UFCD Faculty Toolkit
General Guide

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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.

Note: If you would like to refer back to previous toolkit data entered in the 2016-2017 annual evaluation packet visit: https://apps.dental.ufl.edu/FacultyToolkit/Home/Index/select_tool

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](#).

**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: Assigned activities 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 source such as myUFL and faculty will also have the option to enter text or upload a document. Example: Teaching Evaluations will upload from Gatorrater for DMD courses and faculty will also have the option to upload evaluations from residents, continuing education courses or other course evaluation. See [Data Source Guide](#).

**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 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.

Preferred Browsers: Firefox, Safari and Chrome.

Click login on the left menu and use your gatorlink username and password.

Once logged in you can first click “To see the training video click here” to watch a short introduction to the new version of the toolkit.

To begin your annual evaluation packet click on either “Packet Selection” on the left menu or “Select Your Packet” underneath the training video link.

On the next screen click on the drop down menu “Select a Packet”
Select the annual evaluation packet cycle year.

Then click on “Select”.

You will now 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”
- “Educator Activity”
- “Research & Creative Work”
- “Service/Other Activity” or
- “Other”
Each of the section is broken down into further subsections. For example “ID Info” has the below subsections.

- Identifying Information
- Faculty Mentoring
- Departmental Affiliations
- Professional Qualifications
- Job Duties
- Areas of Specialization
- Assigned Activities
- Educational Background
- Employment
- Educator Activity
- Research & Creative Work
- Service/Other Activity
- Other
- Packet Progress
- Submit Packet
- Select Another Packet
- Export Packet

 Logout
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.

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.
Data Imported from Campus Source(s)
Certain sections of the annual evaluation packet will import from various campus sources. This will require editing/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 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:

- **Patent and Copyrights**
  - Follow this Instruction Guide to enter Patent and Copyrights for the annual evaluation review period.
- **Publications**
  - Human Resources will work with each faculty member to assist in a bulk import of PubMed publications.
  - 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.
  - Faculty will also need to manually enter each publication that is not captured in PubMed for the review period.
  - Follow this Instruction Guide to edit publications imported and enter other publications for the annual evaluation period.
- **Conference Presentations**
  - Follow this Instruction Guide to enter Conference 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/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 of 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.
Packet Progress
You will need to go through each page in order to complete your 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.

<table>
<thead>
<tr>
<th>Section</th>
<th>Status</th>
<th>Marked As N/A?</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advising and Mentoring</td>
<td>NOT STARTED</td>
<td>-</td>
<td>Mark As Not Applicable</td>
</tr>
<tr>
<td>Areas of Specialization</td>
<td>NOT STARTED</td>
<td>-</td>
<td>Mark As Not Applicable</td>
</tr>
<tr>
<td>Assigned Activities</td>
<td>NOT STARTED</td>
<td>Section Required</td>
<td></td>
</tr>
<tr>
<td>Bio sketch</td>
<td>NOT STARTED</td>
<td>-</td>
<td>Mark As Not Applicable</td>
</tr>
<tr>
<td>Clinical Activities</td>
<td>NOT STARTED</td>
<td>-</td>
<td>Mark As Not Applicable</td>
</tr>
<tr>
<td>Conference Presentations</td>
<td>NOT STARTED</td>
<td>Section Required</td>
<td></td>
</tr>
<tr>
<td>Contracts and Grants</td>
<td>NOT STARTED</td>
<td>Section Required</td>
<td></td>
</tr>
<tr>
<td>Creative Works</td>
<td>NOT STARTED</td>
<td>-</td>
<td>Mark As Not Applicable</td>
</tr>
<tr>
<td>Departmental Affiliations</td>
<td>SAVED</td>
<td>Section Required</td>
<td></td>
</tr>
</tbody>
</table>
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.

Click login on the left menu and use your gatorlink username and password.

To begin your annual evaluation packet click on either “Packet Selection” on the left hand menu or “Select Your Packet” underneath the training video link.

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

Select the annual evaluation packet cycle year.
Then click on “Select”.

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 Summary
- Evaluated Courses
- 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”.

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 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, provide a copy to the faculty member, and provide a copy to Human Resources.

Note: If you would like to refer back to previous toolkit data entered in the 2016-2017 annual evaluation packet visit: https://apps.dental.ufl.edu/FacultyToolkit/Home/Index/select_tool