

Office of Faculty Affairs

Annual Performance Review User Guide- Faculty

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Introduction

This user guide provides step-by-step instructions for conducting **Faculty Annual Performance Reviews (APRs)** in **Softdocs**. The guide outlines the complete workflow from form initiation through final approval and signature.

There are three main tasks for faculty in the APR process:

- Share your activities and accomplishments
- Review your Supervisor's evaluation
- Final sign off

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

Please see additional information and resources on the OFA website:

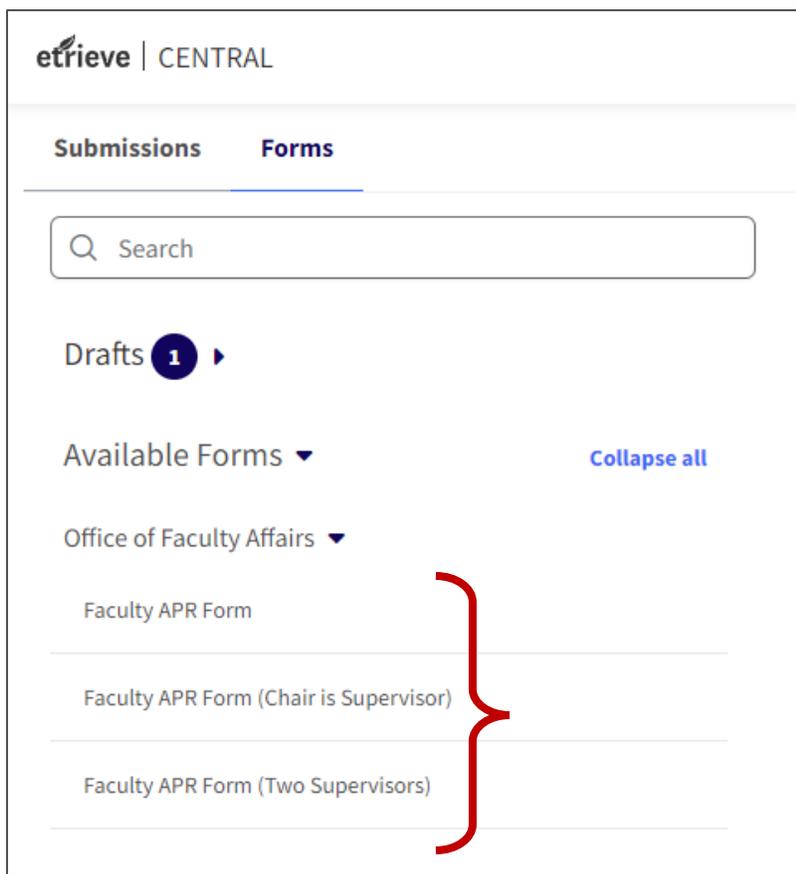
<https://www.umassmed.edu/ofa/academic/faculty-reviews/apr/>

Step 1: Log in to Softdocs

- You will receive an email from the Office of Faculty Affairs indicating that your Annual Performance Review (APR) has begun. The email will include a link to our new APR platform, Softdoc's [Etrieve](https://umassmedcentral.etrive.cloud/Index) (https://umassmedcentral.etrive.cloud/Index).
- Sign in to Softdocs using your UMassmed or UMass Memorial credentials. If you are already signed in to your UMass Chan or UMass Memorial account, you will be automatically signed into Softdocs, and no additional sign in may be needed.

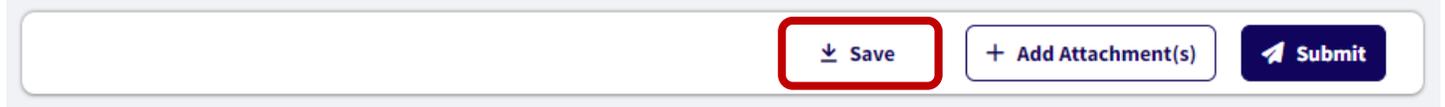
Step 2: Access Your Assigned Form

- Navigate to the [Forms](#) tab and locate a form starting with name 'Faculty APR Form' on the left side menu. **The form that is appropriate for you has been prepopulated.** Most faculty will have one Supervisor who is distinct from their Department Chair. They will see and select the "Faculty APR Form." If your Supervisor is also the Department Chair you will see and select "Faculty APR Form (Chair is Supervisor)", and if you have more than one Supervisor, you will see and select "Faculty APR Form (Two Supervisors)."

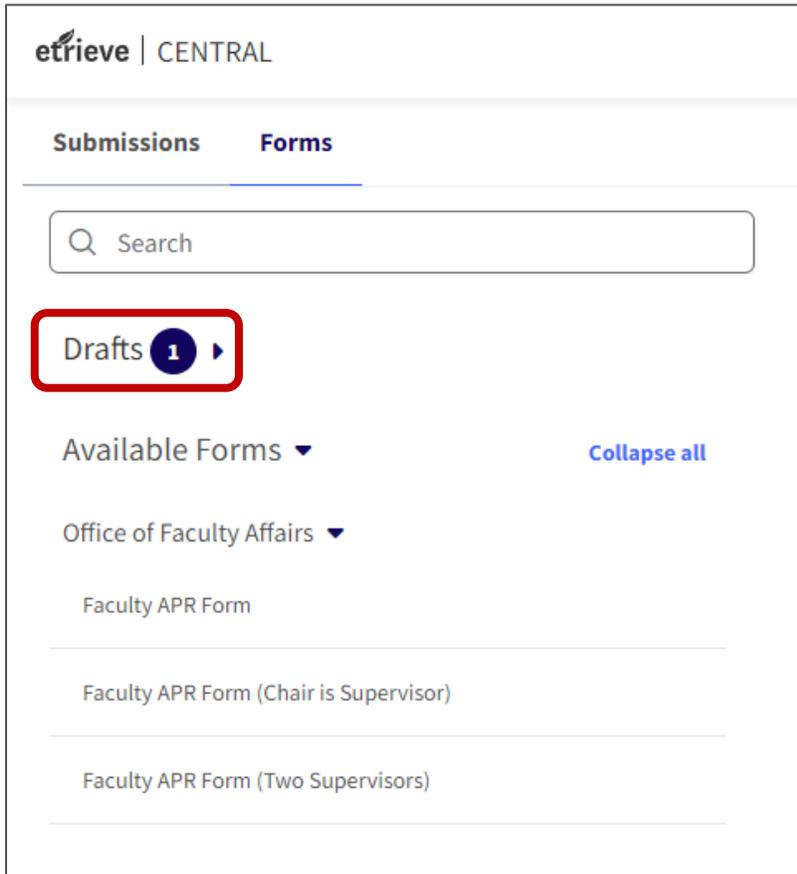


Step 3: Save Your Progress as you go

- You may save the form at any time by clicking on the **'Save'** button at the bottom of the form and return to it later.



- Saved forms appear under the **Drafts** tab.

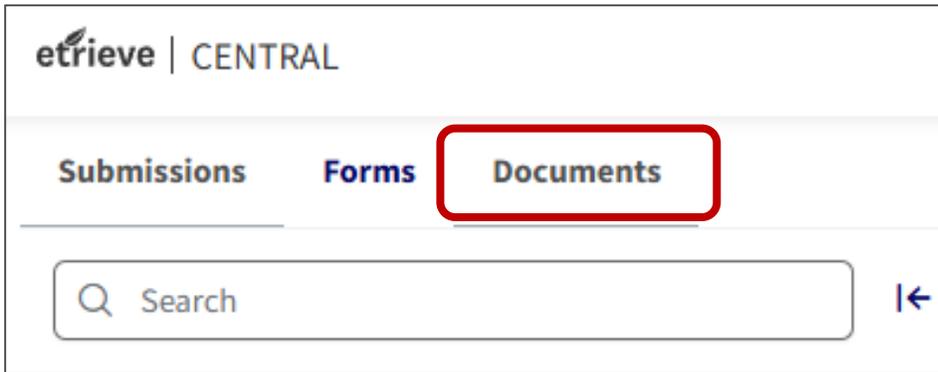


Step 4: Upload Supporting Documents (Optional)

- Upload any supporting documents required by your department directly to the form by clicking on "Add Attachment(s)" button at the bottom of the form.



- Uploaded documents can be found under [Documents](#) tab.



Step 5: Enter Your Activities and Accomplishments

- Fill in all relevant fields. Leave a section blank if it is not relevant to you. *Note: Your academic department may add additional Health Care Delivery Performance Metrics. If this is the case, you will need to add your department-specific metrics by clicking “Add Metrics” and then provide your self-evaluation.*

A screenshot of a form titled 'Metrics'. It features a large empty text input field. Below this are two dropdown menus labeled 'Self Evaluation' and 'Evaluator'. At the bottom left of the form, there is a blue button with the text 'Add Metrics', which is highlighted with a red rectangular border. A small red 'x' icon is visible on the right side of the form.

- The most important part of your APR is your list of professional activities and accomplishments for the reporting period. List these in the appropriate sections:
 - Education
 - Investigation
 - Scholarship
 - Academic Service
 - Leadership Positions and Responsibilities
 - Health Care Delivery

- Honors and Awards
 - Efforts to Support Mission-Aligned Contributions: *Intentional engagement in practices that strengthen belonging, access, equity, and inclusive excellence across our education, research, clinical, and service missions (for more information: [Mission Driven Efforts](#))*
- Required fields are indicated with a red asterisk (*). Enter your **Area of Distinction**, 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 from the previous year have been prepopulated.)*

A. Define your primary Area of Distinction. *

Health Care Delivery

Education

Investigation

Population Health and Public Policy

B. Reflecting on the goals you set for this year in your previous APR, provide a self-assessment summarizing performance during this year; highlight what you consider your most significant accomplishments and indicate areas where you were not able to reach your goals. *

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C. List your goals for the next year, and indicate your number one goal. *

D. What aspects of work life do you find most fulfilling? What would you most like to retain in your current work life? Is there anything new that interests you? What would you most like to change? How can your supervisor help? Do you need assistance to identify mentors? *

Step 6: Submit for Supervisor Review

- Submit your completed form for Supervisor review by clicking on the “Submit” button. *(For smaller departments, this Supervisor may be your department Chair. For other departments, your APR may be reviewed by both a Supervisor and a Chair.)*

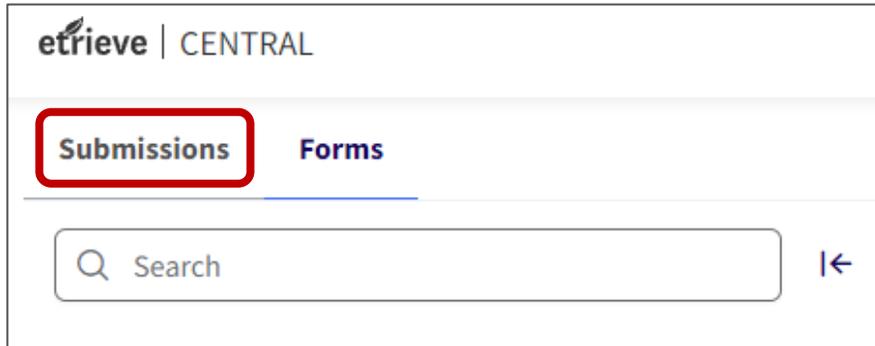
Save

+ Add Attachment(s)

Submit

Step 7: Track Your Submission

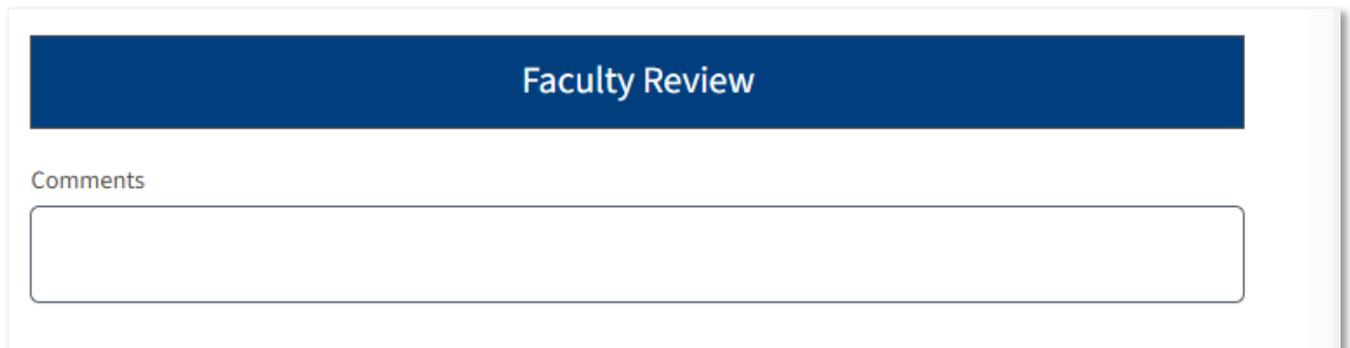
- You can view your submitted form under the [Submissions](#) tab.



The screenshot shows the top navigation bar of the etrieve | CENTRAL system. The 'Submissions' tab is highlighted with a red box, and the 'Forms' tab is also visible. Below the tabs is a search bar with a magnifying glass icon and a back arrow icon.

Step 8: Final Review and Signature

- After review and approval by your Supervisor and Department Chair (if applicable), the form will be returned to you for final signature.
- You will receive an email notification from facultyAPRs@umassmed.edu when your final review and signature are required.
- Review the comments from your Supervisor/Chair. Provide your own additional optional comments under the Faculty Review section.



The screenshot shows the 'Faculty Review' section of the form. It features a dark blue header with the text 'Faculty Review'. Below the header is a section labeled 'Comments' with a large, empty text input field for providing feedback.

- Sign the form by entering your name and selecting the “I acknowledge the above APR” button. This indicates that you have reviewed the evaluation and comments of your Supervisor/Chair. The Date field populates automatically when the button is selected.
- Submit your evaluation by clicking the “Acknowledged” button at the bottom of the form.

The image shows a web form with the following elements:

- Three input fields: "Last Name *", "First Name *", and "Date". The "Date" field has a calendar icon on the right.
- An "Acknowledge *" section containing a radio button and the text "I acknowledge the above APR(Typed name above acceptable as signature)".
- A bottom bar with three buttons: "Save" (with a download icon), "Lock" (with a lock icon), and "Acknowledged" (with a green checkmark).

Red boxes highlight the "Acknowledge *" section and the "Acknowledged" button.