



UNIVERSITY OF
CALGARY

People and Culture

User Guide: Academic Portfolio for OAA

Step-By-Step Guide for Deans and Faculty Assessment
Committee (FAC)

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.

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 [Schedule A](#).

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.

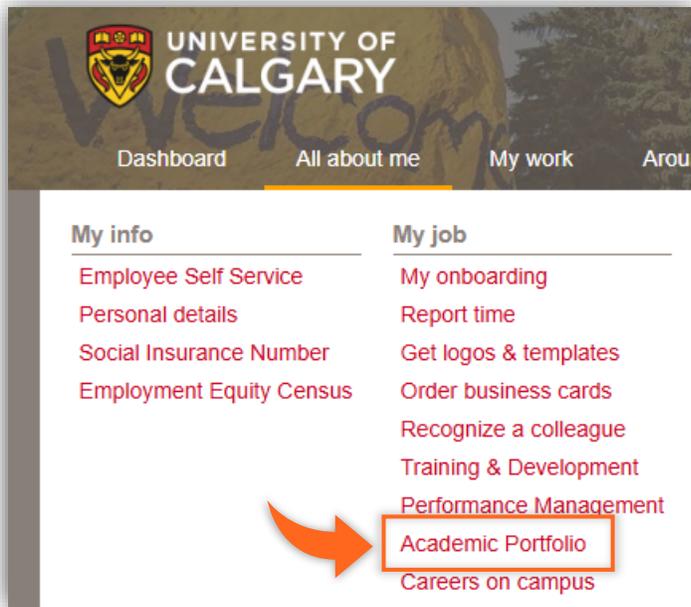
The Dean shall inform applicants and those nominated by the Head as to whether they will be receiving an OAA by November 22.

The following guide provides step-by-step instructions for Deans on reviewing OAA nominations, submitting recommendations on behalf of the FAC through Academic Portfolio, and recording the Deans' decision. The first section covers [Head-Nominations](#), while the second focuses on responding to [Self-Nominations](#).

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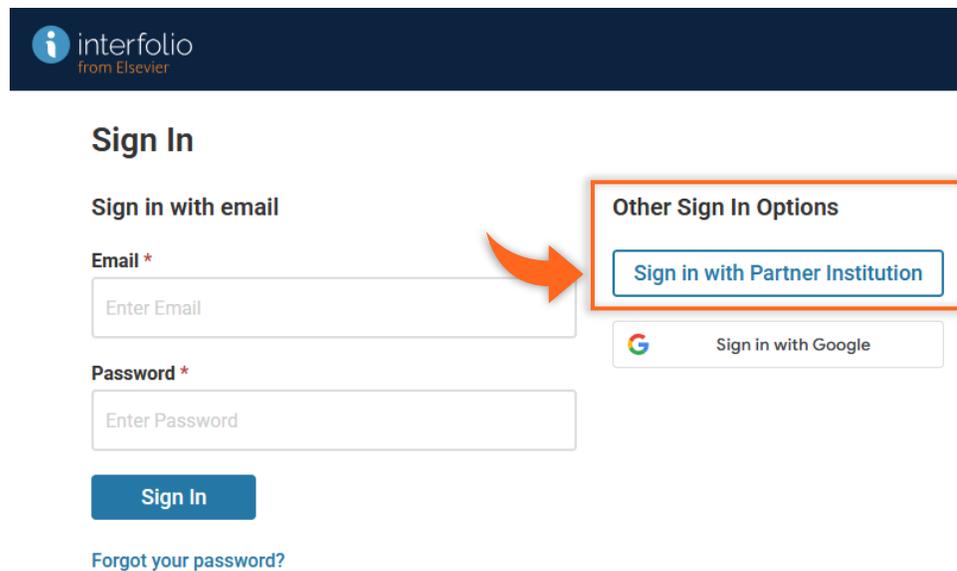
How to Login to Academic Portfolio



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.



Reviewing Nominations

Reviewing Cases

Cases for FAC review will be displayed on the **My Tasks** landing page. Click on a case to view it or navigate to the **Cases** menu in the left-hand menu bar to view all.

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

Candidate_TRN9 Test Send Case Case Options

Unit: Social Work Template: 2025 OAA - Head Nomination Status: Select Status

Case Materials **Case Details** ¹

Search case materials by title

Expand All Collapse All Download Share Settings Move

Candidate Packet
Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

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](#)

Head or Equivalent Nomination for OAA Edit Add File

Brief letter indicating reasons for recommending the staff member for OAA (one document only).

Materials
No files have been added to this section.

Review the [Instructions](#), then return to the [Case Materials](#) tab to review the packet.

Case Materials Case Details 1

Reviewing as
Faculty Assessment Committee (FAC) Standing Committee

Instructions

Please complete the required form to indicate the FAC recommendation and the Dean's decision for OAA. Review the documents submitted by the Head or equivalent and the nominee under the 'Case Materials' tab.

Next steps:

The Dean shall inform applicants and those nominated by the Head as to whether they will be receiving an OAA by November 22. **Faculties must send a decision letter to each staff member.** Where the Dean has changed the recommendation of the FAC, the Dean shall include such information in this letter.

Resources:

- [Academic Performance Assessment website](#) - provides **instructional guides, FAQs, timeline and resources.**
- [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).

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	Assignee	Actions
OAA - FAC and Dean Recommendation for OAA 2 required questions	Committee Managers	Manage Respondents
OAA - FAC and Dean Recommendation for OAA 2 required questions	Dean_TRN3 (You)	Fill Out Form

To review all documents and forms submitted for the OAA nomination, click [Read Case](#). Alternatively, you can review each item included in the *Candidate Packet* and *Internal Sections* of the case individually.

Unit
Social Work

Template
2025 OAA - Individual Application

Case Materials Case Details 1

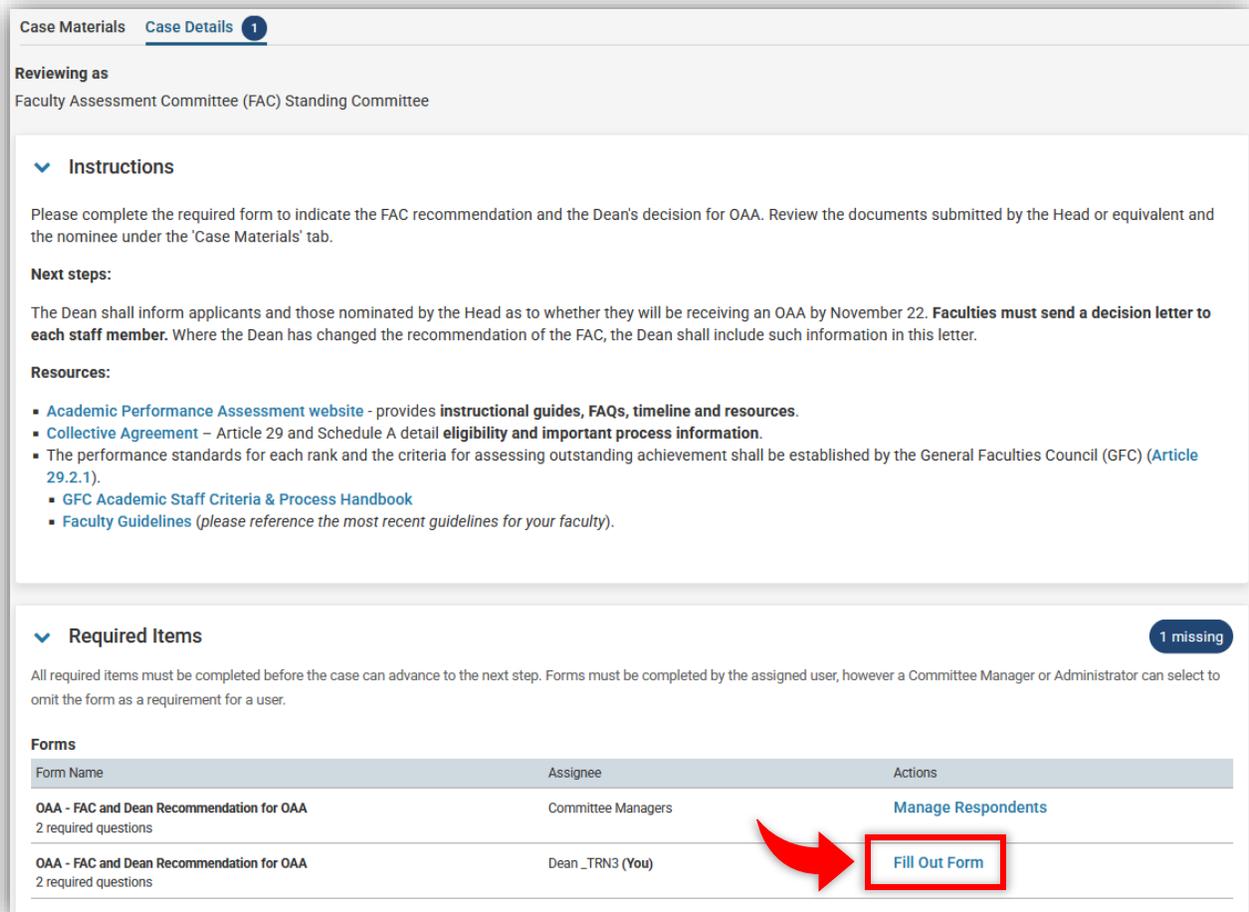
Search case materials by title

[Read Case](#)

Submitting Decisions Following FAC Review

After the FAC has met and finalized its recommendations, the FAC Chair (Dean) must complete the **FAC and Dean Recommendation for OAA** form.

On the Case Details tab, click **Fill Out Form** to document the FAC's recommendation and the Dean's decision. *If assistance is required, the faculty contact may complete the form on behalf of the Dean.*



Case Materials **Case Details** 1

Reviewing as
Faculty Assessment Committee (FAC) Standing Committee

Instructions

Please complete the required form to indicate the FAC recommendation and the Dean's decision for OAA. Review the documents submitted by the Head or equivalent and the nominee under the 'Case Materials' tab.

Next steps:

The Dean shall inform applicants and those nominated by the Head as to whether they will be receiving an OAA by November 22. **Faculties must send a decision letter to each staff member.** Where the Dean has changed the recommendation of the FAC, the Dean shall include such information in this letter.

Resources:

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OAA - FAC and Dean Recommendation for OAA 2 required questions	Dean_TRN3 (You)	Fill Out Form

Once the form is completed, click [Submit Form](#).

OAA - FAC and Dean Recommendation for OAA

Form captures the recommendation of the FAC for OAA, as well as the Dean's decision.

Faculty Assessment Committee (FAC) Recommendation

Does the FAC support this application for Outstanding Achievement Award (OAA)? *

Yes - the FAC supports the application for OAA

No - the FAC does not support the application for OAA

Dean's Decision for OAA

Does the Dean support this application for Outstanding Achievement Award (OAA)? *

Yes - the Dean supports the application for OAA

No - the Dean does not support the application for OAA

Next Steps

All accepted recommendations for OAA from the FAC, by the Dean, are considered final.

The Dean shall inform applicants and those nominated by the Head as to whether they will be receiving an OAA **by November 22**.

- Where the Dean has changed the recommendation of the FAC, the Dean shall **include such information in the letter**.
- Where the Dean has **overturned a positive recommendation of the FAC**, the individual may appeal this to the OAA Appeal Committee through the Provost's office by December 8.

Any changes (including additions) from the FAC's recommendations that affect **academic administrators** as defined in Article 29.8.1 or 29.8.2 shall require the additional approval of the Provost.

For more information, reference the [Collective Agreement](#) articles 29.9 and 29.11

[Submit Form](#) [Save Responses](#) [Return to Case](#)



After submission, if revisions are needed, click [Edit Submission](#) to make changes and re-submit.

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

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OAA - FAC and Dean Recommendation for OAA 2 required questions	Dean_TRN3 (You)	Edit Submission



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



*Forms should be submitted as soon as possible after the FAC meeting and **no later than November 22.***

End of the FAC review process in Academic Portfolio.

Next steps

The Dean shall inform applicants and those nominated by the Head as to whether they will be receiving an OAA by November 22. **Faculties must send a decision letter to each staff member.** Where the Dean has changed the recommendation of the FAC, the Dean shall include such information in this letter.

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

Resources

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

For support with reviewing cases, contact hracadem@ucalgary.ca.

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