



People and Culture

User Guide: PTR in Manager Self-Service

Step-By-Step Guide for Heads and Equivalents

May 2025

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



Introduction

[Article 29](#) of the Collective Agreement outlines the process for academic performance assessment and Progression Through the Ranks (PTR) along with OAAs for Continuing, Limited Term, Contingent Term, Special Limited Term or Pre-Tenure Track academic staff.

Progression Through the Ranks (PTR) 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](#) (Article 29.1.4).

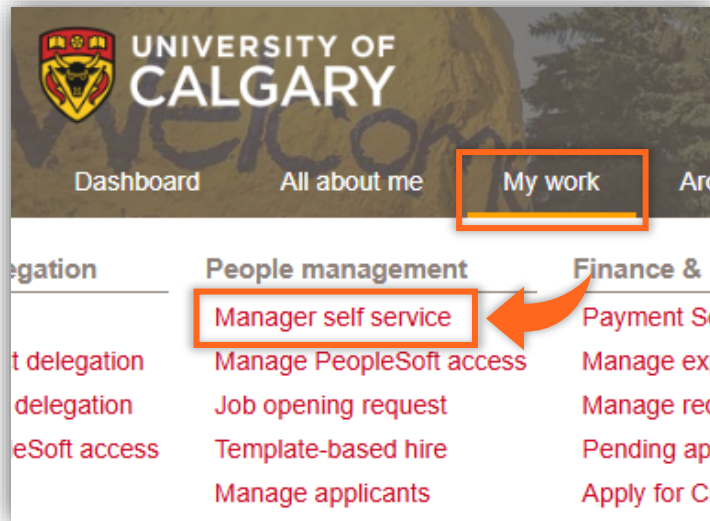
The deadline PTR is set by each faculty and is no later than September 1.

This guide outlines detailed, step-by-step procedures for reviewing PTR assessment cases, including Academic Performance Reports (APRs), as part of the Academic Performance Assessment process.

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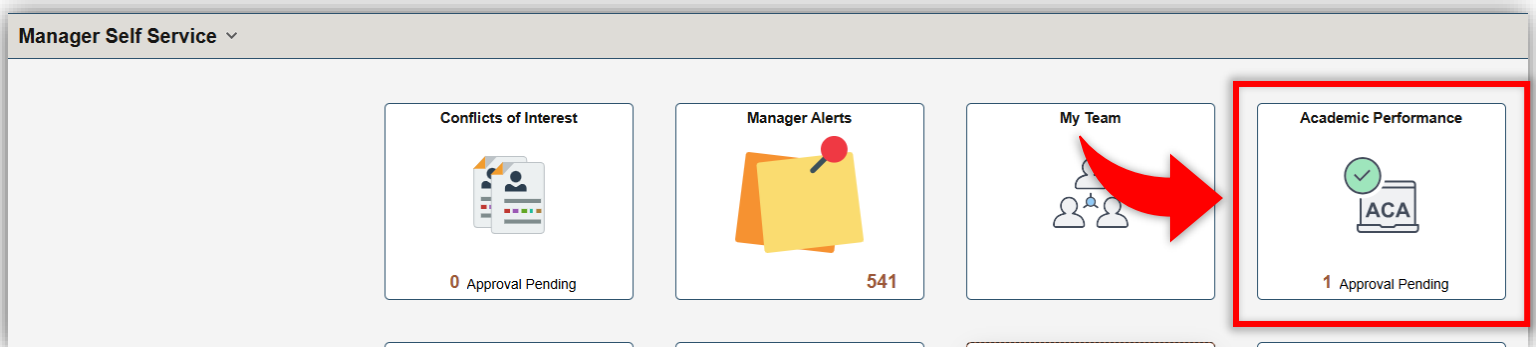
How to Login to Manager Self-Service for PTR



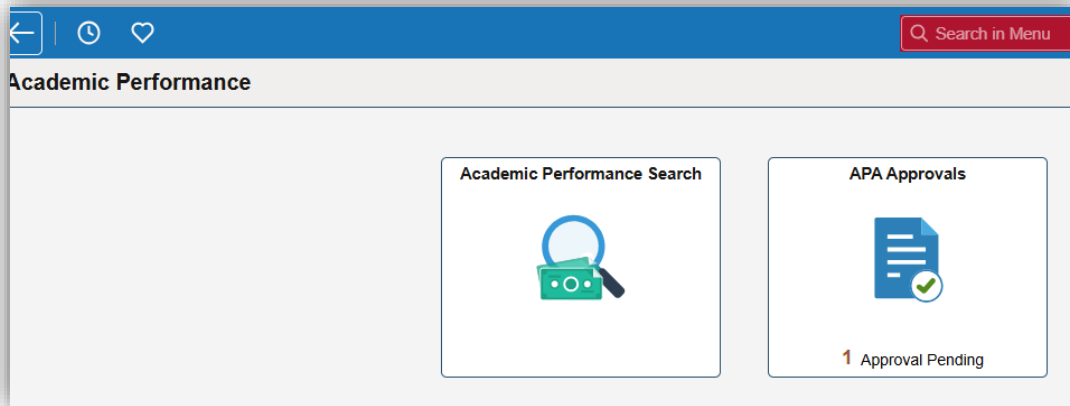
Login to Manager Self-Service using the [My UCalgary Portal](#).

My UCalgary > My Work > Manager Self Service

Click on the **Academic Performance** tile.

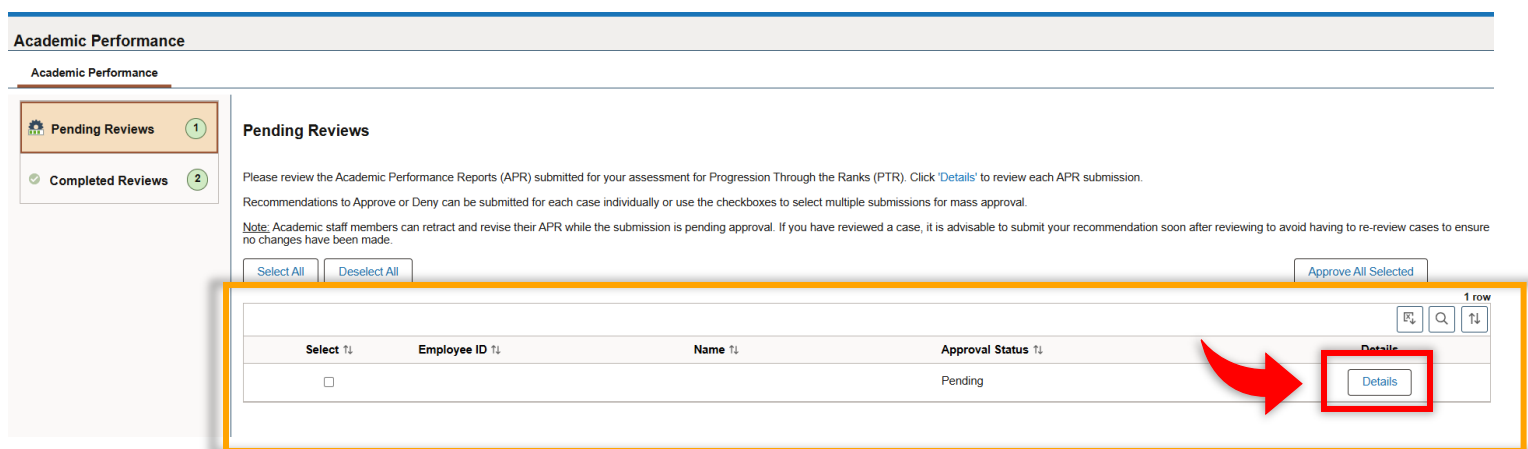


Within this tile, you will have access to 2 tiles: [Academic Performance Search](#) and [APA Approvals](#).



Reviewing Academic Performance Reports (APR)

Click on the [APA Approvals](#) tile to review PTR assessments that have been submitted and are pending your approval. All submitted assessments will appear as a list on the landing page.



Click [Details](#) on an individual assessment to review the APR submission.

Review the [Guidelines](#) section for important information on reviewing the Academic Performance Report (APR). For details on APR requirements, refer to Collective Agreement [Article 29.1.4](#).

Academic Performance

Performance Details

Name

Job Title Professor | Dean's Office - Nursing

Employee Id

Performance ID 72

Period Begin Date 2023/07/01

Period End Date 2025/08/30

Due Date 2025/09/08

Review Status Advanced by PPS

Alternate Approver

Guidelines

Heads or equivalents shall determine whether the academic staff member meets the standard for a PTR increase. 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.).

By September 8, click the 'Approve' or 'Deny' button to submit your recommendation for PTR. Once the PTR is approved or denied, no further revisions can be made.

Resources*

- PTR Guide for Academic Leaders
- Academic Performance Assessment website
- Collective Agreement (Article 29 and Schedule A)
- GFC Academic Staff Criteria & Process Handbook
- Faculty Guidelines

*Right-click and select 'Open in a new window' to keep this page open. Directly clicking links will navigate away from this page.

Outstanding Achievement Awards (OAA) are annual increases to rank salary awarded to staff members to recognize excellence and outstanding performance. The deadline for Head recommendations for OAA is September 30. For more information and to submit a recommendation for OAA, visit the [Academic Performance Assessment website](#)

For support, contact hrcadem@ucalgary.ca

Add Document

No Document has been attached.

Add Attachment

Approvals

Approve

Deny

Comments

Acad Performance Assessment

Academic Performance

Pending

APR Review

Pending

Academic Approval >

Click on the [arrow](#) next to the [attached document](#) to open and review the APR.

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For support, contact hrcadem@ucalgary.ca

Add Document

Add Attachment

Document Name	Description	Attached By	Attached	Status
APR.docx		Francesca Cadel	25/04/17 01:26:48 PM	Active

Submitting PTR Recommendations

When ready, click the **Approve** button to recommend a PTR increase for the staff member, no later than September 8.

*If considering not recommending PTR, refer to Collective Agreement [Article 29.5.3](#) and the **Head's Resource Guide** for next steps.*

*The Head or equivalent should click **Deny** after submitting their final recommendation to the Dean (September 30). In the **Comments** box, note the date the final recommendation was emailed to the academic staff member and Dean.*

The screenshot shows the 'Academic Performance' form. A red box highlights the 'Approvals' section, which contains 'Approve' and 'Deny' buttons. A red arrow points from the 'Approve' button towards the 'Comments' section. The 'Comments' section is a large text area at the bottom of the form. Other sections include 'Performance Details' with fields for Name, Job Title, Employee Id, and Performance ID; 'Guidelines' with instructions and resources; and 'Add Document' with an 'Add Attachment' button.

Academic Performance	
Performance Details	
Name	Period Begin Date: 2023/07/01
Job Title: Professor Dean's Office - Nursing	Period End Date: 2025/06/30
Employee Id	Due Date: 2025/09/08
Performance ID: 72	Review Status: Advanced by PPS
	Alternate Approver
Guidelines	
Heads or equivalents shall determine whether the academic staff member meets the standard for a PTR increase. 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.).	
By September 8, click the 'Approve' or 'Deny' button to submit your recommendation for PTR. Once the PTR is approved or denied, no further revisions can be made.	
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<ul style="list-style-type: none">• PTR Guide for Academic Leaders• Academic Performance Assessment website• Collective Agreement (Article 29 and Schedule A)• GFC Academic Staff Criteria & Process Handbook• Faculty Guidelines	
*Right-click and select 'Open in a new window' to keep this page open. Directly clicking links will navigate away from this page.	
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For support, contact hacadem@ucalgary.ca	
Add Document	
No Document has been attached.	
Add Attachment	
Approvals	
Approve Deny	
Comments	

Once the Head has submitted their recommendation for PTR, the academic staff member will receive an email notification to review the recommendation.

Mass Approval Option

From the landing page, Heads have the option to mass-approve assessments. Click the box next to the staff member's name to select their assessment for approval or use the Select All button. Once selected, click **Approve All Selected**.

Academic Performance

Academic Performance

Pending Reviews 1

Completed Reviews 2

Please review the Academic Performance Reports (APR) submitted for your assessment for Progression Through the Ranks (PTR). Click 'Details' to review each APR submission. Recommendations to Approve or Deny can be submitted for each case individually or use the checkboxes to select multiple submissions for mass approval.

Note: Academic staff members can retract and revise their APR while the submission is pending approval. If you have reviewed a case, it is advisable to submit your recommendation soon after reviewing to avoid having to re-review cases to ensure no changes have been made.

Select All Deselect All Approve All Selected

Select	Employee ID	Name	Approval Status	Details
<input type="checkbox"/>			Pending	Details

1 row

Once the Head has submitted their recommendation for PTR, the academic staff member will receive an email notification to review the recommendation.

Note: The recommendation cannot be changed by the Head in the system. For assistance, contact hracadem@ucalgary.ca.

View Completed Reviews

From the landing page of the APA Approvals tile, click on **Completed Reviews** to see a list of all PTR cases for the current assessment year where a recommendation has been submitted. The **Approval Status** column indicates if a case has been Approved or Denied.

Academic Performance

Academic Performance

Pending Reviews 1

Completed Reviews 2

Listed below are the completed assessments for Progression Through the Ranks (PTR). Click 'Details' to review each APR submission. Edits cannot be made on this page.

Employee ID	Name	Approval Status	Details
		Approved	Details
		Denied	Details

2 rows

End of PTR process in PeopleSoft.

Visit the [Resources](#) section for more information and support.

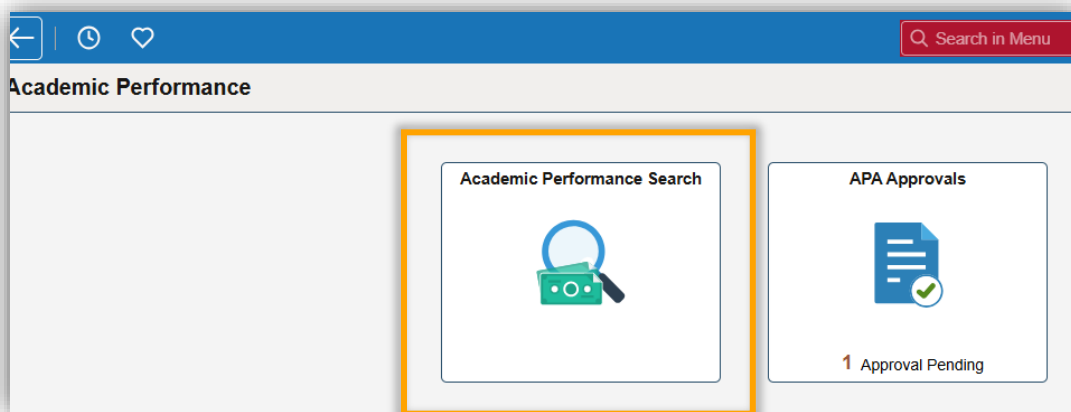
Outstanding Achievement Award (OAA)

If you are interested in nomination for an OAA, please visit the [Academic Performance Assessment website](#) for information and resources.

The deadline for Head-nominations for OAA is [September 30](#).

Academic Performance Search

Click on the [Academic Performance Search](#) tile to review PTR assessments at all stages of the process (not just pending approval).



All current and past assessment cases will be listed on the landing page. Use the [Search Criteria](#) section to filter cases by review status, approval status, date, faculty, department, and more.

UC Academic Performance Search

Search Criteria

Enter any information you have and click Search.

This is just for testing.

Employee ID = [] Q

Last Name Begins with []

Period Begin Date = []

First Name Begins with []

Faculty/Unit ID = [] Q

Department ID = [] Q

Review Status = [] Completed

Approval Status = []

Search Clear All

Employee	Performance ID	Department	Period	Review Status	Approval Status	
	759	29010 Dean's Office - Nursing	2023/07/01 2025/06/30	Completed	Denied	Details
	3	29010 Dean's Office - Nursing	2023/07/01 2025/06/30	Completed	Approved	Details

2 rows

Resources

[Academic Performance Assessment website](#) - provides **instructional guides, FAQs, timeline and resources** to support the PTR application process.

[Collective Agreement](#) – Article 29 and Schedule A detail **eligibility and important process information**.

The performance standards for each rank and the criteria for assessing outstanding achievement shall be established by the General Faculties Council (GFC) ([Article 29.2.1](#)).

- [GFC Academic Staff Criteria & Process Handbook](#)
- [Faculty Guidelines](#) (*please reference the most recent guidelines for your faculty*).
- [Declaration on Research Assessment \(DORA\)](#) – Includes recommendations on evaluating research and scholarship activities on quality and impact, rather than on bibliometrics alone.

For support, contact hracadem@ucalgary.ca.