Using Statuses to Track APRs

Add, Change, or Remove Case Statuses

Unit Administrators, Case Managers, and Committee Managers can apply and remove color coded case statuses to mark where cases are in the review process and mark their ultimate outcomes. These statuses can be applied or removed one at a time to individual cases or as a bulk action to a group of selected cases.

It is recommended that the unit administrators who are creating APR cases for groups of faculty members add statuses to the individual faculty members' APR cases as they progress through the Case Review Steps.

There are five APR statuses to track faculty performance reviews:

Open	<i>.</i>
Waiting for Faculty APR Submission	e
Supervisor Review	e *
Faculty Review	ø
Chair Review	ø
Faculty Review 2	ø
Closed	ø

During **Step 4A** Unit administrators can change the status of the faculty members APR to **Waiting for Faculty APR Submission**. This will allow the unit administrator to filter out the faculty APRs that need to be notified via email that they have an APR case to complete.

- 1) Navigate to the **Cases** page.
- 2) To navigate to the **Status** change button, click the [Faculty Member's Name] in the Cases window.

Home Your Packets	UMass Chan Medical School >			CREATE CASE
culty Activity Reporting	Search cases			
Announcements & Help		Filter		
Profile				
Activities				
Forms & Reports	2 of 2 cases			
Vitas & Biosketches 🔺	Filtered By: Active Cases 🗙			
Vitas				
My Templates	Name 🗸	Type ♦	Template Name 🗢	Status 🗢
Legacy Vitas				
Find Colleagues	Faculty Member 0	Review	2025 PQHS Faculty Annual Performance Review	Waiting for Faculty APR S
Account Access	Population and Quantitative Health Sciences	-	Supervisor	
Administration 🗸	Case Created: Waiting for an administrator to	2 candidate		
view, Promotion & Tenure	Faculty Member 2	Review	2025 PQHS Faculty Annual Performance Review	
Cases	Population and Quantitative Health Sciences	Review	Supervisor	Faculty Review
remplates	Case Created: Waiting for an administrator to n	otify candidate		
Administration	and an addition to the	oni, ournauto		
Reports				
Users & Groups				

3) Click the blue Status Change or change button under the word **Status**.

If no status has been assigned, click <u>Select Status</u> at the top. If a status is already assigned it will display here and you can click <u>Change</u> instead. You may have to scroll down through the dropdown list to see more options.

Faculty Member 2		Send Case 🗸 Case Op	ptions 🗸
Unit Population and Quantitative Health Sciences	Template 2025 PQHS Faculty Annual Performance Review Supervisor	Status Faculy Review change	3
Case Materials Case Details			
Search case materials by title			
	۹		
👽 🚯 Expand All 👄 Collapse All		🛓 Download 🛛 Share 🐗 Settings	Move
Candidate Packet Any materials added to the candidate packet will be files in an unlocked section before they submit.	visible to the candidate and available for them to use in their	current case. The candidate will be able to replace	or delete any
✓ Recording Academic Activities Un	locked	ତ	Lock
Please record your academic and professional ac you—you do not need to complete every section.	tivities for the previous academic year in the appropriate sect	ions below. Complete only the sections that are rele	evant to
Key Points			
	make it easier to complete the form. The APR form is consis your CV into your APR. Keep a log of your teaching evaluatior		format,

4) A drop-down window will appear. Click on Waiting for Faculty APR Submission.

Jnit Population and Quantitative Health Sciences	Template 2025 PQHS Faculty Annual Performance Review Supervisor	• Open change
Case Materials Case Details		Closed Supervisor Review
Search case materials by title		Faculty Review
	٩	Chair Review
		Faculty Review 2
🖌 😌 Expand All 🗢 Collapse All	<u>خ</u>	Waiting for Faculty APR
Candidate Packet		Submission
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Any materials added to the candidate packet will be	visible to the candidate and available for them to use in their cu	rrent case. The candidate will be able to replace or delet
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Any materials added to the candidate packet will be files in an unlocked section before they submit.	visible to the candidate and available for them to use in their cu	rrent case. The candidate will be able to replace or delet • Lock
Any materials added to the candidate packet will be files in an unlocked section before they submit.		

Then go to Step 2 in Job Aid Step 4A.

Unit administrators have the option to add, change or remove statuses on the APRs they are monitoring as they progress through the **Case Review Steps**.