# **OPT-Post Tenure Review**

### **Overview**

The following document describes the steps on how to download the new Post Tenure Review template along with the steps needed for document upload and completion.

# **Downloading Post Tenure Packet – Faculty Self Service**

#### Description

Faculty will be able to access and download the new Post Tenure Review template with Activity by navigating to the following location found through HR Self Service:

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure

Click the Promotion & Tenure Packet link.

Promotion & Tenure Packet Actions

View the Promotion & Tenure template packet. Upload documents and view the status of reviews tracked in Online Promotion & Tenure.

Promotion & Tenure Packet

### DOWNLOADING TEMPLATE

Specific sections of the Packet Template will be automatically populated with data (i.e., Effort Reported, Teaching Evaluations, Graduate Committee Activities, etc.). Other areas will need your input.

1. Click the Packet Template with Activity link.

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Post Te	enure Review Document	
Post	Tenure Review with Activity Copen the post tenure review document popula available data such as teaching evaluations, g committees and sponsored projects.	
	JF_PO_PACKET.rtf 68 KB • Done	
2. If	your browser initially blocks the display of the Packet Template, click Open from	the message window.
3. If	your browser displays the Packet Template in Protected View, click the Enable Ed	diting button to open for editing.
	TOOLS     VIEW     UF_PT_PACKET.rtf (Protected View) - Word       TECTED VIEW     Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Pro	Image: Second

# **Downloading Post Tenure Packet – Annual Review Admin Page**

### Description

Department Admins will be able to access and download the new Post Tenure Review template with Activity by navigating to the following location found through the following navigation:

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion and Tenure > Annual Review Admin

Promotion and Tenure Document
OPT Packet Template with Activity
Post Tenure Review
Post Tenure Review with Activity
Annual Report Pilot
Type College of Pharmacy w/IDP   Annual Report Template
Distinguished Professor Application
Distinguished Professor Template
Return to Search
DOWNLOADING TEMPLATE
Specific sections of the Faculties Post Tenure Template will be automatically populated with data (i.e., Effort Reported, Teaching Evaluations, Graduate Committee Activities, etc.). Other areas will need your input.
1. Click the Packet Template with Activity link.
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.
UF_PO_PACKET.rtf 368 KB • Done

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2. If your browser initially blocks the display of the Packet Template, click Open from the message window.

3. If your browser displays the Packet Template in Protected View, click the Enable Editing button to open for editing.

	FIL	E TOOLS	VIEW	UF_PT_PACKET.rtf (Protected View) - Word	(2)	-		×
	0	PROTECTED VIEW	Be ca	reful-files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.	Enable Editing			×
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### **Opening Post Tenure Review Case – Department Administrators**

Description

OPENING CASE FOR POST TENURE REVIEW

Department Administrators will navigate to the PTR Department Admin Page to open up a Case for Faculty Members Post Tenure Review.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

Click on the "Add a New Value" tab.

Enter in the Faculty Members UFID along with the Year range the review will be associated to.
Click "Add"
Post Tenure Review - Dept Adm
Eind an Existing Value Add a New Value
*Empl ID Q
*Promotion and Tenure Year 2028x2024 Q
2024-2025
Find an Existing Value   Add a New Value
Once created, a new page will be generated in the "Open" status.
Post Tenure Review
Candidate Status Open
NOTE: To create the case number, the page must be saved once created.

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\$witch User		PTR Departm	ent Admin
Post Tenure Review			
	Empl ID Case Number 999999 OPT Year 2000 LINICAL / HLTH PSYCHOLOGY Chair/Director	el.	
Upload Documents			
Category	✓ Upload		
		Personalize   Find	🛛 🔹 🕞 😨 👔 🖓 🖓 🖓
Category	Filename	Added Date/Time	Added By
1			

### **Uploading and Certifying Post Tenure Packet – Faculty Self Service**

### Description

UPLOADING AND CERTIFYING YOUR TEMPLATE PACKET

After downloading, accurately completing, and saving the Post Tenure template as a .pdf file, you will have the ability to upload the Post Tenure template, along with your Resume and 3 optional Narrative documents.

NAVIGATION Login into myUFL and navigate to:

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Main Menu > Human Resour Post Tenure Review	rces > Self Service > Fac	ulty Promotion & Ter	nure > UF Faculty Pror	notion & Tenure
Candidate Status Open	~	Empl ID	Case Number 7 OPT Year 202222224	
College 33070000	HP-CLINICAL / HLTH P	Cild	ir/Director	1
Certified Date	HP-CLINICAL / HLTH P	SYCHOLOGY Dea	n/Director	
Certified Date	Cr	ertify for Dept. Review		
Upload Documents				
Category	Ň	Upload		
	5			
	eview Letters			Per
Category Dean's Le	etter ir/Director's Letter			Added
1	ary Documentation			
	esponse to Dean			
Optional 1	Narrative (up to 3) ure Review			
NOTE: You can upload it as	culty mentor(s) and Depa			However, we strongly recommend tion. Once certified, the original
Once Post Tenure Review ter the "Certify for Dept Review		onal Narratives have b	been uploaded, and are	ready to move forward, Click on
A message will appear for the	e user to confirm the doc	uments are ready to su	ubmit to the next step i	n the process.
Message				
Are you sure the docum	nents are complete ar	nd ready for depart	ment review? (2400	00,1063)
OK Car	ncel			

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	_		Number 7		
Status Certified	Emj		e Number 7		
			Year 28282834		
	NICAL / HLTH PSY	Gildinbird	ector		
*College 33070000 Q HP-CLI	NICAL / HLTH PSY	CHOLOGY Dean/Dire	ector '		
ified Date 02/07/2024					
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Upload Documents					
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opioad Documents					
Category Post-Tenure Review	v ]	Upload			
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Category Post-Tenure Review	×			Personalize   Find   🔄	
Category Post-Tenure Review		Filename		Added Date/Time	Added By
Category Post-Tenure Review Category 1 Resume	View	Filename TestPDFfile.pdf		Added Date/Time 02/07/24 12:35:39PM	Added By Woods,Adam J
Category Post-Tenure Review		Filename		Added Date/Time	Added By

# Adding Faculty Annual Evaluation – Department Administrators

### Description

ADDING ANNUAL EVALUATIONS AND DEPARTMENT CRITERIA FOR FACULTY MEMBERS

Once the Post Tenure Case is in Certified Status, Department Administrators will have the ability to upload 5 years' worth of Annual Letters of Evaluations, along with any additional Department Criteria for faculty members.

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NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

NavBar: Menu			ŝ
	=	Identify APB Members	
Recently Visited		UF Faculty Designee Access	
0	=	OPT University Admin	
Favorites	=	APB Queries	
=	=	Publication Import	
Menu	=	Annual Review Admin	
	=	PTR Department Admin	

As the Department Admin, Select Annual Review Letters and/or Department Criteria from the Upload Documents grid, select Letter(s) and click upload.

Upload Docum	ients			
Category		•	Upload	
	Annual Review Letters Dean's Letter Department Criteria			
E Q	Dept Chair/Director's Letter Disciplinary Documentation			
Category	Faculty Response to Dean Optional Narrative (up to 3)		Filename	
1 Post-Ten	Post-Tenure Review Resume	View	TEST.pdf	

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	nd no additional documents need to be up ed to Department Admin Reviewed.	ploaded for the Faculty member.	, Department will update the Status on the
Candidate	Woods, Aslam J	Empl ID	Case Number 7
Status	Certified ~		OPT Year 2828×2824
Department *College Certified Date	College Reviewed Department Admin Reviewed Department Pariswed	HLTH PSYCHOLOGY	Chair/Director

t Tenure Review	
I TEILUIE REVIEW	
andidate Status Department Admin Review	Empl ID Case Number 7 Wed V OPT Year 20000044
partment 33070000 HP-0	CLINICAL / HLTH PSYCHOLOGY Chair/Director
*College 33070000 Q HP-0	CLINICAL / HLTH PSYCHOLOGY Dean/Director
fied Date 02/07/2024	
100 Date 02/07/2024	
Jpload Documents	
Category Annual Review Lette	ters V Upload
	P
Category	Filename
1 Resume	View TestPDFfile.pdf
2 Optional Narrative (up to 3)	Vlew TEST.pdf
3 Post-Tenure Review	Vlew UF_PO_PACKET(5).pdf
4 Annual Review Letters	View TestPDFfile.pdf
Save Return to Search	

## **Adding Chairs Letter – Department Chairs**

Description

ADDING CHAIRS LETTER FOR FACULTY MEMBERS

Once the Post Tenure Case is in Department Admin Reviewed, the Department Chairs will have the ability to upload their Chairs Letter.

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NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Chair/Director

In the Upload Documents section, Department Chair can select the Dept Chair/Director's Letter

Select the File Attachment (as PDF) and click upload.

### **Upload Documents**

Category		~	Up	load	
	Annual Review Letters Dean's Letter Department Criteria				
	Dept Chair/Director's Letter	N			
	Disciplinary Documentation	43			
Category	Faculty Response to Dean Optional Narrative (up to 3)			Filename	
_	Post-Tenure Review				

Once Department Chair/Director's Letter has been uploaded, the Department Chair can mark the review as complete by pressing the Chair/Director Review Complete Button.

\$witch User
Post Tenure Review
Candidate       Woods,Adam J       Empl ID       87738921       Case Number       7         Status       Department Admin Reviewed <ul> <li>OPT Year</li> <li>OPT Year</li></ul>
Dean/Director Reviewed
A message will appear for the user to confirm the documents are ready to submit to the next step in the process.
Message
Are you sure the department review is complete? (24000,1065) OK Cancel

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Once the "OK" button is pressed, Post Tenure Review Status will then update to Department Reviewed.								
The date will be captured and reflect in the Chair/Director Reviewed Section.								
\$witch User								
Post Tenure Review								
Candidate Woods,Adam J Empl ID 87738921 Case Number 7								
Status Department Reviewed V OPT Year 2022 2022 2022								
Department 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Chair/Director Janicke,David								
*College 33070000 HP-CLINICAL / HLTH PSYCHOLOGY Dean/Director Virnig,Beth A								
Certified Date 02/07/2024								
Chair/Director Reviewed 02/08/2024 Chair/Director Review Complete								
Dean/Director Reviewed								
Upload Documents								
Cotogon Upload								
Category								
NOTE: The Department Chair Step is now complete. Dean/Director Step is now ready for Review.								

# Adding Deans Letter – College Dean/Director

# Description ADDING DEANS LETTER FOR FACULTY MEMBERS Once the Department Chair/Director has uploaded their Chair's Letter and Case is now in Department Reviewed status, the College Dean can now navigate to the PTR College Dean/Director page to add in their Deans Letter. Disciplinary Documents can also be uploaded by the Dean at this Step. NAVIGATION Login into myUFL and navigate to: Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR College Dean/Director NavBar: Menu ် Menu > Human Resources > Workforce Development > Faculty Events **Recently Visited Online Promotion and Tenure OPT** Overview and Resources Favorites **Promotion & Tenure Review** College Dean/Director Review Menu **UF Faculty Designee Access** PTR College Dean/Director In the Upload Documents section, College Deans/Directors can select the following document to upload:

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Categories:							
Dean's Letter							
Disciplinary Do	ocumentatior	1					
Post Tenu	ire Review						
Candidate	West-Alter		Empl ID	1000	Case Nun	nber	7
Status	Department	Reviewed ~			OPT Year	2023+2024	
Department	33070000	HP-CLINICAL	/ HLTH PSYCHOLOGY	(	Chair/Director		
*College	33070000		/ HLTH PSYCHOLOGY		Dean/Director	Second Second	
Ce	ortified Date	02/07/2024					
Chair/Directe	or Reviewed	02/08/2024					
Dean/Directe	or Reviewed		Dean/Directo	or Review Co	mplete		
Upload Do	ocuments						
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	Dept	Chair/Director's Letter					
B Q	Facu	plinary Documentation ty Response to Dean					
Cate		nal Narrative (up to 3) Tenure Review		Filena	ame		
		uploaded (and Discipl		if needed), t	the College Dear	n can mark the	e review as
complete by pr	essing the Ch	nair/Director Review Co	omplete Button.				

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*College       33070000       HP-CLINICAL / HLTH PSYCHOLOGY       Dean/Director         Certified Date       02/08/2024         Chair/Director Reviewed       02/08/2024         Dean/Director Reviewed       Dean/Director Review Complete         Upload Documents       Upload         Category       Upload	Status	Department Rev	riewed ~			OPT Year	<b>2023:202</b> *
Certified Date 02/07/2024   Chair/Director Reviewed 02/08/2024   Dean/Director Reviewed 02/08/2024   Upload Documents   Category   Implement the documents are ready to submit to the next step in the process. re you sure the college review is complete? (24000,1066)	Department	33070000	HP-CLINICAL	HLTH PSYCHOLOG	βY	Chair/Director	definition from the
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Upload Documents Category Upload Category Upload message will appear for the user to confirm the documents are ready to submit to the next step in the process. re you sure the college review is complete? (24000,1066)	Chair/Direct	or Reviewed 0	2/08/2024				
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nessage will appear for the user to confirm the documents are ready to submit to the next step in the process. re you sure the college review is complete? (24000,1066)	Upload D	ocuments					
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re you sure the college review is complete? (24000,1066)							
OK Cancel	re you sur						
		OK	Cance	el			

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	Once review has completed, the date will be captured and reflect in the Dean/Director Reviewed Section. In addition, the Status will update from Department Reviewed to College Reviewed.							
Post Ter	nure Revie	w						
Candidate		Adda a		Empl ID		Case Nun	nber	7
Status	College	Review	ved ~			OPT Year	XXXX-XX	24
Departmen	t 330700	00	HP-CLINICAL	/ HLTH PSYCHOLOG	GY	Chair/Director	Annual C	and a second
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(	Certified D	ate (	02/07/2024					
Chair/Dire	ctor Review	wed	02/08/2024					
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NOTE: The F	ann/Direct	tors Sta	n is now Complete	The faculties response	a to the Deen	s Letter is now re	odv	
NULE: THE L		iors Sie	p is now complete.	The faculties response	e to the Dean	s Letter is now rea	auy.	

# Adding Faculty Response to Deans Letter– Faculty Self Service

### Description

#### ADDING FACULTY RESPONSE TO DEANS LETTER

Faculty will have 5 days to upload their response to the Dean's Letter once the case is College Reviewed Status. This response can be done through the UF Faculty Promotion & Tenure page through the Promotion & Tenure Packet Hyperlink found in HR Self Service.

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Self Service > Faculty Promotion & Tenure > UF Faculty Promotion & Tenure

In the Upload Documents section, an option will be present for the candidate to upload their Response to the Dean.

	lenure	Review		
			·	
Candio	ate		Empl ID	1
Sta	tus Co	llege Revi	iewed ~	
Departm	nent 33	070000	HP-CLINICAL / HLTH PSYCHOLOGY	
*Coll	ege 33	070000	HP-CLINICAL / HLTH PSYCHOLOGY	
	Certif	ied Date	02/07/2024	
Chair/D	irector F	Reviewed	02/08/2024	
Dean/D	irector F	Reviewed	02/09/2024	
Uploa	ad Docu Catego			
				_
		Annu	ual Review Letters	
			ual Review Letters	
<b>F</b>	Q	Dear Dept	n's Letter	
E,	Q Catego	Dear Dept Disci	n's Letter Chair/Director's Letter iplinary Documentation	
	Catego	Dear Dept Disci Facu	n's Letter Chair/Director's Letter iplinary Documentation Ity Response to Dean	
		Dear Dept Disci Facu Poptic	n's Letter Chair/Director's Letter iplinary Documentation	

Q				I	<ul> <li>◀ 1-7 of 7 ∨</li> </ul>
Category			Filename	Added Date/Time	Added By
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2 Resume		View	TestPDFfile.pdf	02/12/24 4:13:31PM	Participane, Status
3 Annual Review	w Letters	View	TEST.pdf	02/12/24 4:15:28PM	Report Revised
4 Dept Chair/Dir	rector's Letter	View	TEST.pdf	02/12/24 4:21:08PM	Spectra Area 7
5 Dean's Letter		View	TEST.pdf	02/12/24 4:25:32PM	Philasolane, Danielli
6 Faculty Respo	onse to Dean	View	TEST.pdf	02/12/24 4:27:25PM	Participus, Sana
ipuale fron		Reviewed to Colle	ες κενιεωεά.		
Post Tent	ure Review				
	ure Review		Empl ID	Case Nun	nber 7
			Empl ID	Case Nun OPT Year	nber 7 2022x30344
Candidate Status	Texts Adapt	ewed	Empl ID		
Candidate Status	College Revi	ewed HP-CLIN	~	OPT Year	2 <del>022x2024</del>
Candidate Status epartment *College	College Revi 33070000	ewed HP-CLIN	VIICAL / HLTH PSYCHOLOGY	OPT Year Chair/Director	2022x2024
Candidate Status epartment *College Ce	College Revi 33070000 33070000	HP-CLIN	VIICAL / HLTH PSYCHOLOGY	OPT Year Chair/Director	2022x2024
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Candidate Status epartment *College Ca Chair/Direct Dean/Direct	College Revi 33070000 33070000 ertified Date tor Reviewed tor Reviewed	ewed HP-CLIN HP-CLIN 02/07/2024 02/08/2024	IICAL / HLTH PSYCHOLOGY IICAL / HLTH PSYCHOLOGY Dean/Director F	OPT Year Chair/Director Dean/Director	2022x2024

Faculty Response to the Deans letter will be uploaded storing the date in which it was added, and who added it.

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**NOTE:** The Faculty Response is now Complete. The Deans Assessment to the Faculty response is now ready. If the case is deemed complete, the Department Admin can then update the case to mark the faculties Post Tenure Review as Complete.

## **Completing Post Tenure Review – Department Administrators**

Description

COMPLETING POST TENURE REVIEW CASE

Once the Post Tenure Case has been reviewed by the Dean/Department Admins, the case status can now be updated to reflect "Complete".

NAVIGATION Login into myUFL and navigate to:

Main Menu > Human Resources > Workforce Development > Faculty Events > Online Promotion & Tenure > PTR Department Admin

As the Department Admin, they will be able to confirm all three reviewers (Faculty, Chair and Deans) have completed their reviews by verifying the dates are present and confirm all required document are uploaded.

Once everything has been confirmed, the Department Admin can update the Status on the Case to Complete.

Candidat       Empl D       Case Number       7         Status       OP T Year       Status Status       OP T Year       Status Status         College       Certified       I H TH PSYCHOLOGY       Chair/Director       Image: College       College       Certified       I H TH PSYCHOLOGY       Dear/Director       Image: College       Dear/Director       Image: Colege       De	Post Tenu	re Review				
Status       Review Complete       OPT Year       2023-2024k         Department       Certified       / HLTH PSYCHOLOGY       Chair/Director         College       Reviewed       / HLTH PSYCHOLOGY       Dean/Director         Chair/Direct       Department Admin Reviewed       Department Reviewed         Dean/Direct       Open       Withdrawn         Category       Upload       Upload						
Department Certified College Reviewed College Reviewed College Reviewed College Reviewed Department Admin Reviewed Department Reviewed Status to Review Complete Status Partment Administrators will be greeted with the following Pop up once they attempt to Save: Are you sure you are ready to update the review to 'Complete' status? (24000,1067)	(			Accession 1		iber /
*College       Certified       L / HLTH PSYCHOLOGY       Dean/Director         Chair/Direct       Department Admin Reviewed       Department Reviewed       Department Reviewed         Dean/Direct       Open       Withdrawn       Upload       Upload         OTE: From College Reviewed Status to Review Complete Status         epartment Administrators will be greeted with the following Pop up once they attempt to Save:         Are you sure you are ready to update the review to 'Complete' status? (24000,1067)		Review Complete			OPT Year	2023-2024
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Dean/Direct Open Review Complete Withdrawn Category Upload OTE: From College Reviewed Status to Review Complete Status epartment Administrators will be greeted with the following Pop up once they attempt to Save:	Ce					
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Category       Upload         OTE: From College Reviewed Status to Review Complete Status         epartment Administrators will be greeted with the following Pop up once they attempt to Save:         Are you sure you are ready to update the review to 'Complete' status? (24000,1067)						
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epartment Administrators will be greeted with the following Pop up once they attempt to Save: Are you sure you are ready to update the review to 'Complete' status? (24000,1067)	outo	3017				
UK Cancer	-	you are ready to update the r	review to 'Complete'			

be uploaded.	-	will no	w the locked in all areas, including the Faculty Self So	ervice navigations.	No other items can
Post Tenu	ire Review				
Candidate	Terrary Arrest		Empl ID	Case Num	ber 7
Status	Review Com	olete	<b>← →</b>	OPT Year	2023-2024
Department	33070000		HP-CLINICAL / HLTH PSYCHOLOGY	Chair/Director	And the Party of t
*College	33070000	Q	HP-CLINICAL / HLTH PSYCHOLOGY	Dean/Director	A factory and
с	ertified Date	02/0	7/2024		
Chair/Direc	tor Reviewed	02/0	8/2024		
Dean/Direc	tor Reviewed	02/0	9/2024		
Upload D	ocuments				
Cate	Dept	Chair/D	irector's Letter V Upload	-	