

Using Statuses to Track APRs

Add, Change, or Remove Case Statuses

Unit Administrators, Case Managers, and Committee Managers can apply and remove color coded case statuses to mark where cases are in the review process and mark their ultimate outcomes. These statuses can be applied or removed one at a time to individual cases or as a bulk action to a group of selected cases.

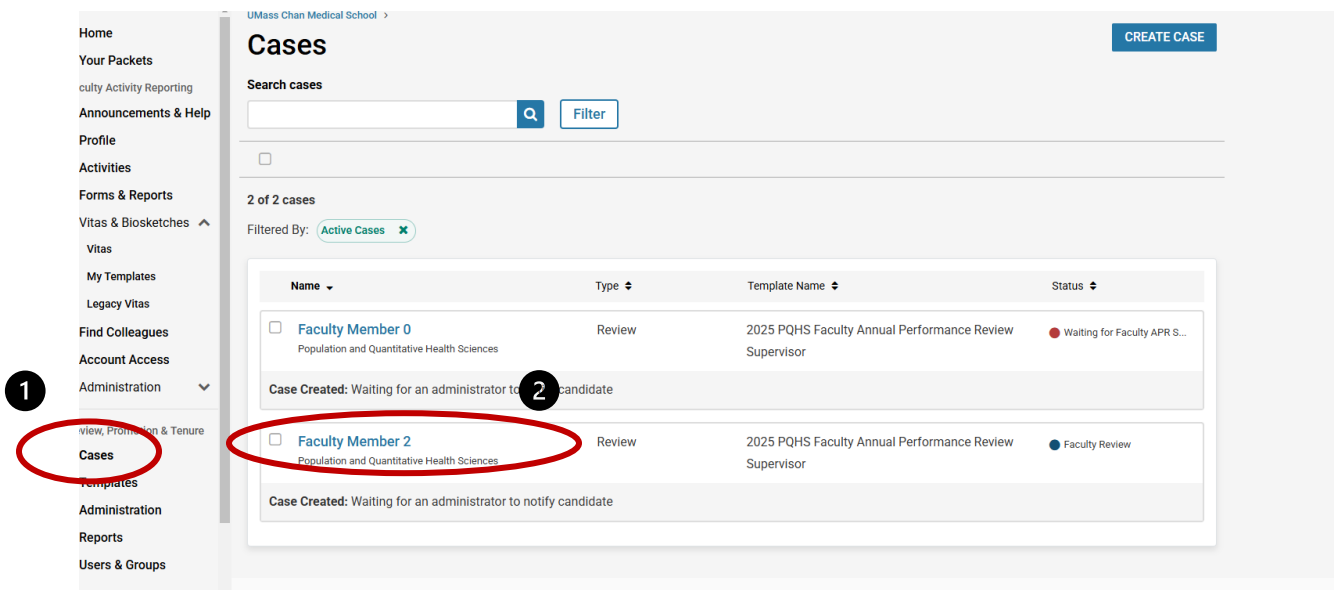
It is recommended that the unit administrators who are creating APR cases for groups of faculty members add statuses to the individual faculty members' APR cases as they progress through the Case Review Steps.

There are five APR statuses to track faculty performance reviews:

Open	■	
Waiting for Faculty APR Submission	■	
Supervisor Review	■	
Faculty Review	■	
Chair Review	■	
Faculty Review 2	■	
Closed	■	

During **Step 4A** Unit administrators can change the status of the faculty members APR to **Waiting for Faculty APR Submission**. This will allow the unit administrator to filter out the faculty APRs that need to be notified via email that they have an APR case to complete.

- 1) Navigate to the **Cases** page.
- 2) To navigate to the **Status change** button, click the [Faculty Member's Name] in the Cases window.



Optional Job Aid: Faculty Annual Performance Review

- 3) Click the blue **Status Change** or **change** button under the word **Status**.

If no status has been assigned, click **Select Status** at the top. If a status is already assigned it will display here and you can click **Change** instead. You may have to scroll down through the dropdown list to see more options.

The screenshot shows the 'Faculty Member 2' case page. At the top right, there are two buttons: 'Send Case' and 'Case Options'. Below these, the 'Status' field is highlighted with a red circle and contains the text 'Faculty Review change'. A red circle with the number '3' is placed next to the 'change' link. Below the status field, there is a search bar for case materials by title. A blue bar contains 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move' options. The main content area is titled 'Candidate Packet' and includes a section for 'Recording Academic Activities' which is 'Unlocked' and has a 'Lock' button. Below this section, there are instructions and key points for recording activities.

- 4) A drop-down window will appear. Click on **Waiting for Faculty APR Submission**.

The screenshot shows the 'Faculty Member 2' case page with the 'Status' dropdown menu open. The dropdown menu lists several options: 'Open', 'Closed', 'Supervisor Review', 'Faculty Review', 'Chair Review', 'Faculty Review 2', and 'Waiting for Faculty APR Submission'. The 'Waiting for Faculty APR Submission' option is highlighted with a red circle. The 'Open' status is currently selected, and a 'change' button is visible next to it. The rest of the page layout is identical to the previous screenshot.

Then go to **Step 2 in Job Aid Step 4A**.

Unit administrators have the option to add, change or remove statuses on the APRs they are monitoring as they progress through the **Case Review Steps**.