



Annual Performance Review: Instructions for Faculty

The APR process is completed electronically via Interfolio beginning in 2024. There are two **required** sections at the top of the electronic APR that you must complete.

- General Information
- FTE Effort

The most important part of your APR is your list of professional activities and accomplishments for the reporting period. You must list these activities and accomplishments in the appropriate sections. Complete only the sections that are relevant to you— leave a section blank if it is not relevant to you. Required information is indicated with a red asterisk (*). *Note: Academic departments may add additional requirements.*

- Education
- Investigation
- Scholarship
- Academic Service
- Leadership Positions and Responsibilities
- Health Care Delivery
- Honors and Awards
- Efforts to Support Diversity, Equity, and Inclusion

Finally, you will add your Goals and Self-Assessment. You will need to enter your **Area of Distinction**, your **goals for the previous reporting period**, your **goals for the coming year**, a **self-assessment** of your performance, and any **areas of concern** that you want to bring to the attention of your supervisor.

- Goals and Self-Assessment

* * * * *

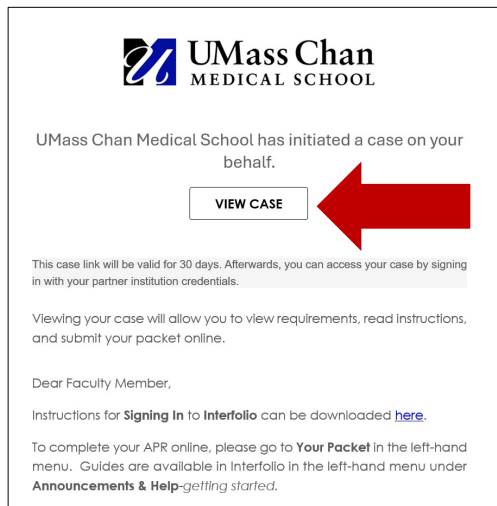
There are three main steps for faculty in the APR process.

- Step 1: Share your activities and accomplishments
- Step 2: Sign off on supervisor's evaluation
- Step 3: Final sign off

A more detailed outline of the steps involved in the APR process is below.

Step 1: Share your activities and accomplishments

- You will receive an email from noreply@interfolio.com indicating that a “case” has been initiated on your behalf. The “case” is your annual performance review. Select “View Case.”



- Please note that this email will go to the “preferred” email you have listed with the medical school. For information to check or change your “preferred” email address, please visit our website: <https://www.umassmed.edu/ofa/about/newswire/>
- The first time that you access your APR via Interfolio you will need to create a “new” password. An account has already been created for you, but you need to set a password that works for you. In order to do this, click “Forgot your password” and follow the directions to create and confirm your password.

A screenshot of the Interfolio Sign In page. The page has a dark blue header with the Interfolio logo and "from Elsevier". The main content area is white. It features a "Sign In" section with "Sign in with email" and "Other Sign In Options". Under "Sign in with email", there are input fields for "Email *" and "Password *", followed by a blue "Sign In" button. Below the "Sign In" button is a link "Forgot your password?" which is circled in red. Under "Other Sign In Options", there are two buttons: "Sign in with Partner Institution" and "Sign in with Google". At the bottom, there is a section "Don't have an account?" with a link "Create an account".

- Navigate to your APR “Packet.” Your “packet” is the assembly of documents and information that comprise your APR.

UMass Chan Medical School > Your Packets >

Faculty Annual Performance Review Master Template

[View Instructions](#) [Preview Packet](#)

Unit	Type	Soft Deadline	Packet Due Date
UMass Chan Medical School	Review		

[Overview](#) **Packet**

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

Recording Academic Activities

Not Yet Submitted Unlocked [Edit](#)

Type	# Required	# Added
<input checked="" type="checkbox"/> Curriculum Vitae (CV)	0 required	0
<input checked="" type="checkbox"/> Educational Activities Supporting Documentation	0 required	0
<input type="checkbox"/> General Information	5 required	0
<input type="checkbox"/> FTE Effort	5 required	0

- Next are two **required** sections of the APR- General Information and FTE Effort. Click Fill out Form and fill out the information requested. Required information is indicated with a red asterisk (*).

General Information 5 required questions, [Fill Out Form](#)

This form has not been completed.

FTE Effort 5 required questions, [Fill Out Form](#)

This form has not been completed.

UMass Chan
MEDICAL SCHOOL

Emily Green

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Cases

UMass Chan Medical School > Your Packets > Faculty Annual Performance Review Master Template >

FTE Effort

Emily Green

What was your FTE in the following activities during the evaluation period?

Please report your Full-Time Equivalent (FTE) values in the following activities during the evaluation period. Enter 0.0 in the sections that do not apply.
For example: if you are working part-time 50% (Education 0.20 FTE/ Clinical 0.30 FTE)
If you are working full-time 100% (Investigation 0.90 FTE/ Education 0.10)
If you have question concerning your FTE, please review your current offer letter or contact your academic administrator.
Click **Save Responses** when finished entering information. Then click **Return to Template** to complete another section. If the form has already been started, click **Edit Form** to edit that section.

Clinical: *

Education: *

Research: *

Other: *

Other: *

Last Saved on Dec 19, 2024 at 11:18 AM

Save Responses

Return to Packet

Page 4 of 10

- If you have any questions about your FTE, please contact your department administrator.
- Save your responses and Return to Packet.

Last Saved on Dec 19, 2024 at 11:18 AM

☒ Save Responses

Return to Packet

- Complete each relevant section of the APR with your activities and accomplishments for the reporting period using the Edit Form buttons. Have an updated CV on hand to copy and paste (the sections of the electronic APR form mirror exactly the UMass Chan CV template). Save your responses on each section and Return to Packet.

Education Section 0 required questions,		Edit Form
Title	Details	Actions
Education Section	Completed Not Yet Submitted	Edit
Investigation Section 0 required questions,		Edit Form
Title	Details	Actions
Investigation Section	Completed Not Yet Submitted	Edit
Scholarship Section 0 required questions,		Edit Form
Title	Details	Actions
Scholarship Section	Completed Not Yet Submitted	Edit
Academic Service Section 0 required questions,		Edit Form
Title	Details	Actions
Academic Service Section	Completed Not Yet Submitted	Edit
Leadership Positions and Responsibilities Section 0 required questions,		Edit Form
Title	Details	Actions
Leadership Positions and Responsibilities Section	Completed Not Yet Submitted	Edit
Health Care Delivery Performance Metrics & Innovation in Health Care Delivery 0 required questions,		Edit Form
Title	Details	Actions
Health Care Delivery Performance Metrics & Innovation in Health Care Delivery	Completed Not Yet Submitted	Edit
Honors & Awards Section 0 required questions,		Edit Form
Title	Details	Actions
Honors & Awards Section	Completed Not Yet Submitted	Edit
Efforts to Support Diversity, Equity, and Inclusion Section 0 required questions,		Edit Form
Title	Details	Actions
Efforts to Support Diversity, Equity, and Inclusion Section	Completed Not Yet Submitted	Edit
Professional and Faculty Development Activities 0 required questions,		Edit Form
Title	Details	Actions
Professional and Faculty Development Activities	Completed Not Yet Submitted	Edit

- The final section is your Goals and Self-Assessment section. You will need to enter your **Area of Distinction**, your **goals for the previous reporting period**, your **goals for the coming year**, a **self-assessment** of your performance, and any **areas of concern** that you want to bring to the attention of your supervisor. These questions are all required. This section is arguably the most important section of the APR. Please refer to the [APR: Overview and Guidance](#) document for more information.

Goals and Self-Assessment 5 required questions,
Fill Out Form

This form has not been completed.

- Once all relevant sections have been completed, hit “Submit.” Please note that once you submit your APR, no further changes can be made to the sections unless your department administrator or supervisor “unlocks” it for you.

The screenshot shows the 'Recording Academic Activities' section of an APR packet. The status is 'Not Yet Submitted' and 'Unlocked'. A 'Submit' button is visible. A red arrow points to the 'Submit' button. The interface includes tabs for 'Overview' and 'Packet', and buttons for 'Expand All' and 'Collapse All'.

- Submitting your APR information sends it directly to your supervisor. (For smaller departments, this supervisor may be your department Chair. For other departments, your APR may be reviewed by both a supervisor and a Chair.)

Your supervisor will review your packet, add evaluative comments, and sign it. The signed form will be discussed during your in-person APR meeting. Your supervisor will then send your APR packet back to you electronically via Interfolio.

Step 2: Sign off on supervisor’s evaluation

- You will receive an email from noreply@interfolio.com. Select “View Case.”
- Log into <https://account.interfolio.com/login> with your email address and password.
- Click the **CASES** button in the left-hand menu.
- Open your APR by clicking your name.
- Select the **Read Case** button to review your supervisor’s evaluative comments.
 - In the left-hand menu scroll down to **Committee Documents**, click on **APR Supervisor Form / Department Supervisor Review**.

Return to Case

Download Search PDF Search

Packet Annotations

RECORDING ACADEMIC ACTIVITIES

CV

COMMITTEE DOCUMENTS

APR Supervisor Form | Department Supervisor Review

Packet Forms

General Information

This form contains optional questions for which no answer was provided.

First Name
Darryl

Last Name
Conte

Department
RNA Therapeutics Institute

Division

Current Rank
Associate Professor

- Click the **Return to Case** button in the upper right-hand corner to **fill out the Form**.

Darryl Conte

Return to Case

Download Search PDF Search

Packet Annotations

RECORDING ACADEMIC ACTIVITIES

CV

COMMITTEE DOCUMENTS

APR Supervisor Form | Department Supervisor Review

Packet Forms

General Information

This form contains optional questions for which no answer was provided.

First Name
Darryl

Last Name
Conte

Department
RNA Therapeutics Institute

Division

Current Rank
Associate Professor

- Select the **Case Details** tab.
- Scroll down and click the **Fill Out Form** button. The form will open. Add a comment which is optional, sign the form (required) and submit the form.

UMass Chan Medical School > Cases >

Faculty Member 2

Send Case Case Options

Unit
Population and Quantitative Health Sciences

Template
2025 PQHS Faculty Annual Performance Review

Status
Supervisor Review change

Case Materials

Case Details 1

Reviewing as
PQHS Supervisor

Instructions

The evaluator or supervisor evaluates the faculty member's performance for each section and then provides an overall performance rating.

After the evaluation is completed, signed and submitted - Click the **SEND CASE** button to forward the evaluation with comments back to the Faculty member for review.

Required Items

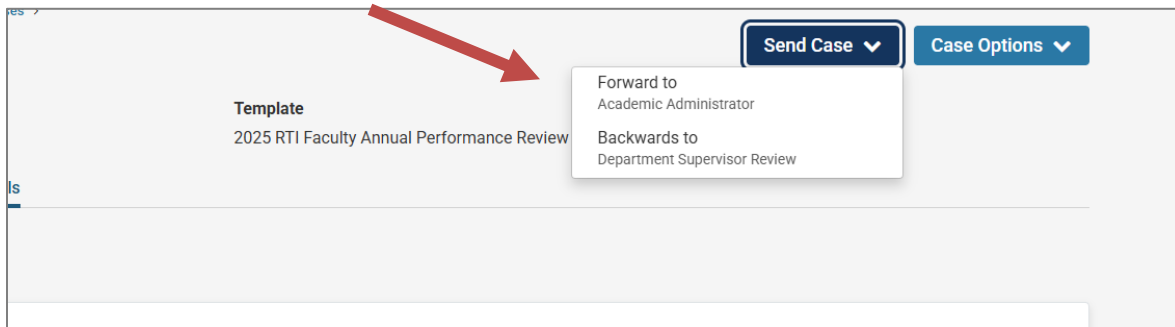
1 missing

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.

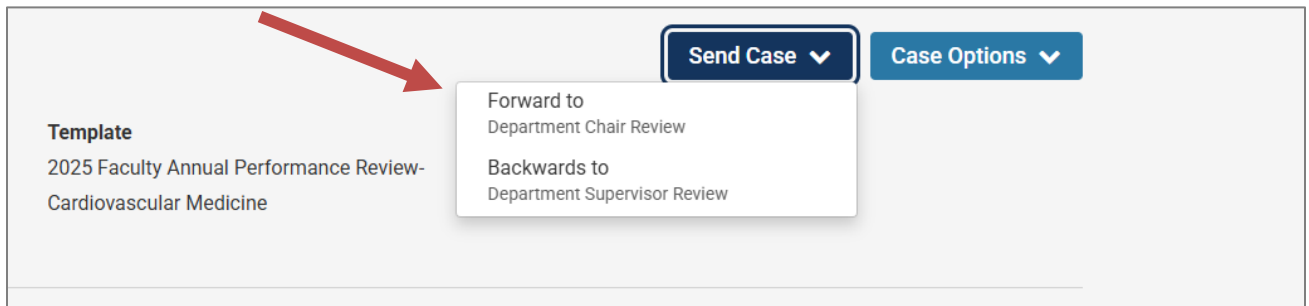
Forms

Form Name	Assignee	Actions
APR Supervisor Form 16 required questions	Committee Members	Manage Respondents
APR Supervisor Form 16 required questions	Supervisor_Case Manager Test (You)	Fill Out Form

- We highly recommend that faculty members download a copy of their APR before they submit their APR case to their departmental administrator. **Faculty members will only be able to view their APR next year within Interfolio if a copy is downloaded during the review process.** Before you send your APR to your Academic Administrator please download a copy of your APR for your records (see the [Download Your APR Packet](#) job aid) .
- Scroll to the top of the page and click the **Send Case** button to **Forward** to either your **Chair** or **Academic Administrator**. If your Chair is the only person reviewing your APR, you will send your response forward to the Academic Administrator.



If your APR is reviewed by a supervisor and a Chair, **Forward to Department Chair Review**. See below.



Faculty members reviewed by their supervisor and Chair will need to do a second review of their Chair's comments. Your department chair will review your packet, add evaluative comments (optional), and sign the form. They will then send the form back to you electronically via Interfolio.

Step 3: Faculty Member Review 2 (If you are evaluated by both your supervisor and Chair you will be required to review your Chair's comments as well.)

- You will receive an email from noreply@interfolio.com. Select "View Case."
- Log into <https://account.interfolio.com/login> with your email address and password.
- Click the **CASES** button in the left-hand menu.
- Open your APR by clicking your name.
- Select the **Read Case** button to review your Chair's evaluative comments.
- In the left-hand menu scroll down to **Committee Documents**, click on **APR Department Chair Form/Department Chair Review** to view any comments made by your Chair.

Packet Annotations

RECORDING ACADEMIC ACTIVITIES

COMMITTEE DOCUMENTS

APR Supervisor Form | Department Supervisor Review

APR Faculty Member Comments After Supervisor Review | Faculty Member Review (1)

APR Department Chair Form | Department Chair Review

- Click the **Return to Case** button in the upper right-hand corner.
- Select the **Case Details** tab.
- Scroll down and click the **Fill Out Form** button. The form will open.
- Add a comment which is optional, sign the form (required) and submit the form.

UMass Chan Medical School > Cases >

Faculty Member 2

Send Case Case Options

Unit: Population and Quantitative Health Sciences Template: 2020 Faculty Annual Performance Review Status: Supervisor Review [change](#)

Case Materials: **Case Details 1**

Reviewing as PQHS Supervisor

Instructions

The evaluator or supervisor evaluates the faculty member's performance for each section and then provides an overall performance rating.

After the evaluation is completed, signed and submitted - Click the **SEND CASE** button to forward the evaluation with comments back to the Faculty member for review.

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.

Form Name	Assignee	Actions
APR Supervisor Form 16 required questions	Committee Members	Manage Respondents
APR Supervisor Form 16 required questions	Supervisor_Case Manager Test (You)	Fill Out Form

- We highly recommend that faculty members download a copy of their APR before they submit their APR case to their departmental administrator. This is the last step in the APR review process. **Faculty members will only be able to view their APR next year within Interfolio if a copy is downloaded during the review process.** Before you send your APR to your Academic Administrator please download a copy of your APR for your records (see the [Download Your APR Packet](#) job aid) .

- Scroll to the top of the page and click the **Send Case** button to **Forward to Academic Administrator**.

