

People and Culture

User Guide: Academic Portfolio for OAA

Step-By-Step Guide for Academic Staff

May 2025

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

Introduction

<u>Article 29</u> 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.

Outstanding Achievement Awards (OAA) 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 <u>Schedule A</u>.

Academic staff shall not be eligible for an OAA if they have received an OAA in the immediately preceding review cycle.

An academic staff member can be nominated for an Outstanding Achievement Award in two ways:

- Academic staff members may nominate themselves for an OAA, or
- The Head or equivalent may nominate candidates from their faculty/unit.

The deadline for OAA applications is the same as the deadline for APR submissions for PTR.

To initiate an OAA nomination, the academic staff member or Head/equivalent must first submit an intent to nominate via the webform available on the <u>Academic Performance Assessment website</u>. Following this, People and Culture will verify eligibility and initiate a case in Academic Portfolio. The staff member will receive an email notification once the case has been created.

The following guide provides step-by-step instructions for submitting the formal OAA nomination through Academic Portfolio. The first section covers <u>Self-Nominations</u>, while the second focuses on <u>Head-Nominations</u>.

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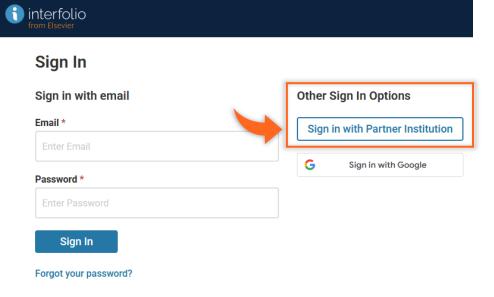
How to Login to Academic Portfolio



Login to Academic Portfolio using the *My UCalgary* Portal.

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

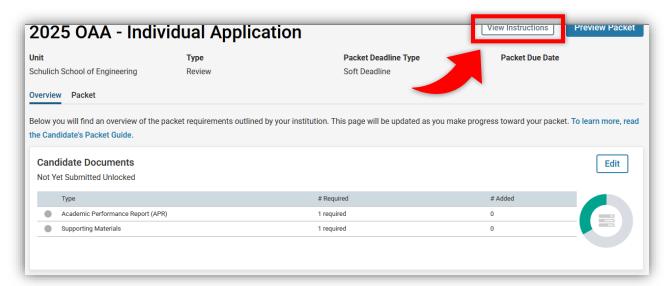
Alternatively, click on the link in the Interfolio email notification and sign-in through the Interfolio website using your UCalgary email and password.



Self-Nomination for OAA

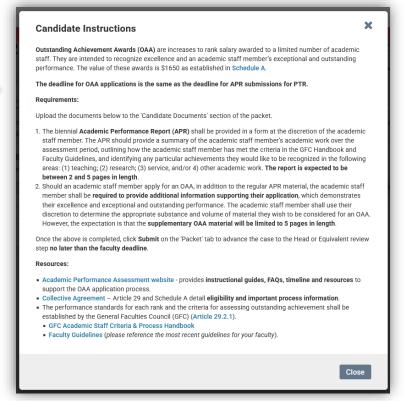
Reviewing the Case

The case will open on the **Overview** page.

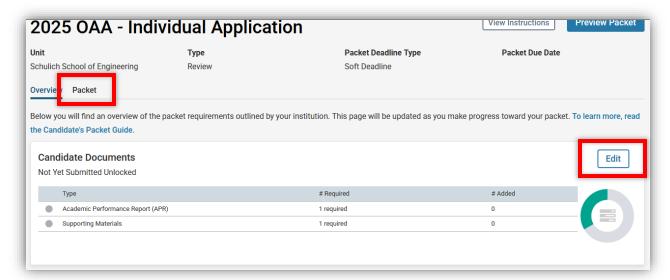


Click on **View Instructions** to review the submission requirements.

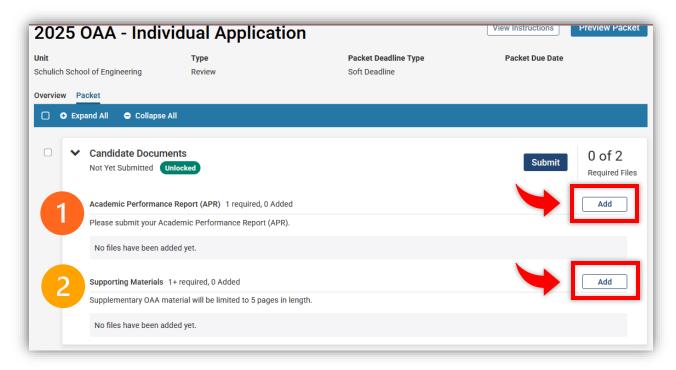




Click on Edit or on the Packet tab to submit the required documents.



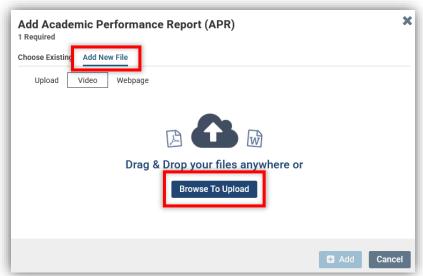
Submitting Documents



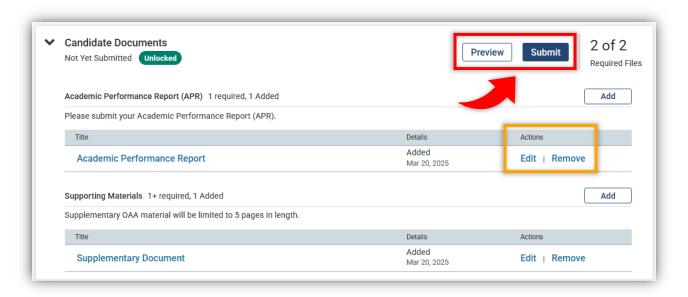
Click Add to upload the 2 required documents:

- Academic Performance Report (APR)
- Supplementary OAA material

To upload a document, select the **Add New File** tab, then click **Browse to Upload** or simply drag and drop your file.



Once uploaded, click Add.

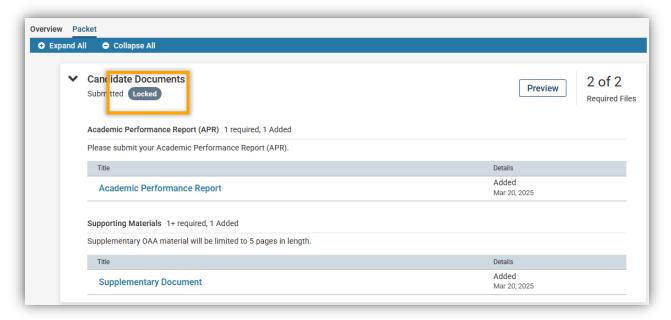


To edit the name of a document, or to remove a document, click on the buttons under Actions.

Once you have uploaded all required documents, click **Preview** to review your submissions, then click **Submit** to forward your case for review by the Head or equivalent.

The deadline for OAA applications is set by the faculty and is the same as the deadline for APR submissions for PTR.

When the packet has been submitted, the candidate documents will be locked for editing. To **unlock** your packet to make changes, contact hracadem@ucalgary.ca.



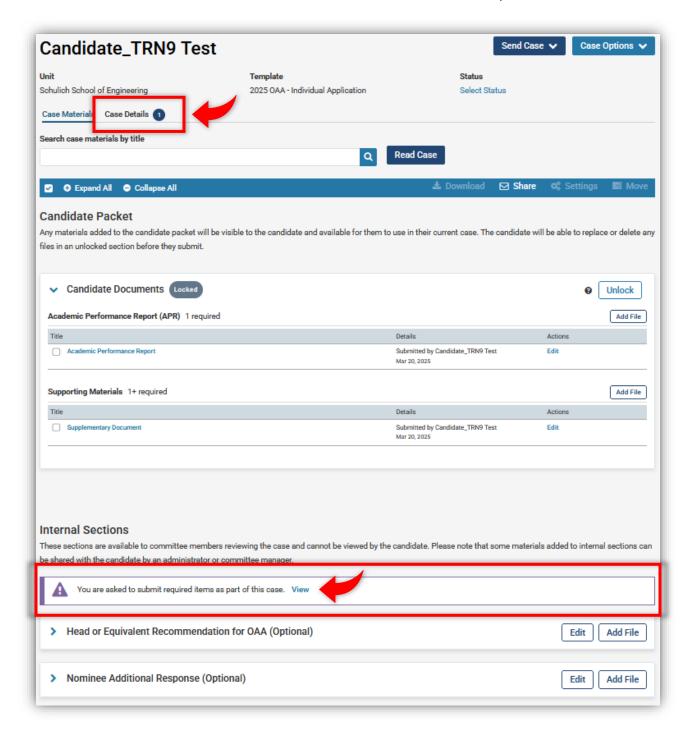
The Head or equivalent reviews the OAA submission and may provide comments or a recommendation if they choose.

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 **by October 10**.

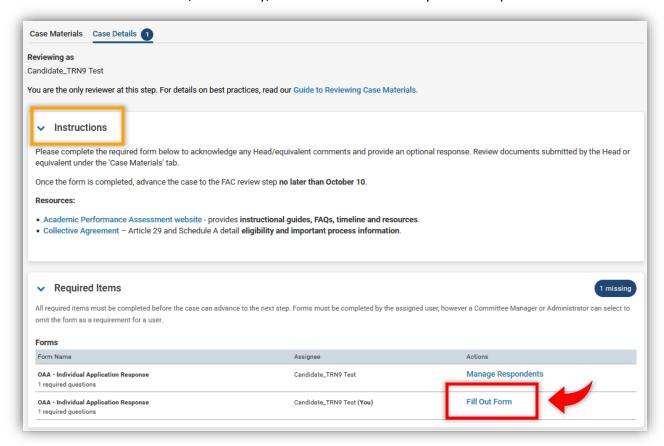
The packet will return to the nominee to review and provide an optional response (see below).

Nominee Response

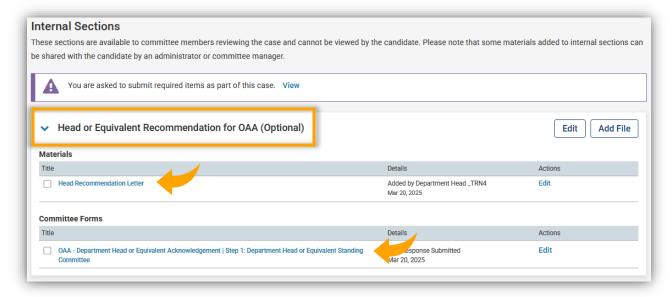
Click on the Case Details tab or View under Internal Sections to review the requirements.



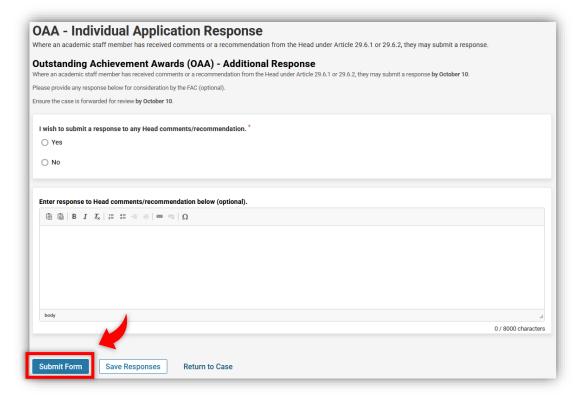
Review the Instructions and, when ready, click Fill Out Form to complete the required form.



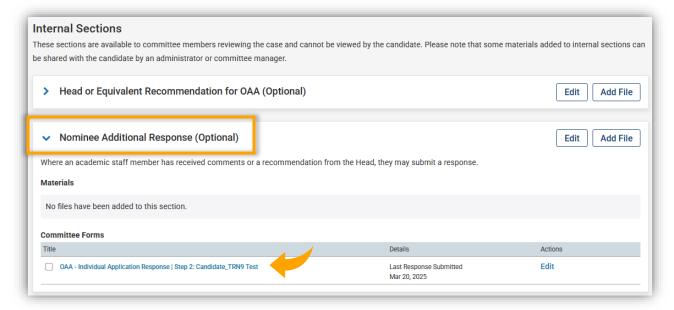
To view the Head's or equivalent's response, go to the **Case Materials** tab and scroll to *Internal Sections*. Then, click the arrow to expand the **Head or Equivalent Recommendation for OAA** section to access any submitted documents or responses.



Return to the Case Details tab and click on Fill Out Form. When complete, click Submit Form.



On the Case Details tab, the completed form will appear in the *Internal Sections* under Nominee Additional Response.



Forward Case to Faculty Assessment Committee

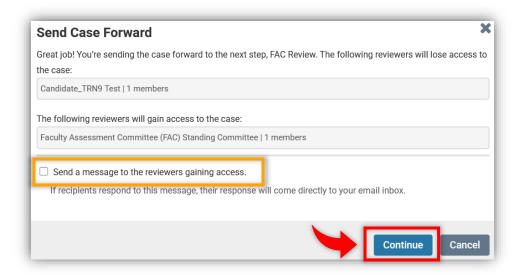
Once the Individual Application Response form has been completed, at the top of the case, click **Send Case** > **Forward to FAC Review**.



Advance the case to the FAC review step no later than October 10.

You can uncheck the box to **Send a message to the reviewers gaining access**—they will still receive a standard email notifying them that the case has progressed to their review step. Alternatively, you may enter a custom message to send a personalized email to the nominee.

Click **Continue** to forward the case.



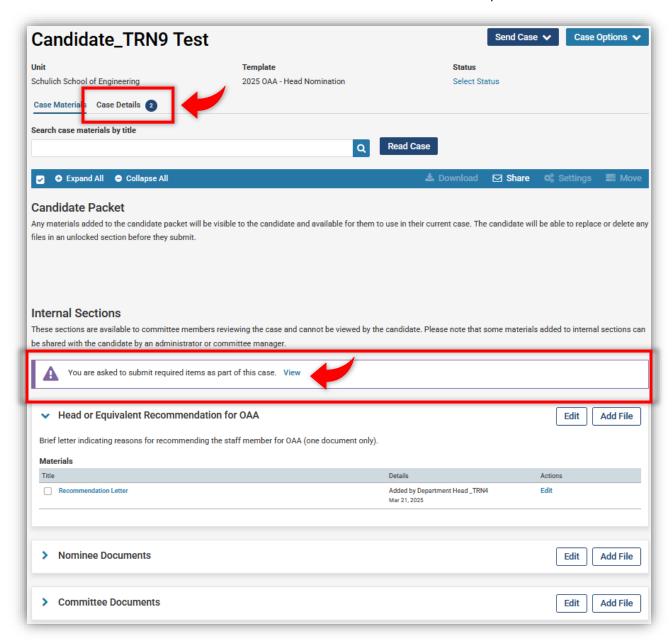
End of self-nomination process in Academic Portfolio.

Visit the Resources section for more information and support.

Head-Nomination for OAA

Reviewing the Case

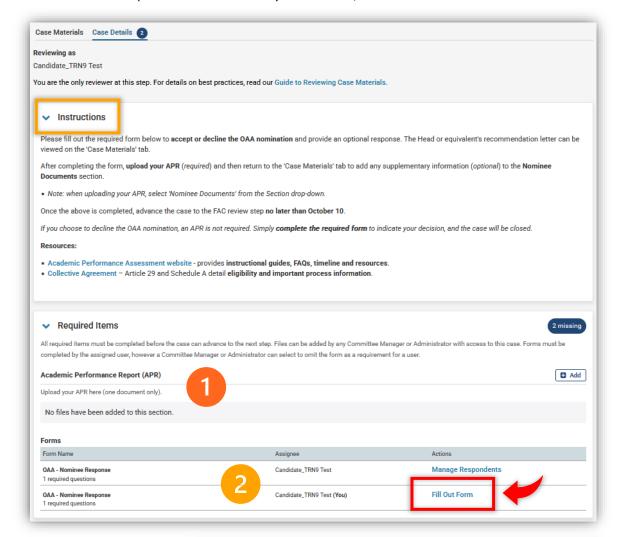
Click on the Case Details tab or View under Internal Sections to review the requirements.



Submitting Documents

Review the Instructions and, when ready, complete the 2 requirements:

- Upload your Academic Performance Report (APR),
- Click Fill Out Form to complete the required form.
 - If you choose to <u>decline</u> the OAA nomination, an APR is not required. Simply complete
 the required form to indicate your decision, and the case will be closed.



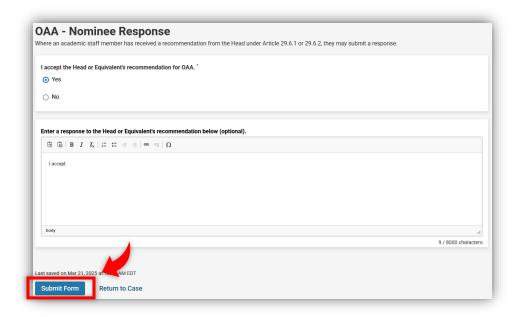


When uploading the APR, select **Nominee Documents** under the Section dropdown.

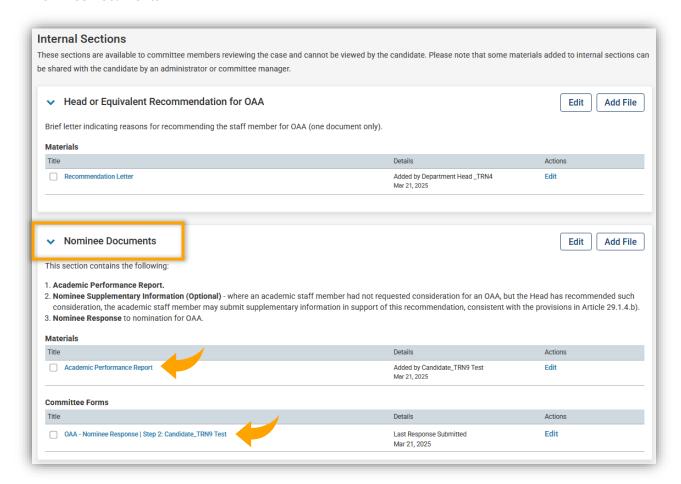


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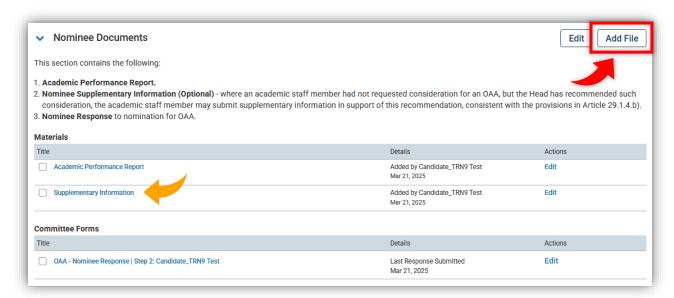
Complete the required form. When complete, click **Submit Form**.



On the Case Materials tab, the APR and completed form will appear in the *Internal Sections* under Nominee Documents.



To upload optional supplementary information, click Add File in the Nominee Documents section.



Forward Case to Faculty Assessment Committee

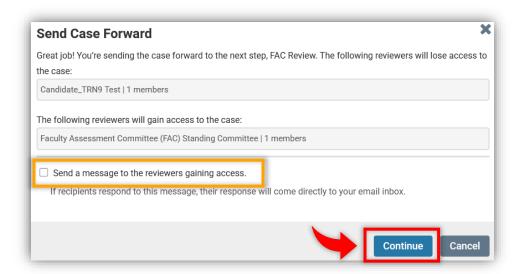
Once the requirements have been completed, at the top of the case, click **Send Case** > **Forward to FAC Review**.



Advance the case to the FAC review step no later than October 10.

You can uncheck the box to Send a message to the reviewers gaining access—they will still receive a standard email notifying them that the case has progressed to their review step. Alternatively, you may enter a custom message to send a personalized email to the nominee.

Click **Continue** to forward the case.



End of head-nomination process in Academic Portfolio.

Visit the Resources section for more information and support.

Resources

<u>Academic Performance Assessment website</u> - provides **instructional guides**, **FAQs**, **timeline and resources** to support the OAA application process.

<u>Collective Agreement</u> – 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).

For support with your nomination case, contact hracadem@ucalgary.ca.

For technical support with Academic Portfolio, contact Interfolio-support@elsevier.com.