

Annual Faculty Report (AFR) – Cross Reference Guide

***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 = 2023-2024 so items entered on subsequent screens that fall within this review period (Sept 1, 2023–Aug 31, 2024) 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		
<ul style="list-style-type: none"> • Name: • Date: 	Personal and Contact Information <ul style="list-style-type: none"> • First Name • Middle Name • Last Name 	<ul style="list-style-type: none"> • Date = date report is generated from AFR system.
<ul style="list-style-type: none"> • College: • Department: • Title: • Rank: • Years in Present Rank: 	Yearly Data <ul style="list-style-type: none"> • College • Department • Title • Faculty/ Staff Rank • Years in Present Rank 	<ul style="list-style-type: none"> • Academic Year field on Yearly Data screen must = date range for review period (e.g. 2023-2024)
<ul style="list-style-type: none"> • Highest Degree & Date: 	Education <ul style="list-style-type: none"> • Degree/ Explanation of “Other” • Emphasis/Major • Institution • Year Completed 	<ul style="list-style-type: none"> • Highest Degree You Have Earned? = “Yes”.
<ul style="list-style-type: none"> • Date of First UMass Appointment: • Tenure Decision Date: 	Permanent Data <ul style="list-style-type: none"> • Start Date at University of Massachusetts, Boston • Tenure Decision Date 	
AFR SECTION 2: TEACHING		
Section 2A: Courses	Scheduled Teaching <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Course Term and Year must fall within requested report period (Sept 1, 2023–Aug 31, 2024)

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<p>Section 2B: Changes in Teaching Approach or Responsibilities</p>	<p>Scheduled Teaching</p> <ul style="list-style-type: none"> • Term and Year • Course Prefix and Course Number • Section Number • Course Name • Pedagogical Innovations Comments • New Teaching Material Comments • Enhanced Student Learning Activities Comments 	<ul style="list-style-type: none"> • Course Term and Year must fall within requested report period (Sept 1, 2023–Aug 31, 2024)
<p>Section 2Ci: Doctoral, Masters, Honors Thesis Students</p>	<p>Directed Student Learning</p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Involvement Type contains the text “Chair”, “Director” or “Capstone”. • Start and End Dates must meet Standard Date Criteria.*
<p>Section 2Cii: Students on Whose Committees You Served</p>	<p>Directed Student Learning</p> <ul style="list-style-type: none"> • Involvement Type/ Other • Number of Students • Student(s) First/ Last Name • Comments 	<ul style="list-style-type: none"> • 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.*
<p>Section 2D: Major Advising and Counseling Responsibilities</p>	<p>Academic Advising</p> <ul style="list-style-type: none"> • Number of Undergraduate Students Advised • Number of Graduate Students Advised • Academic Year • Description of Advising Activities 	<ul style="list-style-type: none"> • Academic Year must be within the requested report range or blank.

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<p>Section 2E: Other Teaching and Counseling Activities</p>	<p>Directed Student Learning</p> <ul style="list-style-type: none"> • 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 <p>Non-Credit Instruction Taught</p> <ul style="list-style-type: none"> • Instruction Type/ Other • Sponsoring Organization • Number of Participants • Academic or Professional? • Start and End Dates • Description 	<ul style="list-style-type: none"> • Involvement Type is anything other than those containing “Chair”, “Director”, “Capstone”, “Member” or “Reader”. • Start and End Dates must meet Standard Date Criteria.*
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SECTION 3 – RESEARCH, CREATIVE OR PROFESSIONAL ACTIVITY

<p>Section 3A1: Research Activity – Completed (in print)</p>		<ul style="list-style-type: none"> • 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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<p>a. Books and Monographs</p>	<p>Intellectual Contributions <u>APA book citations:</u></p> <ul style="list-style-type: none"> • 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 <p><u>MLA book citations:</u></p> <ul style="list-style-type: none"> • 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 Comment 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type = “Book, Non-Scholarly-New”, “Book, Non-Scholarly-Revised”, “Book, Scholarly-New”, “Book, Scholarly-Revised”, “Book, Poetry-New”, “Book, Poetry-Revised”, “Monograph”, “Monograph-Poetry”. • Dates subject to Standard Date Criteria.*
<p>b. Textbooks</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA book citation style • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type = “Book, Textbook-New”, “Book, Textbook-Revised”. • Dates subject to Standard Date Criteria.*
<p>c. Edited Book, Anthologies, Collections, Bibliographies</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA book citation style • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type = “Edited Book”, “Edited Textbook”, “Anthology”, “Bibliography”, “Collection”. • Dates subject to Standard Date Criteria.*

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<p>d. Articles in Journals</p>	<p>Intellectual Contributions <u>APA journal citations:</u></p> <ul style="list-style-type: none"> • 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 <p><u>MLA journal citations:</u></p> <ul style="list-style-type: none"> • 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 • Reprint/ Republished Comment 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type starts with text “Journal Article...” or = “Edited Journal Special Issue”. • Dates subject to Standard Date Criteria.*
<p>e. Chapters in Books</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA book citation style • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type starts with text “Book, Chapter...” or “Book, Contribution...” • Dates subject to standard date criteria.*

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<p>f. Reviews, Abstracts Pamphlets</p>	<p>Intellectual Contributions <u>APA journal citations:</u></p> <ul style="list-style-type: none"> • 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 <p><u>MLA journal citations:</u></p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type is one of... “Abstract”, “Book Review”, “Book Review-Poetry”, “Chapbook”, “Law Review”, “Pamphlet”, “Review”, “Review-Poetry”. • Dates subject to standard date criteria.*
<p>g. Papers Published in Proceedings</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • Current Status = “Published”. • Contribution Type contains text “Proceeding”. • Dates subject to standard date criteria.*

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<p>Section 3A2: Research Activity – Works Completed and Accepted for Publication</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • 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.*
<p>Section 3A3: Research Activity – Works Completed and Submitted for Review</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments 	<ul style="list-style-type: none"> • 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.*
<p>Section 3A4: Research Activity – Work in Progress</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments <p>Research Currently in Progress</p> <ul style="list-style-type: none"> • Collaborator(s) • Title • Status • Description 	<p>Intellectual Contributions:</p> <ul style="list-style-type: none"> • 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.* <p>Research-Currently-in-Progress:</p> <ul style="list-style-type: none"> • Status = “Planning”, “On-Going”, “Writing Results”.

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<p>Section 3B1: Creative Activity: Performance, Shows, Compositions, etc. – Completed</p>	<p>Artistic and Professional Performances and Exhibits</p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Status = “Completed” • Dates subject to Standard Date Criteria.* • Was this peer-reviewed/ referred? = “Yes”
<p>Section 3B2: Creative Activity: Performance, Shows, Compositions, etc. – Completed but Not Presented, Performed, Produced or Published</p>	<p>Artistic and Professional Performances and Exhibits</p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Status = “Completed But Not Released” • Dates subject to Standard Date Criteria.* • Was this peer-reviewed/ referred? = “Yes”
<p>Section 3B3: Creative Activity: Performance, shows, compositions, etc. – In Progress</p>	<p>Artistic and Professional Performances and Exhibits</p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Status = “In Progress” • Dates subject to Standard Date Criteria.* • Was this peer-reviewed/ referred? = “Yes”

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<p>Section 3C1: Professional Activity not included in 3A or 3B – Completed</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments <p>Contracts, Fellowships, Grants and Sponsored Research</p> <ul style="list-style-type: none"> • Investigator(s) • Type/ Other • Title • Sponsoring Organization • Date Awarded • Amount • Start and End Dates of Funding • Abstract Comments <p>Presentations</p> <ul style="list-style-type: none"> • Presenter/ Author(s) • Presentation Type/ Other • Presentation Title • Conference/ Meeting Name • Sponsoring Organization • Location • Start and End Dates • Abstract Comments 	<p>Intellectual Contributions:</p> <ul style="list-style-type: none"> • 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.* <p>Contracts, Fellowships, Grants and Sponsored Research:</p> <ul style="list-style-type: none"> • Current Status = “Funded” <p>Presentations:</p> <ul style="list-style-type: none"> • Dates contain a value.
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<p>Section 3C2: Professional Activity not included in 3A or 3B – In Progress</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments <p>Contracts, Fellowships, Grants and Sponsored Research</p> <ul style="list-style-type: none"> • Investigator(s) • Type/ Other • Title • Sponsoring Organization • Date Awarded • Amount • Start and End Dates of Funding • Abstract Comments <p>Presentations</p> <ul style="list-style-type: none"> • Presenter/ Author(s) • Presentation Type/ Other • Presentation Title • Conference/ Meeting Name • Sponsoring Organization • Location • Date • Abstract Comments 	<p>Intellectual Contributions:</p> <ul style="list-style-type: none"> • 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*. <p>Contracts, Fellowships, Grants and Sponsored Research:</p> <ul style="list-style-type: none"> • Current Status = “Pre-Review”, “Currently Under Review” or contains NO value. <p>Presentations:</p> <ul style="list-style-type: none"> • Dates contain NO value.
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<p>Section 3D: Other Research, Creative, or Professional Activities Not Covered Previously</p>	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • APA/ MLA citation style (according to Contribution Type) • Medium of Publication • Abstract Synopsis Comments • Reprint/ Republished Comments <p>Intellectual Property</p> <ul style="list-style-type: none"> • 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 <p>Contracts, Fellowships, Grants and Sponsored Research</p> <ul style="list-style-type: none"> • Investigator(s) • Type • Title • Sponsoring Organization • Amount • Abstract Comments 	<p>Intellectual Contributions:</p> <ul style="list-style-type: none"> • Contribution Type = “Media Presentation” or “Material Regarding New Courses/Curricula” • Dates must meet Standard Date Criteria.* <p>Intellectual Property:</p> <ul style="list-style-type: none"> • “Date Submitted”, “Date of Application”, “Date Approved”, “Date Licensed” or “Date Renewed” must meet Standard Date Criteria* <p>Contracts, Fellowships, Grants and Sponsored Research:</p> <ul style="list-style-type: none"> • Current Status = “Not Funded”.
<p>SECTION 4 - SERVICE</p>		
<p>Section 4A1: University Service - Departmental and Administrative Contributions</p>	<p>Department</p> <ul style="list-style-type: none"> • Position/ Role or Other • Service Name • Elected or Appointed • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments 	<p>Department:</p> <ul style="list-style-type: none"> • Start and End Dates must meet Standard Date Criteria.*
<p>Section 4A2: University Service - School, College, or University and Administrative Contributions</p>	<p>College</p> <ul style="list-style-type: none"> • Position/ Role or Other • Service Name • Elected or Appointed • Served Ex-Officio • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments <p>University</p> <ul style="list-style-type: none"> • Position/ Role or Other • Service Name • Elected or Appointed • Served Ex-Officio • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments 	<p>College/ University:</p> <ul style="list-style-type: none"> • Start and End Dates must meet Standard Date Criteria.*

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<p>Section 4B: Service to Profession or Discipline</p>	<p>Professional</p> <ul style="list-style-type: none"> • Organization/ Committee/ Club • Position/ Role or Other • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments 	<ul style="list-style-type: none"> • Position/Role ≠ “Media Guest Speaker” • Start and End Dates must meet Standard Date Criteria.*
<p>Section 4C: Professionally Related Outreach Service to the Public Beyond the University</p>	<p>Public</p> <ul style="list-style-type: none"> • Organization/ Committee/ Club • Position/ Role or Other • City/ State/ Country • Audience • Served Ex-Officio • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments 	<ul style="list-style-type: none"> • All Public Position/ Roles • Start and End Dates must meet Standard Date Criteria.*
<p>Section 4D: Other service activities or accomplishments</p>	<p>Professional</p> <ul style="list-style-type: none"> • Organization/ Committee/ Club • Position/ Role or Other • Start and End Dates • Responsibilities Comments • Key Accomplishments Comments 	<ul style="list-style-type: none"> • Position/Role = “Media Guest Speaker” • Start and End Dates must meet Standard Date Criteria.*

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SECTION 5 – OTHER ACTIVITIES AND ACCOMPLISHMENTS		
<p>Section 5: Activities and Accomplishments Not Adequately Covered Previously</p>	<p>Intellectual Contributions APA/ MLA citation style (according to Contribution)</p> <p>Awards and Honors</p> <ul style="list-style-type: none"> • Award or Honor Name • Organization/ Sponsor • Purpose • Scope • Date received • Description <p>Professional Development</p> <ul style="list-style-type: none"> • Activity Type/ Other • Title • Sponsoring Organization • City/ State/ Country • Credit Hours • Start and End Dates • Description <p>Professional Memberships</p> <ul style="list-style-type: none"> • Name of Organization • Scope of Organization • Start and End Dates • Description <p>Licenses and Certifications</p> <ul style="list-style-type: none"> • Title of License/ Certification • Sponsoring Organization • Scope • Date Obtained • Expiration Date • Description 	<p>Intellectual Contributions</p> <ul style="list-style-type: none"> • Contribution Type = “Cited Research”, “Other” • Dates must meet Standard Date Criteria.* <p>Awards and Honors:</p> <ul style="list-style-type: none"> • Date Received must meet Standard Date Criteria.* <p>Professional Development:</p> <ul style="list-style-type: none"> • Start and End Dates must meet Standard Date Criteria.* <p>Professional Memberships:</p> <ul style="list-style-type: none"> • Start and End Dates must meet Standard Date Criteria.* <p>Licenses and Certifications:</p> <ul style="list-style-type: none"> • “Date Obtained” and “Expiration Date” must meet standard Start and End Date Criteria.*

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SECTIONS 6 – REVIEW COMMENTS Department Personnel Committee		
<ul style="list-style-type: none"> Comments of Department Personnel Committee Signature of the Chair of Personnel Committee Date 	<p>Review Comments and Archive</p> <ul style="list-style-type: none"> DPC Chair Comments DPC Chair Name DPC Chair Sign-off Date 	<ul style="list-style-type: none"> All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific Department’s security.
SECTIONS 7 – REVIEW COMMENTS Department Head or Chair		
<ul style="list-style-type: none"> Comments of Department Head or Chair Signature of Department or Chair Date 	<p>Review Comments and Archive</p> <ul style="list-style-type: none"> Dept. Chair Comments Dept. Chair Name Dept. Chair Sign-off Date 	<ul style="list-style-type: none"> All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific Department’s security.
SECTIONS 8 – FACULTY RESPONSE COMMENTS		
<ul style="list-style-type: none"> Comments of Department Head or Chair Signature of Department or Chair Date 	<p>Review Comments and Archive</p> <ul style="list-style-type: none"> Faculty Comments Faculty Name Faculty Sign-off Date 	<ul style="list-style-type: none"> All fields are mapped into AFR Report
SECTIONS 9 – REVIEW COMMENTS Dean		
<ul style="list-style-type: none"> Comments of Signature of Dean Date 	<p>Review Comments and Archive</p> <ul style="list-style-type: none"> Dean Comments Dean Name Dean Sign-off Date 	<ul style="list-style-type: none"> All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific College’s security.