

Step 5: Notify Faculty Member(s)

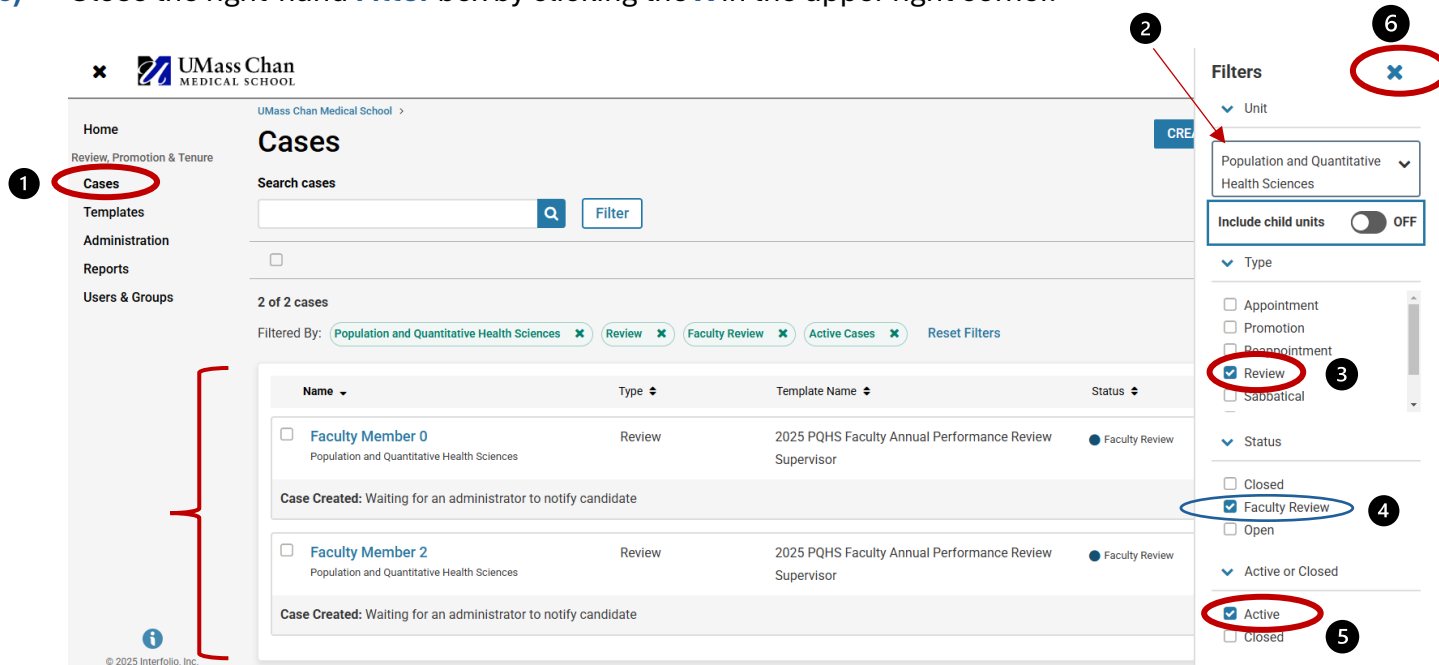
Reminder: It is recommended that unit administrators:

- 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.

Click **Cases** in the left-hand navigation bar.

The **Cases** page will display all the Annual Performance Reviews (APR) case(s) that the unit administrator created for the faculty members that will be reviewed by the supervisor and/or chair that were assigned to that supervisor’s template. For example: **2025 PQHS Annual Performance Review – Smith**

- 1) Click the **Filter** button and a menu will appear on the right-hand side of the screen.
- 2) Make sure your unit/department has been selected from the **Unit** drop down menu.
- 3) Check the **Review** box under the **Type** drop down menu.
- 4) Check the **Waiting for Faculty APR Submission** box under **Status** (See optional Job Aid: *Using Statuses to Track APRs*)
- 5) Make sure the **Active** box is checked under **Active or Closed**.
- 6) Close the right-hand **Filter** box by clicking the **X** in the upper right corner.



Go to the next page.

Notifying faculty member(s) that they have an APR to complete.

For one faculty member:

7.a) Click the check box next to the faculty members' name.

The screenshot shows the 'Cases' page in the Interfolio system for UMass Chan Medical School. The left sidebar contains navigation links: Home, Review, Promotion & Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area is titled 'Cases' and includes a search bar and a 'Filter' button. Below the search bar, there are action buttons: 'Notify Candidates' (highlighted with a red arrow), 'Send Backward', 'Send Forward', 'Close Cases', and 'More Options'. The page displays '2 of 2 cases' with filters for 'Population and Quantitative Health Sciences', 'Include child units', 'Review', 'Faculty Review', and 'Active Cases'. A table lists two cases, both with the status 'Case Created: Waiting for an administrator to notify candidate'. The first case, 'Faculty Member 0', is selected with a checked checkbox, which is also highlighted by a red arrow.

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> Faculty Member 0 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor	● Faculty Review
Case Created: Waiting for an administrator to notify candidate			
<input type="checkbox"/> Faculty Member 2 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor	● Faculty Review
Case Created: Waiting for an administrator to notify candidate			

For a group of faculty members:

7.b) Click the box next to **Notify Candidates**. All the check boxes next to the cases ready to be released by the administrator will automatically be checked. **Note:** This feature works only if the cases displayed are all cases with the status of [Case Created: Waiting for an administrator to notify candidate.] Use the optional **Status change** job aid to group and filter your cases.

This screenshot is similar to the previous one but shows the 'Notify Candidates' button highlighted with a red arrow. In this view, both checkboxes in the table are checked, indicating that the 'Notify Candidates' action has been applied to all cases in the list.

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> Faculty Member 0 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor	● Faculty Review
Case Created: Waiting for an administrator to notify candidate			
<input checked="" type="checkbox"/> Faculty Member 2 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor	● Faculty Review
Case Created: Waiting for an administrator to notify candidate			

Interfolio Step 5 Job Aid: Faculty Annual Performance Review

A pop up box will appear. Both **Subject** and **Message** have a red * by their names indicating that they are required fields.

8) Check the box next to **Include a personal message with this email**.

9) In the **Subject** line type **Annual Faculty Performance Review**

10) In **Message** field copy and paste [ctrl +V] the sample email below.

Dear Faculty Member,

To access your Annual Performance Review (APR) in Interfolio, please click **View Case** in the email above. After you click **View Case** you will be brought to the **Interfolio Sign In** page.

Step by Step job aids for **Signing In** to Interfolio and completing your APR can be downloaded from the OFA Resources webpage [here](#). To complete your APR online, please go to **Your Packet** in the left-hand menu.

Please complete your APR before [DATE].

Thank you for taking the time to complete your Annual Faculty Performance Review.

Notify Candidate ✕

The candidate will receive an email with instructions for uploading and submitting materials online through Interfolio.

8 Include a personal message with this email

Subject *

9 Annual Faculty Performance Review

Message *

10 Dear Faculty Member,

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Please complete your APR before [DATE].

body p

11 **Preview** **Send** **Cancel**

11) Click **Preview** to preview the message that will be sent to the faculty member(s).

Notify Candidate ✕

UMass Chan
MEDICAL SCHOOL

UMass Chan Medical School has initiated a case on your behalf.

VIEW CASE

This case link will be valid for 30 days. Afterwards, you can access your case by signing in with your partner institution credentials.

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Dear Faculty Member,

To access your Annual Performance Review (APR) in Interfolio, please click View Case in the email above. After you click View Case you will be brought to the Interfolio Sign

12 **Edit** **Send** **Cancel**

12) Click **Edit** to go back and edit the email or click **Send**.