

Office of Faculty Affairs

Annual Performance Review User Guide- Chairs/Supervisors

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Introduction

This user guide provides step-by-step instructions for conducting **Faculty Annual Performance Reviews (APRs)** in **Softdocs**. The guide outlines the Supervisor workflow from form initiation through final approval and signature.

There are three main tasks for Chairs/Supervisors in the APR process:

- Review the activities and accomplishments of your faculty
- Meet and discuss your evaluation with the faculty member
- Submit your evaluation

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

Please see additional information and resources on the OFA website:

<https://www.umassmed.edu/ofa/academic/faculty-reviews/apr/>

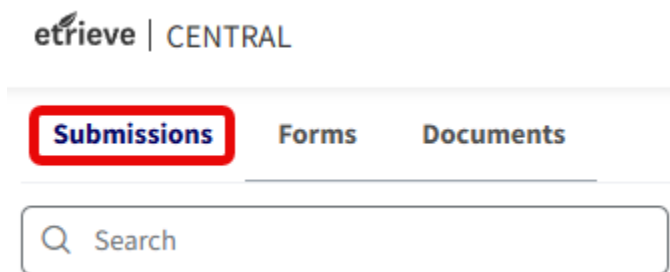
Supervisors

Step 1: Receive Notification

- When an assigned faculty member submits their APR form, you will receive an email notification with a link to our new APR platform, Softdoc's [Etrieve](#), to access the submitted form, or you can view submitted forms by signing into [Softdocs](https://umassmedcentral.etrieve.cloud/Index) (<https://umassmedcentral.etrieve.cloud/Index>).
- Sign in to Softdocs using your UMassmed or UMass Memorial credentials. If you are already signed in to your UMass Chan or UMass Memorial account, you will be automatically signed into Softdocs, and no additional sign in may be needed.

Step 2: Access Submitted Forms

- Navigate to the [Submissions](#) tab.



Step 3: Review and Evaluate the Submission

- Review each submitted form.
- Provide the appropriate feedback and ratings (comments are optional).

Step 4: Request Revisions if needed)

- If additional information or revisions are required:
 - Click the Return button at the bottom of the form.

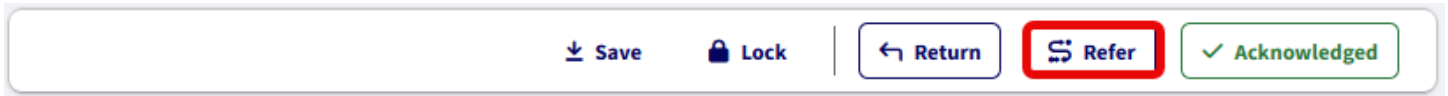


- Enter comments to indicate the required revisions/updates.

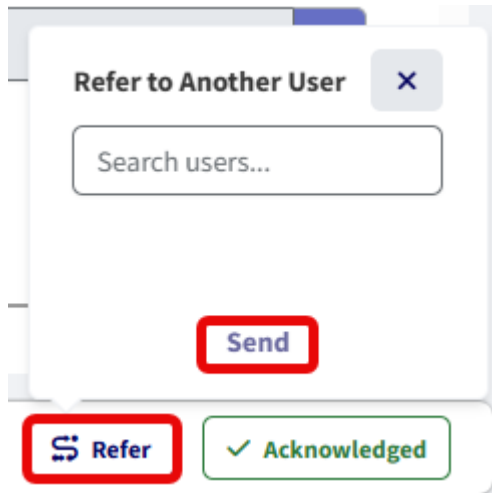
- The faculty member will receive an email notification about the requested changes, log in to Softdocs, revise their form, and resubmit to you.

Step 5: Refer the Form (optional)

- To involve an additional Supervisor, click the Refer button at the bottom of the form.



- Enter the name of the individual into the Refer window, select their name and hit send.



- The referred individual receives an email notification with a link to the form.
- The referred individual adds (optional) comments in the designated comment field within the Supervisor section.

Comments from other supervisors/evaluators

- The referred individual clicks “Acknowledged” to send the form back to the Supervisor.
- Supervisor receives an email notification.

Step 6: Download a Copy of Your Saved Evaluation (optional)

- Click the “Save” button and then click the “Download” option. The evaluation will appear in your browser Downloads as a pdf file and you can save it to your computer or server.

OFA : Faculty APR Form V1 ✓ Draft saved

Clinical Education Research Other

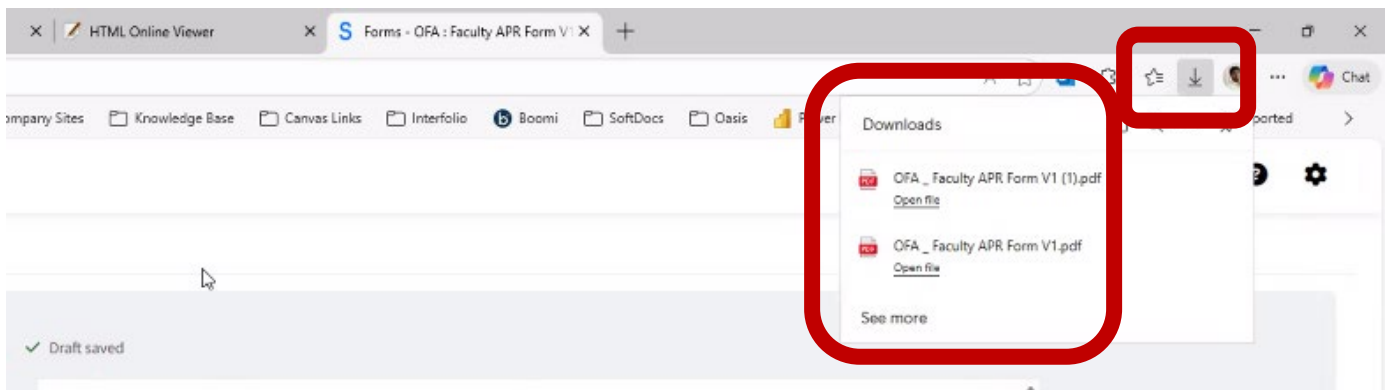
II. Educational Activities (identify interprofessional teaching activities with *)

- . Educational leadership, administration and service
- . External education (e.g., CME)
- Teaching in programs and courses
- . Education for public/community
- . Clinical education and mentoring
- . Development of curricula, courses and educational materials
- . Research education and mentoring

Comments

III. Investigation

Download
Print
Save
+ Add Attachment(s)
Submit



Step 7: Submit Your Evaluation

- Complete the review by filling in all required sections.
- Sign the form by entering your name and clicking on the “Acknowledge” radio button. The Date field populates when “Acknowledge” radio button is selected.
- Submit your evaluation by clicking the “Acknowledged” button at the bottom of the form.

Step 8: View Submitted Forms

- Upon submission, the form is directed to Department Chair, if applicable or back to the faculty member. They are notified via email.
- Submitted and completed forms can be viewed at any time under the [Submissions](#) tab.

etrieve | CENTRAL

Submissions

Forms

Documents

Q Search

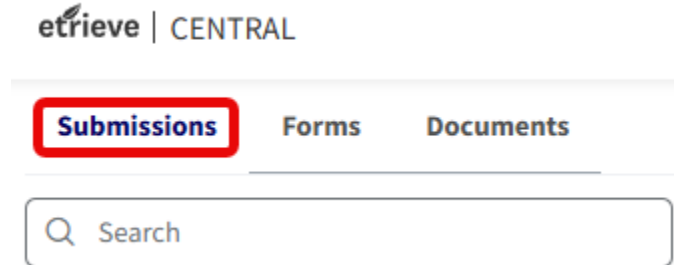
Department Chairs

Step 1: Receive Notification

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Step 2: Access Submitted Forms

- Navigate to the [Submissions](#) tab.



Step 3: Review Supervisor Evaluations

- Review the faculty member's activities and accomplishments, and the evaluation completed by the Supervisor.

Step 4: Complete Your Evaluation

- Fill in the (optional) Comments section.

Step 5: Download a Copy of Your Saved Evaluation (optional)

- Click the "Save" button and then click the "Download" option. The evaluation will appear in your browser Downloads as a pdf file and you can save it to your computer or server.

Clinical Education Research Other

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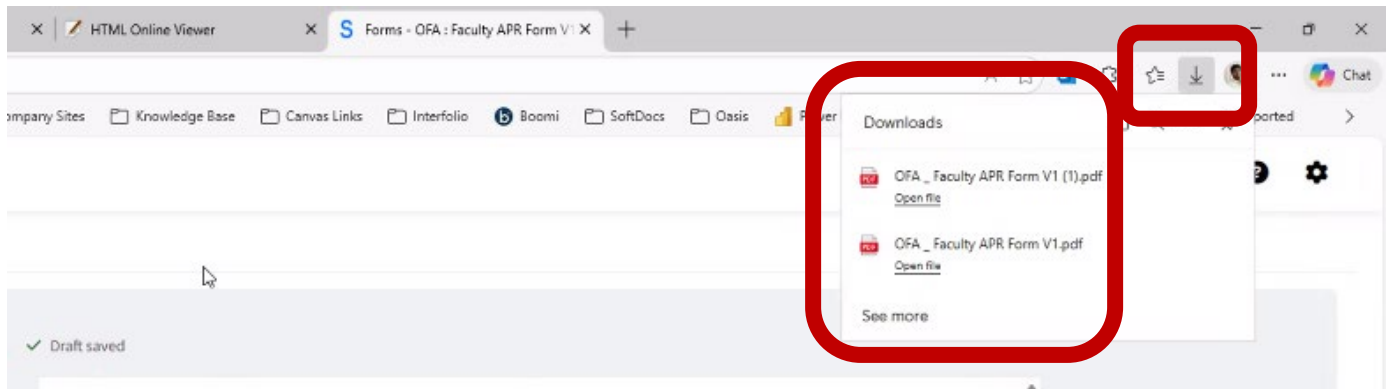
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Step 6: Submit Your Evaluation

- Sign the form by entering your name and clicking on the “Acknowledge” radio button. The Date field populates when “Acknowledge” radio button is selected.
- Submit your evaluation by clicking the “Acknowledged” button at the bottom of the form.

The screenshot shows a web form for submitting an evaluation. At the top is a text input field labeled "Department Chair/Dean". Below it is a "Comments" text area. Further down are three input fields: "Last Name *", "First Name *", and "Date". The "Date" field has a calendar icon. Below these is a red-bordered box containing the "Acknowledge *" section with a radio button and the text "I acknowledge the above APR(Typed name above acceptable as signature)". At the bottom of the form is a navigation bar with buttons: "Save", "Lock", "Return", "Refer", and "Acknowledged". The "Acknowledged" button is highlighted with a red border.

Step 7: View Completed Forms

- Upon submission, the form is directed back to faculty. They are notified via email.
- View submitted and completed forms at any time under the [Submissions](#) tab.

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Submissions

Forms

Documents

Q Search