



Annual Performance Review: Instructions for Chairs

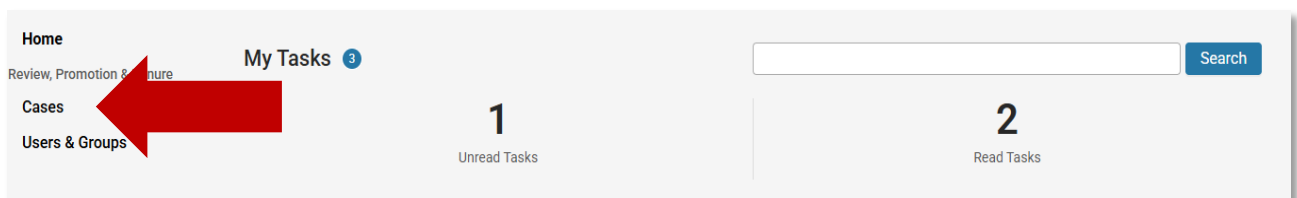
Please use this job aid only in cases where a separate supervisor has completed an initial review. If the Chair review is the only review, please use the [APR: Instructions for Supervisors](#) document.

The APR process is completed electronically via Interfolio beginning in 2025. Your Chair review process begins when a faculty member has signed off on the supervisor review.

- Once the faculty member has signed off on the supervisor review, you will receive an email indicating that you have a case to review.



- Sign in to Interfolio (see the [Interfolio Sign In Instructions](#) document for detailed sign in instructions).
- Click **Cases** in the left-hand menu.



- Click on the faculty member's case that requires Chair review.

Filtered By: [Population and Quantitative Health Sciences](#) [Include child units](#) [Active Cases](#) [Reset Filters](#)

Name	Type	Template Name	Status
Faculty Member 0 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Chair Template	

- Click into the candidate's packet (for example by clicking the General Information section).

[Expand All](#) [Collapse All](#) [Download](#) [Share](#) [Settings](#) [Move](#)

Recording Academic Activities Locked [Unlock](#)

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 you—you do not need to complete every section.

Key Points

- Be prepared! An up-to-date curriculum vitae will make it easier to complete the form. The APR form is consistent with the current version of the UMass Chan CV format, allowing you to cut-and-paste information from your CV into your APR. Keep a log of your teaching evaluations to upload to Interfolio.

Please set aside some time to complete your APR and save your responses for each form so that you may come back to your APR Packet / Case and make edits as needed to each form. **Wait until you have completed all the form sections and have uploaded your teaching evaluations (optional) before you hit the Submit button.** After you hit the **Submit** button you will no longer be able to make edits to the form sections.

Please complete your APR before May 30, 2025.

Instructions for completing your APR can be downloaded from the OFA website link below:

- [Interfolio APR Step by Step Job Aids](#)

Additional Interfolio Instructional Resources:

- After you select your packet, a link to the [Candidate's Packet Guide](#) will be displayed or you can participate in an [eLearning video](#).

Additional Documents optional [Add File](#)

No files have been submitted.

Title	Details
General Information Form 6 Questions, 6 responses	Submitted by Candidate, Jan 23, 2025 at 7:01 PM
FTE Enroll	Submitted by Candidate,

- You can read a faculty member's information section-by-section by clicking on each heading in the left-hand menu (see below), or by clicking **Next Material** at the bottom of the screen.

Downloading Files

- You can read a faculty member's information section by section by clicking on each heading in the left-hand menu, or by clicking **Next Material** at the bottom of the screen. **However, we suggest creating a pdf of the candidate's file to view in a separate window as you complete the rest of your review process.**
- Click the **Download** button.

Faculty Member 2

Return to Case

Download

Search PDF

Search

Packet Annotations

RECORDING ACADEMIC ACTIVITIES

General Information

FTE Effort

Education Section

Investigation Section

Scholarship Section

Academic Service Section

Leadership Positions and Responsibilities Section

Health Care Delivery Performance Metrics & Innovation in Health Care Delivery

Honors & Awards Section

Efforts to Support Diversity, Equity, and Inclusion Section

Packet Forms

General Information

First Name

Last Name

Department

Division

Current Rank

Years in Current Rank

- Check the **Select All** box, and then click the **Download PDF** button.
- On your home page click **Your Files Are Ready to Download**.

Download Packet

Select All

Recording Academic Activities

General Information

FTE Effort

Education Section

Investigation Section

Scholarship Section

Academic Service Section

Leadership Positions and Responsibilities Section

Health Care Delivery Performance Metrics & Innovation in Health Ca...

Honors & Awards Section

Efforts to Support Diversity, Equity, and Inclusion Section

Professional and Faculty Development Activities

Goals and Self-Assessment

Download ZIP

Download PDF

Cancel

Home

Review, Promotion & Tenure

Cases

Users & Groups

My Tasks 4

1 Unread Tasks

Your Files Are Ready to Download

Faculty Member 2

Population and Quantitative Health Sciences | Review | 2025 PQHS Faculty Annual Perform Template

Faculty Member 2

UMass Chan Medical School | Review | Faculty Annual Performance Review Supervisor Tool

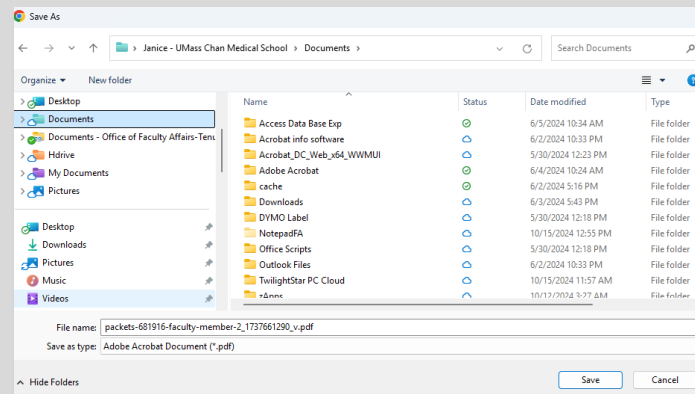
Cases
Users & Groups

Requested Downloads

Below is a list of materials you've requested to download. Please note that if you've requested to download a set of documents, materials might have been added to the set since you last requested the download. Please check back to make sure you have all of the relevant documents.

Name	Date Requested	Action
Your download of documents materials for Faculty Member 2's case is ready.		
Population and Quantitative Health Sciences Review 2025 PQHS Faculty Annual Performance Review Supervisor Template	January 23, 2025	Download Remove

- A pop-up menu will appear to allow you to save the candidate's file to your computer.



- Repeat these steps for each faculty member you need to review.
- To return to your review process, click **Cases** in the left-hand menu.

- Click on the **Case Details** tab and **Fill Out Form**.

Faculty Member 2

Send Case
Case Options

Unit

Population and Quantitative Health Sciences

Template

2025 PQHS Faculty Annual Performance Review Supervisor No CV Upload

Status

Chair Review [change](#)

Case Materials

Case Details 1

Reviewing as

PQHS Chair

Required Items

1 missing

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms

Form Name	Assignee	Actions
APR Department Chair Form 1 required questions	Committee Members	Manage Respondents
APR Department Chair Form 1 required questions	Department Chair (You)	Fill Out Form

- Enter your Chair review. Provide comments (optional) and your signature (required).

UMass Chan Medical School > Cases > Faculty Member 2 >

APR Department Chair Form

Add any additional comments and sign this form. Comments are optional but signature is required.

Department Chair's Evaluation
 The Comment section is optional; Signature is required.

Click the **READ** button to view the candidate Annual Performance Review/packet and supervisor's evaluation.

For instructions on how to view or download case materials click [here](#).

For instruction on how to Email Candidate, Share Case Materials with a Candidate, and Allow Candidate Response/Rebuttal click [here](#).

Click the **Save Responses** button to come back and complete your evaluation at a later date. Only click the **Submit** button when you are finished with your evaluation. After you submit your evaluation, forward the packet to the faculty member for review.

0 / 8000 characters

Signature *
 Type your name as your signature

- Click **Save Responses** to come back later and edit the form, or click **Submit Form** when your review is complete.

Last saved on Jan 23, 2025 at 4:23 PM EST

- Once you submit the form, a pop-up confirmation window will open. Click **Yes** to send your review to the faculty member for a final review and signature.

Confirm

✕

Submitting the form "APR Department Chair Form" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

- Use the **Send Case** button to forward your review to the faculty member.

UMass Chan Medical School > Cases >

Faculty Member 2

Unit
Population and Quantitative Health Sciences

Template
2025 PQHS Faculty Annual Performance Review
Supervisor No CV Upload

Send Case ▼

- Forward to Faculty Member
- Backward to Faculty Member
- Forward to Faculty Member

Case Options ▼

- A pop-up email notification will appear. Type in a subject line of your choice. **We suggest: “Annual Performance Review- please review and sign”.** (The other parts of the email are generated automatically and can be left as is.) Click **Continue**.

Send Case Forward

Great job! You're sending the case forward to the next step, Faculty Member. The following reviewers will lose access to the case:

PQHS Chair | 1 members

The following reviewers will gain access to the case:

Faculty Member | 1 members

☒ Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Annual Faculty Performance Review

Message *

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Department Chair

Preview **Continue** **Cancel**

The faculty member will receive an email alert, will review your ratings and comments, will provide their own comments (optional) and sign the form (required). The department Administrator will then close the case.