

Step 1: Faculty Annual Performance Review

Create Duplicate Departmental APR Supervisor and Chair Templates

Unit administrators or case managers will create duplicates of the Faculty Annual Performance Review Master Templates depending on the number of reviewers.

- Duplicate the **Faculty Annual Performance Review Supervisor** template for reviews where the Supervisor and Chair are not the same person.
- Duplicate the **Faculty Annual Performance Review Chair** Template for reviews where the Chair and supervisor are the same person.

Unit administrators can use these two templates to make duplicate templates as needed for each supervisor that reviews APRs within their department.

When creating additional supervisor templates, it is **recommended** that unit administrators add the **last name of the supervisor to the template information** so that later in the process they can assign the correct supervisor to the correct template before they create the cases for faculty members that will be reviewed by that supervisor.

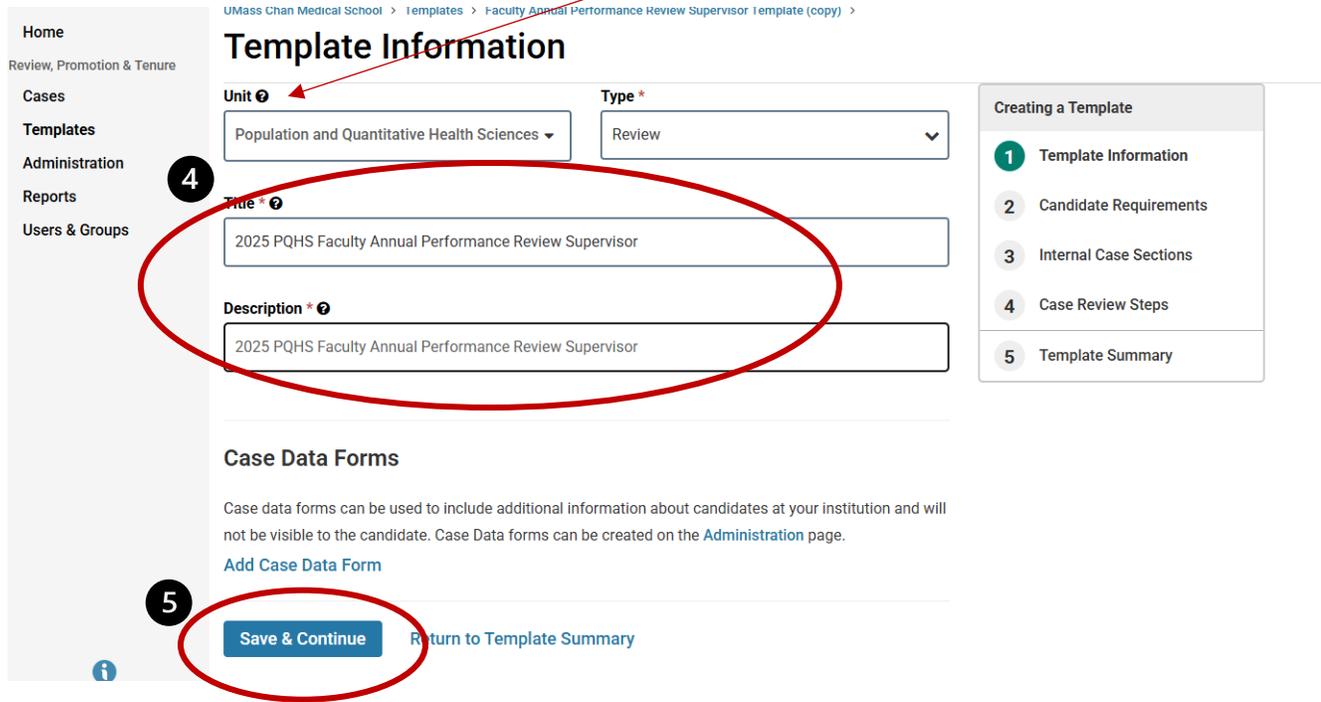
- 1) Click **Templates** in the left-hand navigation bar.
- 2) Add the word Annual to the **Search** field and the Faculty Annual Performance Review Supervisor and Chair Master Templates will appear.
- 3) Click the **Options** Drop down menu and select **Create a Duplicate**.

The screenshot shows the UMass Chan Medical School Interfolio interface. On the left, a navigation menu has 'Templates' circled in red with a '1' next to it. The main content area is titled 'Templates List (2)'. A search bar labeled 'Search by title or unit' contains the text 'Annual' and is circled in red with a '2' next to it. Below the search bar, a table lists two templates. The second row, 'Faculty Annual Performance Review Supervisor Template', has an 'Options' dropdown menu open. The 'Create a Duplicate' option in this menu is circled in red with a '3' next to it.

Title	Unit	Type	Dossier Visibility	Options
Faculty Annual Performance Review Chair Template Faculty Annual Performance Review Chair Template	UMass Chan Medical School	Review	No	Options
Faculty Annual Performance Review Supervisor Template Faculty Annual Performance Review Supervisor Template	UMass Chan Medical School	Review	No	Options Preview Template Create a Duplicate

The Template Information fields will appear.

- 4) Add the year and departmental abbreviation to the duplicate APR template's **Title** and **Description**. For example, 2025 PQHS Faculty Annual Performance Review Smith
Make sure your template is always assigned to your primary unit.
- 5) Click the **Save & Continue** button



After a unit administrator creates a template, they can go back to Step 1 to create additional supervisor templates.

- 6) Click **Templates** in the left-hand navigation bar to review your list of templates.
- 7) Enter the **current year** of the template in the **Search** window (e.g. 2025) and the list of templates you created for your unit/department will appear.

