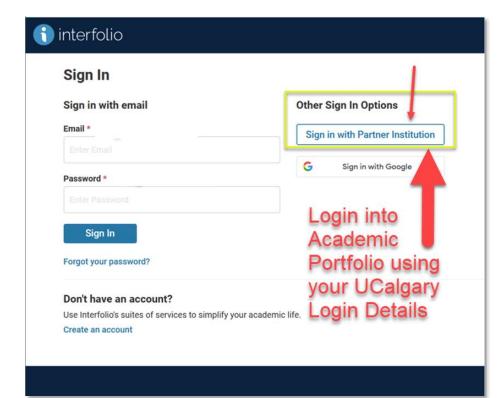
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LOGGING INTO ACADEMIC PORTFOLIO

Login 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

To guide your assessment, review the Academic

Performance Assessment website: <u>https://www.ucalgary.ca/hr/work-compensation/labour-</u> relations/academic-labour-relations/academic-staff-tucfa/academic-performance-assessment

for resources (Article 29, Schedule A, MOA Covid Period Assessment, assessment timeline, GFC Academic Staff Criteria & Process Handbook, Faculty Guideline, etc.).

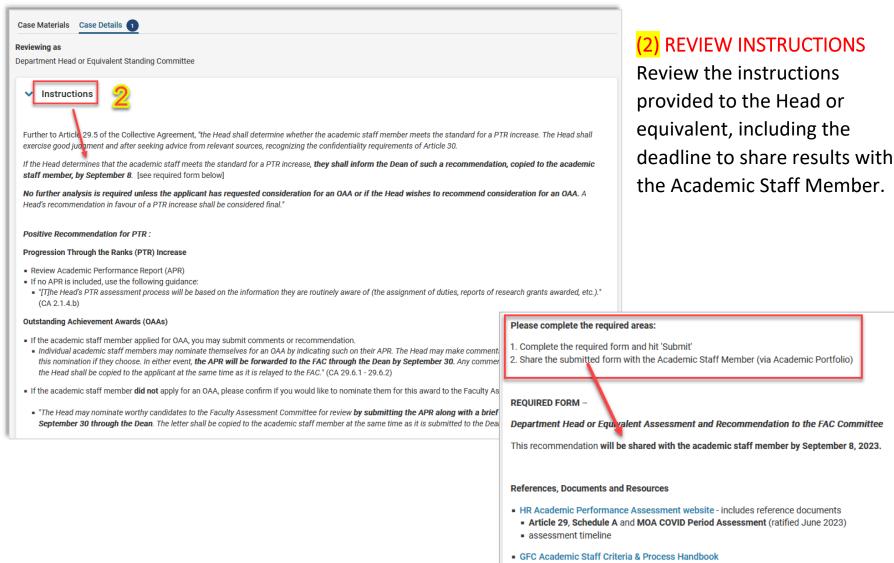
Under Cases, select Academic Staff member Name (case) to begin reviewing:

	Name 🗸	Туре 🗢	Template Name 🗢	Status 🖨	
	Candidate TRN_9 Department of Medicine	Review	_2023 - Academic Performance Assessment - Regular Academics (2023)		
Step 1 of 5: Head or Equivalent - Assessment and PTR Recommendation Sep 8, 2023					
	Candidate TRN_9 Department of Medicine	Review	_2023 - Academic Performance Assessment - Department of Medicine		
Step 1 of 5: Department Head or Equivalent - Assessment and PTR Recommendation Sep 8, 2023 🛕 Required Documents					

(1) OPEN CASE

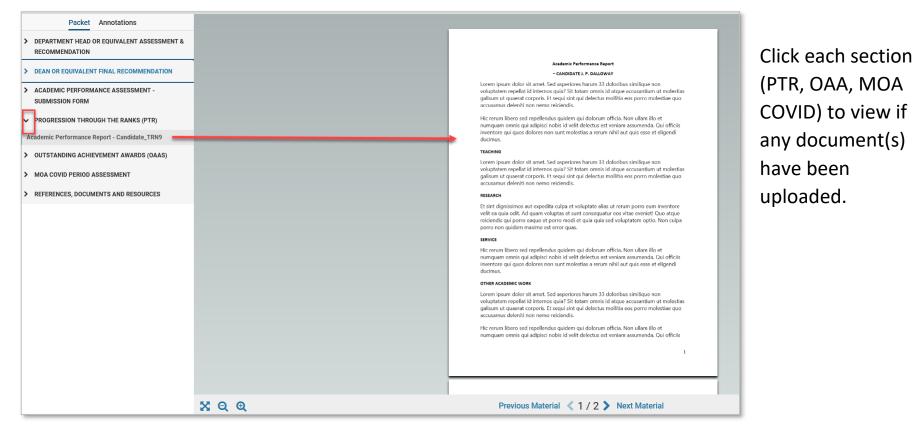
Click 'Case Details', next to Case Materials

Home	Candidate TRN_9		Send Case 🗸 Case Options 🗸
Academic Portfolio Training Announcements & Help Profile	Unit Department of Medicine	Template _2023 - Academic Performance Assessment - Department of Medicine	Status Select Status
Activities Forms & Reports Vitas & Biosketches Find Colleagues Account Access	Case Materials Case Details 1	Q Read Case	
Review Steps Cases	Expand All Collapse All Internal Sections These sections are available to committee members review be shared with the candidate by an administrator or comm	ving the case and cannot be viewed by the candidate. Plea	Download 🖸 Share 🕸 Settings 📰 Move
© 2023 Interfolio, Inc. Program Policies	 You are asked to submit required items as part of Department Head or Equivalent Assessment 		Edit Add File

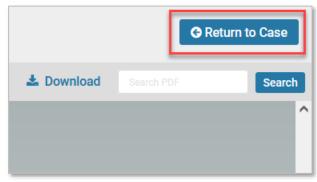


• Faculty Guidelines - Please ensure you use the faculty guidelines in effect on July 1, 2021.

Candidate TRN_9		Send Case 🗸 Case Options		
epartment of Medicine	Template _2023 - Academic Performance Assessment - Department of Medicine	Status Select Status	<mark>(3)</mark> REVIEW THE CA	ASE
Case Details ① earch case materials by title Case Details ① Expand All ② Collapse All Internal Sections hese sections are available to committee members reviewi e shared with the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by an administrator or committee Image: A state of the candidate by a state of the candida	ng the case and cannot be viewed by the candidate. Pl tee manager.	■ 3 ■ Download ⊠ Share ≪ Settings ≡ Mo Please not, that some materials added to internal sections.	applicable, docum	w the Academic bmission, and if
Department Head or Equivalent Assessme Recommendation can be shared with the academic.	ent & Recommendation	Edit Add File		O Return to Case
Materials	=			Download Search PDF Search
No files have been added to this section.	Packet Annotations Packet Annotations Packet Annotations Packet Annotations Packet RECOMMENDATION PACADEMIC PERFORMANCE ASSESSMENT I Submission Form Academic Performance Assessment - Candidate Bubmission Form Proceession THROUGH THE RANKE (PTR) OUTSTANDING ACHIEVEMENT AWARDS (GAAS MOA COVID PERIOD ASSESSMENT REFERENCES, DOCUMENTS AND RESOURCES	Packet Fo Acade Form UCID 1734 Facut Curr Depa Fam Are y Yes- Are y	emic Performance Assessment - Candidate Submission	
		<u>୪ ୧ ଭ</u>	Previous Material < 1 / 1 🔉 Next Material	



To go back to the case details, click 'Return to Case' button at top right corner.



Please complete the required areas: 1. Complete the required form and hit 'Submit' 2. Share the submitted form with the Academic Staff Member (via Academic Portfolio) REQUIRED FORM – Department Head or Equivalent Assessment and Recommendation to the FAC Comm This recommendation will be shared with the academic staff member by September 8, 2	
References, Documents and Resources	
 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, 2 	021.
✓ Required Items	1 missing
All required items must be completed before the case can advance to the next step. Forms must be c omit the form as a requirement for a user.	ompleted by the assigned user, however a Committee Manager or Administrator can select to
Forms Form Name Assume	Actions
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee Mana Committee 1 required questions	Manage Respondents
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Department Head Committee 1 required questions	_TRN4 (You) Fill Out Form

(4) FILL OUT THE HEAD ASSESSMENT AND RECOMMENDATION

Now that you have completed reading the assessment, and uploaded documents, fill out the Head Recommendation under 'Required Items' by clicking 'Fill Out Form'

The assessment will open, and the Head is required to answer the first question under **Progression Through** the Ranks (PTR).

2023_Department Head or Equivalent Assessment and Recommendation to the FAC
Committee
Form to be used by the Head in recommendation for PTR, OAA and/or MOA COVID Period Award.
Form to be shared with the candidate by September 8.
ACADEMIC PERFORMANCE ASSESSMENT For detailed instructions, please scroll further below.
The Head or equivalent will share a copy of this form with applicant after submission.
Progression Through the Ranks (PTR)
Do you recommend the academic staff member for a PTR increase? *
• Yes - I recommend for a PTR increase.
O No - consider not recommending a PTR increase (see Article 29.5.3 - 29.5.4. Please contact hracadem@ucalgary.ca)
Outstanding Achievement Awards (OAAs)
If applicant has NOT applied for Outstanding Achievement Award (OAA), do you wish to nominate them?
*During the PTR Assessment, the Head may identify individuals to be nominated for an OAA. The Head may nominate worthy candidates to the Faculty Assessment Committee for review by submitting the APR along with a brief letter indicating reasons by September 30 through the Dean. The letter shall be copied to the academic staff member at the same time as it is submitted to the Dean.
- CA 29.6.1
Additional documents required for OAA Nominations
 Brief letter of recommendation from Head, and copy of APR to be sent to the Dean by September 30, 2023
"Where an academic staff member has received comments or a recommendation from the Head under Article 29.6.1 or 29.6.2, they may submit a response to the FAC through the Dean by October 10.
- CA 29.6.3
Yes - I would like to nominate applicant for an OAA
Additional Comments

Questions under Outstanding Achievement Awards are *optional* to respond to.

Please note:

Answers and/or comments added under OAAs **will be Shared** with the recommendation to the Academic Staff Member.

You can save your responses. Or if ready, submit your recommendation and/or comments.

Last saved on Jul 13, 202	
Submit Form	Return to Case

Please hit the '*Refresh'** button on your browser, after you have submitted the form.

*This ensures the form is updated on the case, and ready to share with the Academic Staff Member.

(5) SHARE DEPARTMENT HEAD RECOMMENDATION WITH ACADEMIC STAFF MEMBER

After submitting the Head Recommendation, the Head can still edit their submission before sharing it with the Academic Staff Member, by returning to **Case Details**; then under **Required Items**, click **Edit Submission**

• Required Items All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.					
Forms					
Form Name	Assignee	Actions			
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee 1 required questions	Committee Managers	Manage Respondents			
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee 1 required questions	Department Head _TRN4 (You)	Edit Submission			

If there are no further changes to the submission, then the recommendation can be shared.

The Head is required to share the recommendation with the Academic Staff Member, no later than September 8.

(5a) SELECT COMMITTEE FORM TO SHARE HEAD RECOMMENDATION

The case can be shared directly through Academic Portfolio. Please use the following steps:

Navigate to the **Case Materials** tab. Under **Internal Sections**, locate **Committee Forms** you will see the 2023_Department Head or Equivalent Recommendation

<u>Click the check box</u> on the left of the Committee Forms – 2023_Department Head Assessment and Recommendation to FAC, then on the top-right blue banner, click Share, and under drop-down menu select With Candidate

Case Materials Case Details		
Search case materials by title		
Q	Read Case	
Expand All Collapse All	🕹 Download 🖂	Share 🛠 Settings 🗮 Move
Internal Sections These sections are available to committee members reviewing the case and cannot be viewed be be shared with the candidate by an administrator or committee manager.	With Candidate With Committee Memburs	added to internal sections can
Candidate Shared Section Materials		Edit Add File
No files have been added to this section.		
Committee Forms	Details	Actions
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee Step 1: Department Head or Equivalent Standing Committee	Last Response Submitted Jul 19, 2023	Edit

(5b) SEND EMAIL NOTIFICATION TO ACADEMIC – TO VIEW SHARED HEAD RECOMMENDATION

A message to the candidate is created to notify them. Please use the template email provided (next page).

Message to Candidate	×
To Candidate TRN_9 (aptestcandidate@ucalgary.ca) Subject * Academic Performance Assessment - Head Recommendation Message * $\boxed{II} \ B I I_x \mid I = I = II \ II = II \ II = II \ II = II = II \ III = II \ III = III \ III = III \ III = III \ III = III \ IIII \ IIII = IIII \ IIIIIIII$	Details Direct email reply: aptestdepthead@ucalgary.ca File Response: Bnable When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.
The Head or Equivalent assessment results have been shared with you. Please login to Academic Portfolio to access your packet and view the results under Shares Committee Forms. For issues logging into Academic Portfolio, please contact: help@interfolio.com body p Share Files Verify Files shared with this message can be viewed by the candidate after longing into Interfolio. Methodation form is attached 4 Add	Please use the recommended email subject line and body template provided.
Preview	Send Cancel

EMAIL NOTIFICATION TEMPLATE FOR SHARED HEAD RECOMMENDATION

Subject:

Academic Performance Assessment – Head Recommendation

Message:

Dear Academic Staff Member,

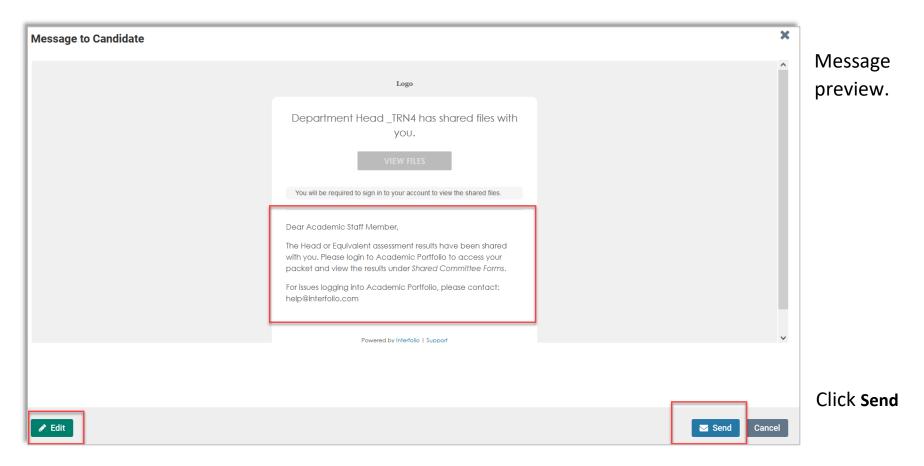
The Head or Equivalent assessment results have been shared with you. Please login to Academic Portfolio to access your packet and view the results under **Shared Committee Forms**.

Please login using the Portal: My UCalgary > All About Me > My Job > Academic Portfolio

The link provided in Interfolio's email notification can only be accessed through **Sign in with Partner Institution** button, then enter University of Calgary.

For issues logging into Academic Portfolio, please contact: <u>help@interfolio.com</u> or view technical support information on the <u>Academic Performance Assessment</u> website.

You may preview the message, before sending the email notification, by clicking Preview.



				partment Head
MESSAGE SENT		×	tm	ent Head or Equ
our message was successfully s	ent.			

A message pop-up shows on bottom-left corner, once sent.

(5c) WHAT THE ACADEMIC STAFF MEMBER SEES ONCE THE HEAD SHARES THE RECOMMENDATION

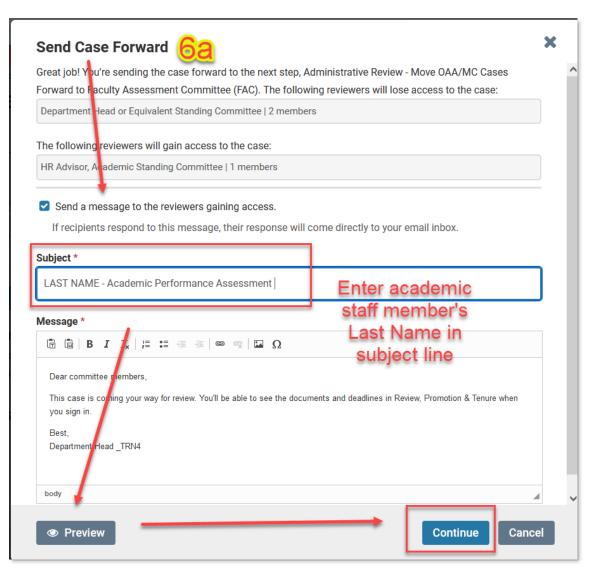
Unit	Туре		Packet Deadline Type	Packet Due Date		
Departme	ent of Medicine Review		Hard Deadline 🕑			
Overview	Packet Shared Committee Files					
Below yo	u will see files that have been sent to you b	/ committee members.		Actions 🗸		
∨ s	ent by Department Head _TRN4 or	Jul 21, 2023				
- 1	Shared Files			Actions		
	2023_Department Head or Equiv Committee Step 1: Depar	alent Assessment and Recomm ment Head or Equivalent Standi		Download		
t						
		Viewing Files				Committee Files
						Search PDF Search
				ACADEMIC PERFORMANCE ASSESSMENT		
				Progression Through the Ranks (PTR)		
				Do you recommend the academic staff member for a PTR increase?		
				Yes - I recommend for a PTR increase.		
				Outstanding Achievement Awards (OAAs)		
				For applicants who have applied for Outstanding Achievement Awards, y	you may add comments	
				or a recommendation (optional) I support the Academic Staff Member's application for OAA.		
				1		
			lf (optional comments are		
			add	ed by the Head, they will		
			baa	hared with the Academic		
			De s			
		0		Staff Member		
		% ବ୍ ଭ		< 2 / 2 >		

(6) FINAL STEP - MOVE CASE FORWARD TO HR

Once the recommendation is shared with the Academic Staff Member, complete the final step by moving the case forward to HR for Administrative Review.

Select the dark blue button Send Case on the top-right, and choose Forward to Administrative Review

University of Calgary Development > Cases >			
Candidate TRN_9		Send Case	✓ Case Options ✓
Unit Department of Medicine	Template _2023 - Academic Performance Assessment - Academics (2023)	Forward to Administrative Review - Move OAA/MC Cases Forward to Faculty Assessment Committee (FAC)	
Case Materials Case Details			O
Search case materials by title	Q Read	Case	
Expand All Collapse All		📥 Download 🛛 Share	📽 Settings 🛛 🚍 Move
Internal Sections			
These sections are available to committee members revi be shared with the candidate by an administrator or com		date. Please note that some materials	added to internal sections can
 Candidate Shared Section 			Edit Add File
Materials			
No files have been added to this section.			



(6a) NOTIFICATION TO HR

To move the case forward, an email notification will open.

Please add the Academic Staff Member's name to the subject line.

Click **Continue** to finish moving the case forward to HR for administrative reviewⁱ.

ⁱCases with applications for OAA and/or MOA COVID Period Award will be forwarded on to the Faculty Assessment Committee (FAC) for further review.

Once the case is moved forward, it is removed from the Head's list of outstanding cases to review.

On the left-panel menu, under **Review Steps**, return to **Cases**. Only remaining assessments to be actioned will be visible –

Required Documents – shows the Head has not completed their recommendation on that case.

Home ademic Portfolio Training	Cases					
Announcements & Help	Search cases					
Profile		Q Filter				
Activities						
Forms & Reports						
Vitas & Biosketches 🔹 🗸	1 of 1 cases					
Find Colleagues						
Account Access	Name 🗸	Туре 🗢	Template Name 🗢	Status 🗢		
view Steps	Candidate TRN_9 Department of Medicine	Review	_2023 - Academic Performance Department of Medicine	Assessment -		
	Step 1 of 5: Department Head or Equivalent - Assessment and PTR Recommendation Sep 8, 2023 A Required Documents					

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

hracadem@ucalgary.ca

For Interfolio Login issues, contact:

help@interfolio.com