

## 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

\* \* \* \* \*

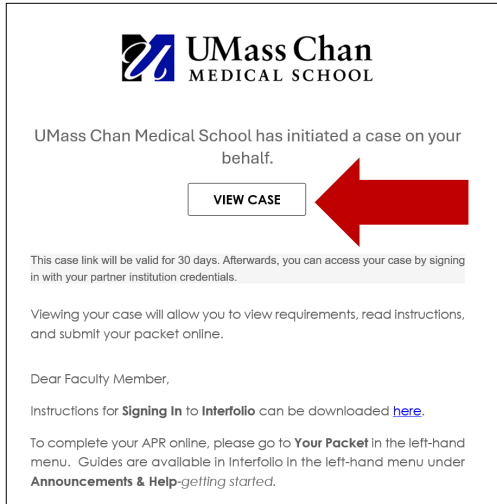
There are three main steps for faculty in the APR process.

- 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](mailto: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.

The screenshot shows the Interfolio Sign In page. The page has a dark blue header with the Interfolio logo and the text "interfolio from Elsevier". Below the header, the page is titled "Sign In". There are two main sections: "Sign in with email" and "Other Sign In Options". The "Sign in with email" section has two input fields: "Email \*" and "Password \*". Below these fields is a blue "Sign In" button. The "Other Sign In Options" section has two buttons: "Sign in with Partner Institution" and "Sign in with Google". A red circle highlights the "Forgot your password?" link below the "Sign In" button. At the bottom of the page, there is a section titled "Don't have an account?" with the text "Use Interfolio's suites of services to simplify your academic life." and a link "Create an account".

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

UMass Chan Medical School > Your Packets >

## Faculty Annual Performance Review Master Template

View Instructions Preview Packet

Unit	Type	Packet Due Date
UMass Chan Medical School	Review	Soft Deadline

Overview **Packet**

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

### Recording Academic Activities

Not Yet Submitted Unlocked [Edit](#)

Type	# Required	# Added
Curriculum Vitae (CV)	0 required	0
Educational Activities Supporting Documentation	0 required	0
General Information	5 required	0
FTE Effort	5 required	0

- 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 (\*).

General Information 5 required questions, [Fill Out Form](#)

This form has not been completed.

FTE Effort 5 required questions, [Fill Out Form](#)

This form has not been completed.

UMass Chan Medical School > Your Packets > Faculty Annual Performance Review Master Template >

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## FTE Effort

What was your FTE in the following activities during the evaluation period?

Please report your Full-Time Equivalent (FTE) values in the following activities during the evaluation period. Enter 0.0 in the sections that do not apply.  
 For example: if you are working part-time 50% (Education 0.20 FTE/ Clinical 0.30 FTE)  
 If you are working full-time 100% (Investigation 0.90 FTE/ Education 0.10)

If you have question concerning your FTE, please review your current offer letter or contact your academic administrator.

Click **Save Responses** when finished entering information. Then click **Return to Template** to complete another section. If the form has already been started, click **Edit Form** to edit that section.

Clinical: \*

Education: \*

Research: \*

Other: \*

Other: \*

Last Saved on Dec 19, 2024 at 11:18 AM

[Save Responses](#) [Return to Packet](#)

- 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.

Education Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Education Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Investigation Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Investigation Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Scholarship Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Scholarship Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Academic Service Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Academic Service Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Leadership Positions and Responsibilities Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Leadership Positions and Responsibilities Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Health Care Delivery Performance Metrics & Innovation in Health Care Delivery 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Health Care Delivery Performance Metrics & Innovation in Health Care Delivery	Completed Not Yet Submitted	<a href="#">Edit</a>	
Honors & Awards Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Honors & Awards Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Efforts to Support Diversity, Equity, and Inclusion Section 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Efforts to Support Diversity, Equity, and Inclusion Section	Completed Not Yet Submitted	<a href="#">Edit</a>	
Professional and Faculty Development Activities 0 required questions,			<a href="#">Edit Form</a>
Title	Details	Actions	
Professional and Faculty Development Activities	Completed Not Yet Submitted	<a href="#">Edit</a>	

- 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.

Goals and Self-Assessment 5 required questions, Fill Out Form

This form has not been completed.

- 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.

Overview Packet

Expand All  Collapse All

**Recording Academic Activities** Submit 0 of 0 Required Files

Not Yet Submitted Unlocked

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.

- 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](mailto: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](mailto: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.