

Office of Faculty Affairs

Annual Performance Review User Guide - Administrative Staff

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Introduction

This user guide provides step-by-step instructions for Administrative Staff to monitor **Faculty Annual Performance Reviews (APRs)** in **Softdocs' Etrieve**.

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

Additional guides that outline the complete workflow from form initiation through final approval and signature can be found on the OFA Annual Performance Reviews Resources website:

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

Departmental Administrative Staff

Step 1: Access the Dashboard

Sign in to [Power BI](#) to access the dashboard.

Power BI in Microsoft 365 is set up as a Single Sign on (SSO) identification system that allows access to multiple applications and websites. Single sign-on (SSO) will allow users to log into Etrieve with their @UMassMed or @UMassMemorial login credentials. If you are already signed into your UMass Chan or UMass Memorial account, no additional sign in may be needed.

Step 2: View Faculty Data

The Power BI dashboard in Microsoft 365 automatically loads all faculty members from your department and contains two sections.

The first section contains an overall snapshot of the department’s APRs progress.

The second section contains all your faculty members and their individual status. Faculty information includes Department, Division, APR Status, NAME, Rank, Supervisor Name, Department Chair Name and Alternate Supervisor (if applicable).

NAME	Department	Division	Category	Due Date
All	UMass Chan Medical School	All	All	All

Department	Not Submitted	Pending Supervisor	Pending Department Chair	Pending Faculty Review	APR Completed	Total
UMass Chan Medical School						24
Total	24	0	0	0	0	24

Department	Division	APR Status	NAME	Rank	Supervisor Name	Department Chair Name	Alternate Supervisor
UMass Chan Medical School	Health informatics and Implementation Science	Not Submitted	Zai,Adrian H	Associate Professor	Allison,Jeroan J	Flotte,Terence R	
UMass Chan Medical School		Not Submitted	Davis,Roger J	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Gao,Guangping	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Gregory,Richard	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	McCormick,Beth A	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Schiffer,Cella A	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Volturo,Gregory A	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Walhout,Albertha J	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Weng,Zhiping	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Winder,Danny G	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Zamore,Phillip D	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School	Basic Pathology	Not Submitted	Rock,Kenneth L	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School	Health informatics and Implementation Science	Not Submitted	Allison,Jeroan J	Chair and Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Mello,Craig	Distinguished Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Ahn,Mary S	Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Dekker,Job	Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Lane,Mary E	Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Thompson,Paul R	Professor	Flotte,Terence R		
UMass Chan Medical School		Not Submitted	Vitello-Cicciu,Joan M	Professor	Flotte,Terence R		
UMass Chan Medical School	Endocrinology & Diabetes	Not Submitted	Harlan,David M	Professor	McManus,David D	Flotte,Terence R	
UMass Chan Medical School	Epidemiology	Not Submitted	Wife,Cathryn L	Professor	Flotte,Terence R		

Step 3: Filter Settings

Filter settings are located at the top of the dashboard. Administrative staff can filter by Division, Category (school employed or clinical employed), and by Due Date (May 31st or Sept 1st).

Please use the Clear Selection Eraser to clear the Faculty Type and DUE_DT headers to all when needed.

NAME	Department	Division	Category	Due Date
All	Biochemistry and Molecular Bio...	All	School Employed	Sunday, May 31, 2026

Department	Not Submitted	Pending Supervisor	Pending Department Chair	Pending Faculty Review	APR Completed	Total
Biochemistry and Molecular Biotechnology	26	0	0	0	0	26
Total	26	0	0	0	0	26

Clear selections

Faculty Type [Eraser icon]

All

DUE_DT

All

May 31

September 1

Faculty Review | APR Completed | Total

Step 4: Monitor Review Progress

Monitor the workflow progress of APRs for your department.

Department	Not Submitted	Pending Supervisor	Pending Department Chair	Pending Faculty Review	APR Completed	Total
Psychiatry and Behavioral Sciences	73					73
Medicine	44					44
Molecular, Cell and Cancer Biology	40					40
Program in Molecular Medicine	38					38
Population and Quantitative Health Sciences	29					29
Total	491	0	0	0	0	491


Monitor the status of individual faculty members' APRs in the workflow.

Department	Division	APR Status	NAME	Rank	Supervisor Name	Department Chair Name	Alternate Supervisor Name
Biochemistry and Molecular Biotechnology		Not Submitted	Ali, Akbar	Associate Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Barasa, Leonard	Instructor	Thompson, Paul R	Schiffer, Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Bolon, Daniel N	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Flores Kim, Josue	Assistant Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Flynn, Julia M	Assistant Professor	Bolon, Daniel N	Schiffer, Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Gonzalez Perez, Maria Paz	Assistant Professor	Kumar, Vikas	Schiffer, Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Han, Gang	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Imbalzano, Anthony N	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kelch, Brian Anthony	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kobertz, William R	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kumar, Vikas	Assistant Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kurt Yilmaz, Nese	Associate Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Massi, Francesca	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	McCollum, Dannel	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Miller, Stephen C	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Munson, Maryann	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Pryciak, Peter M	Associate Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Rando, Oliver J	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Redding, Sy	Assistant Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Rhind, Nicholas R	Professor	Schiffer, Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Ruder, Sean R	Professor	Schiffer, Celia A		

Step 5: Verify Form Completion


Verify that all forms are submitted and processed correctly.

For departmental APR Workflow:



Department	Not Submitted	Pending Supervisor	Pending Department Chair	Pending Faculty Review	APR Completed	Total
Psychiatry and Behavioral Sciences	73					73
Medicine	44					44
Molecular, Cell and Cancer Biology	40					40
Program in Molecular Medicine	38					38
Population and Quantitative Health Sciences	29					29
Total	491	0	0	0	0	491

For faculty members APR workflow:



Department	Division	APR Status	NAME	Rank	Supervisor Name	Department Chair Name	Alternate Supervisor Name
Biochemistry and Molecular Biotechnology		Not Submitted	Ali,Akbar	Associate Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Barasa,Leonard	Instructor	Thompson,Paul R	Schiffer,Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Bolon,Daniel N	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Flores Kim,Josue	Assistant Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Flynn,Julia M	Assistant Professor	Bolon,Daniel N	Schiffer,Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Gonzalez Perez,Maria Paz	Assistant Professor	Kumar,Vikas	Schiffer,Celia A	
Biochemistry and Molecular Biotechnology		Not Submitted	Han,Gang	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Imbalzano,Anthony N	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Keich,Brian Anthony	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kobertz,William R	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kumar,Vikas	Assistant Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Kurt Yilmaz,Nese	Associate Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	Massi,Francesca	Professor	Schiffer,Celia A		
Biochemistry and Molecular Biotechnology		Not Submitted	McCollum,Dannel	Professor	Schiffer,Celia A		

Step 6: Administrative Staff Guide: How to Export Power BI Reports (Optional)

To download all individual faculty member APR statuses within your department, follow the directions located on the OFA website, [Admin Guide to Exporting Power BI Reports](#).

Step 7: Provide Support

To request technical assistance or troubleshooting support from the Office of Faculty Affairs (OFA) or Information Technology (IT) email facultyAPRs@umassmed.edu.