

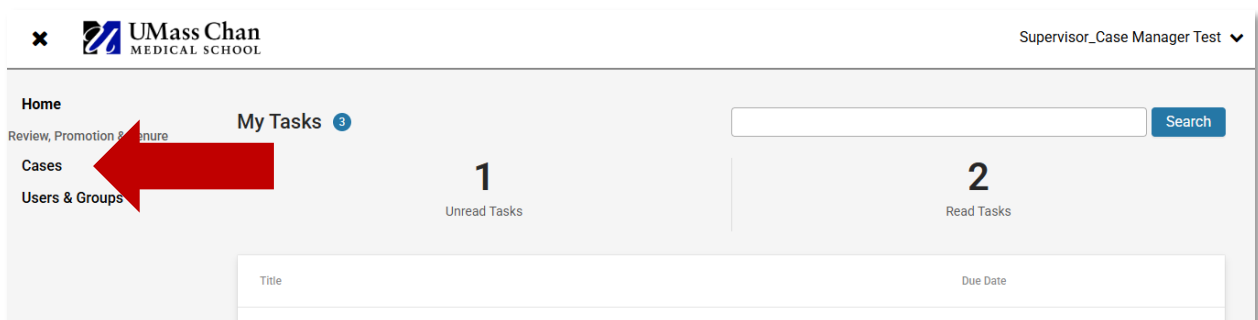
Annual Performance Review: Instructions for Supervisors

The APR process is completed electronically via Interfolio beginning in 2025. Your Supervisor review process begins when a faculty member completes and submits his/her APR information.

- Once the faculty member has submitted his/her APR, you will receive an email indicating that you have a case to review.



- Sign in to Interfolio (see the [Interfolio Sign In Instructions](#) document for detailed sign in instructions).
- Click **Cases** in the left-hand menu.



- Click on the faculty member’s case that requires supervisor review.

Filtered By: [Population and Quantitative Health Sciences](#) [Include child units](#) [Active Cases](#) [Reset Filters](#)

Name	Type	Template Name	Status
<input type="checkbox"/> Faculty Member 0 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Chair Template	
Step 3 of 3: Academic Administrator			
<input type="checkbox"/> Faculty Member 2 Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor No CV Upload	Chair Review
Step 3 of 5: Department Chair/Final Approver ▲ Required Documents			
<input type="checkbox"/> Faculty Member 0	Review	2025 PQHS Faculty Annual Performance	Closed

- Click into the candidate’s packet (for example by clicking the General Information section).

Expand All Collapse All Download Share Settings Move

Recording Academic Activities Locked Unlock

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.

Please complete your APR before May 30, 2025.

Instructions for completing your APR can be downloaded from the OFA website link below:

- [Interfolio APR Step by Step Job Aids](#)

Additional Interfolio Instructional Resources:

- After you select your packet, a link to the [Candidate's Packet Guide](#) will be displayed or you can participate in an [eLearning video](#).

Additional Documents optional Add File

No files have been submitted.

Title	Details
General Information Form 6 Questions, 6 responses	Submitted by Candidate, Jan 23, 2025 at 7:01 PM
FTE Error	Submitted by Candidate,

- You can read a faculty member’s information section-by-section by clicking on each heading in the left-hand menu (see below), or by clicking **Next Material** at the bottom of the screen.

Downloading Files

- You can read a faculty member's information section by section by clicking on each heading in the left-hand menu, or by clicking **Next Material** at the bottom of the screen. **However, we suggest creating a pdf of the candidate's file to view in a separate window as you complete the rest of your review process.**
- Click the **Download** button.

The screenshot shows the 'Faculty Member 2' review interface. On the left is a navigation menu with sections like 'RECORDING ACADEMIC ACTIVITIES', 'General Information', 'FTE Effort', etc. The main content area is titled 'Packet Forms' and shows a 'General Information' form with fields for First Name, Job, Last Name, Brown, Department, POMS, Division, Epidemiology, Current Rank, Assistant Professor, and Years in Current Rank. At the top right, there is a 'Return to Case' button and a 'Download' button with a download icon, which is circled in red. A search bar for PDFs is also visible.

- Check the **Select All** box, and then click the **Download PDF** button.
- On your home page click **Your Files Are Ready to Download**.

The 'Download Packet' dialog box is shown. It has a 'Select All' checkbox at the top left, which is circled in red and has a red arrow pointing to it. Below this is a list of form sections under 'Recording Academic Activities', each with a checked checkbox. At the bottom, there are three buttons: 'Download ZIP', 'Download PDF' (circled in red), and 'Cancel'.

The 'My Tasks' section of the home page is shown. It displays '1 Unread Task'. Below this, a notification card is visible with the text 'Your Files Are Ready to Download' circled in red. The card also lists 'Faculty Member 2' and 'Population and Quantitative Health Sciences | Review | 2025 PQHS Faculty Annual Performance Template'.

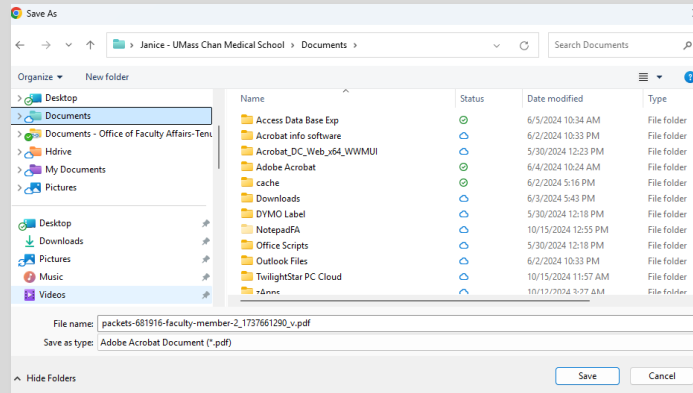
Cases
Users & Groups

Requested Downloads

Below is a list of materials you've requested to download. Please note that if you've requested to download a set of documents, materials might have been added to the set since you last requested the download. Please check back to make sure you have all of the relevant documents.

Name	Date Requested	Action
Your download of documents materials for Faculty Member 2's case is ready.		
Population and Quantitative Health Sciences Review 2025 PQHS Faculty Annual Performance Review Supervisor Template	January 23, 2025	Download Remove

- A pop-up menu will appear to allow you to save the candidate's file to your computer.



- Repeat these steps for each faculty member you need to review.
- To return to your review process, click **Cases** in the left-hand menu.

- Click on the **Case Details** tab to enter your supervisor review.

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 Supervisor Template	Status ● Supervisor Review change
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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.

- Click **Fill Out Form**. Instructions will appear at the top of the form.

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

- Choose the appropriate rating for the faculty member's performance from the drop-down menu. Only questions with a red asterisk are required.

Educational Activities *

Select an option

Select an option

Satisfactory

Unsatisfactory

N/A

- Complete the required Summary sections and required Overall Evaluation.
- Click **Save Responses** to come back later and edit the form. Click **Submit Form** when your review is complete.

Submitted on Jan 23, 2025 at 4:23 PM EST

[Submit Form](#) [Save Responses](#) [Return to Case](#)

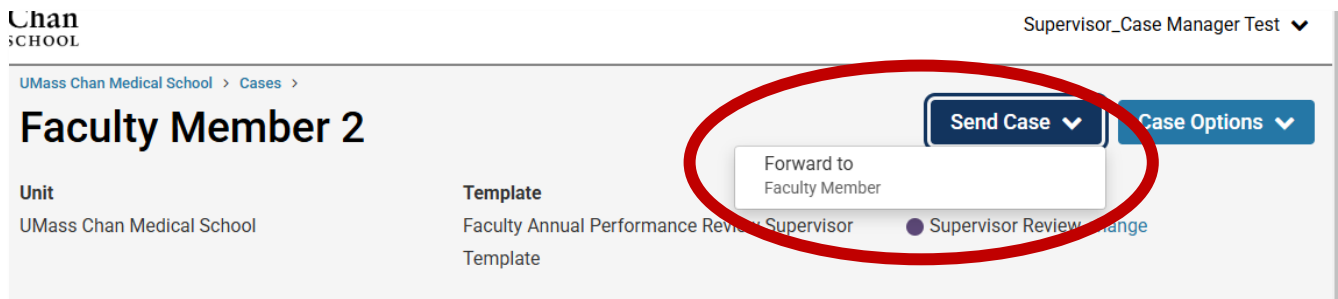
- Once you submit the form, a pop-up confirmation window will open. Click **Yes**.

Confirm ✕

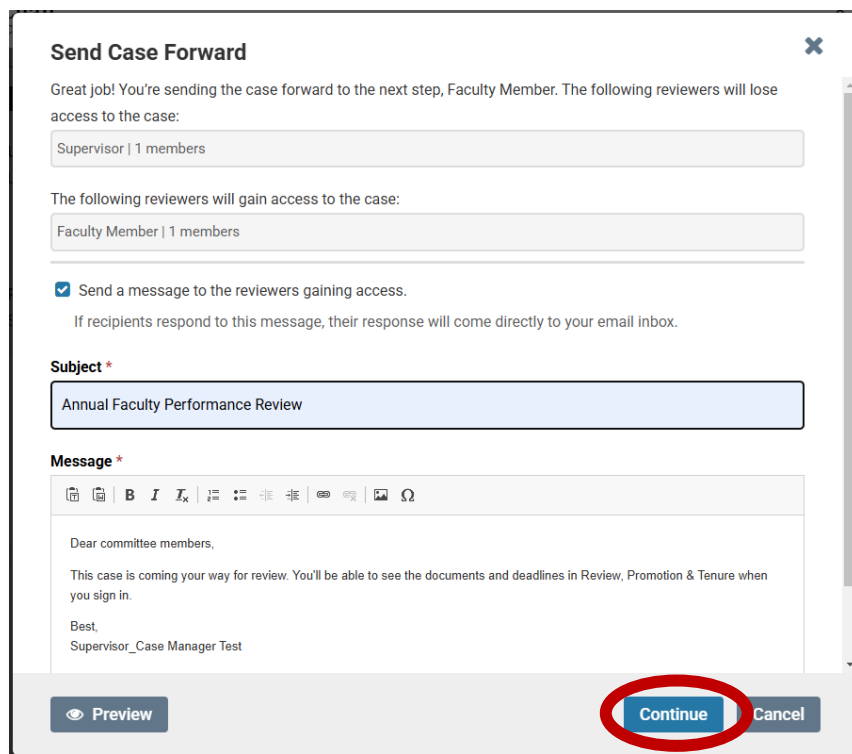
Submitting the form "APR Supervisor Form" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

[Yes](#) [No](#)

- Use the **Send Case** button to forward your review to the faculty member.



- A pop-up email notification will appear. Type in a subject line of your choice. **We suggest: “Annual Performance Review- please review and sign”.** (The other parts of the email are generated automatically and can be left as is.) Click **Continue**.



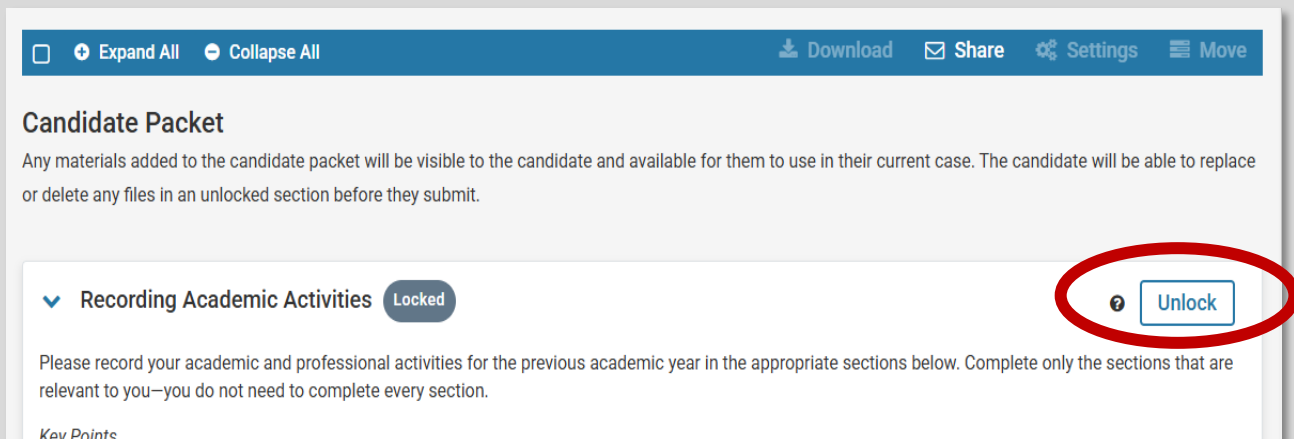
The faculty member will receive an email alert, will review your ratings and comments, will provide their own comments (optional) and sign the form (required).

At this point, your academic administrator will schedule a meeting for you with the faculty member to discuss their APR.

APR Meeting

We recommend that you provide the faculty member time to review, comment (optional) and sign (required) the form **during the meeting** so that the faculty member can move the APR case forward to the Chair.

During the meeting, if you want the faculty member to make any edits to his/her APR information, you will need to first unlock the Packet. Click **Unlock**. You will then need to alert the faculty member using the **Send Case** button. The faculty member must then edit and resubmit.



The screenshot shows a web interface with a blue header bar containing navigation options: 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. Below the header, the main content area is titled 'Candidate Packet' and includes a descriptive paragraph. A section titled 'Recording Academic Activities' is shown with a 'Locked' status. To the right of this section, an 'Unlock' button is highlighted with a red circle. Below the section title, there is a paragraph of instructions and a 'Key Points' link.

The next step in the APR process is Chair Review. The Chair will read the information entered by the faculty and your review, provide a comment (optional), sign the form (required), and forward the APR to the faculty member for final signature. The department Administrator will then close the case.