*Standard Date Criteria:

For items to appear on the Annual Faculty Report...

- Start Date and End Date fields MUST be within the requested report timeframe or the End Date field is left blank;
- For items with one date reference, that date MUST fall within requested review timeframe.

Academic Year field on Yearly Data screen must = 2022-2023 so items entered on subsequent screens that fall within this review period (Sept 1, 2022–Aug 31, 2023) appear in generated AFR.

Where information appears in your AFR	Screens and Fields where that information is entered in your electronic AFR	Fields or other criteria that determine where items appear in your AFR
AFR SECTION 1		
Name: Date:	Personal and Contact Information First Name Middle Name Last Name	Date = date report is generated from AFR system.
 College: Department: Title: Rank: Years in Present Rank: 	Yearly Data	Academic Year field on Yearly Data screen must = date range for review period (e.g. 2022-2023)
Highest Degree & Date:	 Education Degree/ Explanation of "Other" Emphasis/Major Institution Year Completed 	Highest Degree You Have Earned? = "Yes".
 Date of First UMass Appointment: Tenure Decision Date: 	Permanent Data Start Date at University of Massachusetts, Boston Tenure Decision Date	
AFR SECTION 2: TEACHING		
Section 2A: Courses	 Scheduled Teaching Term and Year Course Prefix and Course Number Section Number Course Name Number of Credit Hours Official Enrollment Number Course Load Reduction Comments Sabbatical Comments On Leave Comments 	Course Term and Year must fall within requested report period (Sept 1, 2022–Aug 31, 2023)

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Section 2B: Changes in Teaching Approach or Responsibilities	Scheduled Teaching Term and Year Course Prefix and Course Number Section Number Course Name Pedagogical Innovations Comments New Teaching Material Comments Enhanced Student Learning Activities Comments	Course Term and Year must fall within requested report period (Sept 1, 2022–Aug 31, 2023)
Section 2Ci: Doctoral, Masters, Honors Thesis Students	 Directed Student Learning Involvement Type/ Other Student(s) First/ Last Name Title of Student's Work Student's Home Department Course Prefix and Course Number Number of Credit Hours Stage of Completion Start and End Dates Comments 	 Involvement Type contains the text "Chair", "Director" or "Capstone". Start and End Dates must meet Standard Date Criteria.*
Section 2Cii: Students on Whose Committees You Served	 Directed Student Learning Involvement Type/ Other Number of Students Student(s) First/ Last Name Comments 	 Involvement Type contains the text "Member" or "Reader". Number of students appearing in report is derived from number of student names entered in "Student Information" drop down field. Start and End Dates must meet Standard Date Criteria.*
Section 2D: Major Advising and Counseling Responsibilities	Academic Advising Number of Undergraduate Students Advised Number of Graduate Students Advised Academic Year Description of Advising Activities	Academic Year must be within the requested report range or blank.
Section 2E: Teaching Collaborations with Community Partners	 Community Engaged Teaching Describe project briefly Name of Community Partner Focus of Community Partner's Work Location (zip code or country) Type of Partnership (e.g., multi-year, one-time) Outcomes/Impact Products Created How students were involved Nature of Collaboration 	

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Directed Student Learning

Section 2F: Other Teaching and Counseling Activities	 Involvement Type/ Other Student(s) First/ Last Name Title of Student's Work Student's Home Department Course Prefix and Course Number Number of Credit Hours Stage of Completion Start and End Dates Comments Non-Credit Instruction Taught Instruction Type/ Other Sponsoring Organization Number of Participants Academic or Professional? Start and End Dates Description 	 Involvement Type is anything other than those containing "Chair", "Director", "Capstone", "Member" or "Reader". Start and End Dates must meet Standard Date Criteria.*
SECTION 3 - RESEARCH CREA	TIVE OR PROFESSIONAL ACTIVITY	
Section 3 – RESEARCH, CREA Section 3A1: Research Activity – Completed (in print)	ATIVE OR PROFESSIONAL ACTIVITY	 Order of items listed on report from Intellectual Contributions screen will depend on user's selection of APA or MLA citation style on Custom Report screen. Rapid Reports default to APA citation style. If "Alternative Name You Publish Under" contains a value, that name (as it appears in field) will appear in citations mapping from Intellectual Contributions screen. Current Status for items in Section 3A1 must = "Published".

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a. Books and Monographs	Intellectual Contributions APA book citations: Author(s) Year Published Editor's Name/ Issue # or Edition Title of Contribution Page Numbers Publisher City, State, Country Publisher Name Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments MLA book citations: Author(s) Title of Contribution Editor's Name Volume Issue # or Edition Publisher City, State Publisher Name Year Published Page Numbers Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments	 Current Status = "Published". Contribution Type = "Book, Non-Scholarly-New", "Book, Scholarly-New", "Book, Scholarly-Revised", "Book, Poetry-New", "Book, Poetry-Revised", "Monograph", "Monograph-Poetry". Dates subject to Standard Date Criteria.*
b. Textbooks	 Intellectual Contributions APA/ MLA book citation style Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Current Status = "Published". Contribution Type = "Book, Textbook-New", "Book, Textbook-Revised". Dates subject to Standard Date Criteria.*
c. Edited Book, Anthologies, Collections, Bibliographies	 Intellectual Contributions APA/ MLA book citation style Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Current Status = "Published". Contribution Type = "Edited Book", "Edited Textbook", "Anthology", "Bibliography", "Collection". Dates subject to Standard Date Criteria.*

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d. Articles in Journals	Intellectual Contributions APA journal citations: Author(s) Year Published Title of Contribution Publisher Name Volume Issue # or Edition Page Numbers Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments MLA journal citations: Author(s) Title of Contribution Publisher Name Volume Issue # or Edition Year Published Page Numbers Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments	 Current Status = "Published". Contribution Type starts with text "Journal Article" or = "Edited Journal Special Issue". Dates subject to Standard Date Criteria.*
e. Chapters in Books	 Intellectual Contributions APA/ MLA book citation style Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Current Status = "Published". Contribution Type starts with text "Book, Chapter" or "Book, Contribution" Dates subject to standard date criteria.*

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f. Reviews, Abstracts	Intellectual Contributions APA journal citations:	Current Status = "Published".
Pamphlets	 Author(s) Year Published Editor Name Title of Contribution Title of Larger Work Page Numbers Publisher City, State Publisher Name Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments MLA journal citations: Author(s) Title of Contribution Title of Larger Work Editor Name Volume, Issue # or Edition Publisher City, State Publisher Name Year Published Page Numbers Web Address or DOI Link DOI Number Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Contribution Type is one of "Abstract", "Book Review", "Book Review-Poetry", "Chapbook", "Law Review", "Pamphlet", "Review", "Review-Poetry". • Dates subject to standard date criteria.*
g. Papers Published in Proceedings	Intellectual Contributions	 Current Status = "Published". Contribution Type contains text "Proceeding". Dates subject to standard date criteria.*

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Section 3A2: Research Activity – Works Completed and Accepted for Publication	 Intellectual Contributions APA/ MLA citation style (according to Contribution Type) Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Current Status = Accepted", "In Press or in Production" or "Under Contract" Contribution Type contains one of the substrings: "Abstract", "Anthology", "Bibliography", "Collection", "Conference Proceeding", "Book", "Journal", "Edited Book", "Edited Textbook", "Edited Journal Special Issue", "Law Review", Monograph", "Pamphlet", "Review", "Poetry", "Chapbook". Dates subject to Standard Date Criteria.*
Section 3A3: Research Activity – Works Completed and Submitted for Review	Intellectual Contributions APA/ MLA citation style (according to Contribution Type) Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments	 Current Status = "Submitted", "Revising to Resubmit", "Resubmitted." Contribution Type contains one of the substrings: "Abstract", "Anthology", "Bibliography", "Collection", "Conference Proceeding", "Book", "Journal", "Edited Book", "Edited Textbook", "Edited Journal Special Issue", "Law Review", Monograph", "Pamphlet", "Review", "Poetry", "Chapbook". Dates subject to Standard Date Criteria.*
Section 3A4: Research Activity – Work in Progress	 Intellectual Contributions APA/ MLA citation style (according to Contribution Type) Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Intellectual Contributions: Current Status = "Working Paper", "In Preparation; Not Yet Submitted" or contains NO value. Contribution Type contains one of the substrings: "Abstract", "Anthology", "Bibliography", "Collection", "Conference Proceeding", "Book", "Journal", "Edited Book", "Edited Textbook", "Edited Journal Special Issue", "Law Review", Monograph", "Pamphlet", "Review", "Poetry", "Chapbook". Dates subject to Standard Date Criteria.*
	Research Currently in Progress	Research-Currently-in-Progress: • Status = "Planning", "On-Going", "Writing Results".

UMass Boston, <u>AFRSupport@umb.edu</u>
*Standard Date Criteria listed at top of Page 1

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Section 3B1: Creative Activity: Performance, Shows, Compositions, etc. – Completed	Artistic and Professional Performances and Exhibits Performer/Exhibitor/Lecturer(s) Type of Work/ Other Work/ Exhibit Title Name of Performing Group Sponsor Location (City, State, Country) Scope Academic or Non-academic? Peer-reviewed/ referred? Invited or Accepted? By audition, commission or competition? Start and End Dates Description	 Status = "Completed" Dates subject to Standard Date Criteria.* Was this peer-reviewed/ referred? = "Yes"
Section 3B2: Creative Activity: Performance, Shows, Compositions, etc. – Completed but Not Presented, Performed, Produced or Published	Artistic and Professional Performances and Exhibits Performer/Exhibitor/Lecturer(s) Type of Work/ Other Work/ Exhibit Title Name of Performing Group Sponsor Location (City, State, Country) Scope Academic or Non-academic? Peer-reviewed/ referred? Invited or Accepted? By audition, commission or competition? Start and End Dates Description	 Status = "Completed But Not Released" Dates subject to Standard Date Criteria.* Was this peer-reviewed/ referred? = "Yes"
Section 3B3: Creative Activity: Performance, shows, compositions, etc. – In Progress	Artistic and Professional Performances and Exhibits Performer/Exhibitor/Lecturer(s) Type of Work/ Other Work/ Exhibit Title Name of Performing Group Sponsor Location (City, State, Country) Scope Academic or Non-academic? Peer-reviewed/ referred? Invited or Accepted? By audition, commission or competition? Start and End Dates Description	 Status = "In Progress" Dates subject to Standard Date Criteria.* Was this peer-reviewed/ referred? = "Yes"

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Section 3C: Community- Engaged Scholarship/Reasearch Section 3D1: Professional Activity not included in 3A or 3B - Completed	Community-Engaged Scholarship/Reasearch Describe project briefly Name of Community Partner Focus of Community Partner's Work Location (zip code or country) Type of Partnership (e.g., multi-year, one-time) Outcomes/Impact Products Created How students were involved Nature of Collaboration Intellectual Contributions APA/ MLA citation style (according to Contribution Type) Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments	 Intellectual Contributions: Current Status = "Published", "In Press or in Production" or "Under Contract". Contribution Type = "Broadcast Media", "Instructor's Manual", "Magazine/Trade Publication", "Newsletter", "Newspaper", "Regular Column in Journal or Newspaper", "Research Report", "Software", "Software Instructional", "Study Guide", "Technical Report", "Translation", "Written Case with Instructional Material". Dates subject to Standard Date Criteria.*
	Contracts, Fellowships, Grants and Sponsored Research Investigator(s) Type/ Other Title Sponsoring Organization Date Awarded Amount Start and End Dates of Funding Abstract Comments	Contracts, Fellowships, Grants and Sponsored Research: • Current Status = "Funded"
	Presentations Presenter/ Author(s) Presentation Type/ Other Presentation Title Conference/ Meeting Name Sponsoring Organization Location Start and End Dates Abstract Comments	Presentations: • Dates contain a value.

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Section 3D2: Professional Activity not included in 3A or 3B – In Progress	Intellectual Contributions	 Intellectual Contributions: Current Status = "Accepted", "Submitted", "Revising to Resubmit", "In Preparation; Not Yet Submitted" "Working Paper" or contains NO value. Contribution Type = "Broadcast Media", "Instructor's Manual", "Magazine/ Trade Publication", "Newsletter", "Newspaper", "Regular Column in Journal or Newspaper", "Research Report", "Software", "Software Instructional", "Study Guide", "Technical Report", "Translation", "Written Case with Instructional Material". Dates subject to Standard Date Criteria*. Contracts, Fellowships, Grants and Sponsored Research: Current Status = "Pre-Review", "Currently Under Review" or contains
	 Title Sponsoring Organization Date Awarded Amount Start and End Dates of Funding Abstract Comments 	NO value.
	Presentations Presenter/ Author(s) Presentation Type/ Other Presentation Title Conference/ Meeting Name Sponsoring Organization Location Date Abstract Comments	Presentations: • Dates contain NO value.
Section 3E: Other Research, Creative, or Professional Activities Not Covered Previously	 Intellectual Contributions APA/ MLA citation style (according to Contribution Type) Medium of Publication Abstract Synopsis Comments Reprint/ Republished Comments 	 Intellectual Contributions: Contribution Type = "Media Presentation" or "Material Regarding New Courses/Curricula" Dates must meet Standard Date Criteria.*

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	Intellectual Property Inventor(s) Patent Title Patent Nationality Patent Type Patent/ Copyright #/ ID Licensed Name Assigned Name Date Submitted Date of Application Date Approved Date Licensed Date Renewed Contracts, Fellowships, Grants and Sponsored Research Investigator(s) Type Title Sponsoring Organization Amount Abstract Comments	Intellectual Property: "Date Submitted", "Date of Application", "Date Approved", "Date Licensed" or "Date Renewed" must meet Standard Date Criteria* Contracts, Fellowships, Grants and Sponsored Research: Current Status = "Not Funded".
SECTION 4 - SERVICE		
Section 4A1: University Service - Departmental and Administrative Contributions	 Department Position/ Role or Other Service Name Elected or Appointed Start and End Dates Responsibilities Comments Key Accomplishments Comments 	Start and End Dates must meet Standard Date Criteria.*

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Section 4A2: University Service - School, College, or University and Administrative Contributions	College Position/ Role or Other Service Name Elected or Appointed Served Ex-Officio Start and End Dates Responsibilities Comments Key Accomplishments Comments University Position/ Role or Other Service Name Elected or Appointed Served Ex-Officio Start and End Dates Responsibilities Comments Key Accomplishments Comments	Start and End Dates must meet Standard Date Criteria.*
Section 4B: Service to Profession or Discipline	Professional Organization/ Committee/ Club Position/ Role or Other Start and End Dates Responsibilities Comments Key Accomplishments Comments	 Position/Role ≠ "Media Guest Speaker" Start and End Dates must meet Standard Date Criteria.*
Section 4C: Community- Engaged Service	 Community-Engaged Service Describe project briefly Name of Community Partner Focus of Community Partner's Work Location (zip code or country) Type of Partnership (e.g., multi-year, one-time) Outcomes/Impact Products Created How students were involved Nature of Collaboration 	
Section 4D: Professionally Related Outreach Service to the Public Beyond the University	 Public Organization/ Committee/ Club Position/ Role or Other City/ State/ Country Audience Served Ex-Officio Start and End Dates Responsibilities Comments Key Accomplishments Comments 	All Public Position/ Roles Start and End Dates must meet Standard Date Criteria.*
Section 4E: Other service activities or accomplishments	Professional Organization/ Committee/ Club Position/ Role or Other Start and End Dates Responsibilities Comments Key Accomplishments Comments	 Position/Role = "Media Guest Speaker" Start and End Dates must meet Standard Date Criteria.*

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SECTION 5 – OTHER ACTIVITIES AND ACCOMPLISHMENTS			
Section 5: Activities and Accomplishments Not Adequately Covered Previously	Intellectual Contributions APA/ MLA citation style (according to Contribution)	Intellectual Contributions Contribution Type = "Cited Research", "Other" Dates must meet Standard Date Criteria.*	
	Awards and Honors	Awards and Honors: • Date Received must meet Standard Date Criteria.*	
	Professional Development	Start and End Dates must meet Standard Date Criteria.*	
	 Professional Memberships Name of Organization Scope of Organization Start and End Dates Description 	Professional Memberships: • Start and End Dates must meet Standard Date Criteria.*	
	 Licenses and Certifications Title of License/ Certification Sponsoring Organization Scope Date Obtained Expiration Date Description 	Licenses and Certifications: The "Date Obtained" and "Expiration Date" must meet standard Start and End Date Criteria.* Licenses and Certifications: The "Date Obtained" and "Expiration Date" must meet standard Start and End Date Criteria.*	

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Comments of Department Personnel Committee Signature of the Chair of Personnel Committee Date	NTS Department Personnel Committee Review Comments and Archive DPC Chair Comments DPC Chair Name DPC Chair Sign-off Date	All fields are mapped into AFR Report and are "R" (Restricted) to users' set-up with that specific Department's security.
 SECTIONS 7 – REVIEW COMME Comments of Department Head or Chair Signature of Department or Chair Date 	NTS Department Head or Chair Review Comments and Archive Dept. Chair Comments Dept. Chair Name Dept. Chair Sign-off Date	All fields are mapped into AFR Report and are "R" (Restricted) to users' set-up with that specific Department's security.
Comments of Department Head or Chair Signature of Department or Chair Date	DNSE COMMENTS Review Comments and Archive Faculty Comments Faculty Name Faculty Sign-off Date	All fields are mapped into AFR Report
SECTIONS 9 – REVIEW COMME Comments of Signature of Dean Date	NTS Dean Review Comments and Archive Dean Comments Dean Name Dean Sign-off Date	All fields are mapped into AFR Report and are "R" (Restricted) to users' set-up with that specific College's security.

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