UFCD Faculty Toolkit 2.0
Training
Office of Faculty Affairs and Human Resources
June 2018

Agenda

- Overview
- Workflow
- Faculty Toolkit System Tour
- Data Source Review
- Online Promotion and Tenure System Tour
- Next Steps
- Questions
Faculty Toolkit Overview

- Current Toolkit has been in use since 2000
- IT developed the Faculty Toolkit version 2.0 for the broader campus community
- Faculty Toolkit 2.0 will be used by:
  - College of Dentistry
  - Department of Anesthesiology, College of Medicine
  - Department of Surgery, College of Medicine
  - College of Veterinary Medicine

Importance of Annual Faculty Evaluation

- Required by UF, Regulation 7.010
- Required for Promotion and/or Tenure in addition to Mid-career review, and Sustained Performance Evaluation Program.
- Provides meaningful feedback and opportunity to meet regarding career development.
Faculty Toolkit 2.0 Overview

- Improved Functionality
  - Progress feature
  - Export feature
  - Additional auto import features
  - Not applicable feature
- IT rolled data over from 2016-2017 evaluation cycle
- Continued access to previous system for historical purposes
- Required data entry at source (myufl)
- Additional features are still under development

Faculty Toolkit Workflow
Faculty Toolkit 2.0 Tour

- Preferred Browsers: Firefox, Safari and Chrome
- Introduction Video
- Packet Progress
- Save and Next Section
- N/A Feature
- Data Imported from Campus Source(s)
- Required Fields
- All sections require action/entry to submit annual evaluation packet!

Data Source Guide

- 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.
Data Entry Requirements

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

- Patent and Copyrights
- Publications
- Conference Presentations
- Honors

Online Promotion and Tenure (OPT) Guides

- 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.
Online Promotion and Tenure (OPT) Guides

- **Patent and Copyrights**
  - Follow this [Instruction Guide](#) to enter Patent and Copyrights for the annual evaluation review 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.

Faculty Action Items

- Reminder to provide correct search name(s) for PubMed to HR
  - Email Christina Perez ([c.perez@dental.ufl.edu](mailto:c.perez@dental.ufl.edu))

- Manually input 2017-2018 data in myufl for:
  - Publications not in PubMed
  - Presentations
  - Patent/Copyrights
  - Honors

- Once Faculty Toolkit is available please review all data “Rolled Over” from previous Toolkit
  - Some data is outdated
  - IT manually completed this process
Office of Faculty Affairs/ Human Resources Action Items

- Review of Faculty Toolkit 2.0 with all departments
- Import of each faculty member’s publications in PubMed
- Work with IT on final phase of development
- Rollout of the yearly annual evaluation process
  - Adjusted timeline/dates

Questions and Resources

- Resources
  - Faculty Toolkit General Guide
  - Faculty Toolkit Supervisor’s Guide
  - Faculty Toolkit Data Source Guide