

# Step 3: Assigning Standing Committees to Templates

## The Chair APR Template has Three Case Review Steps

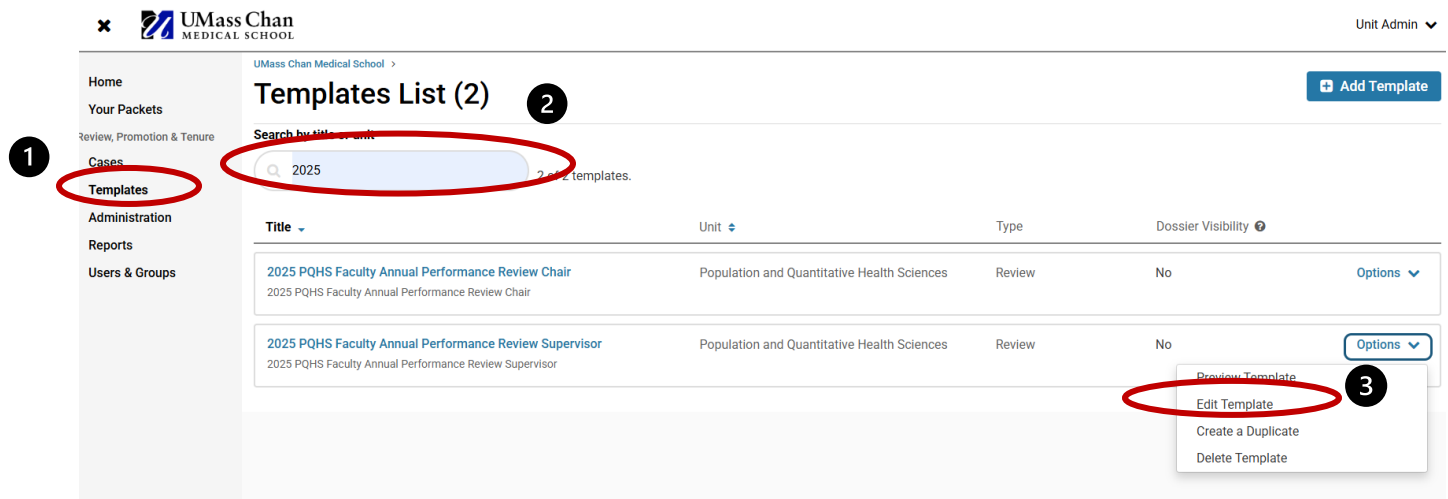
1. **Department Supervisor/Chair**
  - a. Administrator Schedule Interview
2. Faculty Member (1)
3. **Unit Administrator**

## The Supervisor APR Template has Five Case Review Steps

1. **Department Supervisor**
  - a. Administrators Schedules Interviews
2. Faculty Member Review (1)
4. **Department Chair**
3. Faculty Member Review (2)
5. **Unit Administrator**

Unit administrators will assign Standing Committees of One to the appropriate supervisors' template for the **Department Supervisor, Department Chair and Academic Administrator Case Review Steps**.

- 1) Click **Templates** in the left-hand navigation bar.
- 2) Add the **year** in the **Search** field and the Faculty Annual Performance Review Supervisor and Chair templates that you created will appear.
- 3) Click the **Options** Drop down menu and select **Edit Template**.



Go to next page.

**The Template Summary page will appear.**

- 4) Click **Case Review Steps** number 4 in **Creating a Template** menu on the right-hand side.

UMass Chan Medical School > Templates > 2025 PQHS Faculty Annual Performance Review Supervisor >

## 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**

2025 PQHS Faculty Annual Performance Review Supervisor

**Unit**

Population and Quantitative Health Sciences

**Description**

2025 PQHS Faculty Annual Performance Review Supervisor

**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


Unit Administrators will need to assign the correct **supervisor, chair** and **unit administrator** to the appropriate template's **Case Review Steps** for each departmental template created.

- 5) In the Case Review Steps, click the **Edit** button in the **Departmental Supervisor Review** box listed below.

UMass Chan Medical School > Templates > 2025 PQHS Faculty Annual Performance Review Supervisor >

## Case Review Steps

[+ Add Step](#)

[Additional Options](#) 



5

1 Department Supervisor Review

Academic Level: [Medical School](#) [School](#) [Department](#)



Department Supervisor (0)

 Includes Instructions  No Required Documents 1 Required Form



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

2 Faculty Member Review (1)

Academic Level: [Medical School](#) [School](#) [Department](#)



Faculty Member (0)

 Includes Instructions  No Required Documents 1 Required Form



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

3 Department Chair Review

Academic Level: [Medical School](#) [School](#) [Department](#)



Department Chair (0)

 Includes Instructions  No Required Documents 1 Required Form

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

### Creating a Template

1 Template Information

2 Candidate Requirements

3 Internal Case Sections

4 **Case Review Steps**

5 Template Summary

6) The **Edit Details** page will appear. Click the **Replace Committee** button.

UMass Chan Medical School > Templates > 2025 PQHS Faculty Annual Performance Review Supervisor > Case Review Steps >

## Edit Details

**Step Details** (Step 1 of 5)

**Step Name**  
Department Supervisor Review

**Due Date**  
-

[Edit Step Details](#)

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

Medical School School Department

[MANAGE ACADEMIC LEVELS](#)

### Reviewers

[+ Add Committee](#)

6

Options ▾

Replace Committee

Department Supervisor  
Ad Hoc Committee (0)

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

No Members

[Return to Case Review Steps](#)

7) A pop-up window will appear. Click the **CONTINUE WITH REPLACE** button.

7

### Replace this committee?

Department 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](#)

- 8) Another pop-up window will appear. Type your **departmental abbreviation** into the **Select Standing Committee** search field. The Standing Committees of One that you created in Step 2 will appear in the drop-down menu. **Click on the appropriate Standing Committee of One** to add that committee to the Case Review Step.

Replace Committee ×

Department Supervisor

**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 Chair
- PQHS Supervisor 8
- PQHS Supervisor Smith

- 9) Click the **REPLACE COMMITTEE** button.

Replace Committee ×

PQHS Supervisor Smith

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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 \***

9 REPLACE COMMITTEE CANCEL

- 10) Click **Return to Case Review Steps** button.

Reviewers + Add Committee

▼ PQHS Supervisor Smith Options ▾  
Standing Committee (1)

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

👤 1 Member

ST	Supervisor_Case Manager Test supervisor_umass@interfolio.com	★
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10 Return to Case Review Steps

## Interfolio Step 3 Job Aid: Faculty Annual Performance Review

Unit administrators will need to go back to Step 1 to assign Standing Committees of One to the appropriate Case Review Steps.

### Note: Supervisor Template

Unit administrators will assign Standing Committees of One to the **Department Supervisor Review**, **Department Chair Review** and **Academic Administrator Case Review Steps** when using the Supervisor template.

**+ Add Step** **Additional Options** ▾

1 Department Supervisor Review [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department

2 Faculty Member Review (1) [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department

3 Department Chair Review [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department

4 Faculty Member Review (2) [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department

5 Academic Administrator [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department

**Creating a Template**

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

### Note: Chair Template.

Unit administrators will assign Standing Committees of One to the **Department Supervisor Review**, and **Academic Administrator Case Review Steps** when using the Chair template.

**+ Add Step** **Additional Options** ▾

1 Department Supervisor Review [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department Division

**PQHS Chair (1)**  
Includes Instructions No Required Documents 1 Required Form

2 Faculty Member Review (1) [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department Division

**Faculty Member (0)**  
Includes Instructions No Required Documents 1 Required Form

3 Academic Administrator [Edit](#) | [Delete](#)  
Academic Level: **Medical School** School Department Division

**PQHS Unit Administrator (1)**  
Includes Instructions No Required Documents No Required Forms

**Creating a Template**

- 1 Template Information
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After the Unit Administrator releases and notifies the faculty member that they have an APR review to complete.

The faculty member will complete the APR form and submit their APR packet for review. After the faculty member submits their APR packet, the APR case will automatically go to the first step in the review process.

- Each review step will need to be forwarded to the next step in the review process by either the supervisor, faculty member or Chair.
- Unit administrators will be able to monitor the steps in the process to ensure that faculty members APR cases move to completion.
- A unit administrator can move a case review step forward if the supervisor, faculty member, or chair have completed, signed and submitted their review but forgot to forward the case onto the next step.