Faculty OPT Step 2: Go into OPT to Upload Your Materials and Certify Packet

This document tells faculty how to access the OPT system and upload the materials they are required to provide for Post-Tenure Review:
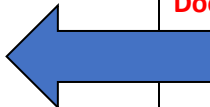
1. The "PTR Template" that was downloaded from OPT in Step 1, reviewed and revised as needed, then saved as a .pdf.
2. Complete and up-to-date CV (can be a lifetime CV or one that covers 1 Jan., 2019- 31 Dec., 2023, saved as a .pdf.
3. Optional narratives describing teaching, research, and service contributions during the same period; the three narrative should be bundled into one document and saved as a .pdf.

The deadline for uploading all three things documents into the OPT system and certifying the packet is 11:59 pm, 19 April.

1. Navigate to the PTR area of OPT via the established Lebron-approved path:

- ◼ *Main Menu > My Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure > Promotion & Tenure Packet*
- ◼ The first step in the path is here: https://my.ufl.edu/ps/signon.html.

2. Upon entering the "UF Online Promotion & Tenure Packet," you'll see:

JF Online Promotion & Tenure Packet

The P&T packet must be prepared according to University Guidelines.

Patricia Travis   Empl ID ~~████~~

Current Review

Upload/View Documents for Current Review

Use this link to upload documents and view the status of a review for the current year in Online Promotion and Tenure. (The link is not active if there is no current review.)

Promotion and Tenure Document

[Packet Template with Activity]   Open the packet template document populated with available data such as your professional education, tenure date, teaching evaluations and graduate committees.

Post Tenure Review

Upload/View Documents for Post Tenure Review

Use this link to upload documents for a post tenure review. (If the link is not active if there is no current post tenure review.)

Post Tenure Review Document

[Post Tenure Review with Activity]   Open the post tenure review document populated with available data such as teaching evaluations, graduate committees and sponsored projects.

Click on "Upload/View Documents for PTR"

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Don't click on "PTR with Activity"! You did that in Step 1.
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Note: depending on when you access the system, the Dean's office may have already added.pdfs of the last five years of annual letters of evaluation and/or any disciplinary records from your HR file to the OPT case. If so, you will be able to see these files in the system; you will not be able to delete them. The guidance that follows assumes that nothing has yet been uploaded to OPT.

3. Upon entering the "Post Tenure Review SS" area, you'll see:

Click on "Category" to see a dropdown menu of the materials that will go into your packet.

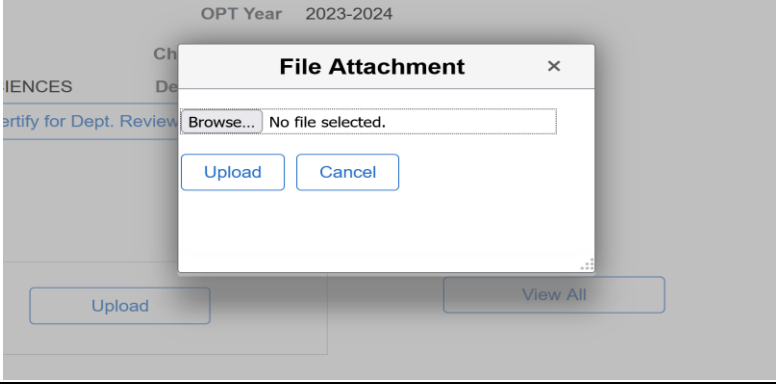## 4. When you click on "Category," you'll see:

From the categories in the dropdown, select "Post-Tenure Review," then click "Upload."

In the dropdown, "Post-Tenure Review" refers to the "PTR Template" you originally downloaded from the OPT system, reviewed/edited for accuracy, and have saved as a .pdf file.
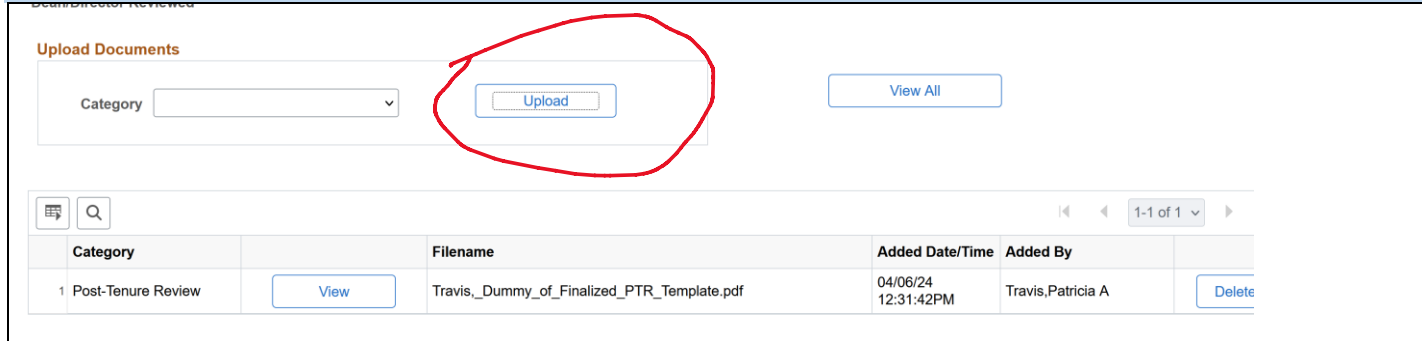
Note: In the dropdown, the term "Optional Narrative (up to 3)" refers to the three optional narratives "of up to one page per area of assignment highlighting accomplishments and demonstrating performance relative to assigned duties over the previous five years [and including] additional detail and clarification of…research, teaching, service or other contributions" ("PTR Policy 3.28.24" p.4). You can write up to one page about each area, for a total of three pages. The narratives should be bundled into one .pdf file for uploading here. You will not be able to attach multiple documents.

The term "CV/Resume" refers to your complete and up-to-date CV—covering either your whole career, or the last five years.

5. When you click "Upload," a wheel will spin, then you'll see:

OPT Year 2023-2024 Ch IENCES De ertify for Dept. Review **File Attachment** × Browse... No file selected. Upload Cancel Upload View All		**Use the "Browse" function to upload your previously-downloaded-reviewed/edited-for-accuracy-and-saved-on-your-computer-as-.pdf "PTR Template."**

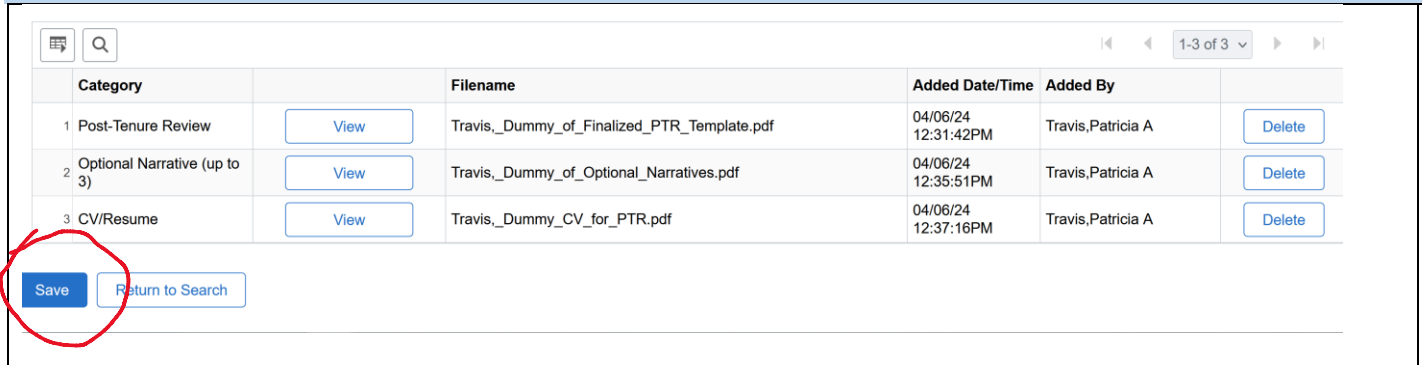## 6. Once you upload your .pdf of your PTR Template, you'll see:

Return to the "Category" dropdown to select the CV and the optional narratives and pull them each into the OPT system using the "Upload" button.

7. When you have uploaded your PTR Template, CV, and Optional Narratives, you'll see:

Click "Save" to save your documents in the system.

Click the "View" button to see the text of the documents you've uploaded. If you want to revise something, you can delete a file using the "Delete" button, edit and re-save the document, then re-attach a new version. **You must click "Save" every time you make a change.**

8. When you have uploaded your finalized documents and are ready to end your part of the process, scroll up the "Post Tenure Review SS" page so that you see the button to "Certify for Dept. Review." Be aware that once you certify the packet, you will not be able to make any changes to it.

	Click the button to Certify for Dept. Review. ————————— The deadline for faculty to finalize and certify their portion of the review is **11:59 pm, April 19.** ——————————

9. When you have clicked the button to "Certify for Dept. Review," you'll see this:

	Once you click "OK," you will not be able to make ANY changes to your packet. By clicking "OK" you affirm that the material presented is correct and complete.

Once the faculty member under review certifies their inputs, the PTR packet then moves to a new status in the OPT system where it awaits the upload of the Chair's letter and certification. Faculty can still see all the files in their case, but they cannot make modifications.

More information will be forthcoming on how to access your PTR case once the Chair's assessment and Dean's letter have been added and to upload the optional response to the Dean's letter.