

Interfolio
Faculty Annual Performance Review
Unit Administrator & Case Manager Training

January 13, 2025



Interfolio's

- **Interfolio Review, Promotion & Tenure (RPT)** is an online platform for carrying out formal faculty reviews in a shared governance context, built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well-documented.

Interfolio's Sign In (www.Interfolio.com)

Sign In

Sign in with email

Email *

Password *

[Forgot your password?](#)

Or sign in with:

OFA Interfolio Resource webpage:

<https://www.umassmed.edu/ofa/academic/faculty-reviews/apr/interfolio-resources-for-faculty/>






Tips, Guidelines and Recommendations:

- **Chrome is the browser of choice.** Although, other browsers will work, Chrome tends to provide the best view and functionality.
- All UMass Chan Interfolio members need to use their Business Email addresses to Sign in to Interfolio.
- Faculty can review their Profile page to determine which email address they have on file with the Office of Faculty Affairs as their business email address.
- Unit administrators will have the ability to view the packet, add documents and allow editing functionality at any time. (If you need access, please contact your departmental Academic Administrator.)



Interfolio Account Dashboard

  UMass Chan
MEDICAL SCHOOL Unit Admin 

Home

Review, Promotion & Tenure

Cases

Templates

Administration

Reports

Users & Groups

My Tasks 1

0
Unread Tasks

1
Read Tasks

Title	Due Date
Faculty Member 1	
Population and Quantitative Health Sciences Review Faculty Annual Performance Review Template PQHS	

UMass Chan Units in Interfolio

Below is a digital representation of UMass Chan's institutional hierarchy. Within the hierarchy, the different tiers will determine access. Administrators can be assigned to any given unit. Ex. Institution > School > Department.

Unit

UMass Chan Medical School

Morningside Graduate School of Biomedical Sciences

Programs, Centers & Institutes

Tan Chingfen Graduate School of Nursing

TH Chan School of Medicine



RPT User Roles

- **Institutional Administrators**
- **Unit Administrators**
- **Template Administrators**
- **Case Managers**
- **Committee Managers**
- **Committee Members**



Unit Administrators: Administrators can access documents, e-mail candidates and committees, and move a case forward. They can only move a case backward after all the case review steps have been completed. Administrators can create templates, forms, and cases for the units to which they have access, and they have access to all cases at their unit/dept., unless recused.

Template Administrators can create and edit templates at their unit/dept but they cannot create cases, view reports or manage any account settings.

Case Managers have the ability to create new cases and edit cases at their unit. They can manage case-level settings and committees, view case details and packet materials, and view all closed cases at their level in the hierarchy.

Case managers cannot manage templates, view reports, or change account settings

Committee Managers have the power to move a case forward. They can only move a case backward after all the Case Review Steps have been completed. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product, record committee votes in the program, and add files to a case. In order to make a user a Committee Manager, an Administrator must manually select them to serve in this role.

Committee Members have the most basic permissions within the system. They can view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.



Templates

The building blocks of the RPT module that allow administrators to create standardized, repeatable processes for all review types at their institution, colleges, schools, and departments. Templates can be created centrally or copied down to specific units for customization.

Cases

The lifecycle of the standardized review cycle, including candidate/committee requirements and associated documentation. The APR Case will include all candidate packet materials as well as all Supervisor and Chair Committee forms.

Packet

The collection of materials uploaded by the candidate based on the requirements specified by the institution. The APR Packet contain materials added by the candidate/faculty member such as CVs or teaching evaluations, as well as the APR forms completed by the candidate.



Committees

Groups of users that can review the candidates' case at a given step of the review process. Committees can be:

- Standing (managed from the central committee tab)
- Ad Hoc (case specific)



Steps Involved in Creating APRs

1. **Create duplicate departmental templates from the Faculty Annual Performance Review Supervisor and Chair Master Templates.**
 - a. **Create additional templates for each supervisor that reviews APRs within their department.**
2. **Create Standing Committees of one for each:**
 - a. **Supervisor**
 - b. **Unit Administrator**
 - c. **And Departmental Chair****that reviews APRs within their department.**
3. **Assign the appropriate standing committees to each supervisor's template.**
4. **Create multiple faculty members APR Cases for each Departmental supervisor's that reviews APRs.**
5. **Release cases and notify faculty members that their APR case is ready to be completed.**
6. **Run Case Information Reports to monitor and close APR cases.**



Faculty Annual Performance Review Master Templates



There are four sections to a template:

- **Template Information (name, dept, type of template and description)**
- **Candidate Requirements (candidate forms)**
- Internal Case Sections (case data forms)
- **Case Review Steps (committee forms)**

Step 1: Create Duplicate Departmental Templates from the Faculty Annual Performance Review Master Templates



- Home
- Your Packets
- Review, Promotion & Tenure
- Cases
- Templates**
- Administration
- Reports
- Users & Groups



UMass Chan Medical School >

Templates List (2)



Search by title or unit

2 of 2 templates.

Title	Unit	Type	Dossier Visibility	
Faculty Annual Performance Review Chair Template Faculty Annual Performance Review Chair Template	UMass Chan Medical School	Review	No	
Faculty Annual Performance Review Supervisor Template Faculty Annual Performance Review Supervisor Template	UMass Chan Medical School	Review	No	

- Preview Template
- Create a Duplicate**

Template Information

UMass Chan Medical School > Templates > Faculty Annual Performance Review Chair Template (copy) >

Template Information

Unit ⓘ

Population and Quantitative Health Sciences

Type *

Review

Title * ⓘ

2025 PQHS Faculty Annual Performance Review Chair Template

Description * ⓘ

2025 PQHS|Faculty Annual Performance Review Chair Template

Creating a Template

- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 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.

[Add Case Data Form](#)

Save & Continue

[Return to Template Summary](#)



Duplicate Templates



Home

Review, Promotion & Tenure

Cases

Templates

Administration

Reports

Users & Groups





[UMass Chan Medical School](#) >

Templates List (2)



Search by title or unit

2 of 2 templates.

Title 	Unit 	Type	Dossier Visibility 	
2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Chair Template	Population and Quantitative Health Sciences	Review	No	Options 
2025 PQHS Faculty Annual Performance Review Supervisor Template 2025 PQHS Faculty Annual Performance Review Supervisor Template	Population and Quantitative Health Sciences	Review	No	Options 

Step 2: Creating Standing Committees

A standing committee is a permanent committee that an administrator creates within Interfolio. Standing committees are a way to set up your committees once, save them to a unit, and have them available to use at any point within a workflow **as a case review step.**

The unit the standing committee is created at determines where an administrator can use them for a template or a case.



Supervisor APR Template

The Supervisor APR Template has **Five** Case Review Steps

1. Supervisor
 - a. Administrators Schedule Interviews
2. Faculty Member
3. Department Chair
4. Faculty Member
5. Administrator



Chair APR Template

The Chair APR Template has **Three** Case Review Steps

1. Supervisor
 - a. Administrator Schedule Interview
2. Faculty Member
3. Administrator



Users, Committees & Units

The screenshot shows the 'Users, Committees & Units' page in the UMass Chan Medical School Admin system. The page has a top navigation bar with the UMass Chan logo and 'Unit Admin' dropdown. A left sidebar contains navigation items: Home, Review, Promotion & Tenure, Cases, Templates, Administration, Reports, and 'Users & Groups' (circled in red). The main content area has a breadcrumb 'UMass Chan Medical School > Admin >' and a title 'Users, Committees & Units'. Below the title are tabs for 'Users', 'Committees' (circled in red), and 'Units'. A search bar is labeled 'Search by committee name' with a search input field containing 'Search Committees'. To the right of the search bar are 'Sort By Name' and 'Browse By All Units' dropdowns, a 'Download' button, and an 'Add Committee' button (pointed to by a red arrow). A red text annotation 'Click Add Committee' is positioned above the button. The main content is a table with columns 'Committee Name' and 'Unit'. Each row includes a committee name, its unit, a group icon with the number '1', and an edit icon.


Committee Name	Unit		
PQHS Administrator Saber	Population and Quantitative Health Sciences	1	
PQHS Chair	Population and Quantitative Health Sciences	1	
PQHS Chair Alison	Population and Quantitative Health Sciences	1	
PQHS Chair Standing Committee	Population and Quantitative Health Sciences	1	
PQHS Epidemiology Supervisor	Epidemiology	1	
PQHS Supervisor Standing Com-Outcomes	Population and Quantitative Health Sciences	1	
PQHS Supervisor Standing Com-Preventive	Population and Quantitative Health Sciences	1	
PQHS Supervisor Standing Committee-Epidemiology	Population and Quantitative Health Sciences	1	

Standing Committee Unit Assignments

Add Committee ✕

Name *

Unit

 Browse By Unit

- Pediatrics at UMass Chan - Baystate
 - Population and Quantitative Health Sciences
 - Epidemiology
 - Epidemiology of Chronic Diseases and Vulnerable Populations
 - Health Informatics and Implementation Science

nding

Adding Committee Members

Edit Committee

PQHS Epidemiology Supervisor

Unit
Epidemiology

3 Click Update To save

✓ Update

Committee Added. Assign committee members below.

Committee Members

1 Supervisor

Sort By Name

First Name	Last Name	Email	
Supervisor_Case Manager	Test	supervisor_umass@interfolio.com	2 Click Add

4 Click X

ding

Assigning a Supervisor the Committee Manager Role

Edit Committee ✕

Unit

Update

Committee Added. Assign committee members below.

1 Committee Members

ST	Supervisor_Case Manager Test supervisor_umass@interfolio.com	
----	---	--

Supervisor Sort By Name

standing

This committee member is a manager

Step 3: Assign the appropriate standing committees to each supervisor's template

UMass Chan Medical School >

Templates List (2)

[+ Add Template](#)

Search by title or unit

2 of 2 templates.

Title	Unit	Type	Dossier Visibility
Faculty Annual Performance Review Master PQHS 2025 Faculty Annual Performance Reviews Template PQHS 2025	Population and Quantitative Health Sciences	Review	No Options
Faculty Annual Performance Review Master PQHS/Epidemiology 2025 Faculty Annual Performance Reviews Template PQHS/Epidemiology 2025	Population and Quantitative Health Sciences	Review	

Committee Assignments

Home

Review, Promotion & Tenure

Cases

Templates

Administration

Reports

Users & Groups

Template Summary

Dossier Visibility

Enabling Dossier visibility will allow faculty using Dossier at your institution to preview the instructions and packet requirements of this template as "Guidelines" to help them prepare for upcoming reviews.

[Enable Dossier Visibility](#)

[Preview](#)

Template Information

Type

Review

Title

Faculty Annual Performance Review Master PQHS/Epidemiology 2025

Unit

Population and Quantitative Health Sciences

Description

Faculty Annual Performance Reviews Template PQHS/Epidemiology 2025

Unit

Population and Quantitative Health Sciences

Creating a Template


- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps**
- 5 Template Summary



Assigning Standing Committees

Case Review Steps

 Add Step

Additional Options 

1 Department Supervisor Review

Academic Level: Medical School School Department

[Edit](#) | [Delete](#)



PQHS Supervisor Smith (1)

Includes Instructions No Required Documents 1 Required Form

2 Faculty Member Review (1)

Academic Level: Medical School School Department

[Edit](#) | [Delete](#)



Faculty Member (1)

Includes Instructions No Required Documents 1 Required Form

3 Department Chair Review

Academic Level: Medical School School Department

[Edit](#) | [Delete](#)

Creating a Case

- 1 Case Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps**
- 5 Case Summary

Replacing Committees

Edit Details

Step Details (Step 1 of 5)

Step Name

Supervisor

Due Date

—

Edit Step Details

Reviewers

▼ Supervisor

Replace this committee?

Supervisor

The committee you are replacing submitted files and/or form responses as part of their review. Replacing the committee will delete all files and form responses submitted by this committee from the case and from reporting.

CONTINUE WITH REPLACE

CANCEL

Assigning Standing Committees of One

Step Name: S
Academic Level: D


Replace Committee ✕

PQHS Supervisor Standing Committee-Epidemiology

Who is reviewing the case at this step? *


- a Standing Committee (created at the unit level in Users & Groups and can be reused for cases in that unit.)
- an Ad Hoc Committee (created on a per case basis; an admin will need to add members to this committee.)
- an Individual User (can review the case, but will not be able to collaborate with others.)


Select Standing Committee *

 PQHS Supervisor

PQHS Supervisor Standing Com-Outcomes

PQHS Supervisor Standing Com-Preventive

 1
PQHS Supervisor Standing Committee-Epidemiology

Supervisor_Case Manager Test
supervisor_umass@interfolio.com 

Edit Details

Step Details (Step 1 of 5)

Step Name

Supervisor

Due Date

–

[Edit Step Details](#)

Academic Level

Academic levels manage which administrators and case managers have access at this step.

[Medical School](#)

[School](#)

[Department](#)

[Division](#)

[MANAGE ACADEMIC LEVELS](#)

Reviewers

[+ Add Committee](#)

▼ PQHS Supervisor Standing Committee-Epidemiology

Standing Committee (1)

[Options ▼](#)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

 1 Member

ST

Supervisor_Case Manager Test
supervisor_umass@interfolio.com



[Return to Case Review Steps](#)

- Home
- Review, Promotion & Tenure
- Cases
- Templates
- Administration
- Reports
- Users & Groups

Edit Details

Step Details (Step 5 of 5)

Step Name
Academic Administrator

Due Date
—

[Edit Step Details](#)

Academic Level

Academic levels manage which administrators and case managers have access at this step.

- Medical School
- School
- Department
- Division

[MANAGE ACADEMIC LEVELS](#)

Reviewers

[+ Add Committee](#)

▼ **PQHS Administrator Saber**
Standing Committee (1)

[Options](#) ▼

- [Manage Members](#)
- [Instructions](#)
- [Required Documents](#)
- [Required Forms](#)
- [Settings](#)


1 Member

JS	Judi Saber Judi.Saber@umassmed.edu
----	---------------------------------------

[Return to Case Review Steps](#)



Best Practices and Helpful Hints

1. Always replace standing committee specific to the case(s) you are creating.
2. Always assign supervisors and chairs as committee managers when creating committees. 
3. If creating multiple cases for more than one supervisor. Duplicate the supervisor APR template for each supervisor that reviews APRs in your department and add their last name to the template, so you know what supervisor standing committee of one to add to the case review steps for that template. For example, 2025 PQHS Faculty Annual Performance Review Smith



Creating a Case

Interfolio Video: How to Create a Case

<https://rise.articulate.com/share/Zv9oVNyzU89LcN9je0Uo44JcriWpZ5JQ#/lessons/fq2OnsQA0gMCbhX9H0m5nqp7EK499pW>

Video: How to Create a Case

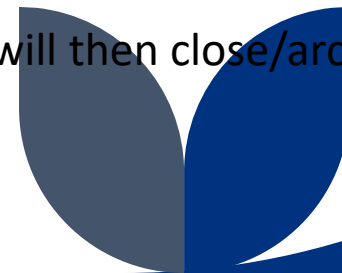
The screenshot displays the Interfolio web interface. At the top, the user is logged in as Steve Goldenberg. The main heading is 'Cases' with a 'Create Case' button. A search bar and a 'Filter' button are present. Below the search bar, it indicates '8 of 8 cases' and 'Filtered By: Active Cases'. A table lists the following cases:

Name	Type	Template Name	Status
<input type="checkbox"/> Adyson Abbott Interfolio Demo University	Promotion	Custom Workflow	● Clock Extension
Case Created: Waiting for an administrator to notify candidate			
<input type="checkbox"/> Virginia Appgar College of Medicine	Review	College of Medicine Evaluation	● Under Review
Step 1 of 8: Department Unit Committee ▲ Required Documents			
<input type="checkbox"/> Marguerite Ross Barnett College of Humanities	Promotion	College of Humanities: Full Professor to Distinguished Professor	● Under Review

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Steps in the Full Review Process

1. An APR case is created. The Unit Administrator releases the case to the faculty member along with a notification email.
2. The faculty member receives an email notifying them that they have an APR review/case to complete.
3. The faculty member completes all the sections of the APR packet that are appropriate. Before the faculty member submits their form, they can go back and review or edit any saved form sections as needed.
4. The faculty member submits the APR packet which is automatically forwarded to their supervisor.
5. The supervisor reviews the faculty members APR, completes the committee forms, and provides a comment. (A copy of the APR can be downloaded and referenced during the supervisor review)
6. The supervisor signs and submits the supervisor's forms.
7. The supervisor and the employee meet for their annual APR interview. The Supervisor can now unlock the APR case and forward the case onto the faculty member during the interview which will allow the faculty member to make edits to their APR in real time.
8. The faculty member must resubmit their form if they make edits.
9. The faculty member reviews the supervisor's comments, signs the form and forwards the APR Case onto the Chair.
10. The Chair reviews the APR, the supervisor comments and signs the form. The chair can also add a comment which is optional. Then the chair forwards the APR case to the faculty member for a final review.
11. The faculty member reviews the Chair's comments if any and signs the form.
12. Then the faculty member forwards the APR case to the unit administrator who will then close/archive the APR case/review.



The Faculty Members Experience of Completing and Submitting their APR



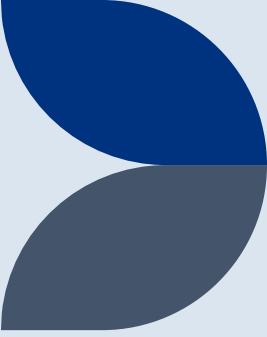
Administrator can attend one of the Faculty Member Training in late January or view the recorded sessions when it is convenient.

- Monday, January 27, 2025 at 12:00 PM (Faculty Training #1)
- Thursday, January 30, 2025 at 12:00 PM (Faculty Training #2-repeat of #1)

Additionally, the Office of Faculty Affairs (OFA) will provide written job aids, short "tips" videos, and offer open OFA office hours every Thursday from 12:00 to 1:00 PM, starting in February.

To access a Interfolio simulation that guides faculty through the candidates experience of populating their APR packet for submission.
<https://rise.articulate.com/share/Zv9oVNyzU89LcN9je0Uo44JcriWpZ5JQ#/lessons/zdtAi-O6jwGNeua8oTAST3AXGIYOI1c>

Supervisor and Chair APR Review Experience



Administrators can attend one of the Chair/Supervisor Trainings in early February or view the recorded session when it is convenient.

- **Monday, February 3, 2025 at 12:00 PM (Chair/Supervisor Training #1)**
- **Thursday, February 6, 2025 at 12:00 PM (Chair/Supervisor Training #2-repeat of #1)**

Additionally, the Office of Faculty Affairs (OFA) will provide written job aids, short "tips" videos, and offer open OFA office hours every Thursday from 12:00 to 1:00 PM, starting in February.

Interfolio Video: Reviewing a Case:

<https://rise.articulate.com/share/Zv9oVNyzU89LcN9je0Uo44JcriWpZ5JQ#/lessons/Vl6QzIF4p0Wk0bYX1IbledtNuSteK7OI>

Unlock a Submitted Section

- Once a candidate has submitted their APR Packet, they are no longer able to edit the materials in the Academic Activities sections. Case Managers, Committee Managers and Administrators for the case can manually unlock the APR case to allow the candidate to make revisions.
- Supervisors can also unlock an APR Case during the interview process and have the candidate add activities to their APR.



Unlock or Lock a Submitted Section

Status of APR Section

Recording Academic Activities **Locked**

 [Unlock](#)

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.

Status of APR Section

Recording Academic Activities **Unlocked**

 [Lock](#)

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.

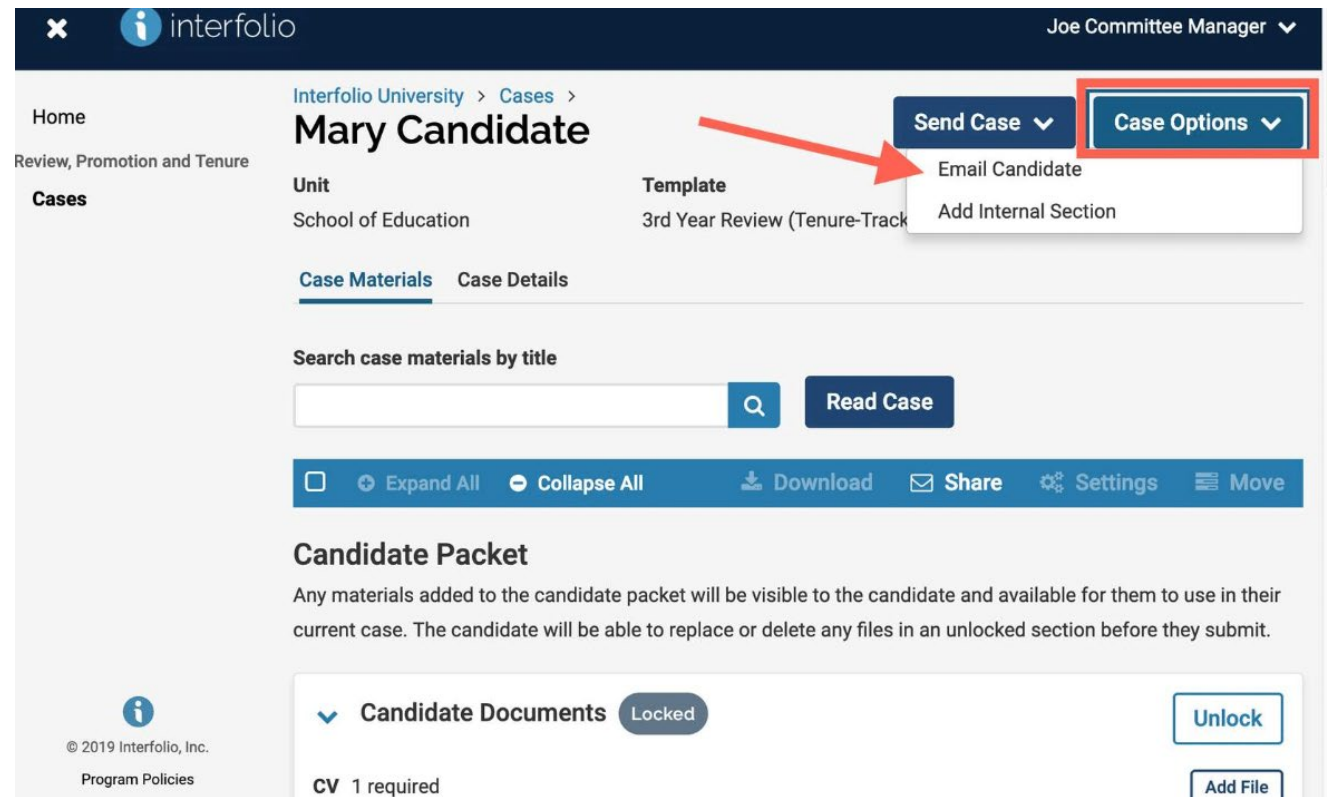
Key Points

- 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.

Committee Members

Administrators, Case Managers, and Committee Managers can send an email to the candidate and committee members from within RPT.

To send an email to the candidate, select "Case Options" from within the case and "Email Candidate."



The screenshot displays the Interfolio RPT interface for a case titled "Mary Candidate". The user is identified as "Joe Committee Manager". The interface includes a navigation menu on the left with "Home" and "Cases" (selected). The main content area shows the case details, including the unit "School of Education" and the template "3rd Year Review (Tenure-Track)". A dropdown menu is open, showing options: "Send Case" (highlighted with a red box and a red arrow pointing to "Email Candidate"), "Case Options" (highlighted with a red box), "Email Candidate", and "Add Internal Section". Below the dropdown is a search bar for case materials and a "Read Case" button. A toolbar contains icons for "Expand All", "Collapse All", "Download", "Share", "Settings", and "Move". The "Candidate Packet" section is visible, showing a "Candidate Documents" section that is "Locked" and an "Unlock" button. A "CV 1 required" message is also present.



Using the Case Activity Log

The chronological activity log is a record of all actions taken on a faculty members case including:

- when a case is moved to a different review step,
- when documents are shared,
- when messages are sent,
- changes in the status of the case,
- when the membership of the committee is changed,
- when external evaluations are requested, and more.

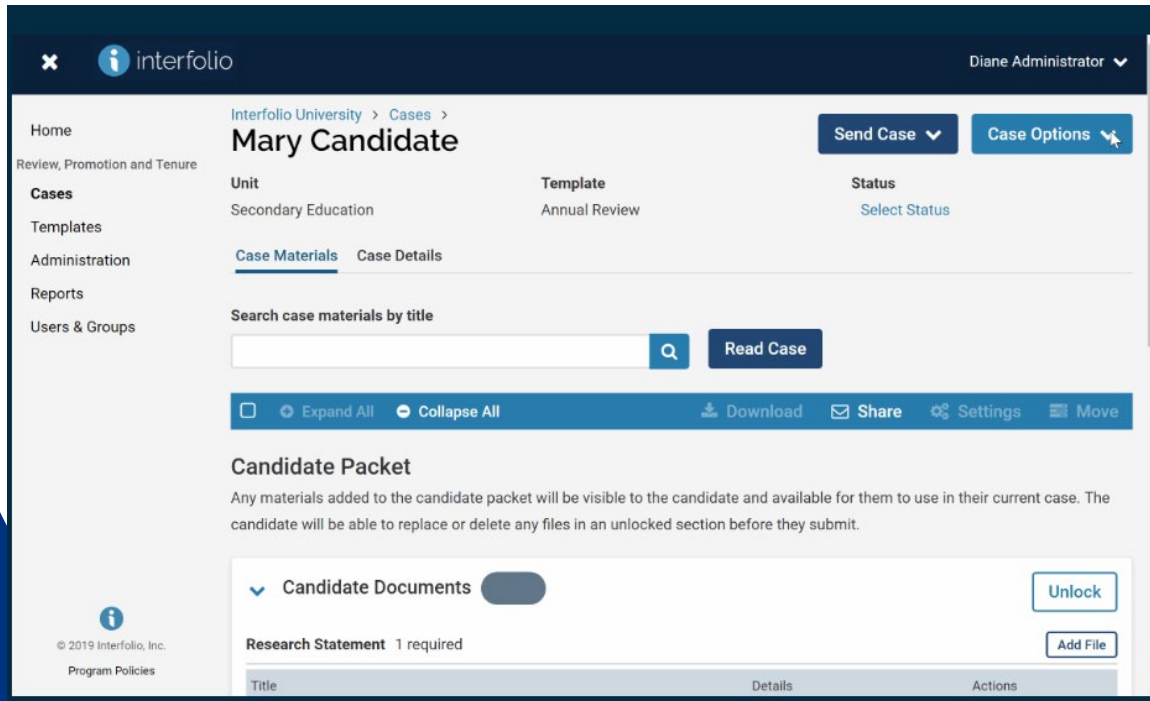
The Activity Log is accessed from the Case page. Case Managers cannot view the activity log of a case.



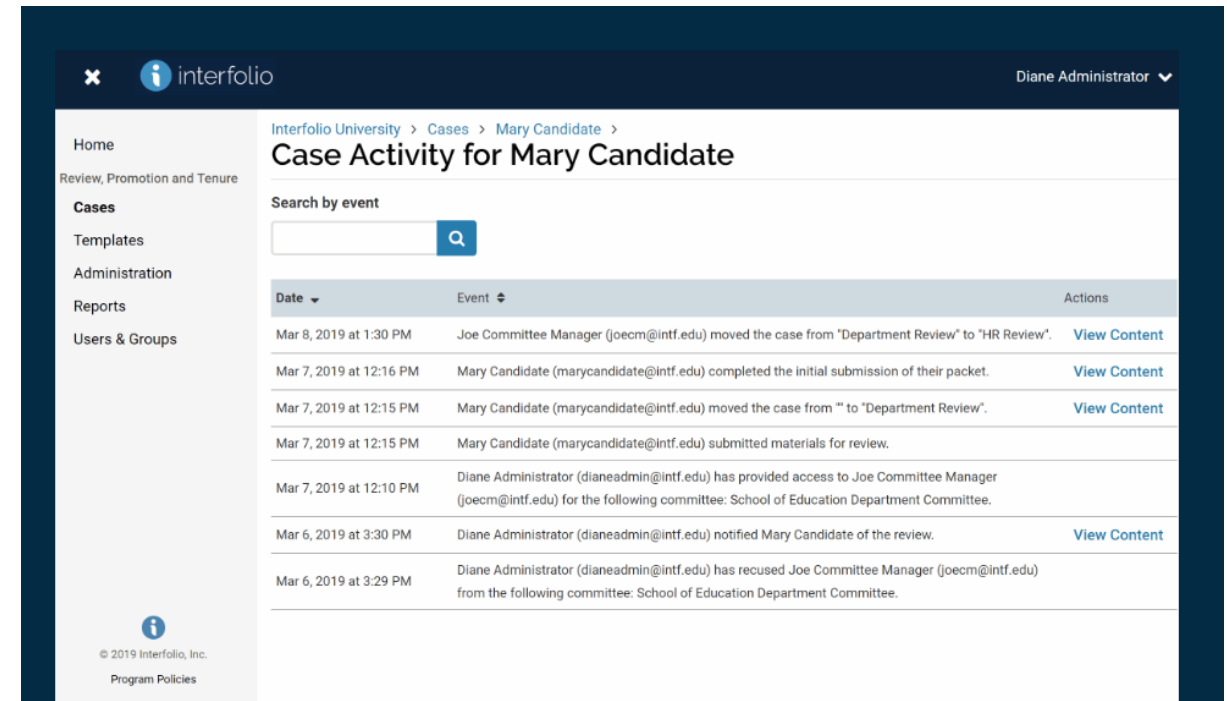
Video: View Case Activity Log

<https://rise.articulate.com/share/Zv9oVNyzU89LcN9je0Uo44JcriWpZ5JQ#/lessons/8T0WUCnDIzyXoNMs01ZcIB-fBS9xBkhQ>

Click **Case Options** and then View Activity Log



The screenshot shows the Interfolio interface for a 'Mary Candidate' case. The user is logged in as 'Diane Administrator'. The page title is 'Mary Candidate'. There are buttons for 'Send Case' and 'Case Options'. The 'Case Options' button is highlighted with a mouse cursor. Below the case information, there is a search bar for case materials and a 'Read Case' button. At the bottom, there is a 'Candidate Documents' section with an 'Unlock' button and a 'Research Statement' section with an 'Add File' button.



The screenshot shows the 'Case Activity for Mary Candidate' page. The user is logged in as 'Diane Administrator'. The page title is 'Case Activity for Mary Candidate'. There is a search bar for events. Below the search bar, there is a table with columns for Date, Event, and Actions. The table contains the following data:

Date	Event	Actions
Mar 8, 2019 at 1:30 PM	Joe Committee Manager (joecm@intf.edu) moved the case from "Department Review" to "HR Review".	View Content
Mar 7, 2019 at 12:16 PM	Mary Candidate (marycandidate@intf.edu) completed the initial submission of their packet.	View Content
Mar 7, 2019 at 12:15 PM	Mary Candidate (marycandidate@intf.edu) moved the case from "" to "Department Review".	View Content
Mar 7, 2019 at 12:15 PM	Mary Candidate (marycandidate@intf.edu) submitted materials for review.	
Mar 7, 2019 at 12:10 PM	Diane Administrator (dianeadmin@intf.edu) has provided access to Joe Committee Manager (joecm@intf.edu) for the following committee: School of Education Department Committee.	
Mar 6, 2019 at 3:30 PM	Diane Administrator (dianeadmin@intf.edu) notified Mary Candidate of the review.	View Content
Mar 6, 2019 at 3:29 PM	Diane Administrator (dianeadmin@intf.edu) has recused Joe Committee Manager (joecm@intf.edu) from the following committee: School of Education Department Committee.	

Generating and Downloading Reports

Administrators can run and save customized Case Information reports, and reports on form data. Reports can be accessed from the main menu.

Types of Reports

- The case information report allows you to see a filtered list of all cases at the institution.

Case Information Reports

- Case Information reports allow you to create customized reports to gather data on customized criteria for one or more packets (cases) within one or more units for a specified date range.
- You can think of Case Information reports as a list of all the cases at your institution. As you apply filters, the list of cases is narrowed to include only the filters you apply.



Adding a Unit/Dept Filter for Reporting

Chan
SCHOOL

4 of 4 cases

Filtered By: Population and Quantitative Health Sciences × Include child units × Active Cases × Reset Filters

Name ▾	Type ⇅	Template Name ⇅
<input type="checkbox"/> Faculty Member 1 Population and Quantitative Health Sciences	Review	Faculty Annual Performance Review Template P
Step 5 of 5: Academic Administrator		
<input type="checkbox"/> Faculty Member 1 Population and Quantitative Health Sciences	Review	PQHS Faculty Annual Performance Review Mast Template
Case Created: Waiting for an administrator to notify candidate		
<input type="checkbox"/> Faculty Member 2 Population and Quantitative Health Sciences	Review	Faculty Annual Performance Review Master Tem
Case Created: Waiting for an administrator to notify candidate		
<input type="checkbox"/> Faculty Member 2 Population and Quantitative Health Sciences	Review	TEST APR Template

Unit

Population and Quantitative Health Sciences ▾

Include child units ON

Type

- Appointment
- Promotion
- Reappointment
- Review
- Sabbatical

Status

- Closed
- done
- Open

Active or Closed

- Active

Close a Case

Administrators and Case Managers can close cases from either the case list or the individual case page of a candidate. To close the case from the case page of the candidate, select "Case Options" and "Close Case."



Interfolio Scholar Services

If you have any additional questions about using Review, Promotion and Tenure, please search the Interfolio Product Help knowledge base or contact our Interfolio-Support.

Effective January 21, 2025, Interfolio's institutional support email and phone number will be:

 [+1 833-844-2118](tel:+18338442118)

 interfolio-support@elsevier.com



Thank you

Office of Faculty Affairs

Janice M Robert

Eileen O'Brien

FacultyAffairs@umassmed.edu

UMass Chan OFA Interfolio Resource webpage:

<https://www.umassmed.edu/ofa/academic/faculty-reviews/apr/>

