Step 1: Faculty Annual Performance Review

Create Duplicate Departmental APR Supervisor and Chair Templates

Unit administrators or case managers will create duplicates of the Faculty Annual Performance Review Master Templates depending on the number of reviewers.

- Duplicate the **Faculty Annual Performance Review Supervisor** template for reviews where the Supervisor and Chair <u>are not the same person</u>.
- Duplicate the **Faculty Annual Performance Review Chair** Template for reviews where the <u>Chair</u> and supervisor are the same person.

Unit administrators can use these two templates to make duplicate templates as needed for each supervisor that reviews APRs within their department.

When creating additional supervisor templates, it is <u>recommended</u> 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.

- 1) Click **Templates** in the left-hand navigation bar.
- 2) Add the word Annual to the **Search** field and the Faculty Annual Performance Review Supervisor and Chair Master Templates will appear.

Unit Admin 🗸

3) Click the **Options** Drop down menu and select **Create a Duplicate.**

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Home Your Packets	UMass Chan Medical School > Templates List (2)			🗜 Add To
view, Promotion & Tenure Cases Templates	Search by title or unit 2 Annual 2 of 2	templates.		
Administration Reports	Title 🗸	Unit 🗢	Туре	Dossier Visibility 🕑
Users & Groups	Faculty Annual Performance Review Chair Template Faculty Annual Performance Review Chair Template	UMass Chan Medical School	Review	No Opti Preview Template
	Faculty Annual Performance Review Supervisor Template Faculty Annual Performance Review Supervisor Template	UMass Chan Medical School	Review	Create a Duplicate

Interfolio Step 1 Job Aid: Faculty Annual Performance Review

The Template Information fields will appear.

4) Add the year and departmental abbreviation to the duplicate APR template's Title and Description. For example, 2025 PQHS Faculty Annual Performance Review Smith Make sure your template is always assigned to your primary department/unit. Do not assign any templates to divisions. Faculty members have been assigned to their primary departments only in Interfolio and will not be able to see a template created at the division level.

5) Click the Save & Continue button

2025 PQHS Faculty Annual Performance Review Supervisor 3 Internal Case Sections Description * @ 4 Case Review Steps 2025 PQHS Faculty Annual Performance Review Supervisor 5 Template Summary Case Data Forms Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the Administration page. 1	Cases Templates Administration Reports Users & Groups	Type * Population and Quantitative Health Sciences Type * Review Title * 0	Creating a Template Template Information Candidate Requirements
Case Data Forms Case data forms can be used to include additional information about candidates at your institution and will			
Case data forms can be used to include additional information about candidates at your institution and will		2025 PQHS Faculty Annual Performance Review Supervisor	5 Template Summary
		Case Data Forms	

After a unit administrator creates a template, they can go back to Step 1 to create additional supervisor templates.

- 6) Click **Templates** in the left-hand navigation bar to review your list of templates.
- 7) Enter the **current year** of the template in the **Search** window (e.g. 2025) and the list of templates you created for your unit/department will appear.

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Cases 6 Templates Administration	Search by title or unit 7 2 025 2 of 2 templates.						
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