

ACADEMIC PORTFOLIO JOB AID – ACADEMIC PERFORMANCE ASSESSMENT

The screenshot shows the Interfolio 'Sign In' page. On the left, there are input fields for 'Email *' and 'Password *', a 'Sign In' button, and a link for 'Forgot your password?'. On the right, under 'Other Sign In Options', there is a button for 'Sign in with Partner Institution' and a 'Sign in with Google' button. A yellow box highlights the 'Sign in with Partner Institution' button, with a red arrow pointing to it from above. A larger red arrow points from below to the same button. Red text below the arrows reads: 'Login into Academic Portfolio using your UCalgary Login Details'. At the bottom of the page, there is a link for 'Don't have an account? Create an account'.

Login to Academic Portfolio using the link through the portal

My UCalgary > All About Me > My Job > Academic Portfolio

or

Click the link in the Interfolio welcome email, then select the button –

Sign in with Partner Institution

to login using your UCalgary login email and password

ACADEMIC PORTFOLIO JOB AID – ACADEMIC PERFORMANCE ASSESSMENT

_2023 - Academic Performance Assessment - Department of Medicine

Unit: Department of Medicine | Type: Review | Packet Deadline Type: Hard Deadline | Packet Due Date

Overview **Packet** 1

View Instructions | Preview Packet 2

Academic Performance Assessment - Submission Form
Not Yet Submitted Unlocked | Edit

(1) Click 'Packet', next to Overview

_2023 - Academic Performance Assessment - Department of Medicine 2

Unit: Department of Medicine | Type: Review | Packet Deadline Type: Hard Deadline | Packet Due Date

Overview Packet

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The following sections are outlined in detail below.

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(2) Start with by clicking the top right button 'View instructions'.

▼ Academic Performance Assessment - Submission Form
Not Yet Submitted **Unlocked** **Submit** 0 of 0 Required Files

Complete the form questions, and save your responses.

NOTE: submitted form answers will be locked for editing. Once ready for review, hit 'Submit'.

Academic Performance Assessment - Candidate Submission Form 5 required questions, **3** **Fill Out Form**

This form has not been completed.

Candidate Instructions **2** **Instructions expanded**

The Academic Performance Assessment and Progression Through the Ranks (PTR) process is guided by the Collective Agreement between the Board of Governors and the Faculty Association, Article 29.

"The performance of every Continuing, Contingent Term, Limited Term, Special Limited Term and Pre-Tenure Track Appointment academic staff member shall be formally reviewed on a biennial basis. The biennial period will be two academic years commencing on July 1 and ending on June 30. The assessment will be based on the biennial academic performance report. The PTR and OAA awarded in the assessment process will apply to each of the current and succeeding years. The deadline for the submission of biennial academic performance reports shall be established by each Faculty."

- CA 29.4.1

The Outstanding Achievement Awards (OAAs) and MOA COVID Period Assessment are also supported increases to salary which applicants can apply for (or in the case of OAAs, can also be nominated by the Head or equivalent). These additional applicants are sent through the Dean to the Faculty Assessment Committee (FAC) for final assessment.

Next Steps:

1. Review Article 29 of the Collective Agreement: Academic Performance Assessment and Progression Through the Ranks
2. Complete the application package, including:
 - PTR Application Form, and if applicable
 - Academic Performance Report (APR)
 - Outstanding Achievement Awards (OAA) Required Documents
 - MOA COVID Period Assessment Required Documents

The deadline for individual applications is set by the Faculty.

No later than the Faculty due date, click the **'Submit'** button on all sections to forward your Academic Performance Report for Progression Through the Ranks (PTR), and if opted to apply the required supporting documents for the Outstanding Achievement Awards (OAA) and MOA COVID Period Assessments, to the Head for review.

The Interfolio application system will be closed for submissions by September 2, 2023.

Reference Documents and Supporting Resources are listed further below.

Process Details:

- As per Article 29.4.1 of the Collective Agreement, the period of assessment is effective July 1, 2021 to June 30, 2023.
- *Eligible applicants may submit an application, supported by a copy of their APR, for recommendation by the*

Close

(3) Fill out the submission form, answering all questions.

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▼ Progression Through the Ranks (PTR) Submit 0 of 0 Required Files

Not Yet Submitted Unlocked

Please submit a copy of your Academic Performance Report (APR) for your assessment for Progression Through the Ranks (PTR).

Details on what to include in your APR are referenced below.

"The biennial academic performance report shall be provided in a form at the discretion of the academic staff member. The APR should provide a summary of the academic staff member's academic work over the assessment period, outlining how the academic staff member has met the criteria in the GFC Handbook and Faculty Guidelines, and identifying any particular achievements they would like to be recognized in the following areas: (1) teaching; (2) research; (3) service, and/or 4) other academic work."

The report is expected to be between 2 and 5 pages in length.

This report shall be central to the PTR and OAA review processes. In the absence of a report submitted by the academic staff member, the Head's PTR assessment process will be based on the information they are routinely aware of (the assignment of duties, reports of research grants awarded, etc.)* (CA 29.1.4 b)

"Progression Through the Ranks (PTR) Increases: PTR Increases are the annual increases to Rank Salary for academic staff members who meet the expected standards of performance for academic staff members at the University of Calgary. The value of these increases is established in Schedule A." (CA 29.1.4 j)

Academic Performance Report (APR) 0 Added Add

The APR is expected to be between 2 and 5 pages in length. PDF recommended.

No files have been added yet.

(4) You may upload your Academic Performance Report (APR) under the section 'Progression Through the Ranks (PTR)' to support your PTR assessment

A PDF of 2 to 5 pages is expected.

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✓ Outstanding Achievement Awards (OAAs)
Not Yet Submitted Unlocked Submit 0 of 0 Required Files

Academic Staff Members may elect to apply for Outstanding Achievement Awards (OAAs) by uploading additional information in support of their application. Details are referenced below.

"OAAs are increases to Rank Salary awarded to a limited number of academic staff. They are intended to recognize excellence and an academic staff member's exceptional and outstanding performance. The value of these Awards is established in Schedule A. Academic staff shall not be eligible for an OAA if they have received an OAA in the immediately preceding review cycle." (CA 29.1.4 j)

"Should an academic staff member apply for an OAA, in addition to the regular APR material, the academic staff member shall be required to provide additional information supporting their application, which demonstrates their excellence and exceptional and outstanding performance. The academic staff member shall use their discretion to determine the appropriate substance and volume of material they wish to be considered for an OAA. However, the expectation is that the supplementary OAA material will be limited to 5 pages in length." (CA 29.1.4. b)

Additional Information - OAA 0 Added

To be eligible for OAA consideration by the Faculty Assessment Committee (FAC), upload the required additional information in support of your application.

Limited to 5 pages in length. PDF recommended.

No files have been added yet.

Add

(5) If you clicked 'yes' in your submission form to apply for other increases, additional information is required to upload under each relevant section:

Outstanding Achievement Awards (OAAs)

Please upload the additional information required
A PDF limited to 5 pages in length.

✓ MOA COVID Period Assessment
Not Yet Submitted Unlocked Submit 0 of 0 Required Files

Academic Staff Members may elect to apply for the MOA COVID Period Assessment Award by uploading additional information. Details are referenced below.

Further to the MOA COVID Period Assessment, in Article 29 –

Whereas that MOA provided that academic staff members who wished to have their achievements from 2019 to 2021 merit cycle recognized could do so in the 2023 review.

1. The Governors shall provide for an additional pool of funds for academic staff members whose performance during the 2019 to 2021 merit cycle was excellent, exceptional and outstanding. Recognizing that eligible academic staff members have previously been provided with a 3.2 increment for the 2019 to 2021 merit cycle, the value of this award shall be \$1,000.00. Furthermore, up to 16.5% of academic staff members in each Faculty may be eligible to receive this award. **The criteria used for this award shall be the same used in determining successful OAA recipients.**

2. **Academic staff members who wish to be considered for additional consideration of their 2019 to 2021 accomplishments are required to do so in a separate report provided along with their regular APR for the 2021 to 2023 cycle.**

3. **The review process shall proceed as a parallel process to the 2021 to 2023 OAA consideration, consistent with the processes established in Article 29. Moreover, the determination of successful candidates for this award shall be made in accordance with the processes set out in Article 29.**

Additional Information - COVID Period Assessment 0 Added

To be eligible for MOA COVID Period Assessment consideration by the Faculty Assessment Committee (FAC), upload the required additional information in support of your application.

Limited to 5 pages in length. PDF recommended.

No files have been added yet.

Add

MOA COVID Period Assessment

Please upload the additional information required
A PDF limited to 5 pages in length.

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(5a) FINALIZE SUBMISSION –

Click ALL Submit buttons

Once you are ready for the Head to review your submission, and you have confirmed you have finished uploading any additional information related to your case, you must select 'Submit' buttons on all sections (APA, PTR, OAA, MOA Covid), **even if you are NOT applying or uploading any documents.**

▼ Academic Performance Assessment - Submission Form
Not Yet Submitted **Unlocked** **Submit** 0 of 0 Required Files
Complete the form questions, and save your responses.
NOTE: submitted form answers will be locked for editing. Once ready for review, hit 'Submit'.
Academic Performance Assessment - Candidate Submission Form 5 required questions, **Fill Out Form**
This form has not been completed.

▼ Progression Through the Ranks (PTR)
Not Yet Submitted **Unlocked** **Submit** 0 of 0 Required Files
Please submit a copy of your Academic Performance Report (APR) for your assessment for Progression Through the Ranks (PTR).

▼ Outstanding Achievement Awards (OAs)
Not Yet Submitted **Unlocked** **Submit** 0 of 0 Required Files
Academic Staff Members may elect to apply for Outstanding Achievement Awards (OAs) by uploading additional information in support of their application. Details are referenced below.
"OAs are increases to Rank Salary awarded to a limited number of academic staff. They are intended to recognize excellence and an academic staff member's exceptional and outstanding performance. The value of these Awards is established in Schedule A. Academic staff shall not be eligible for an OAA if they have received an OAA in the immediately preceding review cycle." (CA 29.1.4.)
"Should an academic staff member apply for an OAA, in addition to the regular APR material, the academic staff member shall be required to provide additional information supporting their application, which demonstrates their excellence and exceptional and outstanding performance. The academic staff member shall use their discretion to determine the appropriate substance and volume of material they wish to be considered for an OAA. However, the expectation is that the supplementary OAA material will be limited to 5 pages in length." (CA 29.1.4. b)
Additional Information - OAA 0 Added **Add**
To be eligible for OAA consideration by the Faculty Assessment Committee (FAC), upload the required additional information in support of your application.
Limited to 5 pages in length. PDF recommended.
No files have been added yet.

▼ MOA COVID Period Assessment
Not Yet Submitted **Unlocked** **Submit** 0 of 0 Required Files
Academic Staff Members may elect to apply for the MOA COVID Period Assessment Award by uploading additional information. Details are referenced

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References, Documents and Resources Unlocked 6

- [HR Academic Performance Assessment website](#) - includes reference documents
 - [Article 29, Schedule A and MOA COVID Period Assessment](#) (ratified June 2023)
 - assessment timeline
- [GFC Academic Staff Criteria & Process Handbook](#)
- [Faculty Guidelines](#) – Please ensure you use the faculty guidelines in effect on July 1, 2021.

(6) Check the HR Academic Performance Assessment website for reference documents such as Article 29, Schedule A, MOA Covid Period Assessment, assessment timeline and FAQs.

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Packet	Type	Status	Due Date	
Department of Medicine _2023 - Academic Performance Assessment - Regular Academics (2023)	Review	Last Submitted on Jun 23, 2023		View

(7) Confirmation of submission status can be seen under 'Your Packets' on the left-panel menu. You may still view the submitted Packet, but it is now locked and sent to the Head for review.

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To unlock or revise any submitted sections of your packet,
please contact:

hracadem@ucalgary.ca