

Office of Faculty Affairs

Annual Performance Review User Guide- Faculty

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Date – 02/18/2026

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.etrrieve.cloud/Index) (https://umassmedcentral.etrrieve.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.

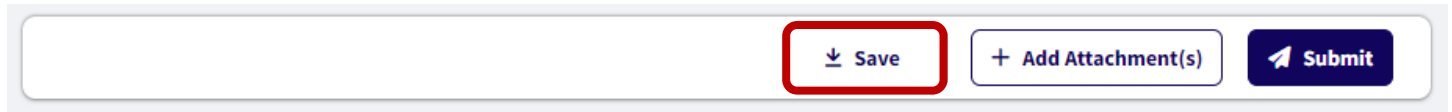
Step 2: Access Your Assigned Form

- 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, your will see and select "Faculty APR Form (Two Supervisors)."

The screenshot shows the Etrieve | CENTRAL interface. At the top, there's a header with the Etrieve logo and 'CENTRAL'. Below this, there are two tabs: 'Submissions' and 'Forms', with 'Forms' being the active tab. A search bar is present below the tabs. Under the search bar, there's a 'Drafts' section with a badge indicating 1 draft. Below that, there's a section titled 'Available Forms' with a dropdown arrow and a 'Collapse all' link. Under 'Available Forms', there's a dropdown menu labeled 'Office of Faculty Affairs'. Below this dropdown, three forms are listed: 'Faculty APR Form', 'Faculty APR Form (Chair is Supervisor)', and 'Faculty APR Form (Two Supervisors)'. A red bracket is drawn around these three forms, indicating they are the ones to be selected.

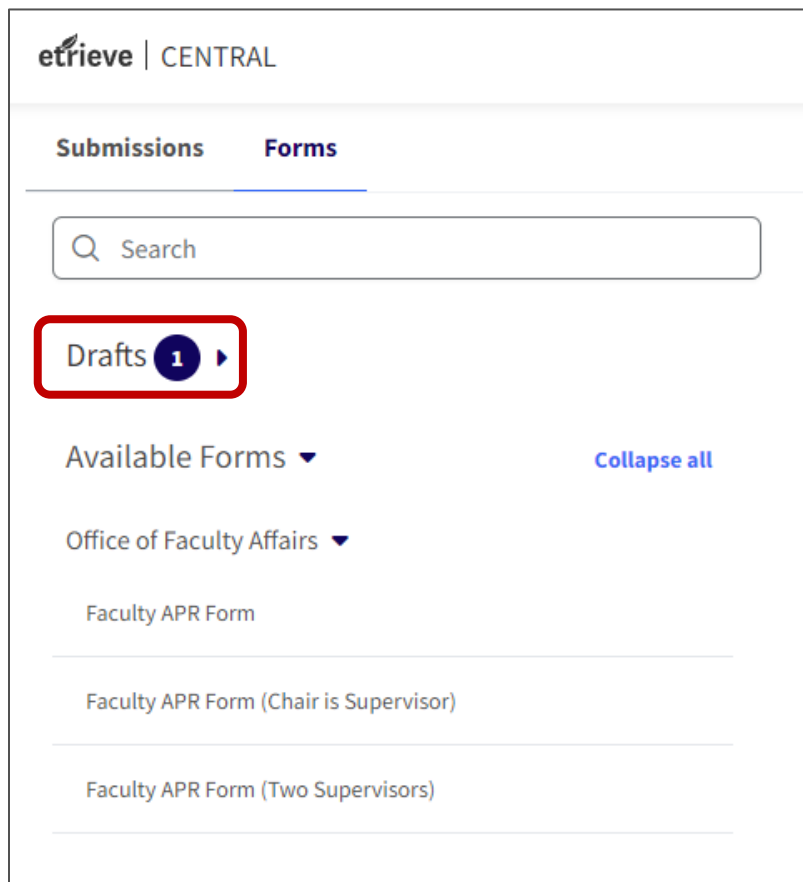
Step 3: Save Your Progress

- 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.*



The footer of the form contains 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 'Save' button is highlighted with a red rectangular box.

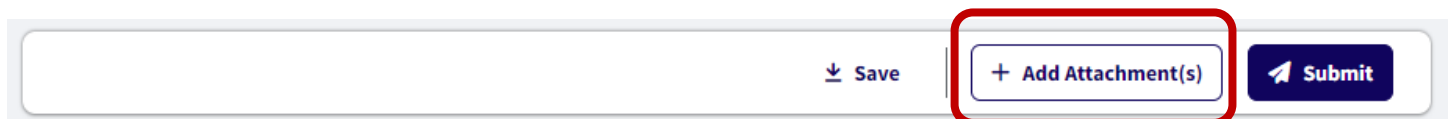
- Saved forms appear under the **Drafts** tab.



The screenshot shows the 'etrieve | CENTRAL' interface. The 'Forms' tab is selected, and a search bar is visible. The 'Drafts' tab is highlighted with a red box and a blue circle containing the number '1'. Below the tabs, there is a section for 'Available Forms' with a 'Collapse all' link. Under 'Office of Faculty Affairs', three forms are listed: 'Faculty APR Form', 'Faculty APR Form (Chair is Supervisor)', and 'Faculty APR Form (Two Supervisors)'.

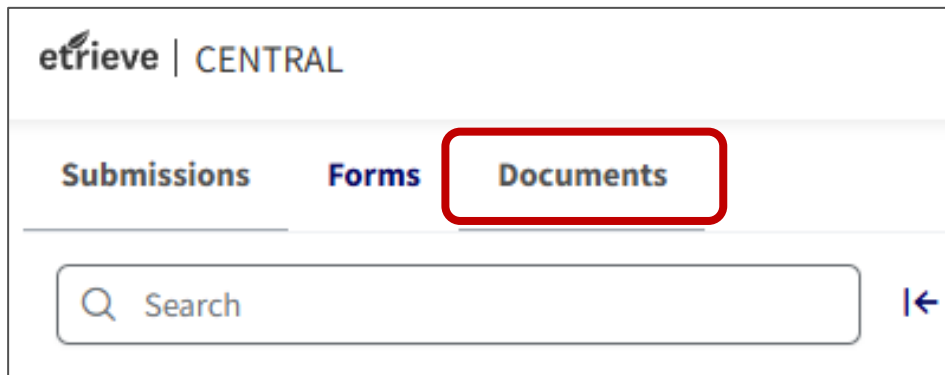
Step 5: Upload Supporting Documents (optional)

- 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.



The footer of the form contains 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 'Add Attachment(s)' button is highlighted with a red rectangular box.

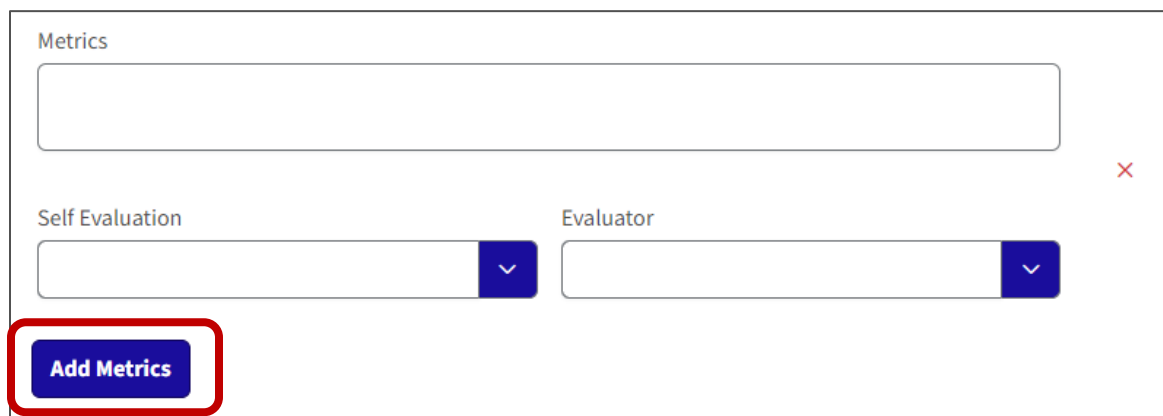
- Uploaded documents can be found under [Documents](#) tab.



The screenshot shows the top navigation bar of the 'etrieve | CENTRAL' system. It features three tabs: 'Submissions', 'Forms', and 'Documents'. The 'Documents' tab is highlighted with a red rectangular border. Below the tabs is a search bar with a magnifying glass icon and the word 'Search', followed by a blue back arrow icon.

Step 6: Enter Your Activities and Accomplishments

- General Information should be pre-populated for you. If you do need to add your “Percentage effort” please contact your department administrator for accurate information. *Note: do NOT use a “%” symbol in these fields; use numerals only.*
- 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.*



The screenshot displays the 'Metrics' section of the interface. It includes a large text input field for metrics. Below this are two dropdown menus labeled 'Self Evaluation' and 'Evaluator'. At the bottom left, there is a blue button labeled 'Add Metrics' which is highlighted with a red rectangular border. A red 'X' icon is visible on the right side of the metrics section.

- 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

OFA : Faculty APR Form V1 ✓ Draft saved

Clinical	Education	Research	Other

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

- . Educational leadership, administration and service
- Teaching in programs and courses
- . Clinical education and mentoring
- . Research education and mentoring

- . External education (e.g., CME)
- . Education for public/community
- . Development of curricula, courses and educational materials

Comments

III. Investigation

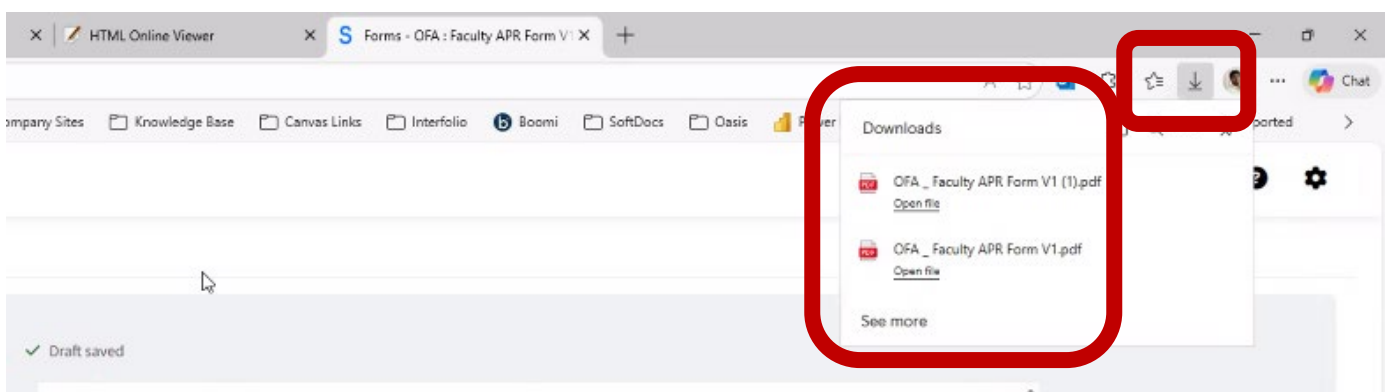
Download

Print

Save

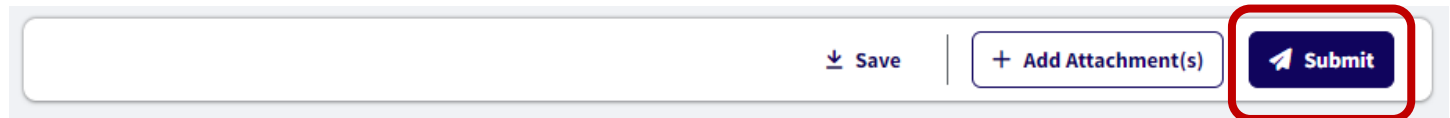
+ Add Attachment(s)

Submit



Step 8: Submit for Supervisor Review

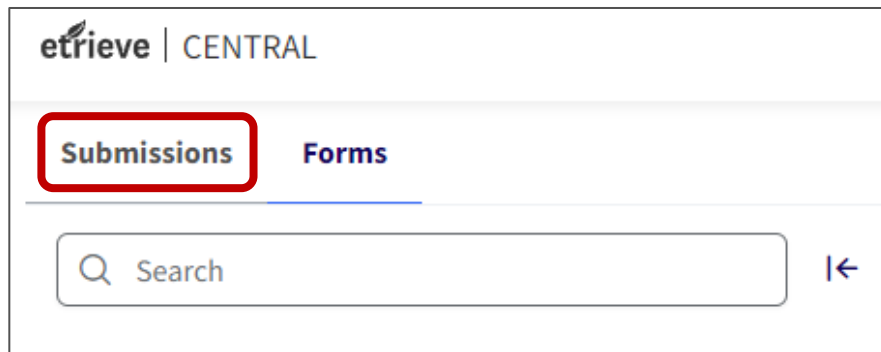
- Submit your completed form for Supervisor review by clicking on the “Submit” button.
(For smaller departments, this Supervisor may be your department Chair. For other departments, your APR may be reviewed by both a Supervisor and a Chair.)



A horizontal bar at the bottom of the form 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

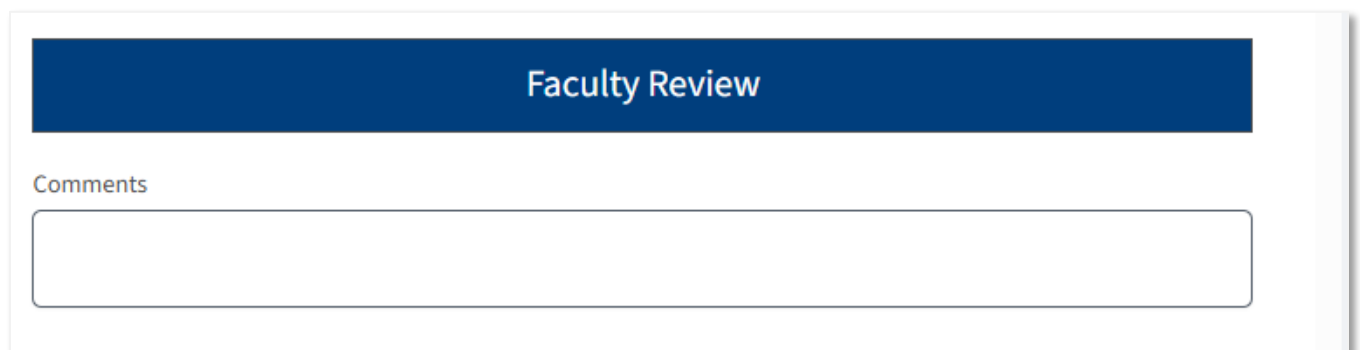
- You can view your submitted form under the [Submissions](#) tab.



A screenshot of the 'etrieve | CENTRAL' interface. It features two tabs: 'Submissions' and 'Forms'. The 'Submissions' tab is selected and 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.



A section titled 'Faculty Review' with a dark blue header. Below the header is a label 'Comments' and a large, empty rectangular text input field for providing additional comments.

- 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 form contains the following elements:

- Last Name ***: A text input field.
- First Name ***: A text input field.
- Date**: A date picker field with a calendar icon.
- Acknowledge ***: A section containing a radio button and the text "I acknowledge the above APR(Typed name above acceptable as signature)".
- Bottom Bar**: Contains 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.