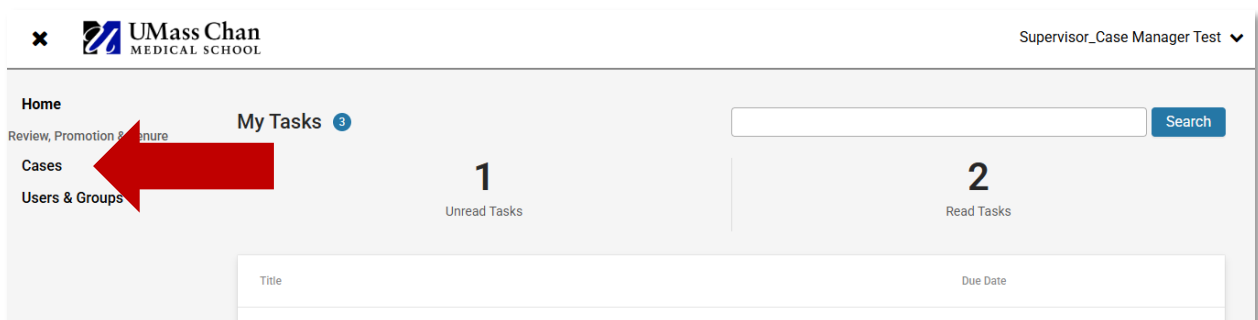## Annual Performance Review: Instructions for Supervisors

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.

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

- 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.

- Check the **Select All** box, and then click the **Download PDF** button.

- On your home page click **Your Files Are Ready to Download**.

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.
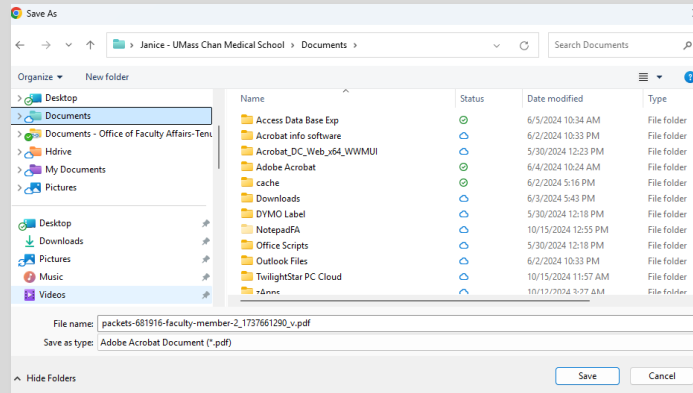
- Repeat these steps for each faculty member you need to review.

- 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

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.

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

- 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.
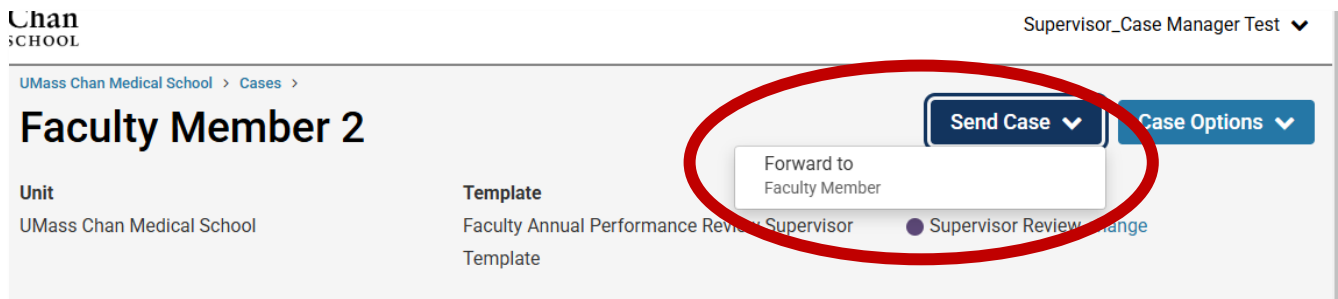

- Once you submit the form, a pop-up confirmation window will open. Click **Yes**.


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**.
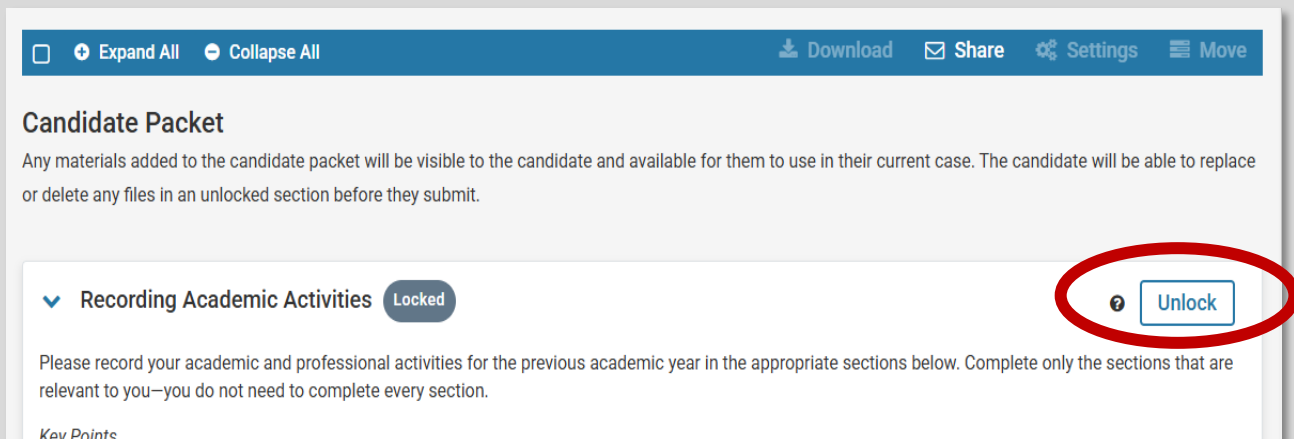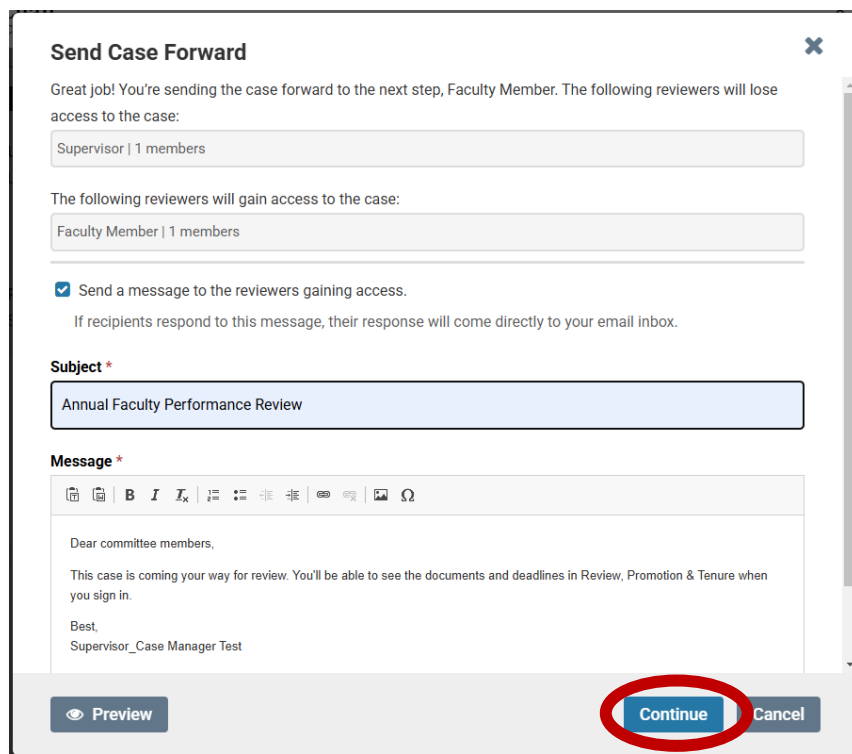

The faculty member will receive an email alert, will review your ratings and comments, will provide their own comments (optional) and sign the form (required).

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 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.