



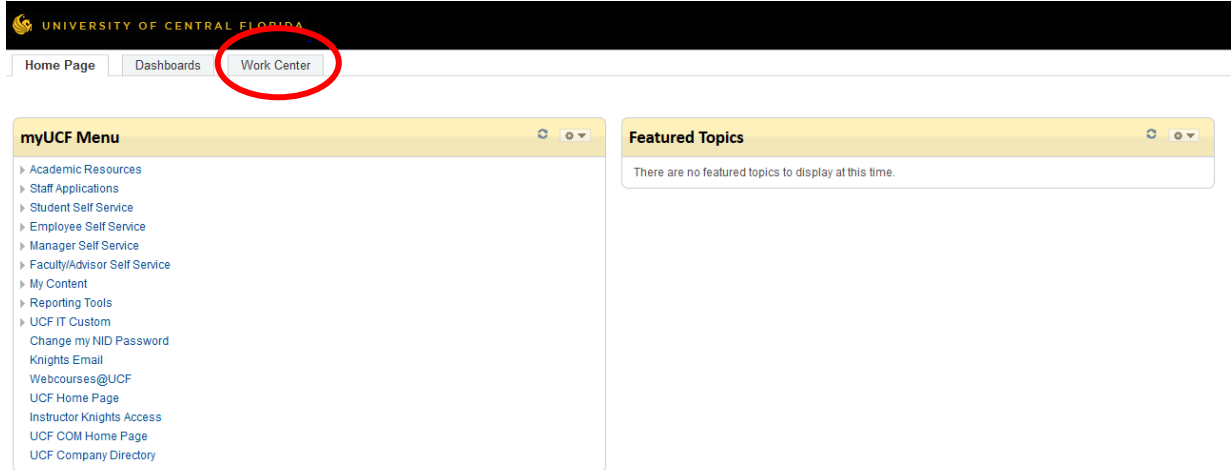
**Department Chair/Unit Head Training Manual
Electronic Promotion and Tenure System**

Contents:

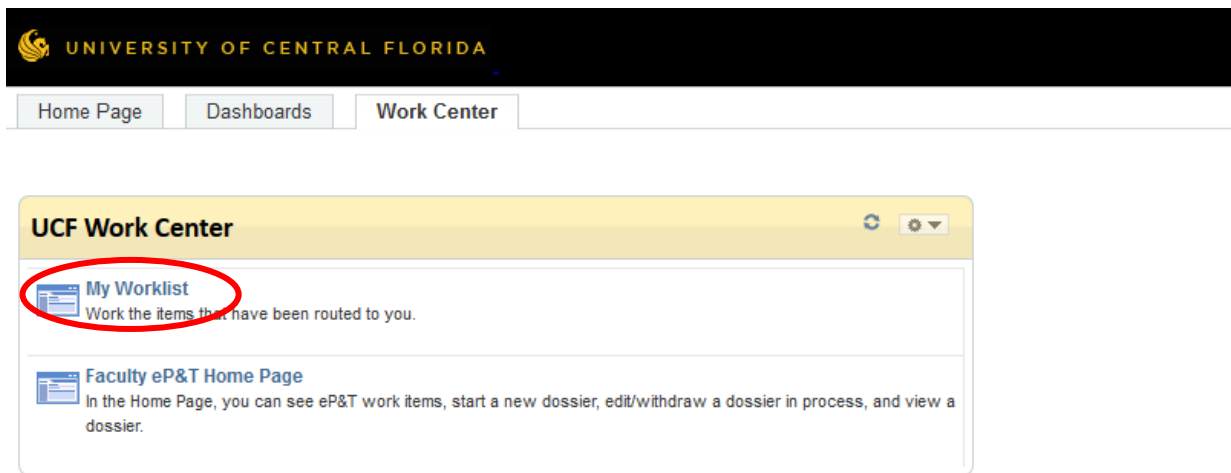
- Part I** [Task: Verification of Dossier Contents](#)
The Department Chair/Unit Head reviews the dossier for completeness, certifies the contents and forwards it to the department committee.
- Part II** [Task: Review and Forwarding of Department Committee's Evaluation](#)
The Department Chair/Unit Head reviews the department committee's evaluation and forwards the dossier to the candidate for review.
- Part III** [Task: Department Chair's Evaluation](#)
The Department Chair/Unit Head completes an evaluation of the dossier and forwards it to the candidate for review.
- Part IV** [View-Only Access to Dossiers](#)
The Department Chair/Unit Head has view-only access to each dossier from the time it is submitted until Provost review begins. Follow these instructions for view-only access.

PART I. Task: Department Chair/Unit Head Verification of Dossier Contents

1. Sign in to the [myUCF portal \(my.ucf.edu\)](http://my.ucf.edu) and click the [Work Center](#) tab. If you do not see the [Work Center](#) tab, contact Faculty Excellence at 407-823-1113 or facultyexcellence@ucf.edu.



2. Click on [My Worklist](#).



3. After selecting **My Worklist**, a screen similar to the following will display. Click on the link to open the dossier.

The screenshot shows a 'Worklist' page with a table of 'Worklist Items'. The table has columns for 'From', 'Date From', 'Work Item', 'Worked By Activity', 'Priority', and 'Link'. The first row is highlighted in yellow and contains the text '06/17/2019', 'Notification Worklist', 'Notification', and a link labeled 'PROMOTION TITLE'. A red circle highlights this link, with a blue box containing the text 'Click here to open the dossier.' pointing to it. To the right of the table, there are buttons for 'Mark Worked' and 'Reassign'. A red box with the text 'Do NOT use this button.' points to the 'Reassign' button.

4. After opening the dossier, review each of the uploaded files by clicking **View**. If the dossier is complete, check both boxes in the **Certifications** area.

The screenshot shows a dossier page with two main sections. The top section is titled 'Certifications' and contains a table with columns for 'Message Text' and 'Description'. There are four rows, each with a checkbox on the left. The first two rows have their checkboxes checked, while the last two are unchecked. A red circle highlights the unchecked checkboxes, with a blue box containing the text 'Complete the certifications by clicking the checkboxes.' pointing to them. The bottom section is titled 'Dossier Files' and contains a table with columns for 'Find', 'Size', and 'View'. There are two rows, each with a 'View' button circled in red. A blue box containing the text 'Review each uploaded document by clicking View.' points to these buttons.

5. After reviewing the dossier in its entirety and completing the certifications, click the relevant button at the bottom of the page.

11-Research/Creative Activities Sum. and Evidence	Size: 26,620 bytes	View	Delete
785397_8_Research___Creative_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:12AM		
12-Teaching Activities Summary and Evidence	Size: 26,620 bytes	View	Delete
785397_9_Teaching_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:27AM		
13-Service Activities Summary and Evidence	Size: 26,620 bytes	View	Delete
785397_10_Service_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:39AM		

Candidate:

Reviewed Hold/Save

Recycle to Faculty

“Reviewed” forwards the dossier to the department committee.

“Hold/Save” saves the dossier, but does not forward it.

“Recycle...” returns the dossier to the candidate for revision.

PART II. Task: Department Chair/Unit Head Review and Forwarding of Department Committee's Evaluation

1. Navigate to the dossier by following steps 1 through 3 in Part I, above.
2. After opening the dossier, click the **Department Committee** tab to review the department committee's vote count and evaluation comments.

Evaluate Dossier

Step 2 of 2: Department Committee Analysis of Candidate Information

Candidate Information

Name of faculty member evaluated: _____ eForm ID: _____
Current rank: Associate Professor
Pathway Type & Year: Tenured/Tenure-Earning Faculty Regular 2019-2020
Application Type: Promotion & Tenure Promotion only Tenure only
Applying to rank: Professor

Committee Votes

Promotion:

10 number of votes FOR promotion
0 number of votes AGAINST promotion

Analysis and Recommendations

*In the field below, or as an attachment, (1) Provide an assessment for each area of assignment and (2) Include an overall comment explaining how the committee's discussion, narrative, and how the votes relate to the department/unit criteria. If attachment is provided, write "Uploaded as PDF" in the field below.

Uploaded as PDF

3. Review the attached department committee signature list.

Click **View** to review the department committee signature list. Confirm that all committee members who voted signed the form and that the number of signatures matches the vote count shown in step 2.

12-Teaching Activities Summary and Evidence	Size: 26,620 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_9_Teaching_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:27AM		
13-Service Activities Summary and Evidence	Size: 26,620 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_10_Service_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:39AM		
17a-Department P&T Committee Signature List	Size: 42,287 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_12_Department_P_T_Committee_Signature_List.pdf	Uploaded: 06/06/2019 11:31:17AM		

Candidate:

[Candidate Info](#) | [Department Committee](#)

4. Scroll down to the bottom of the page to send the dossier to the next step (candidate review) or recycle it back to the committee for revision.

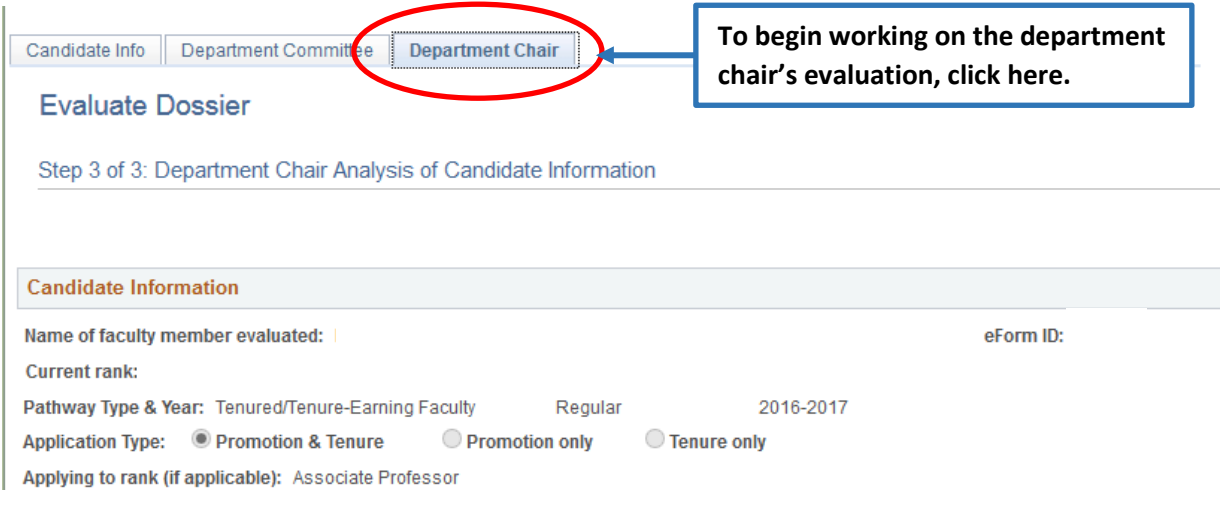
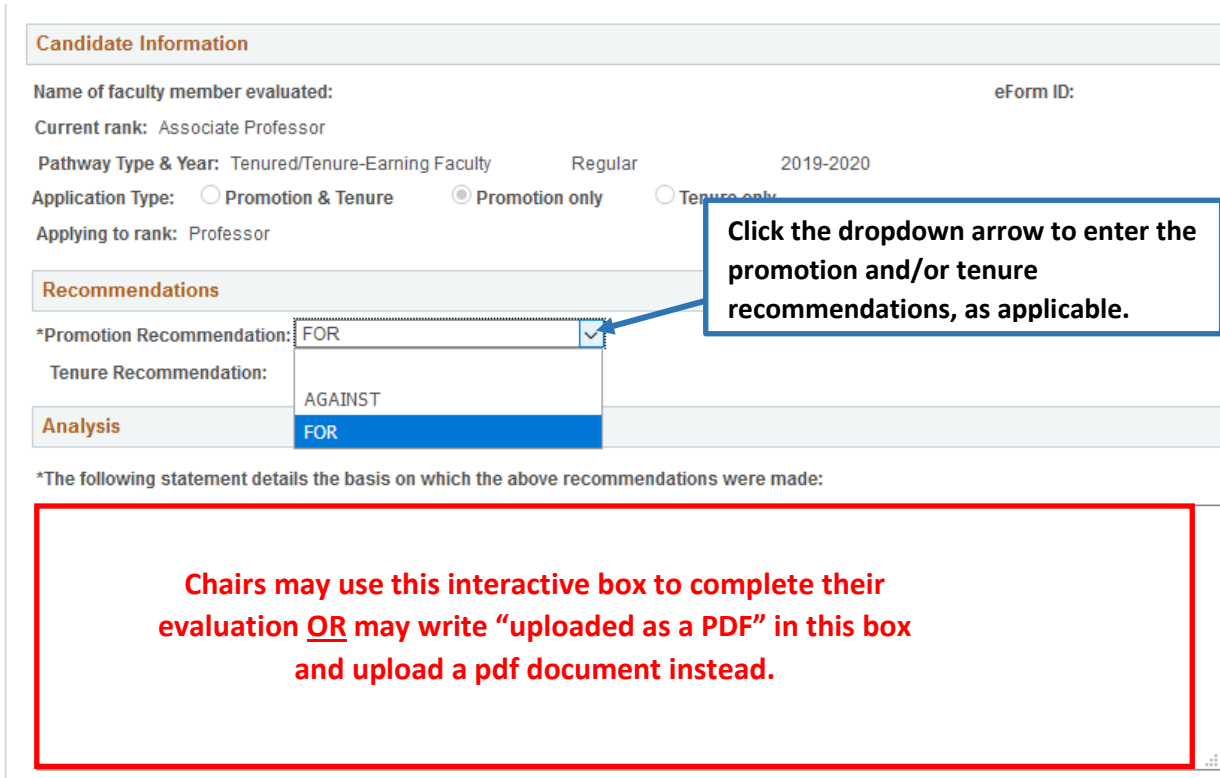
12-Teaching Activities Summary and Evidence	Size: 26,620 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_9_Teaching_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:27AM		
13-Service Activities Summary and Evidence	Size: 26,620 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_10_Service_Activities_Summary_and_Evidence.pdf	Uploaded: 06/06/2019 10:34:39AM		
17a-Department P&T Committee Signature List	Size: 42,287 bytes	<input type="button" value="View"/>	<input type="button" value="Delete"/>
785397_12_Department_P_T_Committee_Signature_List.pdf	Uploaded: 06/06/2019 11:31:17AM		

Candidate:

[Candidate Info](#) | [Department Committee](#)

“Reviewed” forwards the dossier to the candidate.
“Hold/Save” saves the dossier, but does not forward it.
“Recycle to Committee” returns the dossier to the department committee chairperson for revision.

PART III. Task: Department Chair/Unit Head Evaluation of Dossier

1.	Navigate to the dossier by following steps 1 through 3 in <u>Part I</u> , above.
2.	After opening the dossier, click the “Department Chair” tab.
	
3.	Enter the promotion and/or tenure recommendations and complete the written evaluation.
	

4. To upload the evaluation in PDF format, scroll down to the attachments at the bottom of the page. Click the **plus symbol (+)** to add a row. On the new row, use the **dropdown arrow** to display the attachment options.

Note: If you have completed the evaluation by using the interactive box shown in step 3, skip this step and proceed to step 6.

13-Service Activities Summary and Evidence Size: 26,620 bytes View Delete +

731127_10_13_Service_Activities_Summary_and_Evidence.pdf Uploaded: 06/15/2018 1:32:21PM

17a-Department P&T Committee Signature List Size: 83,885 bytes View Delete +

731127_11_Department_P_T_Committee_Signature_List.pdf Uploaded: 06/15/2018 1:40:00PM

17b-Department P&T Committee Evaluation Document Size: 87,159 bytes View Delete +

731127_12_Department_P_T_Committee_Evaluation_Document.pdf Uploaded: 06/15/2018 1:40:37PM

19-Department Chair Evaluation Document Size: 0 bytes Attach Delete +

Candidate: << Previous Reviewed Hold/Save Recycle to Faculty

1. Click the **plus symbol (+)** to add a row.
 2. Use the **dropdown arrow** to display the attachment options.

5. Select **Department Chair Evaluation Document**. Then, click **Attach** to upload the faculty response.

13-Service Activities Summary and Evidence Size: 26,620 bytes View Delete +

731127_10_13_Service_Activities_Summary_and_Evidence.pdf Uploaded: 06/15/2018 1:32:21PM

17a-Department P&T Committee Signature List Size: 83,885 bytes View Delete +

731127_11_Department_P_T_Committee_Signature_List.pdf Uploaded: 06/15/2018 1:40:00PM

17b-Department P&T Committee Evaluation Document Size: 87,159 bytes View Delete +

731127_12_Department_P_T_Committee_Evaluation_Document Uploaded: 06/15/2018 1:40:37PM

19-Department Chair Evaluation Document Size: 0 bytes Attach Delete +

Candidate: << Previous Reviewed Hold/Save Recycle to Faculty

1. Click **Department Chair Evaluation Document**.
 2. Click **Attach** to upload the evaluation document.

6. After completing the evaluation, click one of the buttons at the bottom of the page.

19-Department Chair Evaluation Document

731127_13_Department_Chair_Evaluation_Document_.pdf **Size:** 87,159 bytes **Uploaded:** 06/21/2018 11:25:03AM

<< Previous

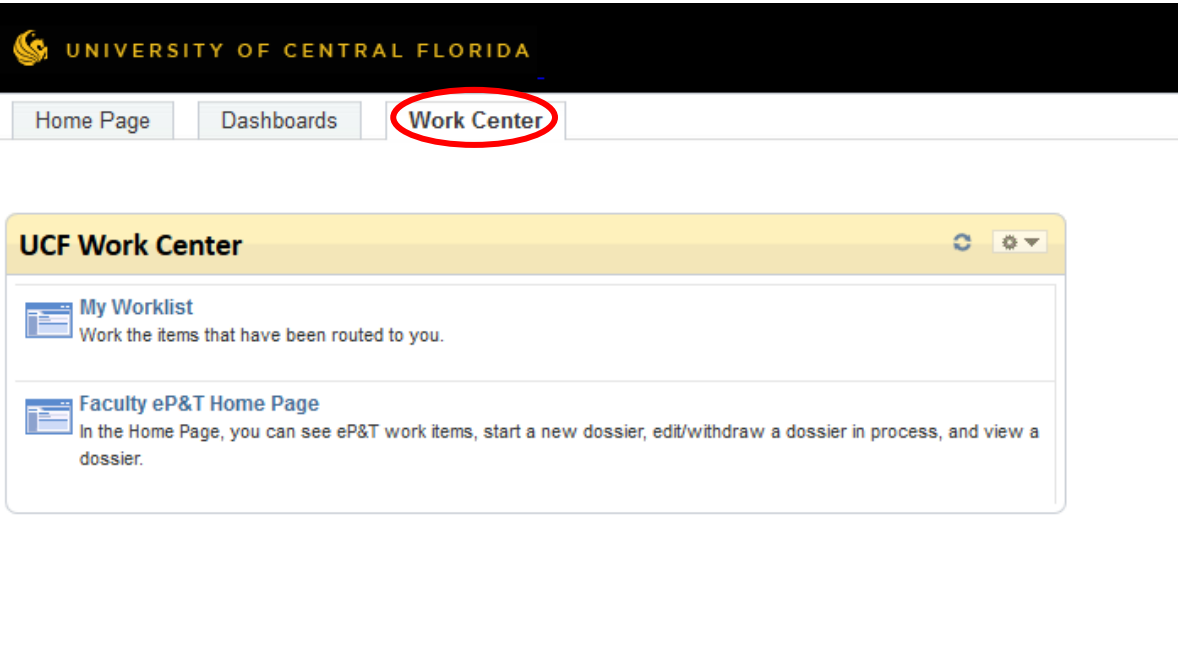
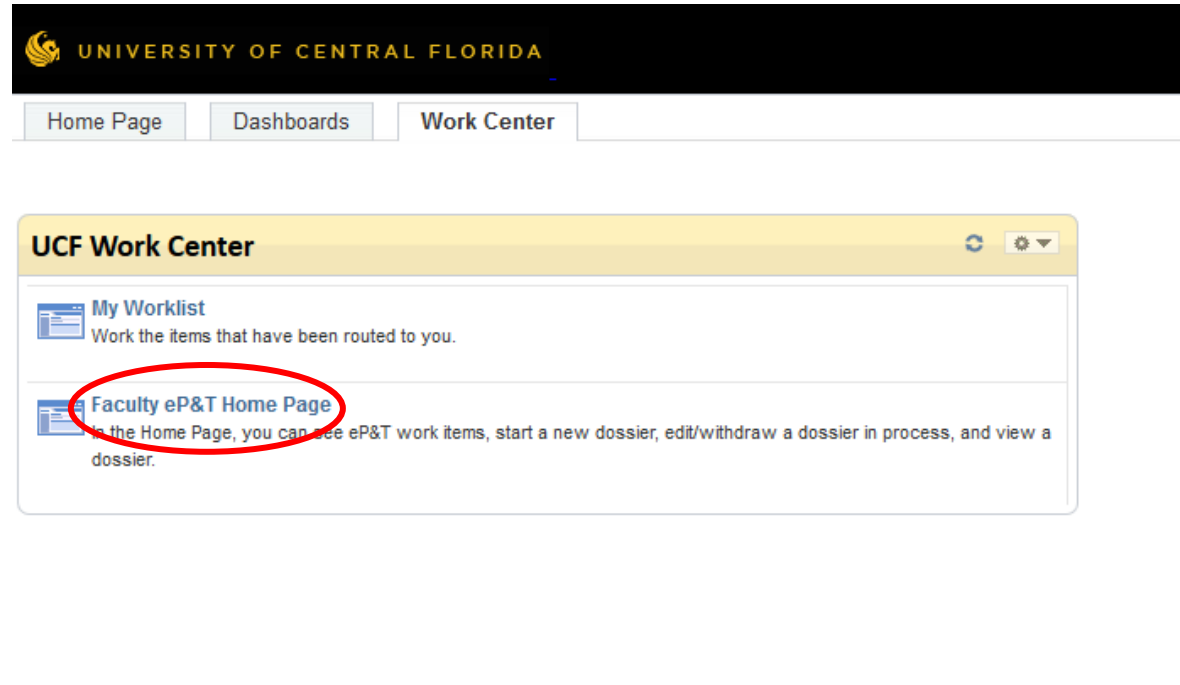
“Reviewed” forwards the dossier to the candidate.

“Hold/Save” saves the dossier, but does not forward it.

“Recycle...” returns the dossier to the candidate.

PART IV. View-Only Access to Dossiers

[Follow these instructions to view the dossiers throughout the process]

1.	<p>Sign in to the myUCF portal (my.ucf.edu) and click the Work Center tab.</p> 
2.	<p>Click Faculty eP&T Home Page.</p> 

3. Click **View-Only Access to eP&Ts**.

UNIVERSITY OF CENTRAL FLORIDA

Home Page Dashboards Work Center

UCF Work Center

Menu

- My Worklist**
Work the items that have been routed to you.
- Faculty eP&T Home Page**
In the Home Page, you can see eP&T work items, start a new dossier, edit/withdraw a dossier in process, and view a dossier.

Electronic Promotion & Tenure Home Page

- My Worklist**
Work the items that have been routed to you.
- Start a New eP&T**
Candidates, use this link to initiate a new dossier, which will then be routed to the appropriate reviewers. Once a dossier has been started, you will not be able to access it through this link. You must use the link below to make changes.
- Edit or Withdraw an eP&T Currently in Process**
Candidates, use this link to make changes to your dossier that is currently in process. Only dossiers that have not had final approval or been withdrawn will be accessible.
- View-Only Access to eP&Ts**
Use this link for a read-only view of dossiers. Candidates will not be able to access their dossier through this link until the process has been completed. Committee members will only have access to dossiers during the specified review windows on the schedule.

4. Click **Search** to bring up all dossiers. There is no need to complete any of the fields.

View a Dossier

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

eForm ID begins with

Year begins with

Pathway Type =

College begins with

Department begins with

Last Name begins with

First Name begins with

Empl ID begins with

Workflow Form Status =

Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Click "search" to bring up all dossiers.


5. Click any field on an individual's line to open the dossier. You may sort the dossiers by clicking on any of the headings.

Click any of the headings to sort the dossiers (e.g., by last name, first name, etc.).

Workflow Form Status =

Case Sensitive

Limit the number of results to (up to 300):

Basic Search  Save Search Criteria

Search Results

[View All](#)

eForm ID	Year	Pathway Type	College	Department	Last Name	First Name
731104	2018	T/TE	College of Business Adm	Finance		
731103	2018	T/TE	College of Engr & Comp Sci	Civil, Environ, & Constr Engr		

To open a dossier, click anywhere on an individual's line.

6. Use the tabs at the top of the page to navigate through the dossier.

Use the "Candidate Info" and "Department Committee" tabs to navigate through the dossier. *NOTE: Depending on your level of review, you may not see all tabs shown here.*

This button takes the user to the dossier attachments.

[Candidate Info](#) [Department Committee](#) [Department Chair](#) [College Committee](#) [College Dean](#) [U](#)

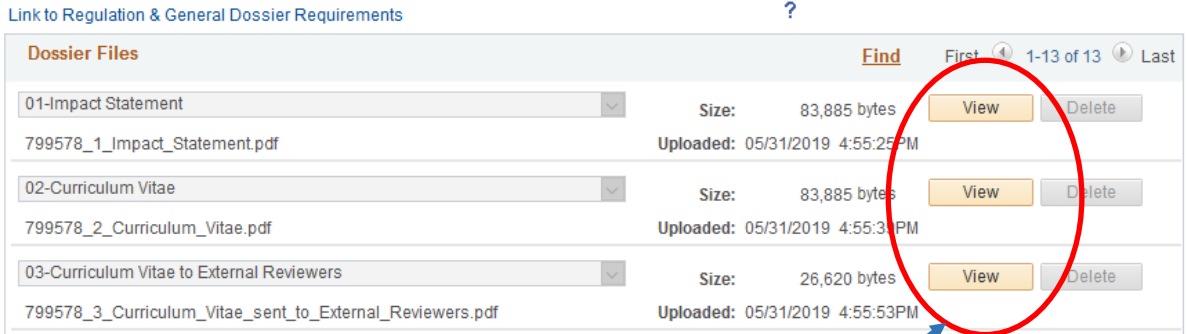
View Dossier

Step 1 of 8: Candidate Information

Candidate Information

Empl ID First Name: Last Name: eForm ID:

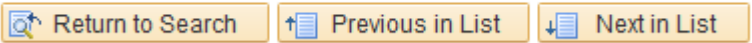
7. To view the attachments, select the “View” button for each dossier file.



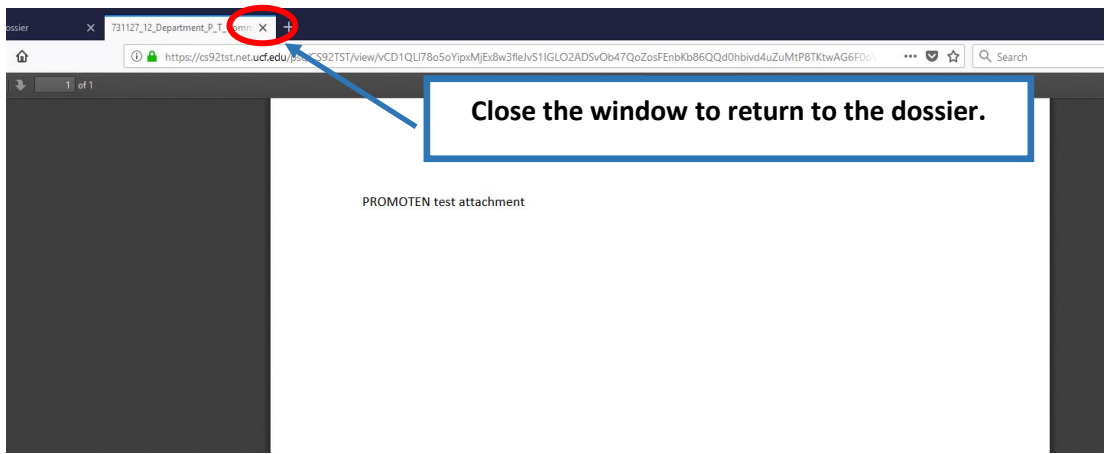
Click the “View” buttons to review the dossier files.

Click here to return to the list of dossiers.

Use these buttons to navigate to the previous/next dossier item.



8. After clicking **View**, the document will open in a new window. When you are finished reviewing the document, close the window to return to the dossier. Repeat this process until you have reviewed all of the attachments.



Close the window to return to the dossier.

NOTE: If a document does not open, ensure that your browser’s pop-up blocker is set to allow pop-ups.