Step 1: Faculty Annual Performance Review

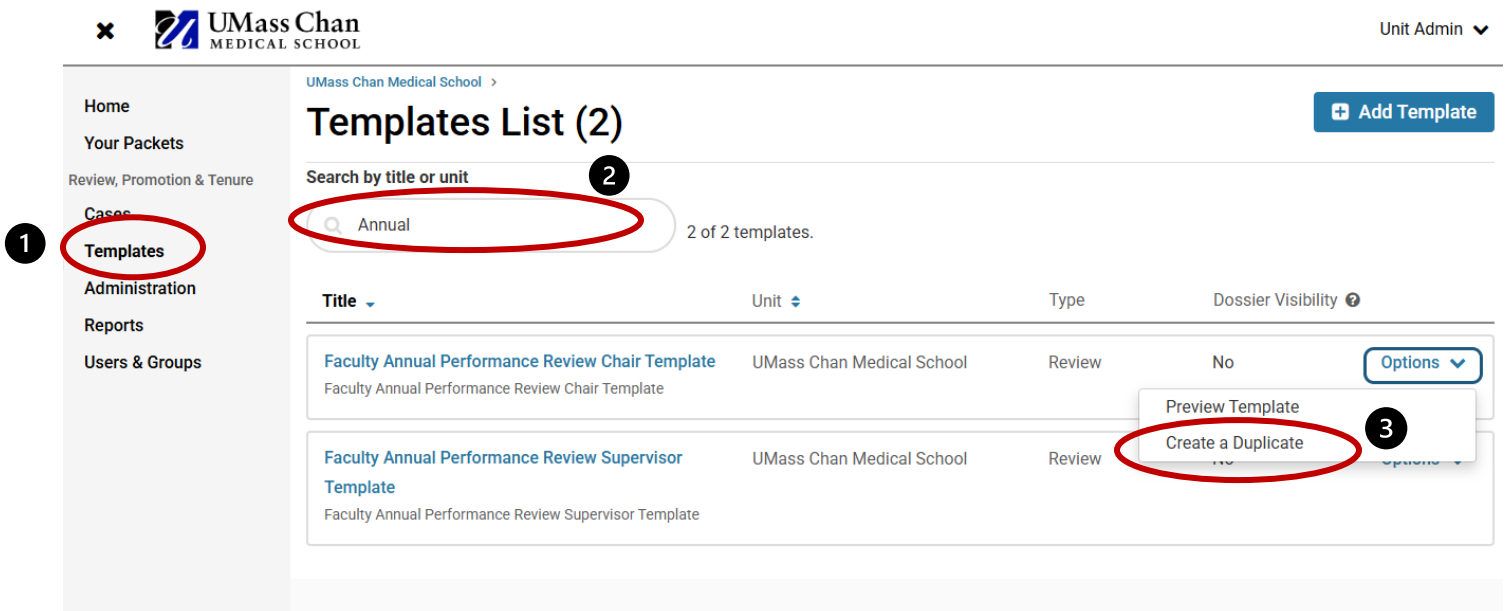## Create Duplicate Departmental APR Supervisor and Chair Templates

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 and supervisor are the same person</u>.

Unit administrators can use these two templates to make duplicate templates as needed for each supervisor that reviews APRs within their department.
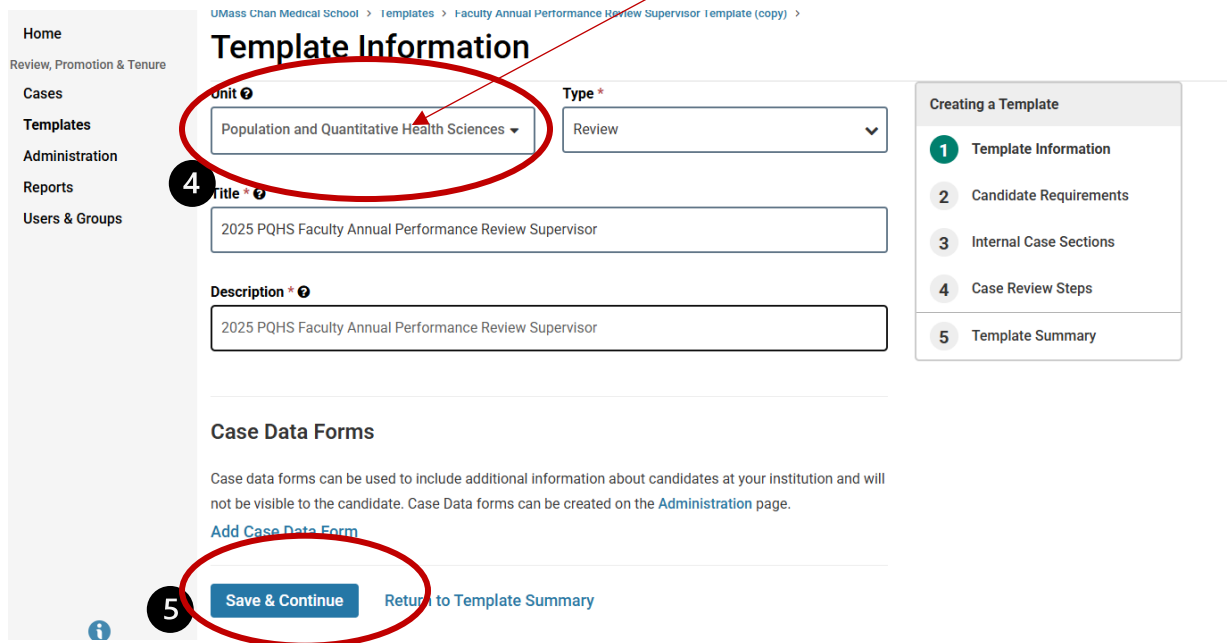
When creating additional supervisor templates, **it is <u>recommended</u> that unit administrators add the last name of the supervisor to the template information** so that later in the process they can assign the correct supervisor to the correct template before they create the cases for faculty members that will be reviewed by that supervisor.

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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.

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

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

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.