UFCD Faculty Toolkit
Supervisor’s Guide

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The Foundation for The Gator Nation
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Overview

This document is intended to guide a faculty supervisor 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.

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](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](https://apps.dental.ufl.edu/FacultyToolkit/Home/Index/select_tool).

**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](https://apps.dental.ufl.edu/FacultyToolkit/Home/Index/select_tool).

**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](https://apps.dental.ufl.edu/FacultyToolkit/Home/Index/select_tool).

**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


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.

You will then have the option to see the overall percentage completion of each of your direct report’s annual evaluation packets by clicking “Packet Progress” under the left menu.

Supervisors also have the option to review information that has been input into the annual evaluation packet by direct reports by clicking on “Select Another Packet” on the left hand menu.

Then click “Select Packet” on the right hand side next to each faculty member’s name.
Note: Supervisors will not be able to complete the packet assessment for individual faculty until the faculty member has completed and submitted the annual evaluation packet.

Depending on your user role, one or more of the selections on the left menu will be visible. When a faculty member submits a completed annual evaluation packet for review, supervisors are notified via email.

As a supervisor, the next step after receiving notification that you have an annual evaluation packet ready for review would be to click the “Select Packet for Review” option under “Supervisor Review.”
You will then see a table showing all faculty who report to you, along with their annual evaluation packet status. 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.

Click “Select Packet” next to the packet you wish to review.

At this point, 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 mentoring, publications, or grant activity by clicking on the corresponding menu option at the left. 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 right hand side of the screen.
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 relating to teaching, student and peer evaluation, progress towards promotion and tenure, a proposed activity assignment worksheet, goals, and additional comments.

As you work through these sections, please make sure to click “Save Assessment Comments” in each section, or you will lose entries in that tab.
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.

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”. Goals proposed by the faculty are highlighted 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 – so this is a vital step in the evaluation process.
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.” This step can be done prior to entering any comments or completing any section as a supervisor.

You will be prompted to add a comment, and 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 will again have the option to “Route Packet Back to Faculty for Rework” or “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.”

**Route Packet Back to Faculty for Rework**  **Submit Assessment To Faculty**

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”

**Route Packet Back to Faculty for Rework**  **Submit Assessment To Countersigner**
The Countersigning Process
Countersigners may review a list of all packets for which they are listed as a countersigner, along with their status, by clicking “Select Packet for Review” under the countersigner menu at 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.

Countersigner’s 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.

**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 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.

Supervisors will then be able to print out the assessment by clicking on Supervisor Review “Export Assessment.”