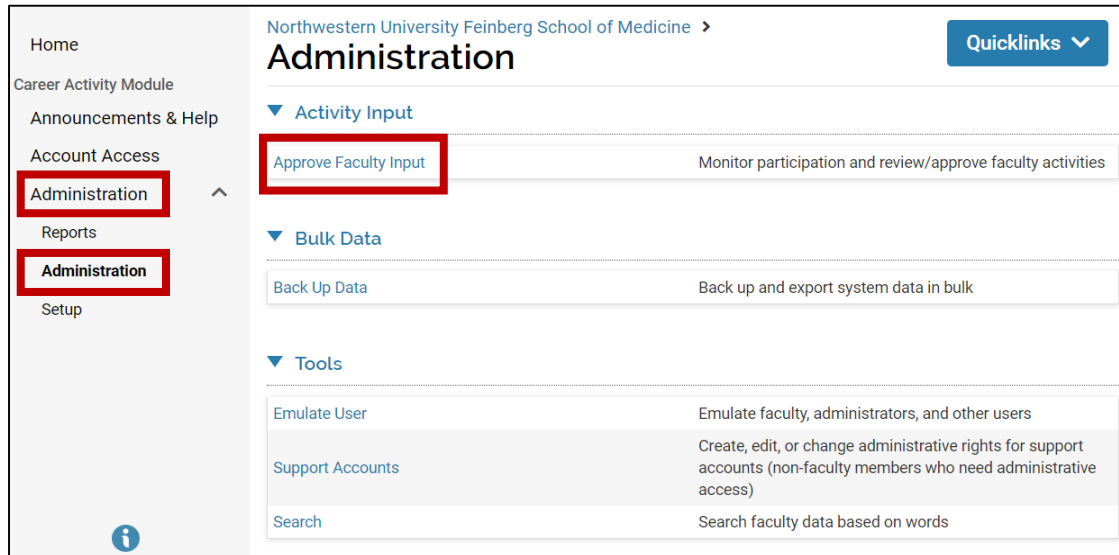


# Feinberg Faculty Portal: Faculty Performance Review Guide for Department Chairs/Division Chiefs to Record Performance Feedback

Last updated: 9/29/2019

1. Open your web browser (Chrome is preferred) and log in at this link using your netID and password:  
[https://iam-api.interfolio.com/users/sso\\_redirect?tenant\\_id=29056&redirect\\_url=https://home.interfolio.com/29056](https://iam-api.interfolio.com/users/sso_redirect?tenant_id=29056&redirect_url=https://home.interfolio.com/29056)
2. Click on Administration > Administration > Approve Faculty Input



3. The next screen lists workflow processes you can see based on the units and faculty you have access to. If you have access to more than one workflow process, read the titles carefully to select the correct process to take action on.

**Administration** Quicklinks  
Approve Faculty Input

General

Start Date: 2019-08-29  
End Date: 2019-09-29  
Workflow Form: Any Form

Faculty

670 Faculty Members Have Been Individually Selected  
**670 Faculty Selected**

**Refresh Report**

*The following input workflows are available based upon the faculty members appointed and your administrative rights.*

Search:

Title	Faculty Input Opens	Faculty Input Is Due	Count of Faculty	% of Faculty Who Have Submitted	# of Approval Steps	% Completed	Actions
FY19 Performance Review   Pediatrics   Homer Simpson Test	2019-09-09 12:09AM		1	0%	2	0%	
FY19 Performance Review   Pediatrics   Regular, Research, and HSC Faculty	2019-09-13 12:09AM		669	3.1%	2	0%	

- a. In the **actions column**, click on the **eye icon** to drill into that process and advance to the screen where you review individual faculty submissions, record your feedback, and ultimately approve the review.
- b. In the **actions column**, click on the **envelope icon** to send a bulk email to faculty. You can send a message to all faculty who have not submitted reviews (useful for reminding faculty of the due date), or to all faculty who were selected for inclusion in the review process.

- c. In the table, you can click on a column header to sort by that column.
  - d. By default, the screen shows active review cycles. The general filters at the top of the screen can be used to locate prior review cycles (e.g., by selecting an earlier start date).
4. After clicking to view a process (SECTION 3a above), the next screen shows a list of units participating in the process. If you only have access to faculty in one unit, this screen won't provide much more information than the prior screen. You might see units listed that you don't oversee—this would result if you share a faculty member with another unit that is also included in the selected workflow process. In that case, you would not have access to all faculty in the external unit but would see only the individuals in that unit whom you share.
- a. In the **Approve column**, press the **eye icon** to open a list of the faculty from that unit who are included in this workflow process.

Northwestern University Feinberg School of Medicine > Administration >

## Administration

Approve Faculty Input Quicklinks ▾

**Details**

Process: FY19 Performance Review | Pediatrics | Regular, Research, and HSC Faculty

Form: Pediatrics Performance Review

Start Date: 2019-09-13 12:09AM

Due Date:

**Faculty**

669 Faculty Members Have Been Individually Selected

669 Faculty Selected

Refresh Report

The following input workflows are available based upon the faculty members appointed and your administrative rights.

Unit	Total Faculty	Faculty in Workflow	Submitted	Chair/Chief Approval	Approve
Pediatrics (Rollup)	971	669	21 (3%)	0	👁
Pediatrics	90	41	0	0	👁
Pediatrics: Academic General Pediatrics and Primary Care	31	25	2 (8%)	0	👁
Pediatrics: Adolescent Medicine	8	7	0	0	👁
Pediatrics: Allergy and Immunology	16	13	0	0	👁
Pediatrics: Cardiology	56	49	1 (2%)	0	👁
Pediatrics: Child Abuse	6	4	0	0	👁
Pediatrics: Community Based Primary Care	253	94	0	0	👁
Pediatrics: Critical Care	32	27	0	0	👁
Pediatrics: Dermatology	8	7	1 (14%)	0	👁
Pediatrics: Developmental Behavioral Pediatrics	7	5	0	0	👁
Pediatrics: Emergency Medicine	52	49	2 (4%)	0	👁

5. Now you see the list of individual faculty who have been included in the performance review cycle you are viewing.

Northwestern University Feinberg School of Medicine > Administration >

## Administration

Approve Faculty Input Quicklinks ▾

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**Details**

Process	FY19 Performance Review   Pediatrics   Homer Simpson Test
Form	Pediatrics Performance Review
Start Date	2019-09-09 12:09AM
Due Date	

Refresh Report

**Faculty**

1 Faculty Member Has Been Individually Selected

1 Faculty Selected

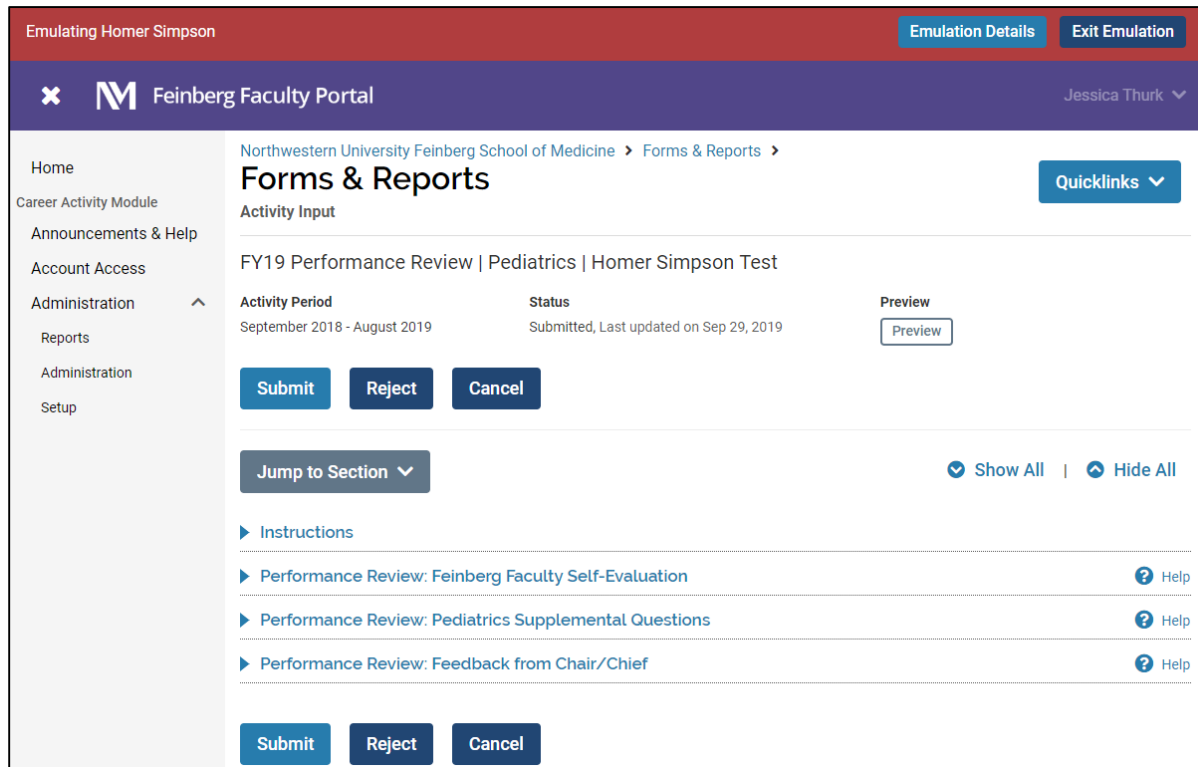
i The following input workflows are available based upon the faculty members appointed and your administrative rights.

Search:

#	Faculty ID	First Name	Last Name	Unit Assigned	Employment Status	Submitted Date	Chair/Chief Approval Date	Email Faculty	View and Approve	Printable Version	CV Version
1	1067944	Homer	Simpson	Pediatrics (Rollup)	Staff	2019-09-29 8:31PM Submitted Homer Simpson	-				

- a. If you want to send an email to an individual faculty member, click the **envelope icon** in the email faculty column. (To send a bulk email—e.g., a reminder to everyone who has not yet submitted—see SECTION 3b above).
- b. To generate the CV (or the Performance Review Summary Form), click on the **print or pdf icons** in the **CV Version column**.
- c. To review and record your feedback, locate the **View and Approve column** and press the **eye icon**. Generally, you will want to wait to do this until after you see that the faculty member has submitted their review (which is logged in the **Submitted Date column**).

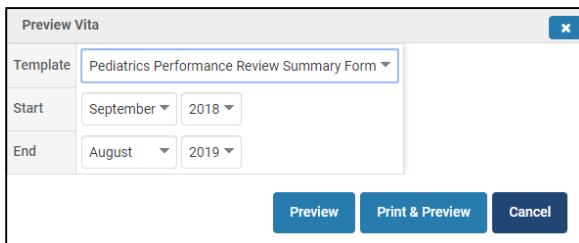
6. After pressing the eye icon to view and approve a specific faculty member (SECTION 5c above), you enter emulation mode, and a red bar at the top of the screen confirms whom you are emulating.



- a. Click on a section title to expand or collapse the section; alternatively, use the **Show All** and **Hide All** links to expand or collapse all sections on the page.

The faculty member’s self-evaluation will be recorded in the section called **Performance Review: Feinberg Faculty Self-Evaluation**. If your department asks additional supplemental questions, then an additional **Performance Review: [Department] Supplemental Questions** section will also contain faculty responses.

- b. To review the self-evaluation submitted, press the **Preview** button at the top of the screen. This will generate the Performance Review Summary Form, which includes the faculty member’s responses to narrative self-evaluation questions as well as the list of activities for the review period. Notice that the Preview pop-up window defaults to the dates of the performance review period so that activities are filtered based on those dates.



7. Department Chairs/Division Chiefs should record feedback after having a performance review meeting with the faculty member.
  - a. Expand the section called **Performance Review: Feedback from Chair/Chief**.
  - b. Press the **Add** button.

▶ **Instructions**

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▶ **Performance Review: Feinberg Faculty Self-Evaluation** ? Help

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▶ **Performance Review: Pediatrics Supplemental Questions** ? Help

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▼ **Performance Review: Feedback from Chair/Chief** ? Help

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Do not complete this section for yourself. Your Department Chair, Division Chief, or other appropriate supervisor will complete this section after you have completed your self-evaluation and submitted for review.

**Instructions for Supervisors:**

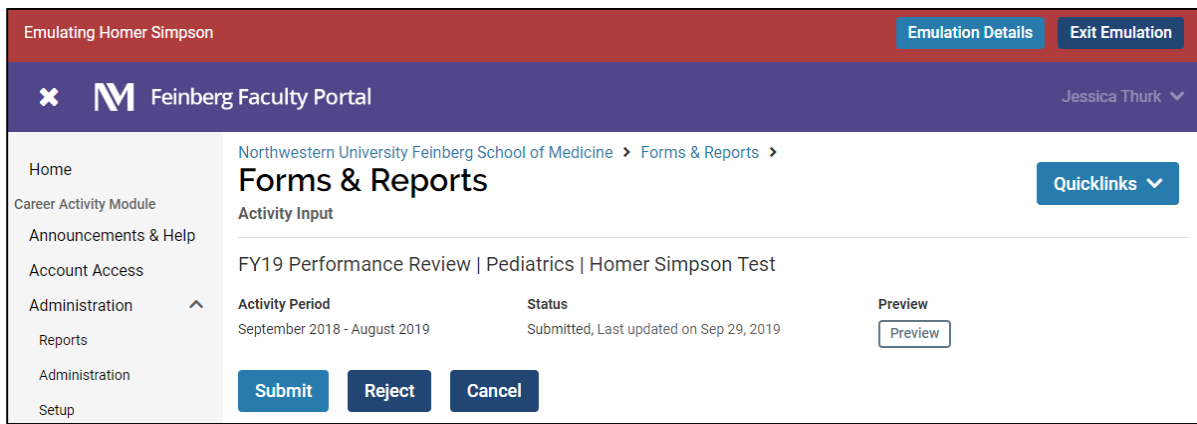
- Press the **Add** button to open the data entry form, and press **Save and Go Back** to save your responses and see them logged in the summary table.
- Complete the form only **once** for the current performance review period so that **one** new row appears in the summary table.
- If you need to edit responses you have already saved, press the pencil icon in the summary table to edit that row.

Summary of Overall Performance	Feedback on Teaching Performance	Goals and Strategies to Achieve Them	Other Comments	Meeting Date	Meeting Participants	Start Month	Actions
No data available in table							

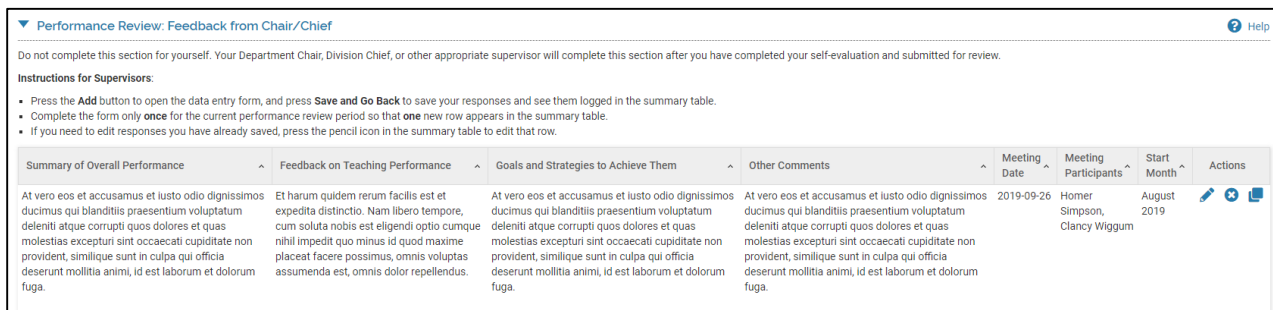
Add
View All

Submit
Reject
Cancel

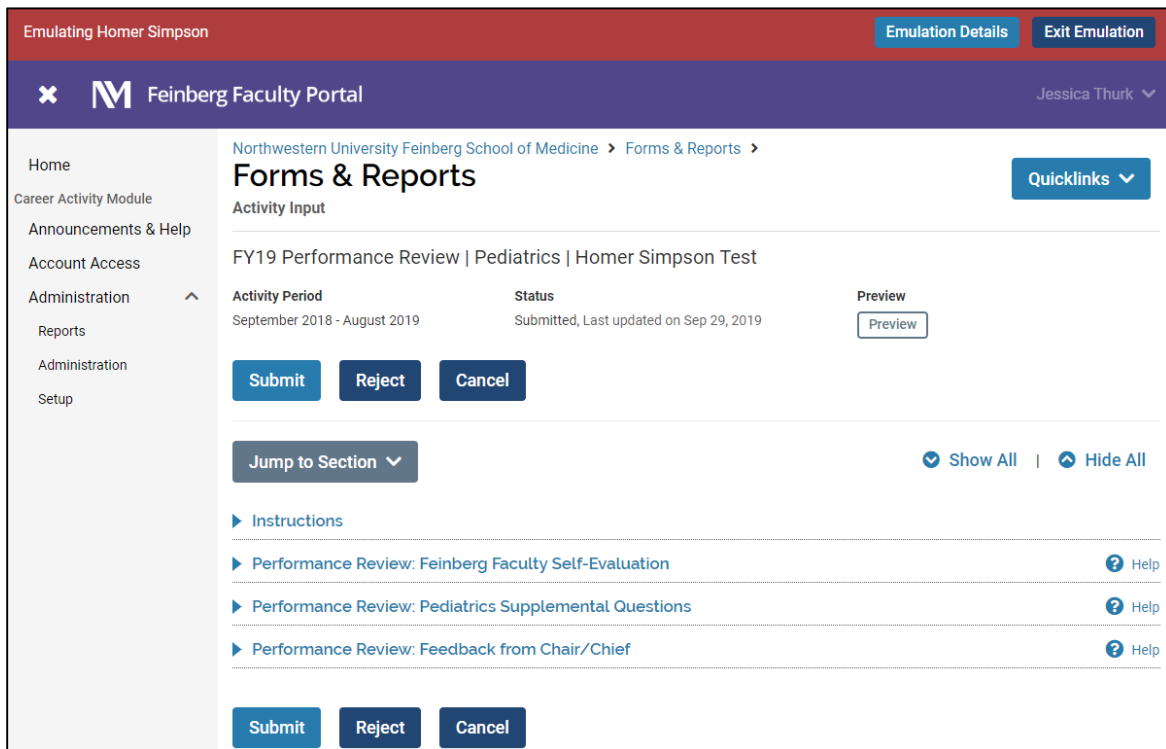
8. Enter responses in the form that opens. Your responses will be visible to the faculty member and available for them to refer to over time.
  - a. In the **Month** field, enter the **end month** of the performance review period. This causes your responses to be included on the Performance Review Summary Form for this period.
  - b. Required fields are designated with an asterisk; you won't be able to save the form until you have responded to all required fields.
  - c. When you are finished, press **Save and Go Back** to return to the prior screen. You should fill this form out only once (you can return to edit if needed), so don't press Save and Add Another.
9. Upon returning to this screen, you may wish to press **Preview** again so that you can see your responses recorded on the Performance Review Summary Form as they would appear to the faculty member.



If you wish to make edits, expand the **Performance Review: Feedback from Chair/Chief** section and press the **pencil icon** to make edits.



10. When you are satisfied with the review, press **Approve**. If you need to ask the faculty member to edit their responses, you can press **Reject** to return the form for them to edit and re-submit.



11. Press **Exit Emulation** at the top of the screen to leave this faculty member’s case and return to the list of faculty. You will see that your decision is recorded in the **Chair/Chief Approval Date** column.

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## Administration

[Quicklinks](#) ▼

Approve Faculty Input

**Details**

Process: FY19 Performance Review | Pediatrics | Homer Simpson Test

Form: Pediatrics Performance Review

Start Date: 2019-09-09 12:09AM

Due Date:

**Faculty**

1 Faculty Member Has Been Individually Selected

**1 Faculty Selected**

[Refresh Report](#)

ⓘ The following input workflows are available based upon the faculty members appointed and your administrative rights.

Search:

#	Faculty ID	First Name	Last Name	Unit Assigned	Employment Status	Submitted Date	Chair/Chief Approval Date	Email Faculty	View and Approve	Printable Version	CV Version
1	1067944	Homer	Simpson	Pediatrics (Rollup)	Staff	2019-09-29 8:31PM Submitted Homer Simpson	2019-09-29 9:23PM Approved Meghan Jablonski	✉	👁	🖨	📄