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 <u>are not the same person</u>.
- Duplicate the **Faculty Annual Performance Review Chair** Template for reviews where the <u>Chair and supervisor are the same person</u>.

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 <u>recommended</u> 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.

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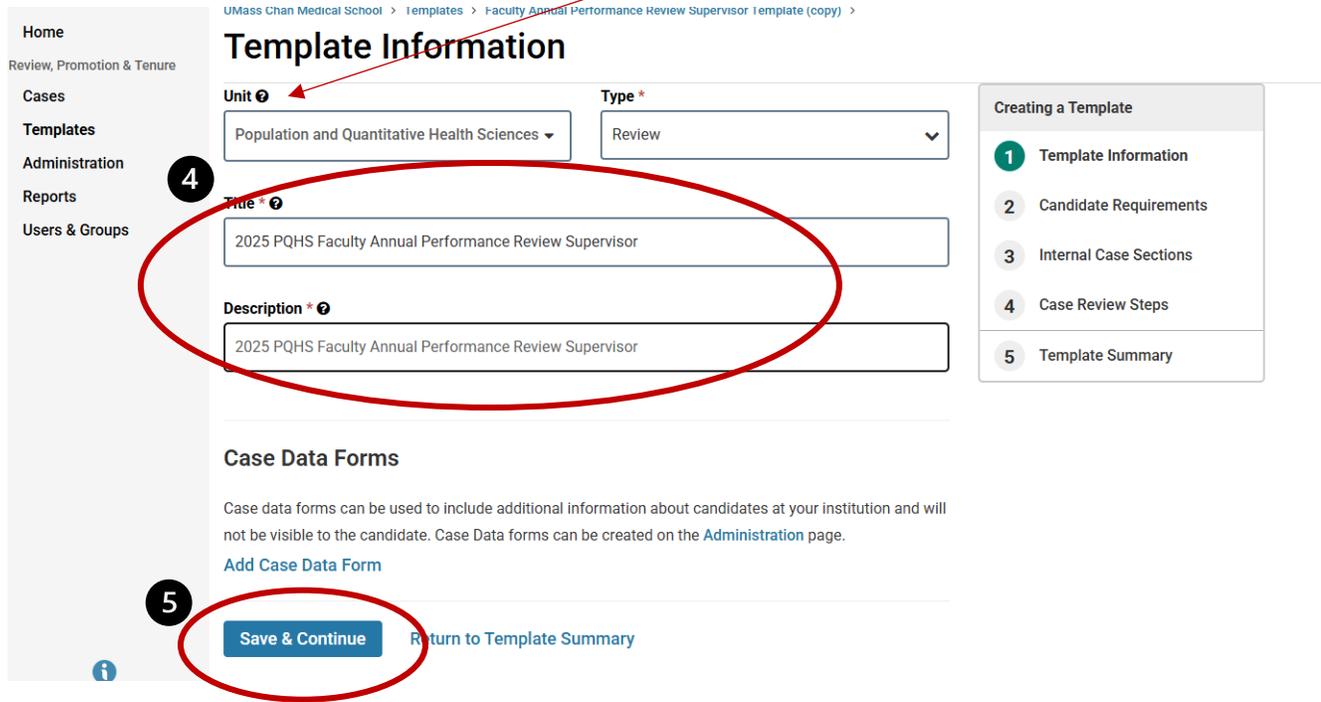
After a unit administrator creates a template, they can go back to Step 1 to create additional supervisor templates.

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.