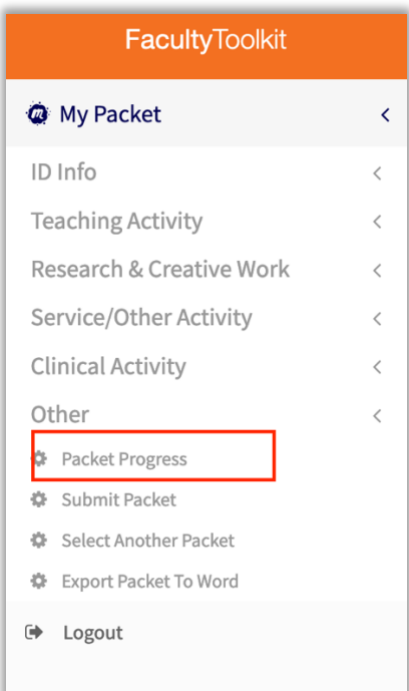
Previous

Next



## Packet Progress

Faculty need to go through each page to complete the annual evaluation packet. If at any point you would like to see your progress select **“Packet Progress”** on the left hand menu.



This will allow you to view the status of each section. Sections in green have the status of “Saved” while those in red have a status of “Not Started”. All sections will need to be designated as “Saved” to submit your annual evaluation packet.

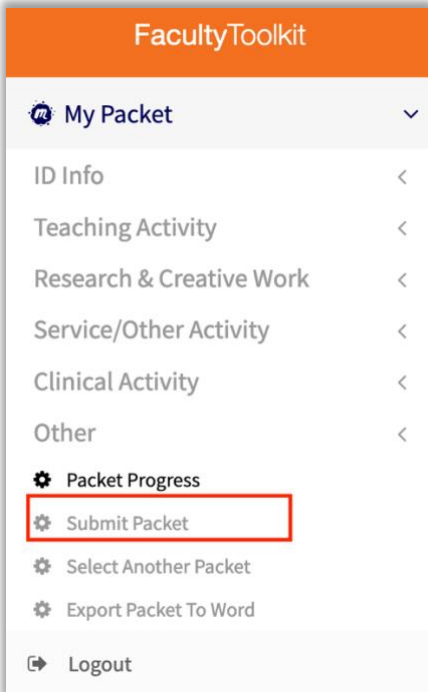
Overall Packet Progress status is also shown on the top right hand side of the page with percentage completed.

The image shows the 'Packet Progress' page for 'Dentistry (05/19/2021 - 05/17/2022) - College of Dentistry Evaluation 21-22 for Christina Perez (In Progress)'. The overall packet progress is 8%. The page lists the following sections and their statuses:

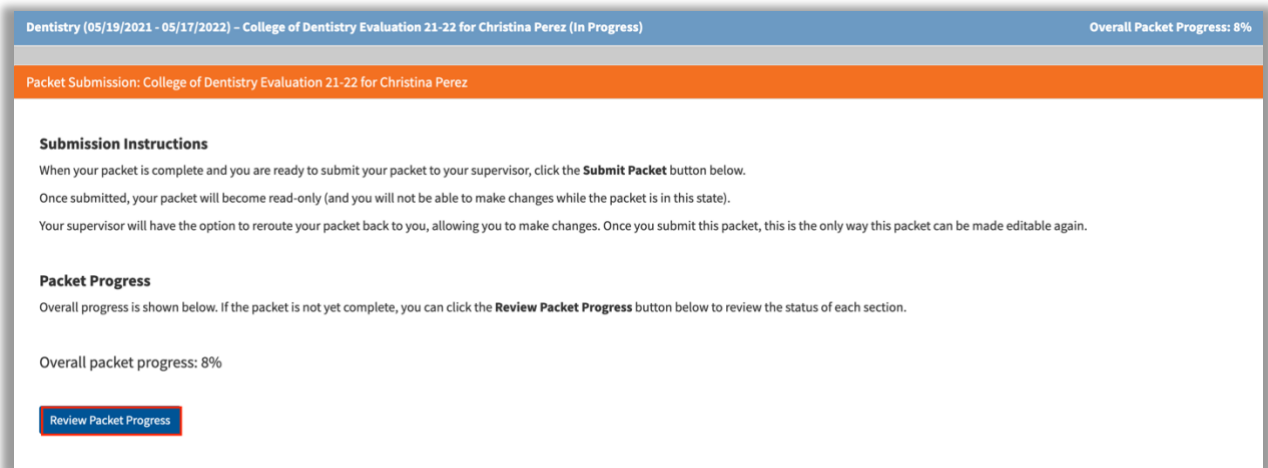
Section	Status	Marked As N/A?	Actions
Advising and Mentoring	MARKED AS N/A	N/A	Mark As Applicable
Areas of Specialization	SAVED	-	Mark As Not Applicable
Assigned Activities	NOT STARTED	Section Required	
Biosketech	NOT STARTED	-	Mark As Not Applicable
Clinical Activities - Other	NOT STARTED	-	Mark As Not Applicable
Clinical Narrative	NOT STARTED	-	Mark As Not Applicable

## Annual Evaluation Packet Submission

Once you have completed all sections you can click “**Submit Packet**” on the left menu.



At this point, your screen will show the submission instructions. Your overall packet progress should be at 100%. Note: You will not be able to submit the packet if it is not complete. Click on “**Review Packet Progress**” to determine what sections need to be addressed.



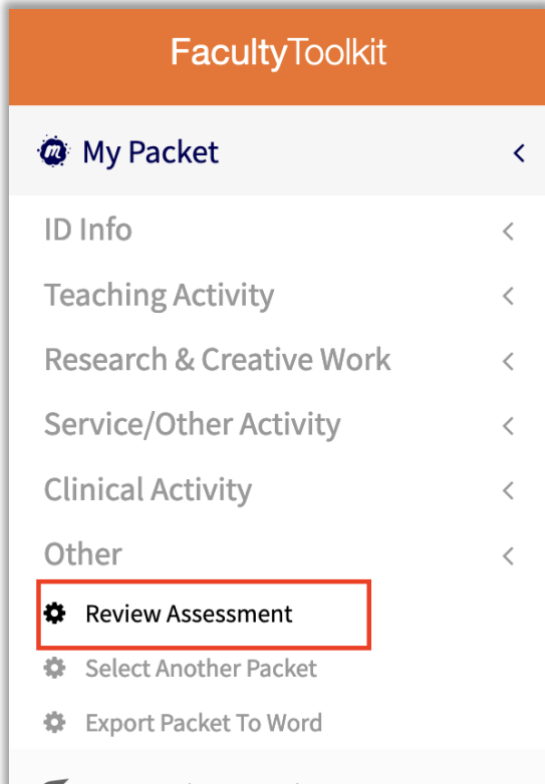
The supervisor will now review and submit the annual assessment. If the supervisor would like any additional information added they will have the option to route the packet back for edits.

### Finalize Annual Evaluation Packet

Once the supervisor submits the assessment, you will receive an email notification and have the option to review and/or comment. Login at <https://facultytoolkit.ese.ufhealth.org/> to view the assessment.

Follow login instructions on page 3.

To review the supervisor's assessment click on "**Review Assessment**" on the left menu.



You will have the option to review the assessment by clicking on the following sections:

- Teaching/Instructional Activity
- Research/Scholarly Activity
- Clinical Activity/Patient Care
- University & Professional Service
- P&T Progress
- Activity Assignments
- Goals
- Comments

Once all information is reviewed you have the option to “**Route Assessment Back to Supervisor**” with comments, or “**Finalize Packet**”.

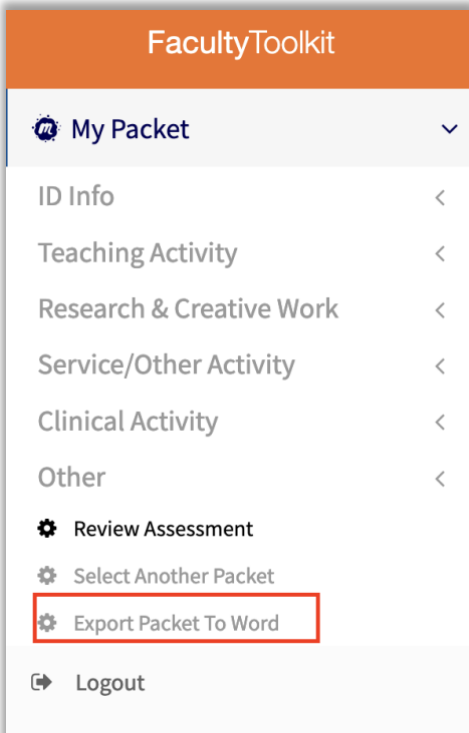
The screenshot displays the 'FACULTY TOOLKIT ASSESSMENT' interface. At the top, an orange header bar contains the title and navigation links for 'PREV' and 'NEXT'. Below the header, a section titled 'Review the assessment of the selected packet.' provides instructions: 'This is the assessment portion of the evaluation process. As a **faculty member**, you are responsible for reviewing the assessment and providing your comments. At that point you may then finalize the packet or reroute the assessment back to the supervisor (or countersigner). You must supply a reason explaining why you rerouted the assessment.' A note states '\* Indicates a required field'. A horizontal tab bar includes 'Teaching/Instructional Activity', 'Research/Scholarly Activity', 'Clinical Activity/Patient Care' (which is selected), 'University & Professional Service', 'P & T Progress', 'Activity Assignments', 'Goals', and 'Comments'. The 'Clinical Activity/Patient Care' tab shows a large text area with 'N/A' entered. At the bottom, two buttons are visible: 'Route Assessment Back to Supervisor' and 'Finalize Packet', both of which are highlighted with a red rectangular border.

Once the annual evaluation packet has been finalized, it becomes read-only. No further updates to the packet will be made from outside sources and no further editing is possible. At this point, a hard copy/PDF must be printed for faculty, supervisor and countersigner (if applicable) signature which finalizes the annual evaluation process. The department will save the final signed copy/PDF, provide a copy/PDF to the faculty member, and provide a copy/PDF to Human Resources.

## Export Packet to Word

Follow login instructions on page 3.

Once you are in your packet, you can select **“Export Packet to Word”** which will provide a word document of everything filled out for reference.



This will take a minute to load and a pop up will appear from Microsoft Word that you can select to open the file or save to folder on your computer.

