UMass Chan MEDICAL SCHOOL | Office of Faculty Affairs

# Annual Performance Review: Instructions for Faculty

The APR process is completed electronically via Interfolio beginning in 2024. There are two **required** sections at the top of the electronic APR that you must complete.

- General Information
- FTE Effort

The most important part of your APR is your list of professional activities and accomplishments for the reporting period. You must list these activities and accomplishments in the appropriate sections. Complete only the sections that are relevant to you— leave a section blank if it is not relevant to you. Required information is indicated with a red asterisk (*). *Note: Academic departments may add additional requirements.*

- Education
- Investigation
- Scholarship
- Academic Service
- Leadership Positions and Responsibilities
- Health Care Delivery
- Honors and Awards
- Efforts to Support Diversity, Equity, and Inclusion

Finally, you will add your Goals and Self-Assessment. You will need to enter your **Area of Distinction**, your **goals for the previous reporting period**, your **goals for the coming year**, a **self-assessment** of your performance, and any **areas of concern** that you want to bring to the attention of your supervisor.

- Goals and Self-Assessment

* * * * *

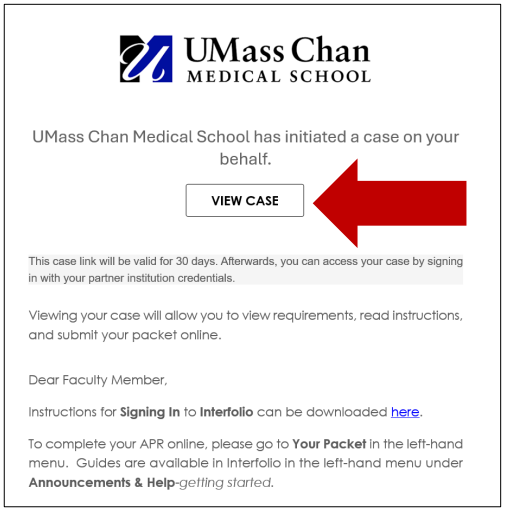
There are three main steps for faculty in the APR process.

- Step 1: Share your activities and accomplishments
- Step 2: Sign off on supervisor's evaluation
- Step 3: Final sign off

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

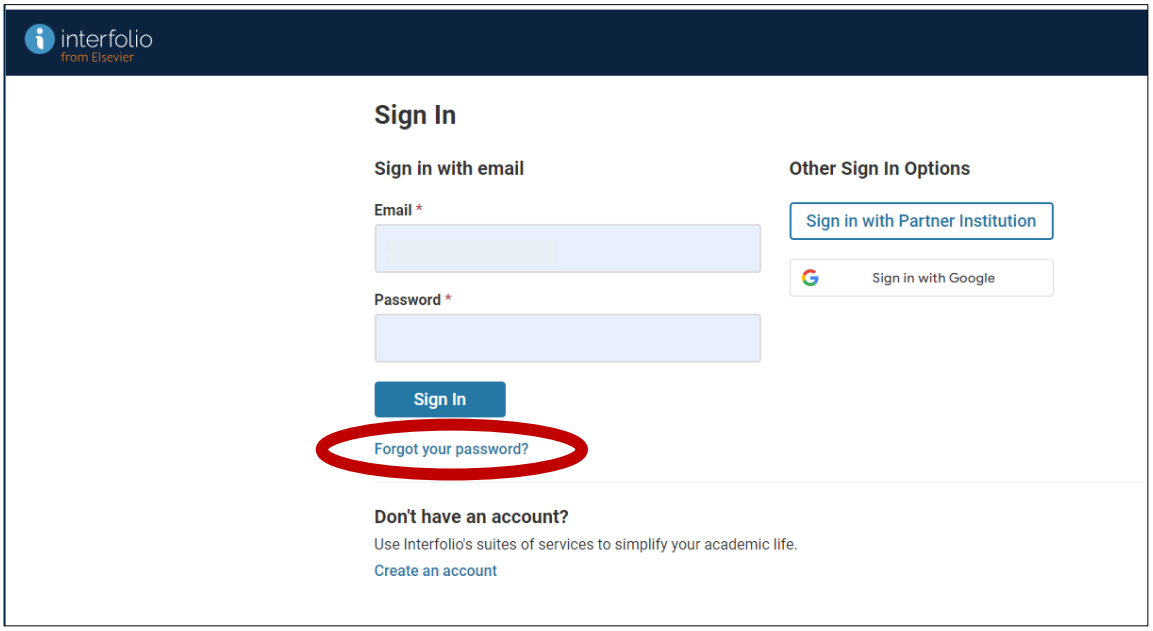
**Step 1: Share your activities and accomplishments**

- You will receive an email from noreply@interfolio.com indicating that a "case" has been initiated on your behalf. The "case" is your annual performance review. Select "View Case."

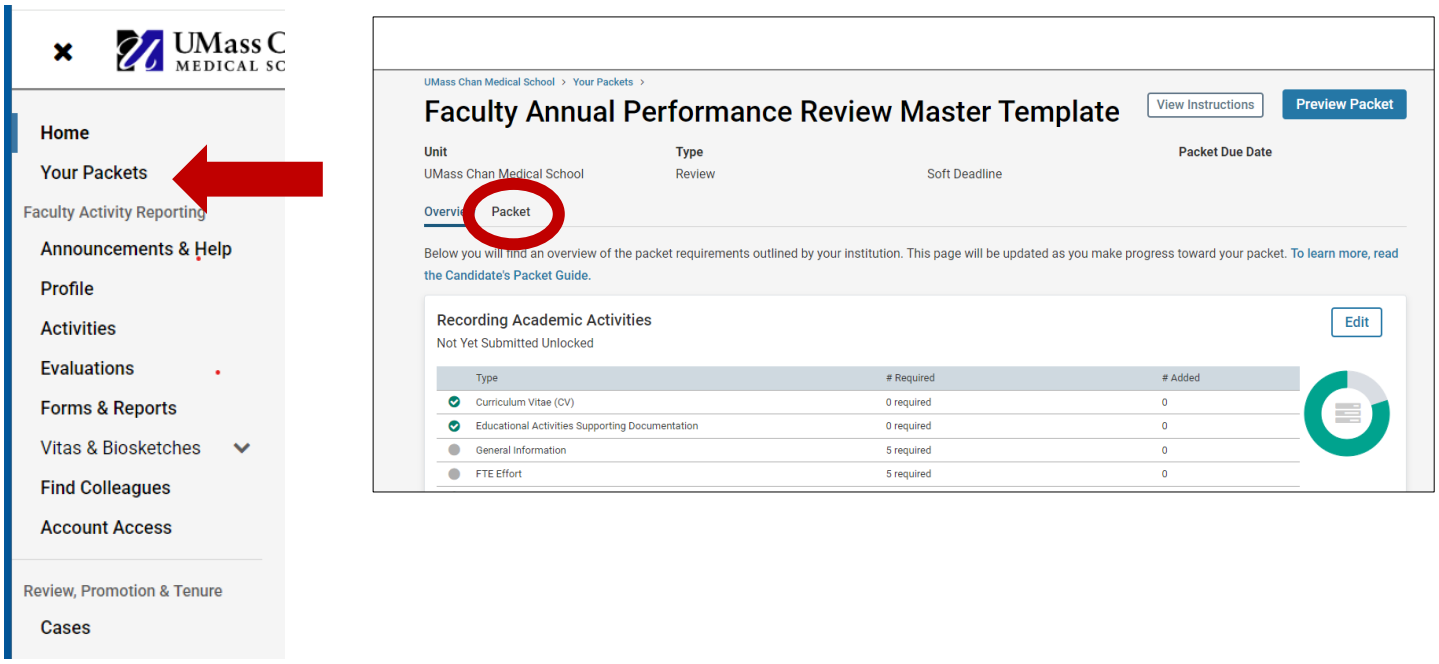



- Please note that this email will go to the "preferred" email you have listed with the medical school. For information to check or change your "preferred" email address, please visit our website: https://www.umassmed.edu/ofa/about/newswire/

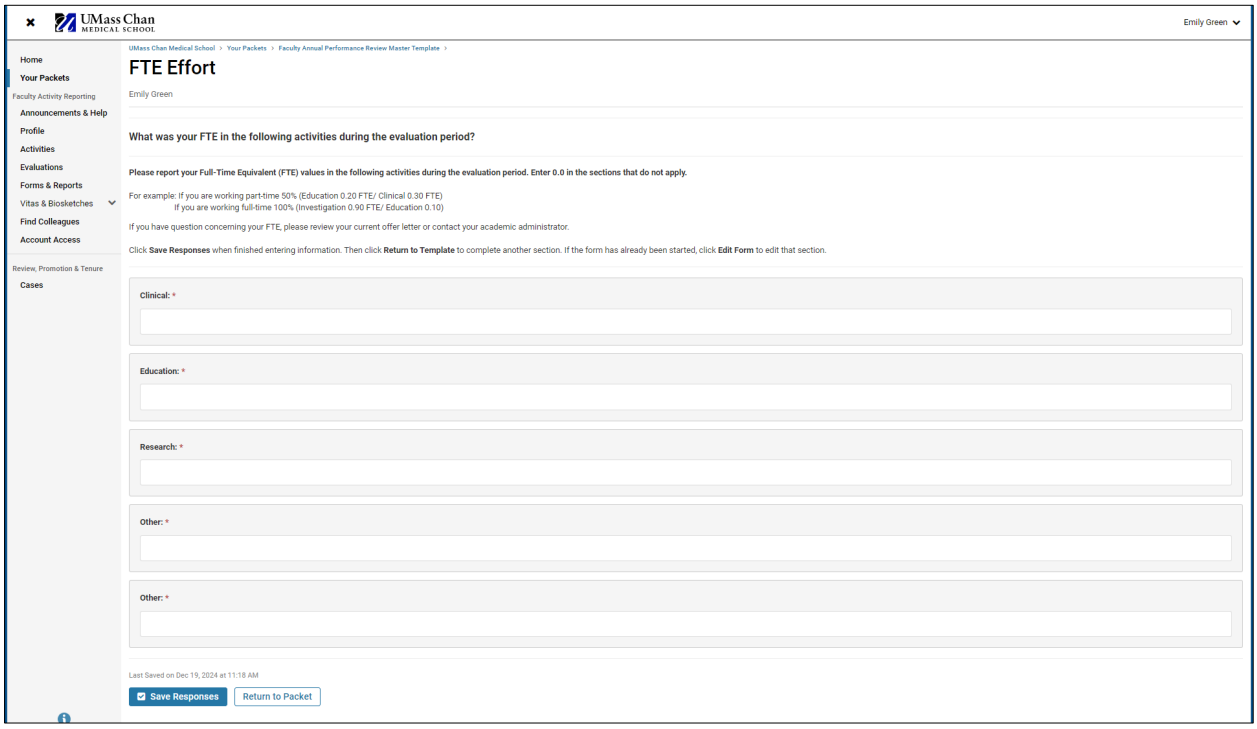
- The first time that you access your APR via Interfolio you will need to create a "new" password. An account has already been created for you, but you need to set a password that works for you. In order to do this, click "Forgot your password" and follow the directions to create and confirm your password.



- Navigate to your APR “Packet.” Your “packet” is the assembly of documents and information that comprise your APR.

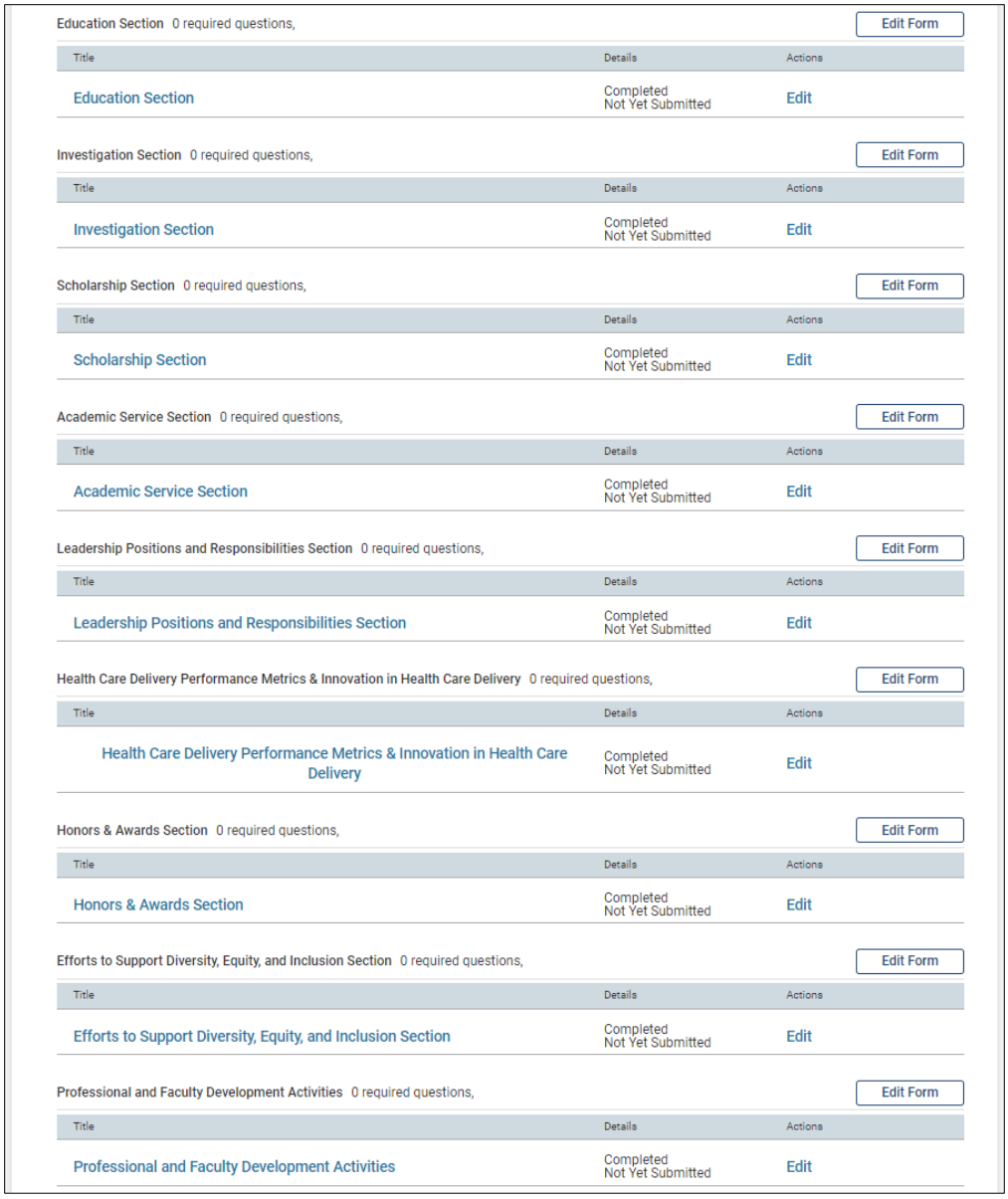



- Next are two **required** sections of the APR- General Information and FTE Effort. Click Fill out Form and fill out the information requested. Required information is indicated with a red asterisk (*).



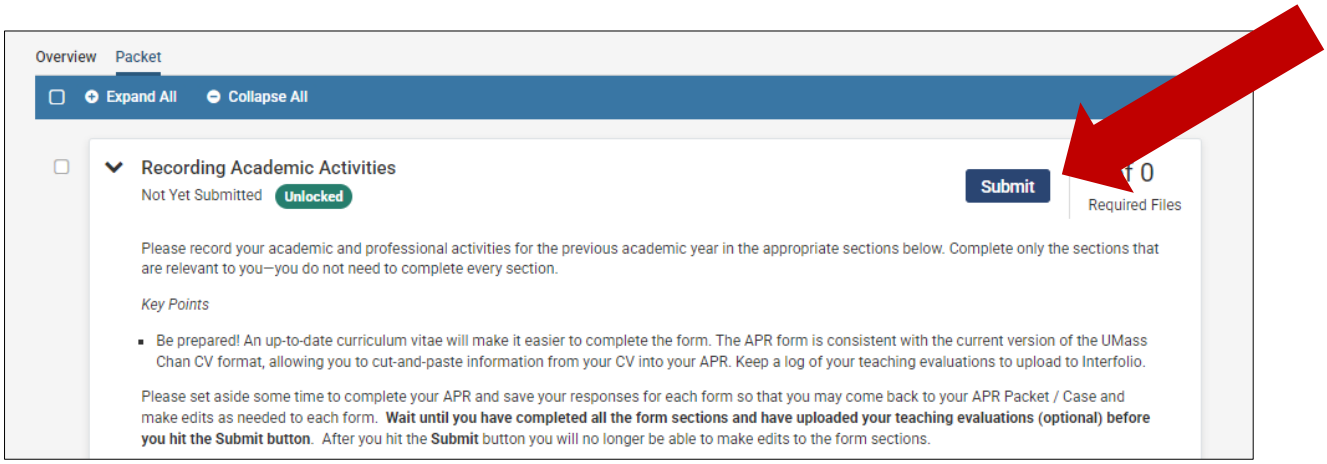
- If you have any questions about your FTE, please contact your department administrator.
- Save your responses and Return to Packet.

- Complete each relevant section of the APR with your activities and accomplishments for the reporting period using the Edit Form buttons. Have an updated CV on hand to copy and paste (the sections of the electronic APR form mirror exactly the UMass Chan CV template). Save your responses on each section and Return to Packet.



- The final section is your Goals and Self-Assessment section. You will need to enter your **Area of Distinction**, your **goals for the previous reporting period**, your **goals for the coming year**, a **self-assessment** of your performance, and any **areas of concern** that you want to bring to the attention of your supervisor. These questions are all required. This section is arguably the most important section of the APR. Please refer to the [APR: Overview and Guidance] document for more information.

- Once all relevant sections have been completed, hit "Submit." Please note that once you submit your APR, no further changes can be made to the sections unless your department administrator or supervisor "unlocks" it for you.




- Submitting your APR information sends it directly to your supervisor.

*Your supervisor will review your packet, add evaluative comments, and sign it. The signed form will be discussed during your in-person APR meeting. Your supervisor will then send your APR packet back to you electronically via Interfolio.*

**Step 2: Sign off on supervisor's evaluation**

- You will receive an email from noreply@interfolio.com. Select "View Case."
- Log in to Interfolio.com using your email address and password.
- Select **Read Case** button to review your supervisor's evaluative comments.
- Select **Case Details** and provide a comment (optional).
- Re-sign the form (required).
- Forward the APR packet to your Chair via **Send Case** button.

*Your department chair, or assigned evaluator such as a division chief, will review your packet, add evaluative comments (optional), and sign the form. They will then send the form back to you electronically via Interfolio.*

**Step 3: Final sign off**

- You will receive an email from noreply@interfolio.com. Select "View Case."
- Log in to Interfolio.com using your email address and password.
- Select **Read Case** button to review comments from your department chair or assigned evaluator.
- Select **Case Details** tab and provide a final comment (optional).
- Re-sign the form (required).
- Forward the APR packet to the Academic Administrator via **Send Case** button.