

Step 2: Create Standing Committees

A standing committee is a permanent committee that an administrator creates within Interfolio. Standing committees are a way to set up your committees once, save them to a unit/department, and have them available to use at any point within a workflow **as a case review step**.

Unit administrators will assign standing committees of one to a unit/department. That unit/department determines where the unit administrator can use that committee for a template or a case.

Create Standing Committees of one for each person below that review's APRs within your department:

- a. **Department Supervisor(s)**
- b. **Unit Administrator(s)**
- c. **Department Chair**

Standing committees only need to be created once. Then each year the unit administrator will utilize the same standing committees until that supervisor leaves or is no longer reviewing faculty as part of the APR process each year.

- 1) Click **Users & Groups** in the left-hand navigation bar.
- 2) Click the **Committee** tab.
- 3) Type in your **department's Abbreviation** into the **Search** field to see if there are any committees created for your department already.
 - a. If there are already standing committees created for each supervisor, chair and unit administrator within your department and no personnel changes have occurred, go to the **Step 3 Job Aid**.
 - b. If there are no standing committees created for your department, go to **Step 4**.
 - c. If you need to edit a standing committee because a supervisor, chair or unit administrator has left, go to **Step 12**.

UMass Chan MEDICAL SCHOOL Unit Admin ▾

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Users, Committees & Units

Users **Committees** Units

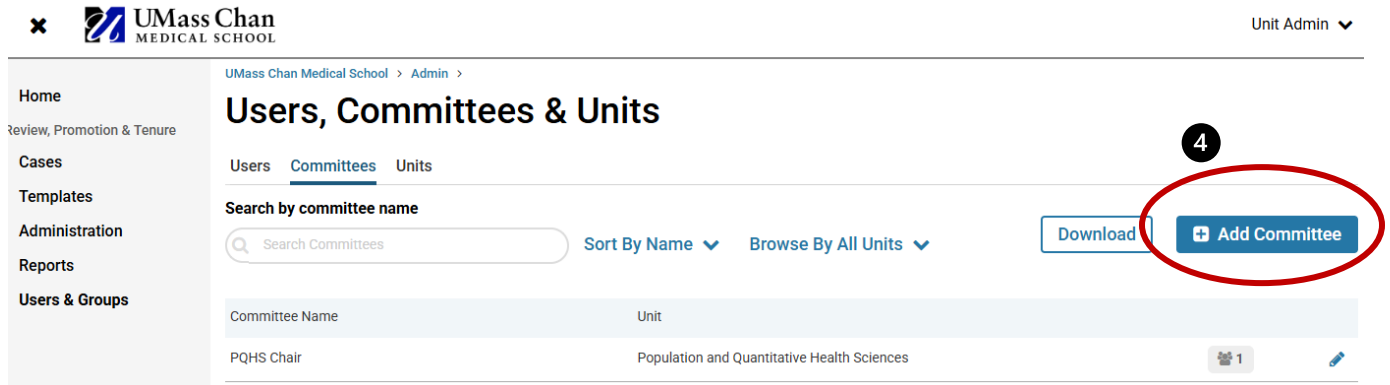
Search by committee name

Sort By Name ▾ Browse By All Units ▾ Download Add Committee

Committee Name	Unit		
PQHS Chair	Population and Quantitative Health Sciences	1	
PQHS Epidemiology Supervisor	Epidemiology	1	
PQHS Supervisor	Population and Quantitative Health Sciences	1	
PQHS Unit Administrator	Population and Quantitative Health Sciences	1	

To Add a Standing Committee

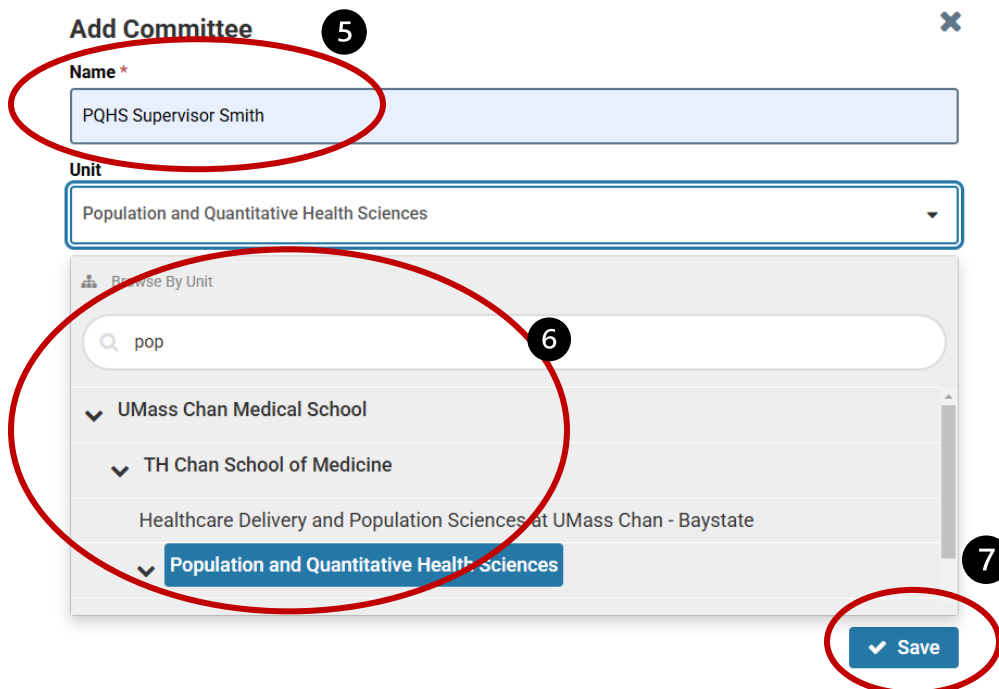
4) Click the **Add Committee** button.



A pop-up box will appear, and the unit administrator will need to add the appropriate department that the supervisor or unit administrator will need access too for the review process.

5) Type in the **Name** of the standing Committee [Dept Abbreviation, type (supervisor, chair or administrator) and last name of the individual]
e.g. **PQHS Supervisor Smith**

6) In the **Search** window type in the department name. Then click on the appropriate **Department Name** to add the name to the **Unit** field. **Only assign supervisors, chairs, and unit administrators to their primary department.** Faculty have not been assigned to any divisions.



7) Click the **Save** button

The pop up window will expand so that unit administrators can add the supervisor, chair or unit administrator's name to the standing committee of one.

- 8) Type in the **Search User** window the name of the appropriate supervisor, chair or unit administrator. In this case, the unit administrator will add the supervisor's name to the committee of one.
- 9) Click the **+ Add** button to add the supervisor to the committee.

Edit Committee [X]

Name *
PQHS Supervisor Smith

Unit
Population and Quantitative Health Sciences

[Update]

Committee Added. Assign committee members below.

0 **Committee Members**

8 [Search: Lapane] Sort By Name [v]

First Name	Last Name	Email
Kate	Lapane	Kate.Lapane@umassmed.edu

9 [+ Add]

[Delete]

- 10) Click the **Star** next to the supervisor or chair's name to make them a Committee Manager.
- 11) Click the **Update** button to save the committee.
- 12) Then click the **X** to close the pop up window.

Edit Committee [X] 11

This committee is associated with active cases and may not be deleted at this time.

Name *
PQHS Supervisor

Unit
Population and Quantitative Health Sciences

12 [Update]

1 **Committee Members**

10 [Star] This committee member is a manager

ST Supervisor_Case Manager Test
supervisor_umass@interfolio.com

[Search: Search Users] Sort By Name [v]

To add another Standing Committee of one, go back to Step 4.

Note: If the supervisor, or chair does not have a blue Star ★ by their name, they will not be able to forward the case onto the next step.

By creating standing committees of one, unit administrators will be able to add those standing committees of one supervisor, chair, or unit administrator to that supervisor’s template prior to creating APR cases for each faculty member reviewed by that supervisor. This process enables the creation of multiple cases that already have the supervisor, chair and unit administrator standing committees of one assigned to the case review steps in advance.

To Edit a Standing Committee of One

- 13) Click the **Pencil** on the right side of the name of the Standing Committee you need to edit.

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Users, Committees & Units

Users Committees Units

Search by committee name

Search Committees Sort By Name Browse By All Units Download Add Committee

Committee Name	Unit		
PQHS Chair	Population and Quantitative Health Sciences	1	
PQHS Epidemiology Supervisor	Epidemiology	1	
PQHS Supervisor	Population and Quantitative Health Sciences	1	
PQHS Unit Administrator	Population and Quantitative Health Sciences	1	

- 14) A pop-up window will appear. Click the **X** next to the **Committee Member’s name** to remove them from the committee.

Edit Committee ✕

This committee is associated with active cases and may not be deleted at this time.

Name *

PQHS Supervisor

Unit

Population and Quantitative Health Sciences

✓ Update

Committee Members

ST	Supervisor_Case Manager Test supervisor_umass@interfolio.com	★	
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Search Users Sort By Name

Then go back to **Step 8** and search for the correct Committee Member’s name.