Faculty Toolkit Supervisor Guide

UFCD HUMAN RESOURCES

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OVERVIEW

This document is intended to guide a faculty supervisor or countersigner such as division director, department chair or assistant/associate dean 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.ese.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.ese.ufhealth.org/ to begin the assessment process. See Faculty Toolkit General Guide for instructions.

Preferred Browsers: Firefox, Safari and Chrome.

As a supervisor you will have the option to view all of your direct report's annual evaluation packets by clicking "Supervisor Review" under the left menu.
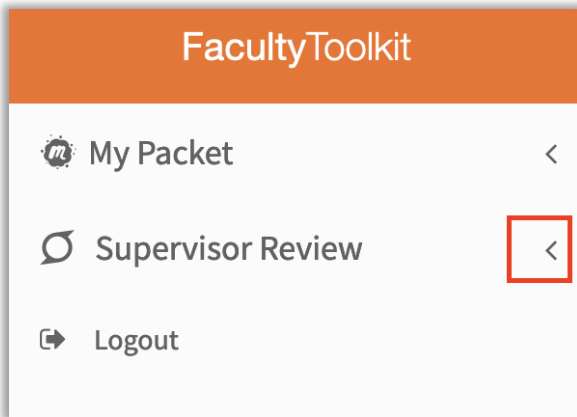
Supervisors also have the option to view past completed packets. For instance, if you wanted to review a particular finalized packet from several years ago, click on the check box next to "Include Finalized Packets".
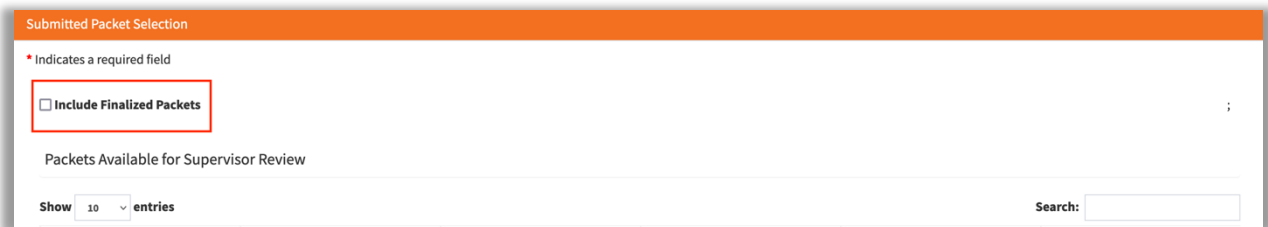
You have the option to see the Annual Evaluation Packet filled out by each faculty by clicking on "Select Packet" next to each faculty member's name.

Supervisors can navigate to another packet by clicking on "Select Another Packet" to go back to the supervisor home screen listing all packets.

You can see the state of each packet as well as the overall progress next to each faculty member's name. A packet in "Submitted" status is ready for supervisor evaluation. The status of "In progress" indicates that the faculty has started, but not submitted the annual evaluation packet, and "New" means the faculty has not begun their annual evaluation packet.

You can see the "Overall Progress" of each of your direct reports. The below screenshot example shows a packet at 100% complete, that is submitted.

Note: Supervisors will not be able to complete the packet assessment for faculty until the faculty member has completed and submitted the annual evaluation packet.

When a faculty member submits a completed annual evaluation packet for review, supervisors are notified via email.

Once you have clicked on "Select Packet" you can view all historical events associated with this annual evaluation packet, including the date the faculty began work on packet, state changes, and comments by clicking "Packet History."

REVIEWING FACULTY SELF-ASSESSMENT

You may begin reviewing faculty entries for each section such as teaching activity and research by clicking on the left hand menu.
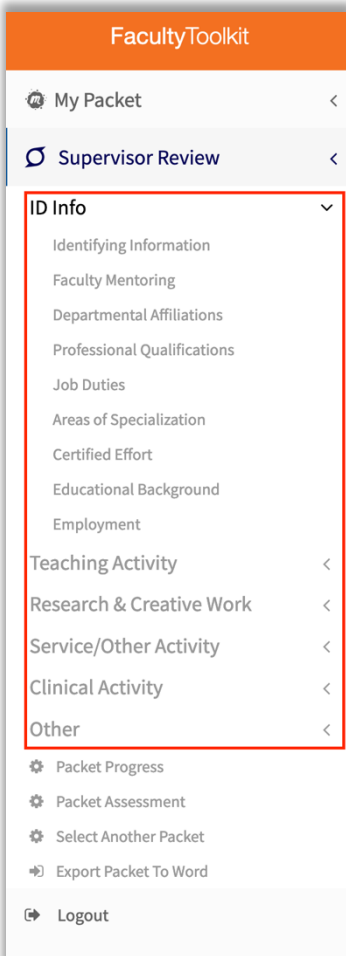

In the example below, "Departmental Affiliations" is shown. Once you are in a particular entry you can move through the packet either by clicking on the entry you would like to view on the left hand menu or clicking "Next" or "Previous" on the top right hand side of the screen.
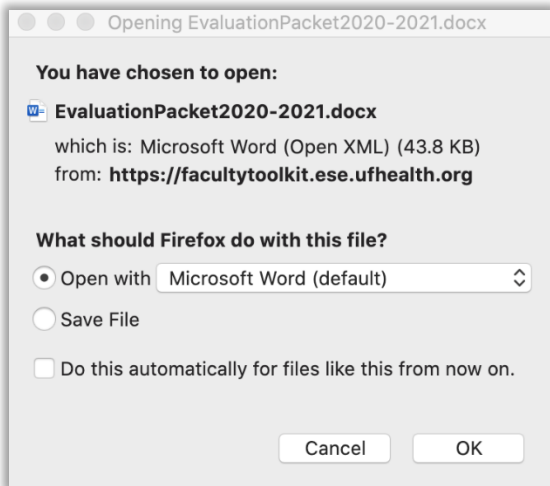
EXPORT PACKET TO WORD

Supervisors can also export all information entered by the faculty member in the annual evaluation packet by clicking "Export Packet to Word" within Supervisor Review.
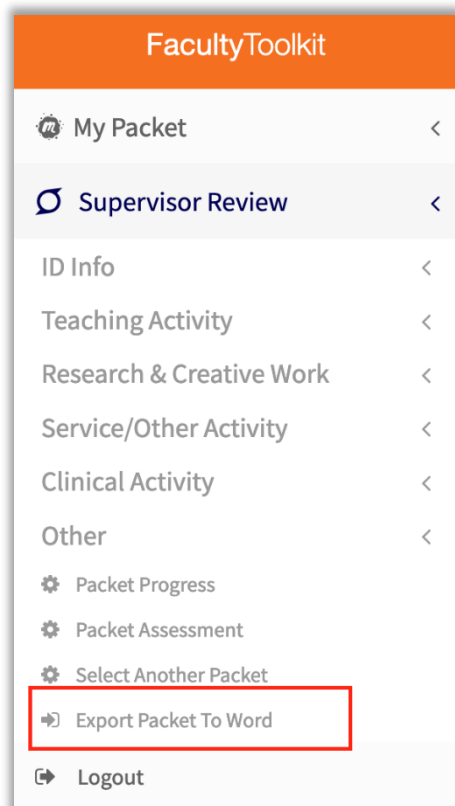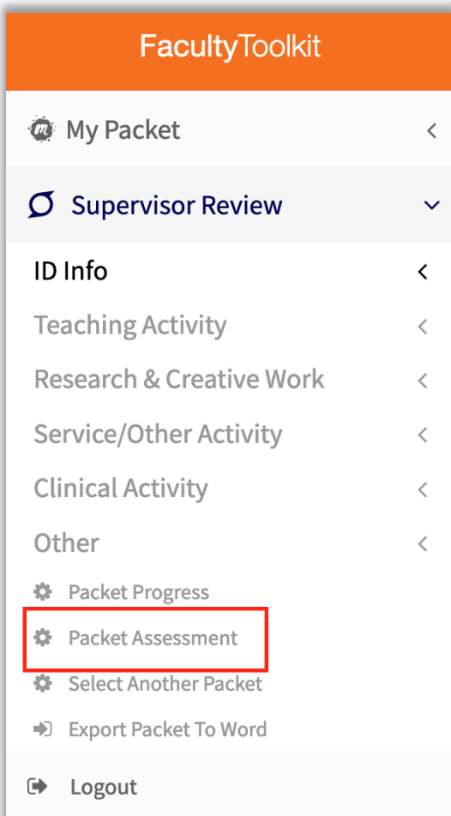

This will take a minute to load and a pop up will appear from Microsoft Word that you can select to open the file or save to folder on your computer.

ENTERING SUPERVISOR ASSESSMENT

Once you have reviewed the annual evaluation packet and are ready to begin your assessment, click on the "Packet Assessment" option under "Supervisor Review."

An evaluation page will appear with several sections including:

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

You can click each tab to go to the next area to type in assessment comments.

As you work through these sections, please make sure to click "Save Assessment Comments" at the bottom of each section.

APPROVING, EDITING, DELETING OR ADDING GOALS

The "Goals" section allows faculty to submit individual goals for the coming year, which the supervisor can "Edit", "Delete" or "Approve". To edit a goal, click "Edit," make the desired changes, enter a comment for the modification, and save.

Goals proposed by the faculty are highlighted in yellow and require approval in order for the goal to carry forward to the following year's annual evaluation packet. The following year, the faculty will then be able to mark goals as being met, exceeded, or not met, with comments.

If the supervisor does not approve the goal(s), by clicking on the green "Approve" icon the goals will not be rolled over for evaluation the following year.

The supervisor may also add additional goals for the faculty by entering them in the field tilted "Add a Proposed Goal for Next Review Period" and then click "Save".
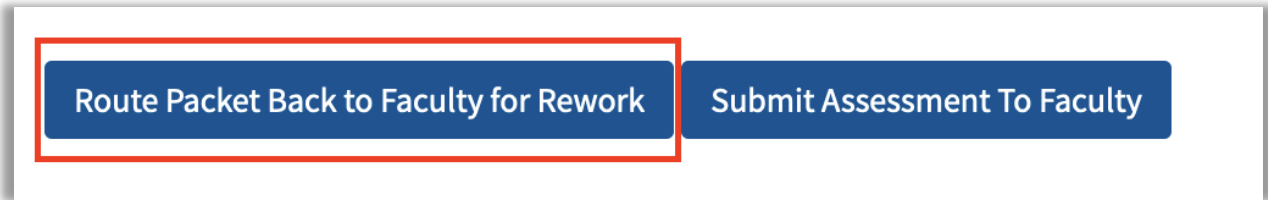
SENDING A PACKET BACK TO FACULTY FOR FURTHER REVISION

If you feel the faculty needs to revise one or more sections, click "Route Packet Back to Faculty for Rework." At the bottom of the page This step can be done prior to entering any comments or completing any section as a supervisor.

Supervisors will be prompted to add a comment, and and click "Save". The faculty member will be notified by email that there is additional action required for their annual evaluation packet.

At that point, you are finished until the faculty re-submits their annual evaluation packet. You will receive a new notification and start the process again.

FINISHING SUPERVISOR EVALUATION AND SUBMITTING ASSESSMENT TO FACULTY

When you have completed your assessment of the faculty, saved all sections, and are ready to proceed, you can click "Submit Assessment to Faculty". Once submitted, the faculty member will receive an email notification.
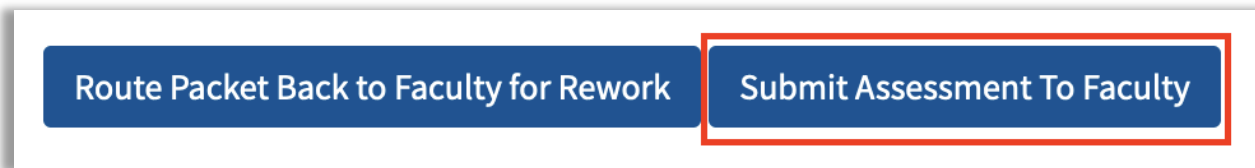

As the next step in the review process, the faculty member will review the supervisor assessment and have the option to comment. The faculty member will either finalize the packet or reroute it back to you with a comment.

If routed back to the supervisor, you will have the ability to revise or review and comment using the same process as above. The annual evaluation packet will then have the status "Under Faculty Assessment Review."

If, the faculty member has a countersigner you will have the option to "Route Packet Back to Faculty for Rework" or "Submit Assessment to Countersigner".

THE COUNTERSIGNING PROCESS

Countersigners may review a list of all packets for which they are a countersigner, along with their status, by clicking "Select Packet for Review" under the countersigner menu on the left.
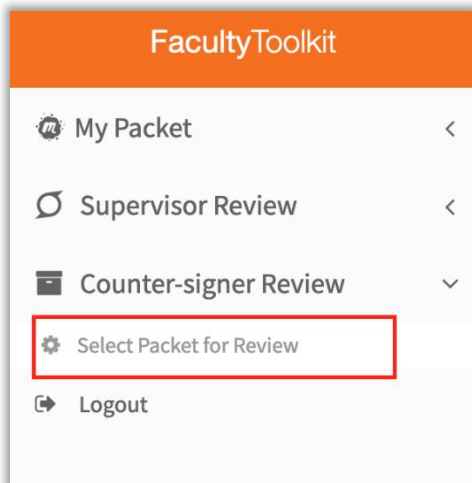
Countersigners will then be able to select a faculty annual evaluation packet to enter their comments by clicking "Review Assessment."
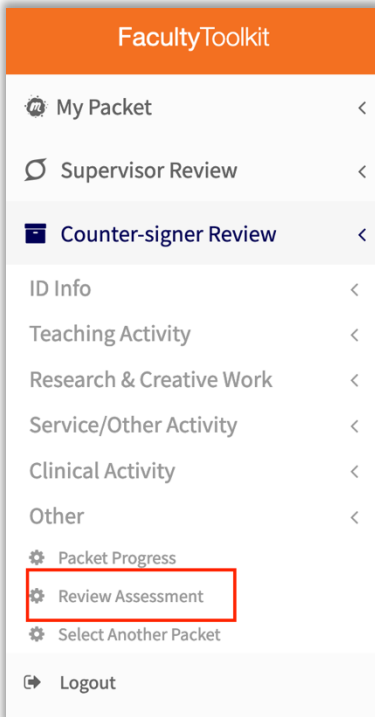
The countersigner may view all areas of the faculty annual evaluation packet including comments and goals entered by the supervisor, but may not make any changes or add additional goals.

Countersigners will submit their evaluation under the "Comments" tab of the assessment and then click "Save Assessment Comments"
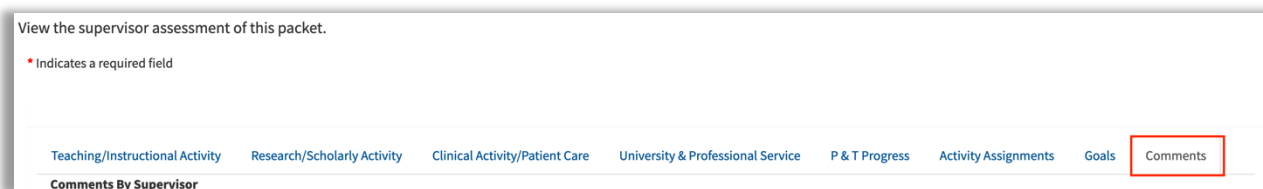
Once entered, the countersigner can either click "Route Packet Back to Supervisor" for modification(s) or "Forward Assessment to Faculty" to finalize the annual evaluation packet at the bottom of the page.

FINALIZING THE ANNUAL EVALUATION PACKET

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/saved for faculty, supervisor and countersigner (if applicable) signature. Once signed, theis 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.

Contact Human Resources for bulk export of departmental assessments.