



OFA Open Hours for any questions:
Every Thursday, 12:00-1:00pm
[Zoom link](#)

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

* * * * *

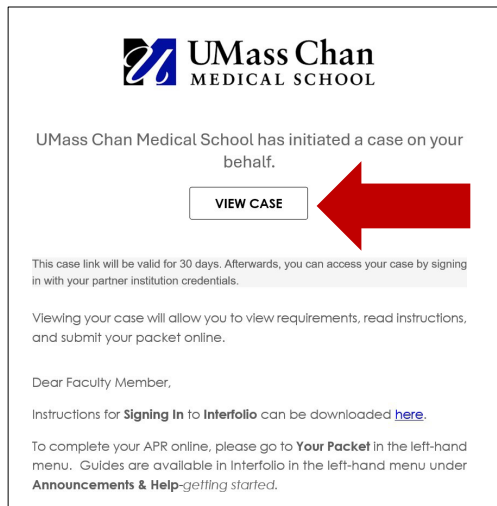
There are three main steps for faculty in the APR process.

- 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

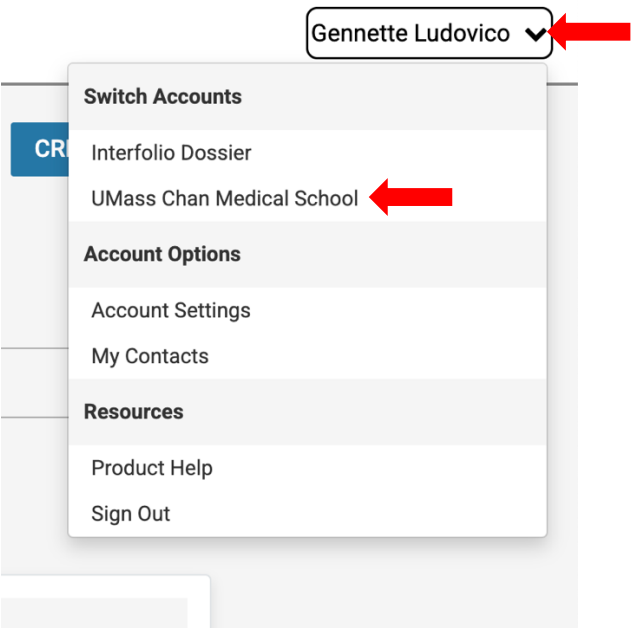
- You will receive an email from noreply@interfolio.com indicating that a “case” has been initiated on your behalf. The “case” is your annual performance review. Select “View Case.”



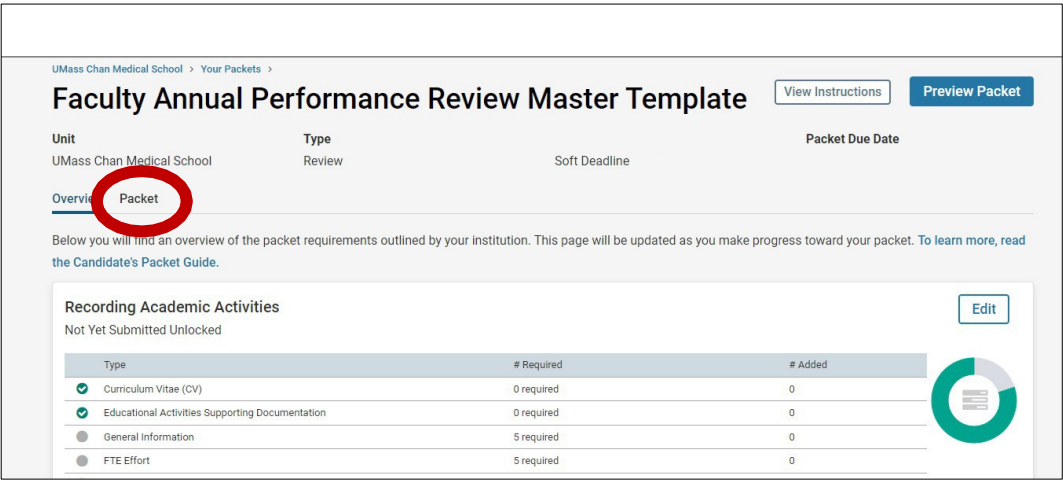
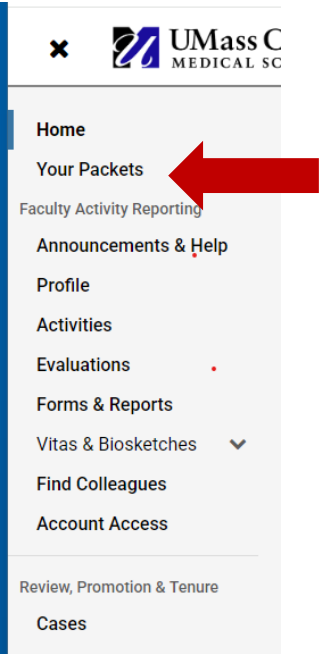
- Please note that this email will go to the “preferred” email you have listed with the medical school. For information to check or change your “preferred” email address, please visit our website: <https://www.umassmed.edu/ofa/about/newswire/>
- The first time that you access your APR via Interfolio 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.

The Interfolio Sign In page. The header shows the Interfolio logo with the text "from Elsevier". The main heading is "Sign In". Under "Sign in with email", there are input fields for "Email *" and "Password *", followed by a "Sign In" button. To the right, under "Other Sign In Options", there are buttons for "Sign in with Partner Institution" and "Sign in with Google". Below the "Sign In" button, the link "Forgot your password?" is circled in red. At the bottom, there is a section "Don't have an account?" with the text "Use Interfolio's suites of services to simplify your academic life." and a link "Create an account".

- Make sure you are in the correct account. You need to be in ‘UMass Chan Medical School’, not any other version.



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



- 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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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

- Your FTE effort is meant to reflect the amount of time you spend in each area. It will not affect your pay or funding, so just do your best to reflect how you divide your time. This is for you and your supervisor to use as an evaluation to see if you need to change your division of efforts.
- Click Return to Packet. Interfolio autosaves your responses.

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 next 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.

- The final section is your Health Care Delivery self-assessment metrics. If you do not participate in HCD, you do not need to complete this form. If you do, answer each question.
- 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.

Overview
Packet

☐ Expand All
☐ Collapse All

☐

Recording Academic Activities

Not Yet Submitted
Unlocked

Submit
0
Required Files

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.

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 in to Interfolio.com using your email address and password.
- Select **Read Case** button to review your supervisor's evaluative comments.
- Select **Case Details** and provide a comment (optional).
- Re-sign the form (required).
- Forward the APR packet to your Chair via **Send Case** button.

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: Final sign off

- You will receive an email from noreply@interfolio.com. Select "View Case."
- Log in to Interfolio.com using your email address and password.
- Select **Read Case** button to review comments from your department chair or assigned evaluator.
- Select **Case Details** tab and provide a final comment (optional).
- Re-sign the form (required).
- Forward the APR packet to the Academic Administrator via **Send Case** button.