# Step 4: Creating Faculty Annual Performance Review Case(s) in Interfolio

### It is recommended that unit administrators:

- practice creating one case and notifying the faculty member before creating groups of cases. (recommended for unit administrators new to Interfolio)
- create groups of APRs for faculty members being reviewed by the same supervisor one at a time and complete Step 1 through 5 before creating another group of APRs.
- review a couple of the APR **Case Review Steps** within a group of cases assigned to a supervisor's template to ensure they have been assigned to the correct supervisor, faculty member, chair, and unit administrator before moving onto the (Step 5 Job Aid: Notifying Faculty Members).
- During the review of the **Case Review Steps** also ensure that all the committee members and faculty members have a blue Star \* next to their names.
- 1) Click **Cases** in the left-hand navigation bar.
- 2) Click the Filter button and a menu will appear on the right side of the screen.
- Select your unit/department from the Unit drop down menu. Make sure that the Active Box is checked.
- 4) Close the right-hand **Filter box** by clicking the X in the upper right corner.

Home	UMass Chan Medical School > Cases	2	3	✓ Unit	
New, Comotion & Tenure Cases	Search cases			Population and Quantitation Health Sciences	ve 🗸
Templates Administration	٩	Filter		Include child units	O ON
Reports		$\smile$		✔ Туре	
Users & Groups	1 of 1 cases Filtered By: Population and Quantitative Health Sciences	X Include child unit	s X Active Cases X Reset Filters	<ul> <li>Appointment</li> <li>Promotion</li> <li>Reappointment</li> </ul>	A
	Name 🗸	Туре 🗢	Template Name 🗢	<ul> <li>Review</li> <li>Sabbatical</li> </ul>	
	Faculty Member 1     Population and Quantitative Health Sciences	Review	Faculty Annual Performance Review Tem PQHS	✓ Status	
	Step 5 of 5: Academic Administrator			<ul> <li>Closed</li> <li>Active or Closed</li> </ul>	
				<ul> <li>Active of closed</li> <li>Active</li> </ul>	
0				Closed	

Home Review, Promotion & Tenure	Cases	CREATE CASE
Cases	Search cases	
Templates	Q Filter	
Administration		
Reports		
Users & Groups	1 of 1 cases	
	Filtered By: Population and Quantitative Health Sciences X (Include child units X) Active Cases X	Reset Filters
	Name → Type ◆ Template Name	♦ Status ♦

5)

6) Click **SELECT CANDIDATES** to identify the faculty members involved in the case(s).

	Case eate Cases	5		
	1	2	3	
Se	lect Candidate(s)	Select Template	Review & Settings	
	andidate Inform Selected Candidates A candidate has not been so + SELECT CANDID/	elected. Once you select one or	more candidates, the candidate informati	ion will display.

A pop-up menu will appear. This is where unit administrators will search for faculty and add faculty members that they want to create APR cases for.

- 7) Enter the name of your department in the Search Box. Click the magnifying glass icon.
- 8) Click the Check Box next to the faculty members' name(s) you want to create cases for. To find faculty within your unit/department, scroll down the list, click on the page number or add a number to Go to Page field at the bottom of the pop-up window.
   Only create cases for 25 faculty members at a time.
- 9) Click the Add Candidates button after you have selected all the faculty you want to create APRs for.

1-20 of	f 118 Results	Show
	Name 个	Unit
	Bruce Barton Bruce.Barton@umassmed.edu	Population and Quantitative Health Sciences
	Amanda Blok Amanda.Blok@umassmed.edu	Population and Quantitative Health Sciences
	Michelle Boakye michelle.boakye@umb.edu	Population and Quantitative Health Sciences
<b>~</b>	Barbara Bokhour Barbara.Bokhour@va.gov	Population and Quantitative Health Sciences
	Benjamin Bovell-Ammon ben.bovellammon@baystatehealth.org	Healthcare Delivery and Population Sciences at UMass Chan - Baystate
	Dustin Burns dbums@exponent.com	Population and Quantitative Health Sciences
	James Carmody James.Carmody@Umassmed.edu	Population and Quantitative Health Sciences
	Maira Castaneda Avila	

Edits can be made to the list of selected faculty members by clicking the **SELECT CANDIDATES** button again. If no edits are needed.

10) Click the **CONTINUE** button to move onto the next step.

Home Review, Promotion & Tenure	0	2	(3)	
Cases	Select Candidate(s)	Select Template	Review & Settings	
Templates Administration	Candidate Inform	nation		
Reports	Selected Candidates			
Users & Groups	1-3 of 3 Results			show 10 -
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	FM Faculty Mem UMass_faculty@		Population and Quantitative Health Sciences +4 more	
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	+ SELECT CAND	DATES		
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attos://mtinterfolio.com/#		-		

# Select Template

- 11) Select the correct department from the **Unit for Case(s)** drop down menu.
- 12) Always select **Review** from the drop-down menu as the **Type** of template being used.
- 13) In the Search window, enter the year or your departmental abbreviation then click the magnifying glass. The APR templates you created with the Step 1 Job Aid will appear.

In this scenario, the supervisor and the chair will be reviewing all the faculty selected for these cases, so the unit administrator selected the department, Population and Quantitative Health Sciences, and Review from the drop-down menus. Then the unit administrator selected the 2025 PQHS Faculty Annual Performance Review [Supervisor] template.

Select Ca	ase Settings		
Unit for Case	(s) * Ny be created in one unit.		
	n and Quantitative realth Sciences		
12 Type Review	× •		
Select Te Templates ar	mplate based on the unit and case type chosen in the case settings.		
13 Search	Q		
	Template Information	Unit 🛧	Туре
0	Custom Case Create a unique case by customizing forms and workflow steps rather than using a template.		
0	2025 PQHS Faculty Annual Performance Review Chair 2025 PQHS Faculty Annual Performance Review Chair	Population and Quantitative Health Sciences	Review
	2025 PQHS Faculty Annual Performance Review Supervisor 2025 PQHS Faculty Annual Performance Review Supervisor	Population and Quantitative Health Sciences	Review

- 14) Click the Radio Button next to the appropriate APR template.
- 15) Click **CONTINUE** and the **Create Cases** page will appear.

Unit for Case	(s) *		
Cases can or	ly be created in one unit.		
Population	and Quantitative Health Sciences		
Гуре			
Review	× •		
elect Te	mplate based on the unit and case type chosen in the case settings.		
inplatee are			
Cu	ustom cases can only be created for one candidate at a time. Please select	a single candidate to create a custom case.	
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Search			
		unit ↑	Туре
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Search	Template Information 2025 PQHS Faculty Annual Performance Review Chair Template	Unit ↑	
Search	Template Information 2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Supervisor Template	Unit ↑ Population and Quantitative Health Sciences	Review
Search	Template Information 2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Supervisor Template	Unit ↑ Population and Quantitative Health Sciences	Review

#### **Create Cases**

#### **Review & Settings**

In the Review & Settings area, unit administrators will select the date the department has identified as the date they want the APR cases completed by. The deadline for Basic Science APRs is the last day in May. It is recommended that departments choose a date in mid-March for the faculty to complete, sign and submit their APR packet. This way the departments have time to schedule supervisor and faculty interviews where the APR can be edited in real time during the interview.

At the end of the interview, the faculty member will review the supervisor's ratings, and comments. Then add a comment (optional) and sign the form. Then the faculty member forwards the APR case onto the chair, who will review the entire APR case, provide a comment (optional), and sign the form. The full review process can be found on the OFA webpage <u>here</u>. (Faculty, Supervisor and Chair signatures acknowledge that they have reviewed the APR.)

Go to next page.

16) Click on the **Calendar Icon** and **enter the date** the APR(s) is due.

# Settings

Confirm that the radio button *Yes, the candidate will be involved during the case* is selected. Confirm that the radio button **No** is selected. Faculty will be notified about their APR case in Step 5 Job Aid.

unit or case() *       yes         Perplaine and quantitative Health Sciences       Templaine *         2026 PRUS Floading Annual Performance Review Supervisor Template       Conclidate Requirements         2026 PRUS Floading Annual Performance Review Supervisor Template       Templaine *         2027 PRUS Floading Annual Performance Review Supervisor Template       Conclidate Requirements         2028 PRUS Floading Annual Performance Review Supervisor Template       Conclidate Requirements         2028 PRUS Floading Annual Performance Review Supervisor Template       Conclidate Requirements         2028 PRUS Floading Performance Review Steps       Conclidate Sections         2028 PRUS Floating Performance Review Steps       Conclidate Meride Performance Review Steps         2028 Provide Steps       Conclidate Meride Performance Review Steps         2029 Provide Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Sciences         2020 Construct Review Steps       Population and Quantitative Health Science	Case Info	ormation	
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This is the last chance to make edits. Click the **Previous** button to go back and edit the case(s).

17) Scroll down to the bottom and click **CREATE** [#] **CASES.** If a single case is created, you'll be directed to its page; if cases are created in bulk, you'll return to the **Cases** page, where you can search for and edit individual cases.

Please wait until Interfolio creates the cases. This can take several seconds. Unit administrators may have to click the browser refresh button for the case(s) to appear.

# Step 4.A: Assigning faculty members to their APR Cases

1)

To navigate to the Case Review Steps page, click the [Faculty Member's Name] in the Cases window.

Search		Q Filter		
<b>3 of 3 c</b> Filtered	ases By: Population and Quantitative Health Scier	ices X Include child unit	Active Cases X Reset Filters	
	Name 🗸	Туре 🗢	Template Name 🗢	Status 🗢
	Kellie Armstrong 1 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template	
Cas	se Created: Waiting for an administrator to	notify candidate		
	Jong Gyu Baek Epidemiology	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template Epidemiology	
Cas	se Created: Waiting for an administrator to	notify candidate		
	Stephen Baker Epidemiology	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template Epidemiology	
	se Created: Waiting for an administrator to			

#### 2) Click the Case Options drop down menu and select Edit Case.

**Note:** Unit Administrators who will be creating groups of APRs for faculty members should review the optional **Job Aid**: *Using Statuses to Track APRs* so they can also change the status of the faculty members APR during this process.



Please record your academic and professional activities for the previous academic year in the appropriate sections below. Complete only the sections that are relevant to

### The Case Summary page will appear.

3) Click Case Review Steps number 4 in the Creating a Case menu on the right-hand side.

Mass Chan Medical School > Cases > Faculty Member 2 >			
Case Summary			Return to Case
Case Information		Edit	Creating a Case
Type Review	Name Faculty Member 2		1 Case Information
Unit Population and Quantitative Health Sciences	<b>Email</b> UMass_faculty@interfolio.com		2 Candidate Requirements
Candidate Requirements		Edit	3 Internal Case Sections
Packet Due Mar 7, 2025			4 Case Review Steps 5 Case Summary
Instructions to the Candidate The Annual Performance Review (APR) is intended t	o promote the discussion of performance and fut	ure goals	

Unit Administrators must assign the **faculty member** to the appropriate ad hoc committee for each case created. There is one faculty review step in the Chair template and two Faculty Review steps in the Supervisor template.

4) In the Case Review Steps, click the **Edit** button in the **Faculty Member Review (1)** box below.

UMass Chan Medical School > Cases > Faculty Member 2 > Case Review Steps		0
Add Step Additional Options V	Creating a Case           1         Case Information	
1       Department Supervisor Review       Edit       Delete         Academic Level:       Medical School       School       Department	<ol> <li>Candidate Requirements</li> <li>Internal Case Sections</li> </ol>	
PQHS Supervisor Smith (1) ⊘ Includes Instructions ● No Required Documents 1 Required Form	Case Review Steps     Case Summary	
2 Faculty Member Review (1)     Academic Level: Medical School Department		
<ul> <li>Faculty Member (0)</li> <li>Includes Instructions ● No Required Documents 1 Required Form</li> </ul>		

Go to the next page.

5) The **Edit Details** page will appear. Click the **Add Members** button.

Step Details (Step 2 of 5)	
Step Name	Academic Level
Faculty Member Review (1)	Academic levels manage which administrators and case managers have access at this ste
Due Date	Medical School School Department
_	MANAGE ACADEMIC LEVELS
Edit Step Details	
	Carl Add Committee
Reviewers	C Add Committee
Reviewers	
Reviewers	Add Committee Options ~
Reviewers ✓ Faculty Member Ad Hoc Committee (0)	Options ~
Reviewers Y Faculty Member Ad Hoc Committee (0)	

- 6) A pop-up window will appear. Add the **[Faculty Members]** name to the **Search User** field.
- 7) Click the + Add button to add the faculty member to the Ad hoc committee.
- 8) Then click the **Close** button

Add Members 6		×		
Q Lapane			Sort By Name 🗸 💄 New	
First Name	Last Name	Email		
Kate	Lapane	Kate.Lapane@umassmed.edu	+ Add	
			8 Close	

9) Click the **Star** next to the faculty member's name to make them a **Committee Manager**.

# 10) Click the Return to Case Review Steps button to add the faculty to another review step.

Faculty Member Ad Hoc Committee (1)	0
Manage Members Instructions Required Documents Required Forms Settings	
₩ 1 Member 9	
KL Kate Lapane Kate Lapane@umassmed.edu	
Add Members	

Note: If the faculty member does not have a blue Star 🗡 by their name, they will not be able to forward the case onto the next step.