UMass Chan MEDICAL SCHOOL | **UMass Memorial** Health

Tips, Guidelines, & Recommendations
Interfolio: Faculty Annual Performance Reviews (APR)

Please note that all faculty in Interfolio's Reviews, Promotions and Tenure (RPT) are assigned access at the departmental level only. All APR cases and committees must be created at the departmental level for faculty members to have access to their APRs and for the faculty member to move the case forward during the Case Review process.

To access the **Interfolio Sign In page** use the following link. https://account.interfolio.com

Sign In Instructions and Job Aids

Tips:
- **Chrome is the browser of choice**. Although other browsers will work, Chrome tends to provide the best view and functionality.
- All UMass Chan Interfolio members need to use their Business Email addresses to Sign in to Interfolio. Faculty can review their Profile page to determine which email address they have on file with the Office of Faculty Affairs as their business email address.
- Unit administrators will have the ability to view the packet, add documents and allow editing functionality at any time. (If you need access, please contact your departmental Academic Administrator.)
- The Annual Performance Review (APR) is intended to promote the discussion of performance and future goals between a faculty member and their supervisor. The APR is required for all UMass Chan employed faculty at the UMass Chan Medical School and UMass Memorial Health Care. The procedure for conducting the APR is described in the Academic Personnel Policy (APP, approved 12/8/2017)—see APP Section 5.5

Steps Involved in Creating APRs
To ensure that cases are created properly please follow the Step-by-Step Job Aids 1 through 5 when creating an APR case or group of APR cases for faculty members being reviewed by the same supervisor.

Step 1: Create duplicate departmental templates from the Faculty Annual Performance Review Supervisor and Chair Master Templates**.** Create additional templates for each supervisor that reviews APRs within your department.

Step 2: Create Standing Committees of One for all Supervisor(s), your Chair, and Unit Administrator(s) involved in the review process within your department.

Step 3: Assign the appropriate standing committees to the appropriate APR supervisor or chair template(s).

Step 4: Create faculty member(s) APR Case(s) for each Departmental supervisor that reviews APRs**.**

    Step 4a: Assign each faculty member to their APR's Case Review Steps.

Step 5: Notify faculty members that their APR case is ready to be completed.

Step 6: Close and Reopen Case(s)

Step 7: Generate and Download Reports

Additional Job Aids

- [Using the Case Activity Log](#)
- [Using Statuses to Track APRs](#)
- [Unlock or Lock a Faculty Members APR](#)

Job Aid Recommendations Embedded in Steps 1-6:

- Step 1: When creating additional supervisor templates, it is recommended that unit administrators add the last name of the supervisor to the template information so that later in the process they can assign the correct supervisor to the correct template before they create the cases for faculty members that will be reviewed by that supervisor.

- Step 2: When creating committees of one that will get assigned to your templates Case Review Steps always ensure that the supervisor and chair have a blue Star ★ next to their name. This will enable the supervisor or Chair to move the case forward to the next review step until the APR is completed.

- Step 3: By creating standing committees of one, unit administrators will be able to assign those standing committees of one supervisor, chair, or unit administrator to that supervisor's template prior to creating APR cases for each faculty member reviewed by that supervisor. This process enables the creation of multiple cases that already have the supervisor, chair and unit administrator standing committees of one assigned to the case review steps in advance.

- Step 4A: When assigning a faculty member to their APR always ensure that the faculty member's name has a blue star ★ next to it, so the faculty member can move the case forward to the next review step.

- 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 Member(s).

- **(recommended for unit administrators new to Interfolio)**
  Practice creating one case and notifying the faculty member before creating groups of cases.

Office of Faculty Affairs

ONGOING OPEN SESSIONS-Weekly			TRAINING LINK
Day	Date	Time	Link
Thursdays		12pm (noon)	[Weekly Open House](#)

Interfolio Scholar Services

Support for Interfolio products, including Faculty Search, Review, Promotion & Tenure, Faculty Activity Reporting, and Lifecycle Management.

Interfolio's institutional support email and phone number are:

📞 [+1 833-844-2118](#)

✉ [interfolio-support@elsevier.com](#)

These tip, guidelines and recommendation are subject to changes,
please download the latest version from the OFA website.