

## Step 4: Creating Faculty Annual Performance Review Case(s) in Interfolio

It is recommended that unit administrators:

- practice creating one case and notifying the faculty member before creating groups of cases. (recommended for unit administrators new to Interfolio)
- create groups of APRs for faculty members being reviewed by the same supervisor one at a time and complete Step 1 through 5 before creating another group of APRs.
- review a couple of the APR **Case Review Steps** within a group of cases assigned to a supervisor's template to ensure they have been assigned to the correct supervisor, faculty member, chair, and unit administrator before moving onto the (Step 5 Job Aid: Notifying Faculty Members).
- During the review of the **Case Review Steps** also ensure that all the committee members and faculty members have a blue Star ★ next to their names.

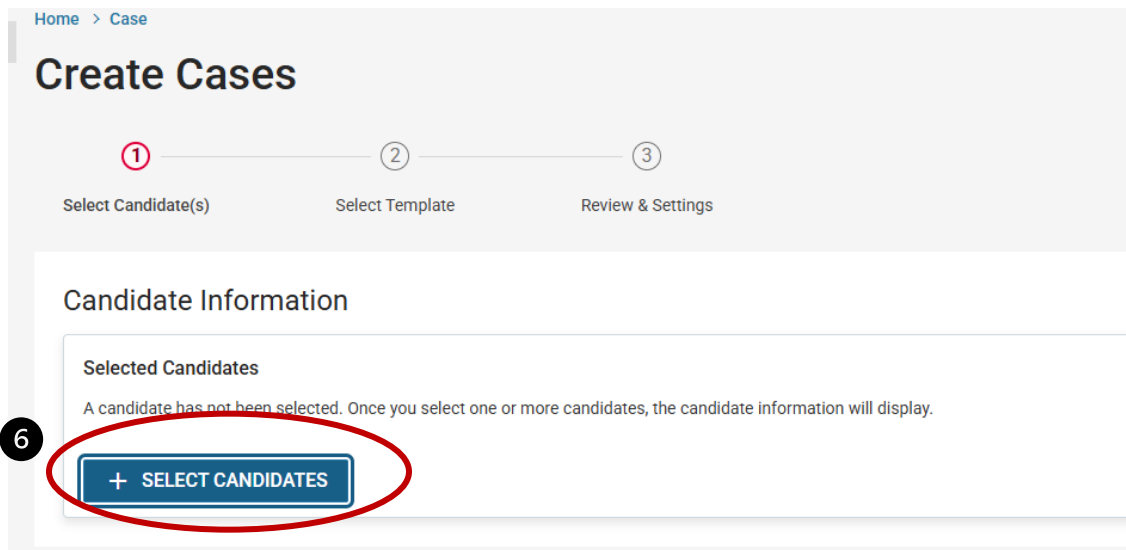
- 1) Click **Cases** in the left-hand navigation bar.
- 2) Click the **Filter** button and a menu will appear on the right side of the screen.
- 3) **Select** your **unit/department** from the **Unit** drop down menu. Make sure that the **Active Box** is checked.
- 4) Close the right-hand **Filter box** by clicking the **X** in the upper right corner.

The screenshot shows the 'Cases' page in the Interfolio system. The left navigation bar has 'Cases' highlighted. The main content area shows a search bar and a 'Filter' button. The filters panel on the right is open, showing the 'Unit' dropdown set to 'Population and Quantitative Health Sciences' and the 'Active' checkbox checked. The 'X' button to close the filters is also visible.

- 5) Click **Cases** in the upper right-hand corner.

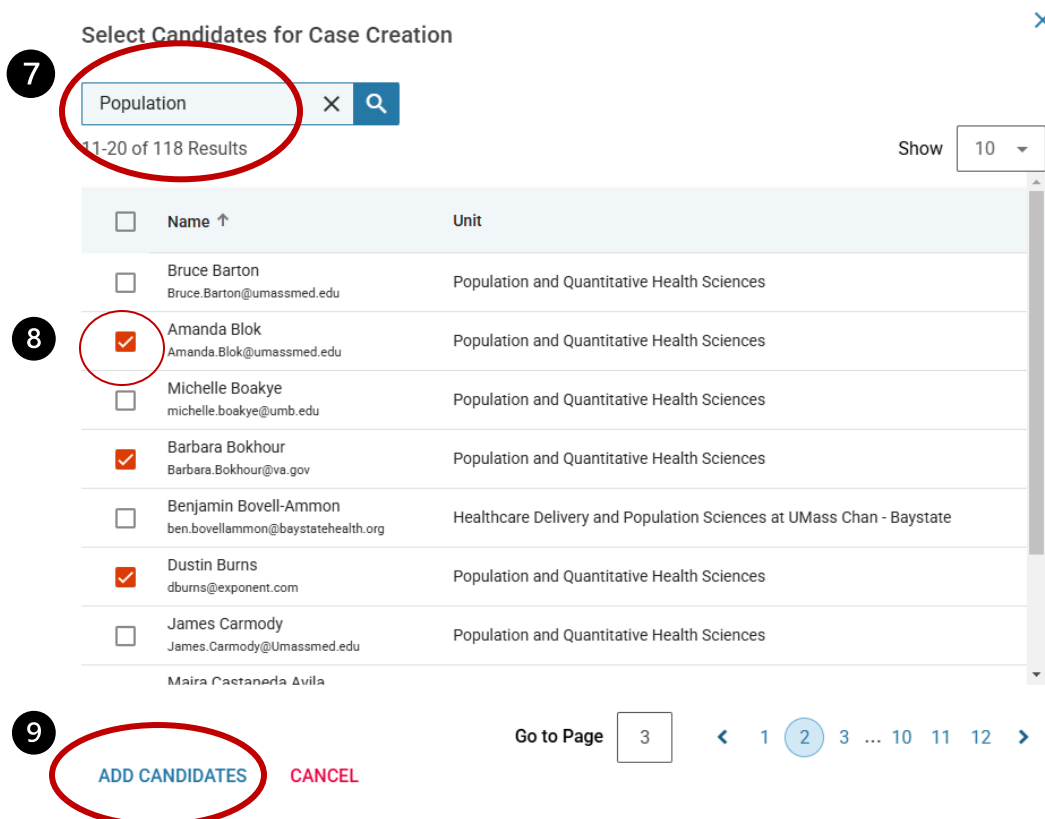
The screenshot shows the 'Cases' page with the 'CREATE CASE' button highlighted in the upper right-hand corner. The page layout is consistent with the previous screenshot, showing the navigation bar, search bar, and filters panel.

- 6) Click **SELECT CANDIDATES** to identify the faculty members involved in the case(s).



A pop-up menu will appear. This is where unit administrators will search for faculty and add faculty members that they want to create APR cases for.

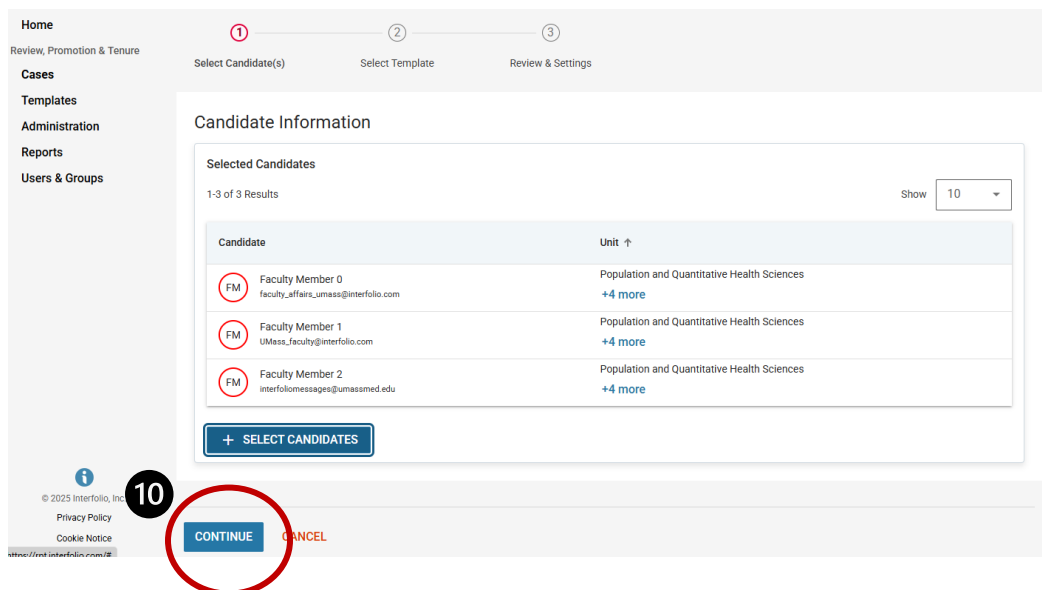
- 7) Enter the name of your **department** in the **Search Box**. Click the **magnifying glass** icon.
- 8) Click the **Check Box next to the faculty members' name(s)** you want to create cases for. To find faculty within your unit/department, **scroll** down the list, click on the **page number** or add a number to **Go to Page** field at the bottom of the pop-up window. **Only create cases for 25 faculty members at a time.**
- 9) Click the **Add Candidates** button after you have selected all the faculty you want to create APRs for.



## Interfolio **Step 4 Job Aid:** Faculty Annual Performance Review

Edits can be made to the list of selected faculty members by clicking the **SELECT CANDIDATES** button again. If no edits are needed.

10) Click the **CONTINUE** button to move onto the next step.



## Select Template

11) Select the correct department from the **Unit for Case(s)** drop down menu.

12) Always select **Review** from the drop-down menu as the **Type** of template being used.

13) In the **Search** window, enter the **year** or **your departmental abbreviation** then click the **magnifying glass**. The APR templates you created with the Step 1 Job Aid will appear.

In this scenario, the supervisor and the chair will be reviewing all the faculty selected for these cases, so the unit administrator selected the department, Population and Quantitative Health Sciences, and Review from the drop-down menus. Then the unit administrator selected the 2025 PQHS Faculty Annual Performance Review [Supervisor] template.

### Select Case Settings

11

**Unit for Case(s) \***  
Cases can only be created in one unit.

Population and Quantitative Health Sciences

12

**Type**  
Review

### Select Template

Templates are based on the unit and case type chosen in the case settings.

13

Search

1-9 of 9 templates

Template Information	Unit ↑	Type
<input type="radio"/> Custom Case Create a unique case by customizing forms and workflow steps rather than using a template.		
<input type="radio"/> 2025 PQHS Faculty Annual Performance Review Chair 2025 PQHS Faculty Annual Performance Review Chair	Population and Quantitative Health Sciences	Review
<input checked="" type="radio"/> 2025 PQHS Faculty Annual Performance Review Supervisor 2025 PQHS Faculty Annual Performance Review Supervisor	Population and Quantitative Health Sciences	Review

## Interfolio **Step 4 Job Aid:** Faculty Annual Performance Review

- 14) Click the **Radio Button** next to the appropriate APR template.
- 15) Click **CONTINUE** and the **Create Cases** page will appear.

Select Case Settings

**Unit for Case(s) \***  
Cases can only be created in one unit.

Population and Quantitative Health Sciences

**Type**  
Review

Select Template

Templates are based on the unit and case type chosen in the case settings.

Custom cases can only be created for one candidate at a time. Please select a single candidate to create a custom case.

Search

1-8 of 8 Templates

Template Information	Unit ↑	Type
<input type="radio"/> 2025 PQHS Faculty Annual Performance Review Chair Template 2025 PQHS Faculty Annual Performance Review Chair Template	Population and Quantitative Health Sciences	Review
<input checked="" type="radio"/> 2025 PQHS Faculty Annual Performance Review Supervisor Template 2025 PQHS Faculty Annual Performance Review Supervisor Template	Population and Quantitative Health Sciences	Review

**CONTINUE** PREVIOUS CANCEL

## Create Cases

### Review & Settings

In the **Review & Settings** area, unit administrators will select the date the department has identified as the date they want the APR cases completed by. The deadline for Basic Science APRs is the last day in May. It is recommended that departments choose a date in mid-March for the faculty to complete, sign and submit their APR packet. This way the departments have time to schedule supervisor and faculty interviews where the APR can be edited in real time during the interview.

At the end of the interview, the faculty member will review the supervisor's ratings, and comments. Then add a comment (optional) and sign the form. Then the faculty member forwards the APR case onto the chair, who will review the entire APR case, provide a comment (optional), and sign the form. The full review process can be found on the OFA webpage [here](#). (Faculty, Supervisor and Chair signatures acknowledge that they have reviewed the APR.)

Go to next page.

## Interfolio **Step 4 Job Aid:** Faculty Annual Performance Review

**16)** Click on the **Calendar Icon** and **enter the date** the APR(s) is due.

### Settings

Confirm that the radio button *Yes, the candidate will be involved during the case* is selected.

Confirm that the radio button **No** is selected. Faculty will be notified about their APR case in Step 5 Job Aid.


#### Review & Settings

Case Information

Unit for Case(s) \* Population and Quantitative Health Sciences Type Review

Template \*  
2025 PQHS Faculty Annual Performance Review Supervisor Template




Candidate Requirements

Soft Deadline 3/15/2025 

Candidate Requirements  
1 Section  
EDIT CANDIDATE SECTIONS

Internal Case Sections  
Committee Documents

Case Review Steps  
5 Steps  
EDIT STEP DUE DATES

Candidate	Unit ↑
 Daniel Amante Daniel.Amante@umassmed.edu	Population and Quantitative Health Sciences
 Kellie Armstrong kellie.armstrong@umassmed.edu	Population and Quantitative Health Sciences
 Arlene Ash arlene.ash@umassmed.edu	Population and Quantitative Health Sciences

**16**

### Settings

Will the candidate be involved in this evaluation? \*

This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

Yes, the candidate will be involved during the case.  
 No

Would you like to notify the candidates now? \*

An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

Yes  
 No

**17**

CREATE 3 CASES PREVIOUS CANCEL

This is the last chance to make edits. Click the **Previous** button to go back and edit the case(s).

**17)** Scroll down to the bottom and click **CREATE [#] CASES**. If a single case is created, you'll be directed to its page; if cases are created in bulk, you'll return to the **Cases** page, where you can search for and edit individual cases.

Please wait until Interfolio creates the cases. This can take several seconds. Unit administrators may have to click the browser refresh button for the case(s) to appear.

## Step 4.A: Assigning faculty members to their APR Cases

- 1) To navigate to the **Case Review Steps** page, click the **[Faculty Member's Name]** in the **Cases** window.

**Cases**

Search cases

3 of 3 cases

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

Name	Type	Template Name	Status
<input type="checkbox"/> <b>Kellie Armstrong</b> Population and Quantitative Health Sciences	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template	
<input type="checkbox"/> <b>Jong Gyu Baek</b> Epidemiology	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template Epidemiology	
<input type="checkbox"/> <b>Stephen Baker</b> Epidemiology	Review	2025 PQHS Faculty Annual Performance Review Supervisor Template Epidemiology	

Case Created: Waiting for an administrator to notify candidate

- 2) Click the **Case Options** drop down menu and select **Edit Case**.

**Note:** Unit Administrators who will be creating groups of APRs for faculty members should review the optional **Job Aid: Using Statuses to Track APRs** so they can also change the status of the faculty members APR during this process.

UMass Chan Medical School > Cases >

### Faculty Member 2

Unit: Population and Quantitative Health Sciences | Template: 2025 PQHS Faculty Annual Performance Review Supervisor

Send Case | Case Options

- Edit Case
- Email Candidate
- Add Internal Section
- View Activity Log
- Close Case

Search case materials by title

Expand All | Collapse All | Download | Share | Settings | Move

#### Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

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

The Case Summary page will appear.

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

UMass Chan Medical School > Cases > Faculty Member 2 >

## Case Summary

[Return to Case](#)

Case Information		<a href="#">Edit</a>
Type	Name	
Review	Faculty Member 2	
Unit	Email	
Population and Quantitative Health Sciences	UMass_faculty@interfolio.com	

Candidate Requirements		<a href="#">Edit</a>
Packet Due		
Mar 7, 2025		

**Instructions to the Candidate**  
The **Annual Performance Review (APR)** is intended to promote the discussion of performance and future goals

**Creating a Case**

- Case Information
- Candidate Requirements
- Internal Case Sections
- Case Review Steps**
- Case Summary

Unit Administrators must assign the **faculty member** to the appropriate ad hoc committee for each case created. There is one faculty review step in the Chair template and two Faculty Review steps in the Supervisor template.

- 4) In the Case Review Steps, click the **Edit** button in the **Faculty Member Review (1)** box below.

UMass Chan Medical School > Cases > Faculty Member 2 >

## Case Review Steps

[Add Step](#) [Additional Options](#)

**1 Department Supervisor Review** [Edit](#) | [Delete](#)  
Academic Level: [Medical School](#) [School](#) [Department](#)  
PQHS Supervisor Smith (1)  
Includes Instructions No Required Documents 1 Required Form

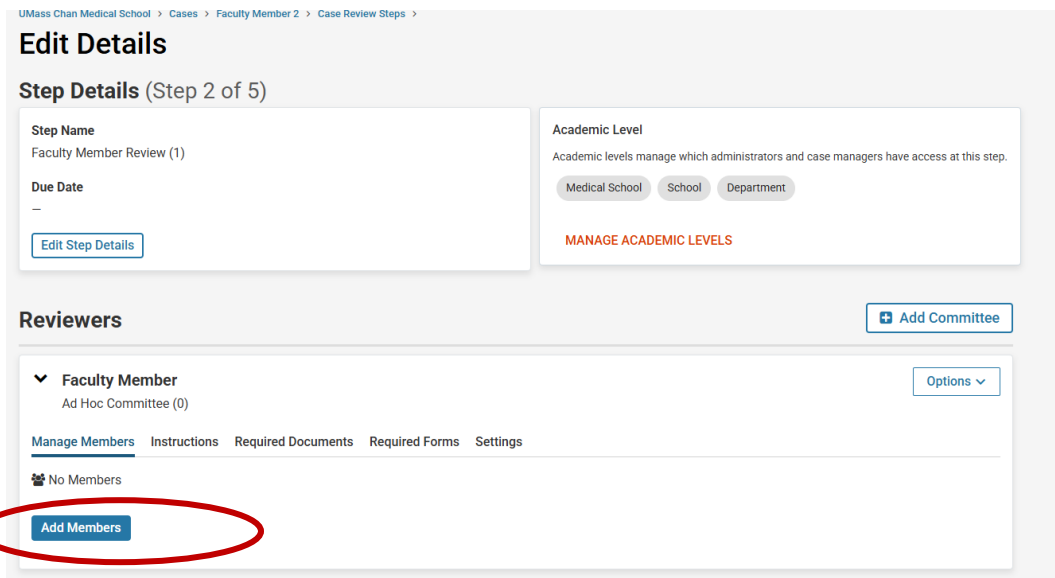
**2 Faculty Member Review (1)** [Edit](#) | [Delete](#)  
Academic Level: [Medical School](#) [School](#) [Department](#)  
Faculty Member (0)  
Includes Instructions No Required Documents 1 Required Form

**Creating a Case**

- Case Information
- Candidate Requirements
- Internal Case Sections
- Case Review Steps**
- Case Summary

Go to the next page.

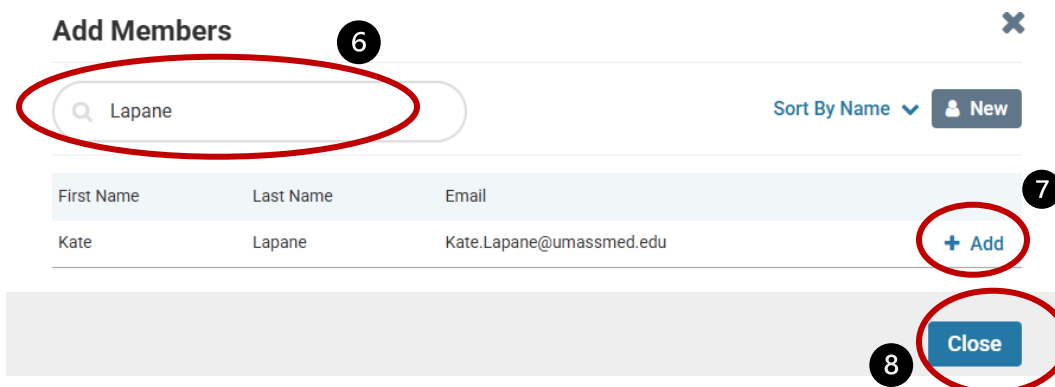
5) The **Edit Details** page will appear. Click the **Add Members** button.



6) A pop-up window will appear. Add the **[Faculty Members]** name to the **Search User** field.

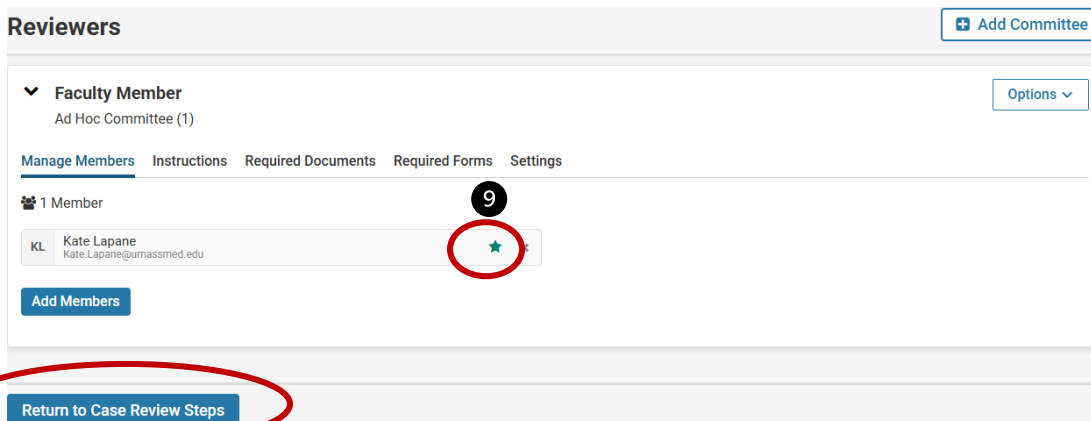
7) Click the **+ Add** button to add the faculty member to the Ad hoc committee.

8) Then click the **Close** button



9) Click the **Star** next to the faculty member's name to make them a **Committee Manager**.

10) Click the **Return to Case Review Steps** button to add the faculty to another review step.



**Note:** If the faculty member does not have a blue Star ★ by their name, they will not be able to forward the case onto the next step.