Academic Portfolio Guide
Research & Scholarship Leave

For Faculty/Department Administrators

This document contains detailed information about the Research and Scholarship Leave process in relation to Academic Portfolio

Updated August 2022
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1. Introduction to Research & Scholarship Leave

The provisions relating to the Research and Scholarship Leave process are documented in the Collective Agreement, Article 16 & 17, which should be used in conjunction with this guide.

RSL is an annual process for faculty members at the University of Calgary. Each year approximately 200 – 250 applicants participate in the process.

Please access the [HR RSL website](#) for RSL timelines and for additional information regarding the RSL process.

a) Roles & Responsibilities

Outline of roles and responsibilities within Academic Portfolio.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>People, Processes and Solutions, HR</td>
<td>Process Owner</td>
<td>Review eligibility and qualifying service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Case creation with assigning appropriate reviewers (DeptHead, Faculty Admin, RSL Committee, Dean)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Once Faculty RSL committee members have been identified, update Committee members in Academic Portfolio.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Case closure and final report upon completion.</td>
</tr>
<tr>
<td>Faculty Administrators</td>
<td>Faculty support and application review</td>
<td>Review application packages for completeness and move the case forward to the Department Head review step.</td>
</tr>
<tr>
<td>Department Heads</td>
<td>Reviewer</td>
<td>Review the submitted applications and provide approval/denial. Move case forward to the Faculty RSL Committee review step.</td>
</tr>
</tbody>
</table>

b) Definitions

<table>
<thead>
<tr>
<th>Academic Portfolio Term</th>
<th>Collective Agreement Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate</td>
<td>Applicant</td>
<td>Faculty Member applying</td>
</tr>
<tr>
<td>Packet</td>
<td>Application</td>
<td>The documents submitted for review</td>
</tr>
</tbody>
</table>
c) Eligibility

Please reference the [HR RSL website](https://www.hr.ucalgary.ca/) and collective agreement for complete eligibility details.

<table>
<thead>
<tr>
<th>3 Years Qualifying Service</th>
<th>6 Years Qualifying Service</th>
<th>6 Years Qualifying Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length Leave: 6 months</td>
<td>Length Leave: 12 months</td>
<td>Length Leave: 6 months</td>
</tr>
<tr>
<td>Maximum Assistance During RSL Based on:</td>
<td>Maximum Assistance During RSL Based on:</td>
<td>Maximum Assistance During RSL Based on:</td>
</tr>
<tr>
<td>90.0% of staff member's academic rank salary</td>
<td>90.0% of staff member's academic rank salary</td>
<td>100% of staff member's academic rank salary</td>
</tr>
</tbody>
</table>

2. Getting Started in Academic Portfolio

a) Log in

1. Navigate to the ucalgary.ca. Click to expand the menu.
2. Click **My UCalgary** button.
3. Enter **Username** and **Password** into the Central **Authentication Service**.
4. Click **Sign In**.

![Central Authentication Service screenshot]

5. Navigate to All about me → My job.
6. Click Academic Portfolio.
All U of C logins are set up to use the Central Authorization Service, or “single sign-on.” If you receive an error contact Scholar Services (877) 997-8807 (7 a.m. to 4 p.m. MST) or use one of the other available support mechanisms.

3. Candidate’s Application

For background information, once the People, Processes and Solutions Team (HR) has reviewed the candidate’s eligibility, a case will be opened in Academic Portfolio where the staff member must submit their application.

a) Candidate / Applicant Uploads Application

When the case has been opened by HR, the candidate will receive an email that looks like this (note: there will further information about the RSL included in the email):
University of Calgary has initiated a review on your behalf.

VIEW CASE

This case link will be valid for 30 days.

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

The candidate can click on the “View Case” button to go directly to the dashboard or the dashboard can be accessed by logging into the UCalgary portal and clicking “Academic Portfolio”.

**Note**: “This case link will be valid for 30 days” sentence refers to the “View Case” link in the email that takes them directly to their application. After 30 days they can access the case by logging in through My UCalgary Portal.

i) Candidate’s Dashboard

The candidate’s dashboard will show all of the current action items and their due dates for any process they are participating, such as Merit, Tenure and Promotion, or RSL.

“Your Packets” on the left-hand sidebar displays a history of packets.

**Very Important!** Packets are Academic Portfolio’s term for Application, which describes the documents submitted by the academic for review.

The candidate should click on the appropriate case to open it.

Candidates will click “Add File” under “Leave Application and Documents” in order to open a screen that will allow them to add and remove files.

iii) Dashboard View – Confirmed Submission
Once submitted, the applicant will be able to see a date stamp confirming when the application was submitted.

Your Packets

<table>
<thead>
<tr>
<th>Packet</th>
<th>Type</th>
<th>Status</th>
<th>Due Date</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty of Science</td>
<td>Sabbatical</td>
<td>Lent Submitted on Aug 29, 2022</td>
<td>–</td>
<td>View</td>
</tr>
</tbody>
</table>

2023-24 RSL & Admin – Science

Packet is locked for editing but is still available as a preview.

4. Faculty/Department Administrator Review

This is the core responsibility for administrators involved in supporting the RSL process within Academic portfolio

Reviewing the Packet

The administrator will receive a notification once an academic has submitted their application:

1. Review the RSL & Admin Leave Application details
2. Based on their answers in the form, ensure the following **required** documents are uploaded:

1. **Dates of Leave Requested** – Leave dates must match dates listed in their RSL Proposal (uploaded proposal document) If they do not match, please notify HR (hr@ucalgary.ca) immediately to review eligibility.

2. **Itinerary** – Confirmation required whether they will be traveling outside of Calgary and detailed activities or staying within Calgary.

3. **CV**

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**Conditional Documents**: if they answered on “Yes” in their RSL & Admin Leave Application, they must upload related forms found under “Supporting Documents” and “Documents and Forms” on [HR Website](#).

a. **Collaborations/Facility Use**

b. **Contract Research During Leave** – Confirm signed by applicant and Research Services. Note: Contract Research is work in the industry that the academic staff member has a signed contract to complete. I.e., Pharmaceutical company, architecture firms, outside company. Does not include research grants internal within University and Tri-Council. It is the responsibility of the academic to obtain the signatures from Research Services.

c. **Graduate Supervision During Leave** – Confirm student, academic, GPD and Department Head/Head Equivalent signatures are received. Emails from students are also accepted in lieu of signatures.

d. **Funding Supports** – Confirm signed by applicant.
e. **Application for Approval of Employment for Compensation while on Research and Scholarship Leave** – Confirm signed by the Department Head/Head Equivalent and the Dean.

f. **Previous Sabbatical Report** – Copy of RSL report sent to Dean if they went on a RSL in the past. The Department and/or Dean’s Office should have a copy of former RSL reports.  
*NOTE: HR does not collect or save RSL Reports anymore. There are some limited records from prior years - contact hr@ucalgary.ca if you have questions.*

4. If application is complete and the RSL dates are correct in their proposal and the RSL & Admin Leave application, it can be forwarded to the next step for review.

If **changes are needed** after the applicant has submitted:

Unlock the case and notify applicant to re-upload/edit application as needed:

Once the documents have been uploaded and submitted, the Academic will submit the application which will lock it. If further changes are needed, then the application needs to be unlocked again.

Once the case has been moved forward to the Department Head step, the candidate will need to advise Department Head to push the step back (FAQ #3) or contact hr@ucalgary.ca to unlock their application to add documents.
5. Department Head/Equivalent Step

Once the candidate has submitted their packet the Department Head will receive an email that the case is ready to review. The case will also show in the Department Head’s dashboard as an action item with a due date.

Once the Department Head has submitted the assessment to the case, they must send the case to the next step by clicking “Send Case” in the upper right-hand corner.

6. Faculty Research and Scholarship Leave Step

Due Date: December 2

The Department Head will push the case forward to FRSLC. All committee members will receive an email notification. The FRSL Committee must complete their assessment and the Chair will move the case forward to the Dean.

7. Dean or Equivalent Review Step

Due Date: December 16

The Dean must complete their assessment of the application in their form.
Frequently Asked Questions

Q1: I am getting notifications of a RSL application after the Fall application deadlines, do I need to do anything with them?

A1: No, this is considered an off-cycle application; after the Fall application deadlines are managed by the PPS Team. No further action is required from the department/faculty for off-cycle applications. Please direct the academic to contact hr@ucalgary.ca if they have not already done so.

Q2: Does HR have copies of previous RSL reports?

A2: HR does not collect or save RSL Reports anymore and unfortunately there is no report available to determine who has submitted their RSL reports. There are limited records from past years - contact hr@ucalgary.ca if you have questions.

Q3: I inadvertently pushed forward an application, can I push the application back to Step 1?

A3: Administrators cannot push the application backwards, the next approver (Department Head/Head Equivalent) will need to send the case backwards to administrators with information on what needs to be added to the application.

The Department Head/Head Equivalent must send the application back. There is an option for them to ‘send a message to the reviewers gaining access’. If there is no need to include a message, uncheck the send message box.

If the Department Head/Head Equivalent is unable to send back the message, please contact hr@ucalgary.ca or your Academic Advisor to request the push back.
Resources

HR Website: https://www.ucalgary.ca/hr/work-compensation/labour-relations/academic-labour-relations/rsl

How to use Academic Portfolio Videos: https://www.ucalgary.ca/hr/work-compensation/labour-relations/academic-labour-relations/academic-portfolio/academic

UService: hr@ucalgary.ca, (403) 210-9300