

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:

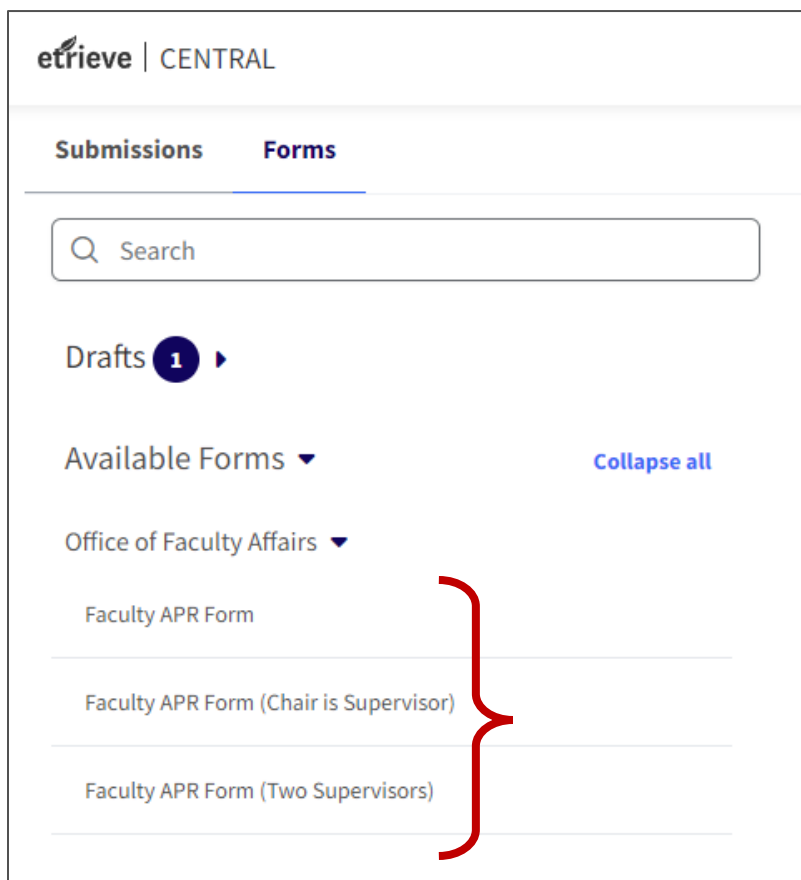
<https://www.umassmed.edu/ofa/academic/faculty-reviews/apr/>

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.

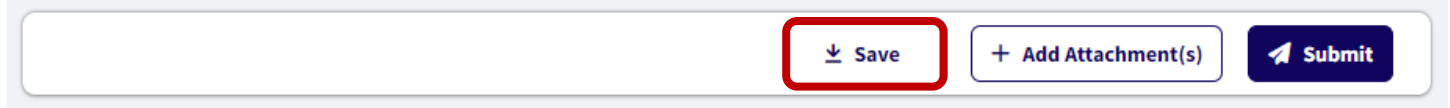
Step 2: Access Your Assigned Form

- 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)."

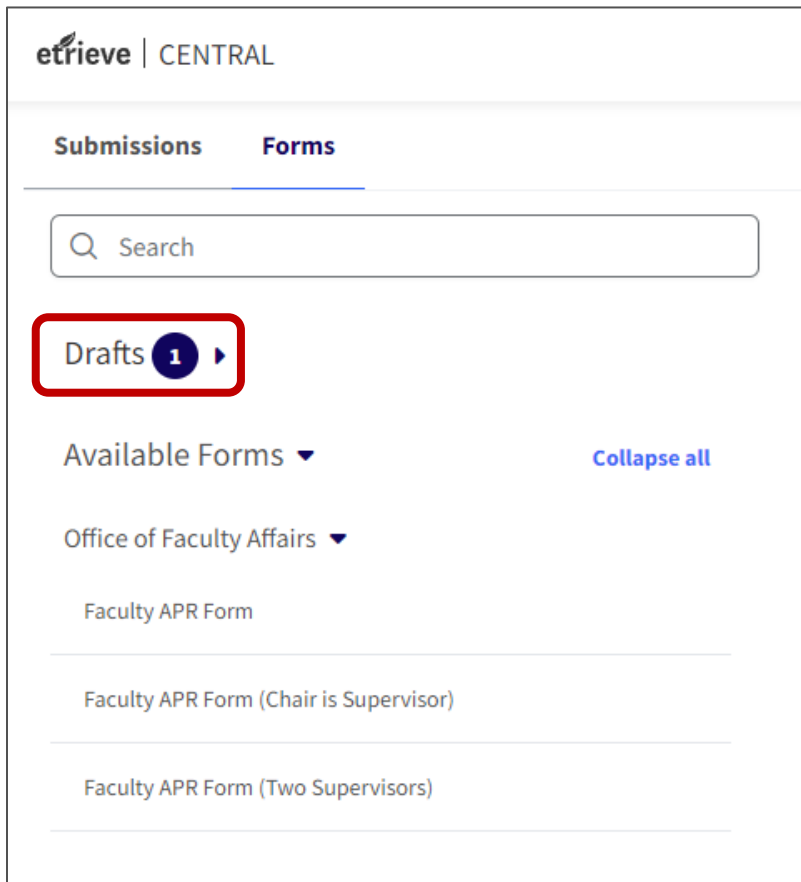


Step 3: Save Your Progress

- 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. *The system will also periodically save your progress automatically.*

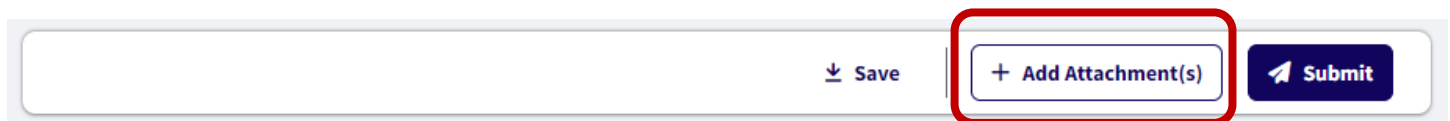


- Saved forms appear under the **Drafts** tab.

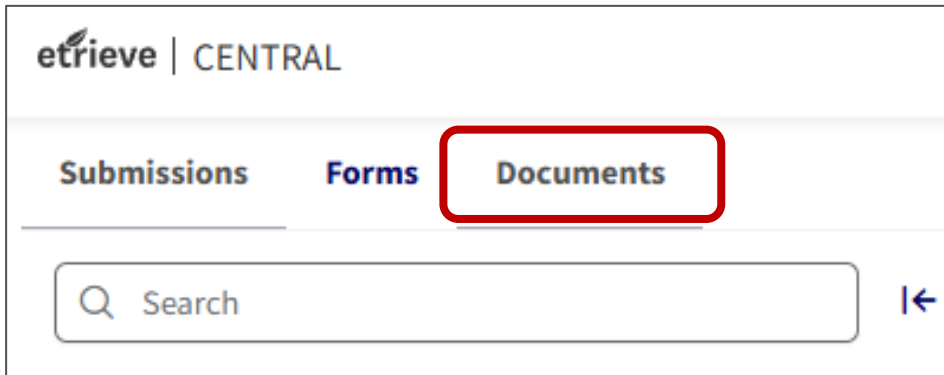


Step 5: Upload Supporting Documents (optional)

- 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 6: 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 7: Download a Copy of Your Saved Form (optional)

- Click the “Save” button and then click the “Download” option. Your APR form will appear in your browser Downloads as a pdf file and you can save it to your computer or server.

Clinical	Education	Research	Other
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

II. Educational Activities (identify interprofessional teaching activities with *)

- . Educational leadership, administration and service
- . External education (e.g., CME)
- . Teaching in programs and courses
- . Education for public/community
- . Clinical education and mentoring
- . Development of curricula, courses and educational materials
- . Research education and mentoring

Comments

III. Investigation

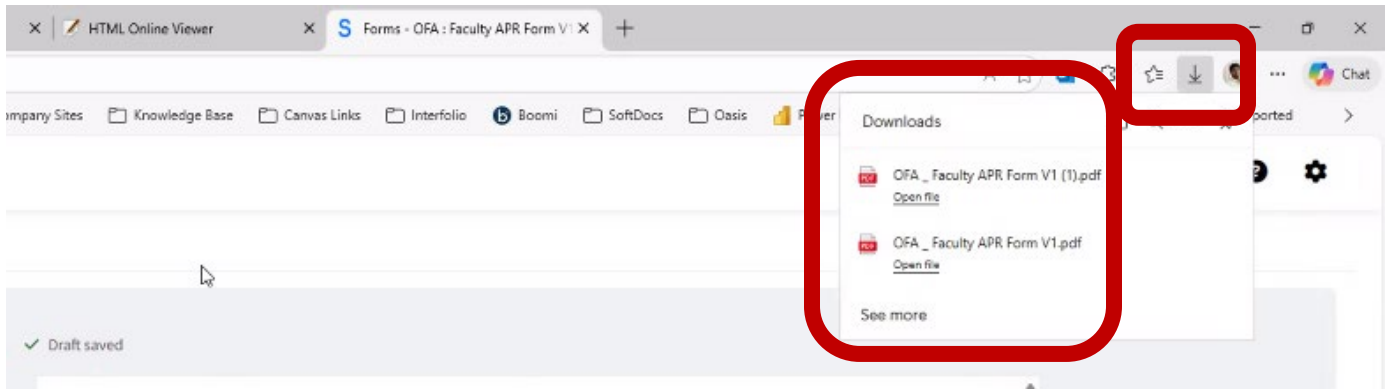
Download

Print

Save

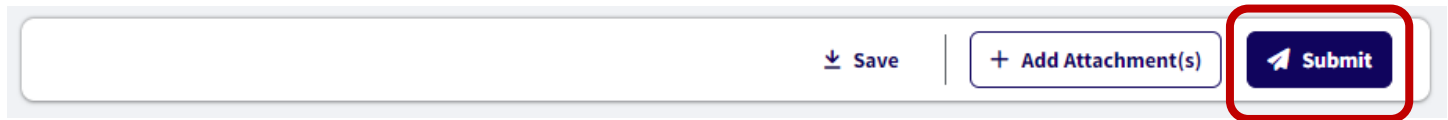
+ Add Attachment(s)

Submit



Step 8: Submit for Supervisor Review

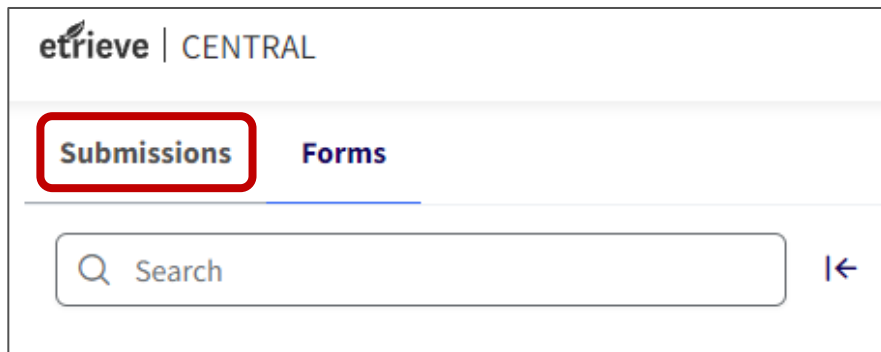
- Submit your completed form for Supervisor review by clicking on the “Submit” button. *(For smaller departments, this Supervisor may be your department Chair. For other departments, your APR may be reviewed by both a Supervisor and a Chair.)*



A horizontal bar containing three buttons: a 'Save' button with a download icon, an 'Add Attachment(s)' button with a plus icon, and a 'Submit' button with a paper plane icon. The 'Submit' button is highlighted with a red rectangular border.

Step 9: Track Your Submission

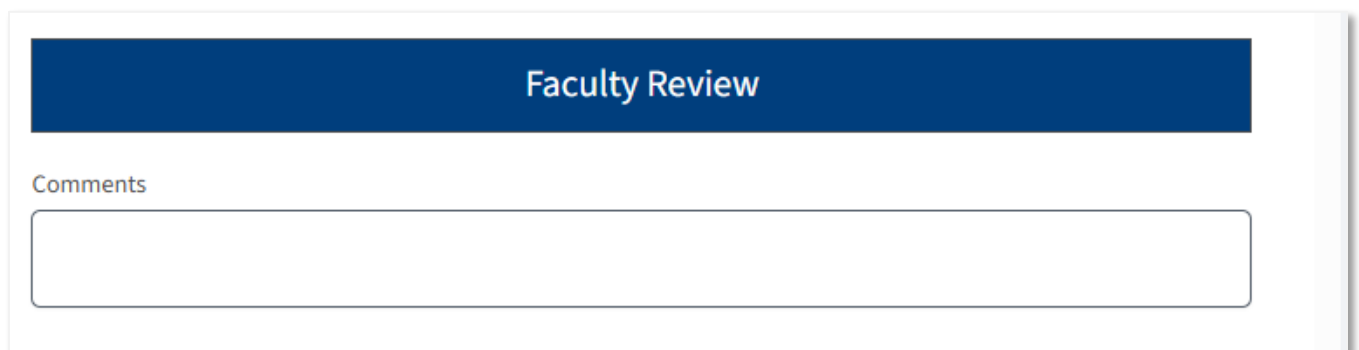
- You can view your submitted form under the [Submissions](#) tab.



The screenshot shows the 'etrieve | CENTRAL' header. Below it are two tabs: 'Submissions' and 'Forms'. The 'Submissions' tab is highlighted with a red rectangular border. Below the tabs is a search bar with a magnifying glass icon and the text 'Search', followed by a left-pointing arrow icon.

Step 10: 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 a section titled 'Faculty Review' in a dark blue header. Below the header is a label 'Comments' and 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 screenshot shows a form with the following elements:

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

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