

# ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

## Contents

<b>LOGGING INTO ACADEMIC PORTFOLIO</b> .....	2
<b>(1) OPEN CASE</b> .....	3
.....	4
<b>(2) REVIEW INSTRUCTIONS</b> .....	4
.....	5
<b>(3) REVIEW THE CASE</b> .....	5
<b>(4) FILL OUT THE HEAD ASSESSMENT AND RECOMMENDATION</b> .....	7
<b>(5) SHARE DEPARTMENT HEAD RECOMMENDATION WITH ACADEMIC STAFF MEMBER</b> .....	9
<b>(5a) SELECT COMMITTEE FORM TO SHARE HEAD RECOMMENDATION</b> .....	10
<b>(5b) SEND EMAIL NOTIFICATION TO ACADEMIC – TO VIEW SHARED HEAD RECOMMENDATION</b> .....	11
____ <b>EMAIL NOTIFICATION TEMPLATE FOR SHARED HEAD RECOMMENDATION</b> .....	12
<b>(5c) WHAT THE ACADEMIC STAFF MEMBER SEES ONCE THE HEAD SHARES THE RECOMMENDATION</b> .....	14
<b>(6) FINAL STEP - MOVE CASE FORWARD TO HR</b> .....	15
<b>(6a) NOTIFICATION TO HR TO MOVE CASE</b> .....	16

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

interfolio

### Sign In

Sign in with email

Email \*

Enter Email

Password \*

Enter Password

Sign In

Forgot your password?

Don't have an account?

Use Interfolio's suites of services to simplify your academic life.

[Create an account](#)

Other Sign In Options

Sign in with Partner Institution

Sign in with Google

Login into Academic Portfolio using your UCalgary Login Details

### 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: <https://www.ucalgary.ca/hr/work-compensation/labour-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.).

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

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

2 of 2 cases

Name	Type	Template Name	Status
<input type="checkbox"/> 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			
<input type="checkbox"/> 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

**Candidate TRN\_9** Send Case Case Options

Academic Portfolio Training

**Announcements & Help**

**Profile**

**Activities**

**Forms & Reports**

**Vitas & Biosketches**

**Find Colleagues**

**Account Access**

**Review Steps**

**Cases**

Unit: Department of Medicine

Template: \_2023 - Academic Performance Assessment - Department of Medicine

Status: Select Status

[Case Materials](#) **Case Details** 1

Search case materials by title

Expand All  Collapse All Download Share Settings Move

**Internal Sections**

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

**⚠️** You are asked to submit required items as part of this case. [View](#)

**Department Head or Equivalent Assessment & Recommendation** Edit Add File

© 2023 Interfolio, Inc. Program Policies

# ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

## (2) REVIEW INSTRUCTIONS

Review the instructions provided to the Head or equivalent, including the deadline to share results with the Academic Staff Member.

Case Materials Case Details **1**

Reviewing as  
Department Head or Equivalent Standing Committee

Instructions **2**

Further to Article 29.5 of the Collective Agreement, "the Head shall determine whether the academic staff member meets the standard for a PTR increase. The Head shall exercise good judgment and after seeking advice from relevant sources, recognizing the confidentiality requirements of Article 30.

If the Head determines that the academic staff meets the standard for a PTR increase, **they shall inform the Dean of such a recommendation, copied to the academic staff member, by September 8.** [see required form below]

**No further analysis is required unless the applicant has requested consideration for an OAA or if the Head wishes to recommend consideration for an OAA. A Head's recommendation in favour of a PTR increase shall be considered final."**

**Positive Recommendation for PTR :**

**Progression Through the Ranks (PTR) Increase**

- Review Academic Performance Report (APR)
- If no APR is included, use the following guidance:
  - "[T]he 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 2.1.4.b)

**Outstanding Achievement Awards (OAAs)**

- If the academic staff member applied for OAA, you may submit comments or recommendation.
  - Individual academic staff members may nominate themselves for an OAA by indicating such on their APR. The Head may make comment on this nomination if they choose. In either event, **the APR will be forwarded to the FAC through the Dean by September 30.** Any comment on the APR shall be copied to the applicant at the same time as it is relayed to the FAC." (CA 29.6.1 - 29.6.2)
- If the academic staff member **did not** apply for an OAA, please confirm if you would like to nominate them for this award to the Faculty Assessment Committee.
  - "The Head may nominate worthy candidates to the Faculty Assessment Committee for review **by submitting the APR along with a brief letter of nomination to the Dean 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."

### 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 Committee

This recommendation **will be shared with the academic staff member by September 8, 2023.**

### 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, 2021.

# ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

**Candidate TRN\_9**

Send Case ▾ Case Options ▾

Unit: Department of Medicine | Template: \_2023 - Academic Performance Assessment - Department of Medicine | Status: Select Status

Case Materials | Case Details 1

Search case materials by title

Expand All | Collapse All | Download | Share | Settings | Move

**Internal Sections**

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

**Department Head or Equivalent Assessment & Recommendation** | Edit | Add File

## (3) REVIEW THE CASE

Under 'Case Materials' tab, click 'Read Case' to view the Academic Staff Member's submission, and if applicable, document(s) that have been uploaded.

**Candidate TRN\_9**

Return to Case

Download | Search PDF | Search

Packet Annotations

- DEPARTMENT HEAD OR EQUIVALENT ASSESSMENT & RECOMMENDATION
- DEAN OR EQUIVALENT FINAL RECOMMENDATION
- ACADEMIC PERFORMANCE ASSESSMENT - SUBMISSION FORM**
- PROGRESSION THROUGH THE RANKS (PTR)
- OUTSTANDING ACHIEVEMENT AWARDS (OAAs)
- MOA COVID PERIOD ASSESSMENT
- REFERENCES, DOCUMENTS AND RESOURCES

**Packet Forms**

**Academic Performance Assessment - Candidate Submission Form**

UCID: 12345678

Faculty: Cumming School of Medicine

Department: Family Medicine

Are you applying for Outstanding Achievement Awards (OAAs)?  
Yes - I am applying

Are you applying for the MOA COVID Period Assessment Award?  
No - I am not applying

Previous Material < 1 / 1 > Next Material

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

The screenshot shows a web interface for an academic portfolio. On the left, there is a sidebar with a 'Packet' tab and a list of sections: 'DEPARTMENT HEAD OR EQUIVALENT ASSESSMENT & RECOMMENDATION', 'DEAN OR EQUIVALENT FINAL RECOMMENDATION', 'ACADEMIC PERFORMANCE ASSESSMENT - SUBMISSION FORM', 'PROGRESSION THROUGH THE RANKS (PTR)', 'Academic Performance Report - Candidate\_TRN9', 'OUTSTANDING ACHIEVEMENT AWARDS (OAAS)', 'MOA COVID PERIOD ASSESSMENT', and 'REFERENCES, DOCUMENTS AND RESOURCES'. The 'PROGRESSION THROUGH THE RANKS (PTR)' section is highlighted with a red box. A red arrow points from this box to the document preview on the right. The document preview shows a page titled 'Academic Performance Report - CANDIDATE J. P. DALLOWAY' with sections for 'TEACHING', 'RESEARCH', 'SERVICE', and 'OTHER ACADEMIC WORK'. At the bottom of the interface, there are navigation icons and a 'Previous Material < 1 / 2 > Next Material' button.

Click each section (PTR, OAA, MOA COVID) to view if any document(s) have been uploaded.

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

This screenshot shows the bottom right corner of the interface. It features a blue button with a circular arrow icon and the text 'Return to Case'. Below this button is a 'Download' button with a download icon, a search bar with the placeholder text 'Search PDF', and a blue 'Search' button. The background is a light gray color.

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### (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'

**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 Committee*

This recommendation **will be shared with the academic staff member by September 8, 2023.**

**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, 2021.

**Required Items** 1 missing

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	Assigned	Actions
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee 1 required questions	Committee Managers	<a href="#">Manage Respondents</a>
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee 1 required questions	Department Head_TRN4 (You)	<a href="#">Fill Out Form</a>

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

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

**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.

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, 2023 at 4:03 PM EDT

[Submit Form](#) [Save Responses](#) [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.*



## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### (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	<a href="#">Manage Respondents</a>
2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee 1 required questions	Department Head _TRN4 (You)	<a href="#">Edit Submission</a>

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.**

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### (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*

**Click the check box** 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**

The screenshot displays the 'Case Materials' interface. At the top, the 'Case Materials' tab is selected and highlighted with a red box. Below it is a search bar and a 'Read Case' button. A blue navigation bar contains 'Expand All', 'Collapse All', 'Download', 'Share' (highlighted with a red box), 'Settings', and 'Move'. A dropdown menu for 'Share' is open, showing 'With Candidate' (highlighted with a yellow box) and 'With Committee Members'. Below this is the 'Internal Sections' section, which includes a 'Candidate Shared Section' with 'Materials' and a message 'No files have been added to this section.' At the bottom, the 'Committee Forms' section is highlighted with a red box. It contains a table with one row: '2023\_Department Head or Equivalent Assessment and Recommendation to the FAC Committee | Step 1: Department Head or Equivalent Standing Committee'. The checkbox in the first column of this row is checked and circled in red. A yellow '5a' label is placed near the 'Share' button and the table row. Red arrows point from the 'Case Materials' tab to the 'Share' button, from the 'Share' button to the 'With Candidate' option, and from the 'Committee Forms' section to the checked checkbox.

Title	Details	Actions
<input checked="" type="checkbox"/> 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

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### (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).

The screenshot shows an email composition interface with the following elements:

- Title:** Message to Candidate
- To:** Candidate TRN\_9 (aptestcandidate@ucalgary.ca)
- Subject:** Academic Performance Assessment - Head Recommendation (highlighted with a red box and a yellow '5b' label).
- 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. For issues logging into Academic Portfolio, please contact: help@interfolio.com (highlighted with a red box).
- Share Files:** 2023\_Department Head or Equivalent Assessment and Recommendation to the FAC Committee (highlighted with a green box and a green arrow pointing to it from the text 'Verify Recommendation form is attached').
- Details Panel:** Direct email reply: aptestdepthhead@ucalgary.ca; File Response:  Enable.
- Buttons:** Preview, Send, Cancel.

Red arrows point from the subject line and message body to a text box on the right that says: "Please use the recommended email subject line and body template provided."

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### 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: [help@interfolio.com](mailto:help@interfolio.com) or view technical support information on the [Academic Performance Assessment](#) website.

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

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

**Message to Candidate** [Close]

Logo

Department Head\_TRN4 has shared files with you.

[VIEW FILES](#)

You will be required to sign in to your account to view the shared files.

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*.

For issues logging into Academic Portfolio, please contact: [help@interfolio.com](mailto:help@interfolio.com)

Powered by [Interfolio](#) | [Support](#)

[Edit] [Send] [Cancel]

Message preview.

Click Send

2023\_Department Head or Equ

**MESSAGE SENT** [Close]

Your message was successfully sent.

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

# ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

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

Unit	Type	Packet Deadline Type	Packet Due Date
Department of Medicine	Review	Hard Deadline ⓘ	

Overview Packet **Shared Committee Files**

Below you will see files that have been sent to you by committee members. Actions ▾

▼ Sent by Department Head \_TRN4 on Jul 21, 2023

Shared Files	Actions
<a href="#">2023_Department Head or Equivalent Assessment and Recommendation to the FAC Committee   Step 1: Department Head or Equivalent Standing Committee</a>	<a href="#">Download</a>

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, you may add comments or a recommendation (optional)

I support the Academic Staff Member's application for OAA.

**If optional comments are added by the Head, they will be shared with the Academic Staff Member**

2 / 2

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

### (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

**Unit**  
Department of Medicine

**Template**  
\_2023 - Academic Performance Assessment -  
Academics (2023)

**Send Case** Case Options

Forward to  
Administrative Review - Move OAA/MC  
Cases Forward to Faculty Assessment  
Committee (FAC)

6

Case Materials Case Details

Search case materials by title

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 by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

Candidate Shared Section Edit Add File

Materials

No files have been added to this section.

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

**Send Case Forward 6a**

Great job! You're sending the case forward to the next step, Administrative Review - Move OAA/MC Cases Forward to Faculty Assessment Committee (FAC). The following reviewers will lose access to the case:

Department Head or Equivalent Standing Committee | 2 members

The following reviewers will gain access to the case:

HR Advisor, Academic Standing Committee | 1 members

Send a message to the reviewers gaining access.  
If recipients respond to this message, their response will come directly to your email inbox.

**Subject \***  
LAST NAME - Academic Performance Assessment

**Message \***

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,  
Department Head\_TRN4

body

**Preview** **Continue** **Cancel**

### (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 review.

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



## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

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.

The screenshot displays the 'Cases' page. On the left, a navigation menu includes 'Home', 'Academic Portfolio Training', 'Announcements & Help', 'Profile', 'Activities', 'Forms & Reports', 'Vitas & Biosketches', 'Find Colleagues', 'Account Access', 'Review Steps', and 'Cases'. The 'Cases' menu item is highlighted with a red arrow. The main content area is titled 'Cases' and features a search bar with a magnifying glass icon and a 'Filter' button. Below the search bar, there is a checkbox and the text '1 of 1 cases'. A table lists the case details:

Name	Type	Template Name	Status
<input type="checkbox"/> <b>Candidate TRN_9</b> Department of Medicine	Review	_2023 - Academic Performance Assessment - Department of Medicine	

Below the table, a progress indicator shows 'Step 1 of 5: Department Head or Equivalent - Assessment and PTR Recommendation | Sep 8, 2023'. A red box highlights a warning icon and the text 'Required Documents'.

## ACADEMIC PORTFOLIO JOB AID – HEAD ASSESSMENT

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

[hracadem@ucalgary.ca](mailto:hracadem@ucalgary.ca)

For Interfolio Login issues, contact:

[help@interfolio.com](mailto:help@interfolio.com)