



UNIVERSITY OF  
CALGARY

People and Culture

# User Guide: Academic Portfolio for OAA

Step-By-Step Guide for Heads and Equivalentents

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 deadline for Heads to nominate a staff member for OAA, or to submit a response to an individual OAA application, is September 30.**

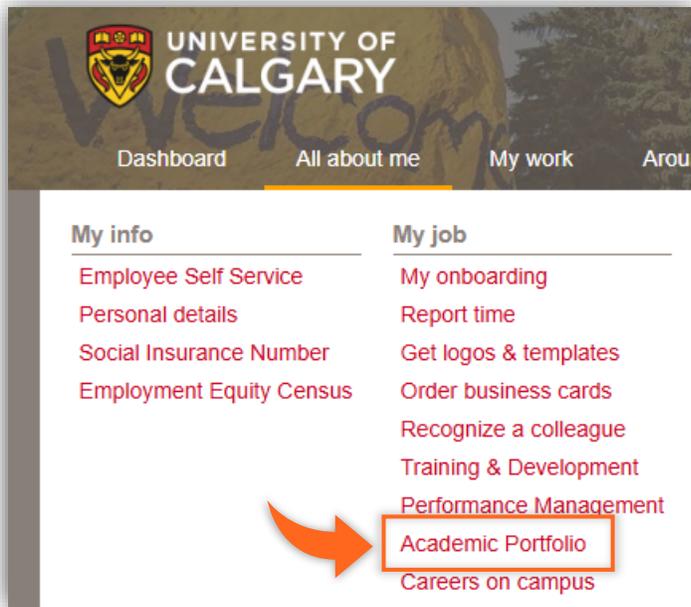
To initiate an OAA nomination, the academic staff member or Head/equivalent must first submit an intent to nominate via the webform available on the [Academic Performance Assessment website](#). Following this, People and Culture will verify eligibility and initiate a case in Academic Portfolio. Heads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

The following guide provides step-by-step instructions for Heads in submitting an OAA nomination or responding to an OAA application through Academic Portfolio. The first section covers [Head-Nominations](#), while the second focuses on responding to [Self-Nominations](#).

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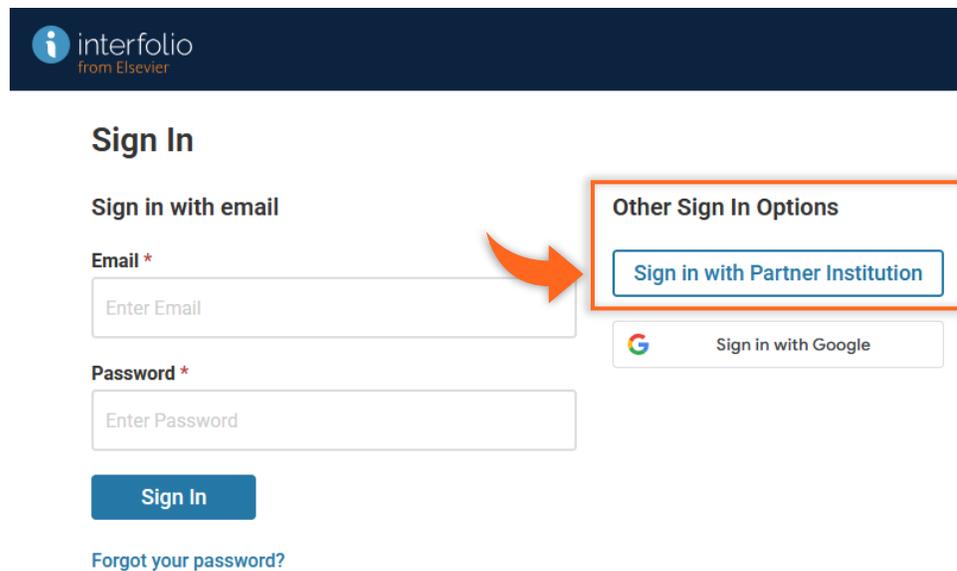
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# How to Login to Academic Portfolio



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.

# Head-Nomination for OAA

## Reviewing the Case

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** <sup>1</sup>

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.

## Submitting Documents

Review the Instructions, then click **Add** to upload the required recommendation letter.

Case Materials Case Details **1**

Reviewing as  
Department Head or Equivalent Standing Committee

**Instructions**

**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 \$1650 as established in [Schedule A](#).

The Head may nominate candidates to the Faculty Assessment Committee for OAA by submitting a brief letter indicating reasons **by September 30**.

**Requirements:**

- Upload a brief letter indicating reasons for recommending the staff member for OAA (one document only). Save the document to the 'Head or Equivalent Nomination for OAA' section.

Once the above is completed, advance the case to the Academic Staff Member review step **no later than September 30**.

*Academic staff member will be required to upload their APR at their review step.*

**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. Files can be added by any Committee Manager or Administrator with access to this case.

**Head or Equivalent Recommendation for OAA**

Upload a brief letter indicating reasons for recommending the staff member for OAA (one document only).

No files have been added to this section.

**Add**

When uploading the recommendation letter, select **Head or Equivalent Nomination for OAA** under the Section dropdown (*this will be the default*).

**Add Head or Equivalent Recommendation for OAA**

[Upload a new file](#) Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

**Name \***  
Recommendation Letter

**Section \***  
Head or Equivalent Nomination for OAA

On the **Case Materials** tab, the required form will appear in the *Internal Sections* under **Head or Equivalent Nomination for OAA**.

**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.

▼ **Head or Equivalent Nomination for OAA** Edit Add File

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

**Materials**

Title	Details	Actions
<input type="checkbox"/> Recommendation Letter	Added by Department Head _TRN4 Apr 1, 2025	<a href="#">Edit</a>

### Forward Case to Academic Staff Member

Once the recommendation letter has been added, at the top of the case, click **Send Case** > **Forward to Academic Staff Member Review**.

**Candidate\_TRN9 Test**

**Unit**  
Schulich School of Engineering

**Template**  
2025 OAA - Head Nomination

**Send Case** ▼

Forward to  
Academic Staff Member Review

Select Status

---

*Advance the case to the Academic Staff Member review step **no later than September 30.***

---

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.

**Send Case Forward** ✕

Great job! You're sending the case forward to the next step, Academic Staff Member Review. The following reviewers will lose access to the case:

Department Head or Equivalent Standing Committee | 1 members

The following reviewers will gain access to the case:

Candidate\_TRN9 Test | 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.

[Continue](#) [Cancel](#)

End of Head-Nomination for OAA process in Academic Portfolio.

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

# Self-Nomination for OAA

## Reviewing the Case

Click on the [Case Details](#) tab or [View](#) under *Internal Sections* to review the requirements.

**Candidate\_TRN9 Test** Send Case Case Options

Unit: Schulich School of Engineering    Template: 2025 OAA - Individual Application    Status: Select Status

**Case Material** | **Case Details** <sup>1</sup>

Search case materials by title  Read Case

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.

**Candidate Documents** Locked Unlock

**Academic Performance Report (APR)** 1 required Add File

Title	Details	Actions
<input type="checkbox"/> Academic Performance Report	Submitted by Candidate_TRN9 Test Mar 21, 2025	<a href="#">Edit</a>

**Supporting Materials** 1+ required Add File

Title	Details	Actions
<input type="checkbox"/> Supplementary Information	Submitted by Candidate_TRN9 Test Mar 21, 2025	<a href="#">Edit</a>

### 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 Recommendation for OAA \(Optional\)](#) Edit Add File

## Submitting Documents

To access the nominee's APR and supplementary information, navigate to the **Case Materials** tab and review the documents under *Candidate Documents*. Alternatively, click on **Read Case**.

The screenshot shows the 'Case Materials' tab selected. At the top, there is a search bar and a 'Read Case' button highlighted with a red box and a red arrow. Below the search bar, there are options to 'Expand All' and 'Collapse All', along with 'Download', 'Share', 'Settings', and 'Move' buttons. The main content area is titled 'Candidate Packet' and contains a section for 'Candidate Documents' which is currently 'Locked'. Below this, there are two document entries: 'Academic Performance Report (APR) 1 required' and 'Supporting Materials 1+ required'. Each entry has a table with columns for 'Title', 'Details', and 'Actions'. The 'Academic Performance Report' entry has a red arrow pointing to the 'Academic Performance Report' title. The 'Supporting Materials' entry has a red arrow pointing to the 'Supporting Information' title.

Review the **Instructions** and, when ready, click **Fill Out Form** to provide comments in acknowledgement of the application. Comments are optional, but the form must be submitted to progress the case in the workflow.

The screenshot shows the 'Case Materials' tab selected. The 'Case Details' sub-tab is active. The 'Reviewing as' section shows 'Department Head or Equivalent Standing Committee'. Below this, there is a section for 'Instructions' highlighted with a red box. The instructions text reads: 'Please complete the form below to submit any comments in acknowledgment of the OAA application. If you choose to include a recommendation letter, add it to the 'Head or Equivalent Recommendation for OAA' section of the packet on the 'Case Materials' tab. Both comments and the recommendation letter are optional for the Head or equivalent. If provided, the candidate and FAC will have access to view them. Once the above is completed, advance the case to the Academic Staff Member review step no later than September 30. 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.' Below the instructions, there is a 'Required Items' section with a '1 missing' badge. It contains a table with columns for 'Form Name', 'Assignee', and 'Actions'. The table has two rows, both for 'OAA - Department Head or Equivalent Acknowledgement'. The first row has 'Committee Managers' as the assignee and 'Manage Dependents' as the action. The second row has 'Department Head \_TRN4 (You)' as the assignee and 'Fill Out Form' as the action, which is highlighted with a red box and a red arrow.



To upload an optional recommendation letter, click on [Add File](#).

**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.

▼ **Head or Equivalent Recommendation for OAA (Optional)** Edit Add File

**Materials**  
No files have been added to this section.

**Committee Forms**

Title	Details	Actions
<input type="checkbox"/> OAA - Department Head or Equivalent Acknowledgement   Step 1: Department Head or Equivalent Standing Committee	Last Response Submitted Mar 21, 2025	<a href="#">Edit</a>

Click on [Browse to Upload](#) or simply drag and drop your file. Rename the document, if required, when uploading.

**Add File** [X]

Upload Video Webpage

Drag & Drop your files anywhere or

[Browse To Upload](#)

Save Cancel

Once uploaded, click [Add](#). The recommendation letter will now be showing in the [Head or Equivalent Recommendation for OAA](#) section.

**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.

▼ **Head or Equivalent Recommendation for OAA (Optional)** Edit Add File

**Materials**

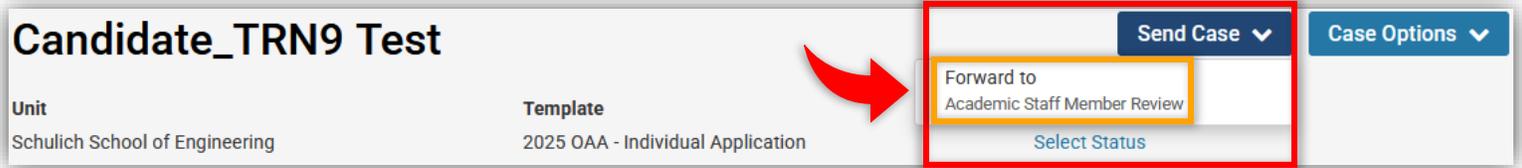
Title	Details	Actions
<input type="checkbox"/> <a href="#">Recommendation Letter</a>	Added by Department Head_TRN4 Mar 21, 2025	<a href="#">Edit</a>

**Committee Forms**

Title	Details	Actions
<input type="checkbox"/> OAA - Department Head or Equivalent Acknowledgement   Step 1: Department Head or Equivalent Standing Committee	Last Response Submitted Mar 21, 2025	<a href="#">Edit</a>

## Forward Case to Academic Staff Member

Once the recommendation letter has been added, at the top of the case, click **Send Case > Forward to Academic Staff Member Review**.



**Candidate\_TRN9 Test**

Unit: Schulich School of Engineering | Template: 2025 OAA - Individual Application

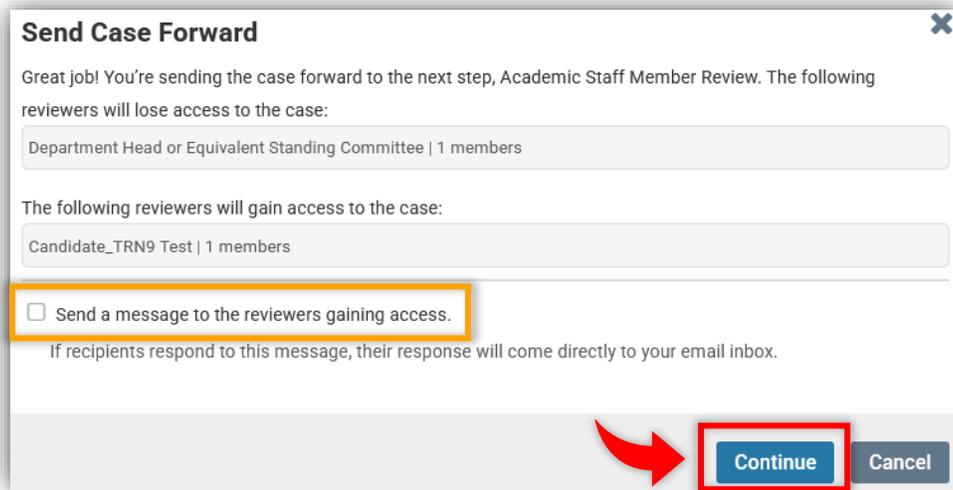
Send Case ▾ | Case Options ▾

Forward to: Academic Staff Member Review | Select Status

*Advance the case to the Academic Staff Member review step **no later than September 30.***

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.



**Send Case Forward** [X]

Great job! You're sending the case forward to the next step, Academic Staff Member Review. The following reviewers will lose access to the case:

Department Head or Equivalent Standing Committee | 1 members

The following reviewers will gain access to the case:

Candidate\_TRN9 Test | 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.

Continue | Cancel

End of self-nomination process in Academic Portfolio.

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 your nomination case, contact [hracadem@ucalgary.ca](mailto:hracadem@ucalgary.ca).

For technical support with Academic Portfolio, contact [Interfolio-support@elsevier.com](mailto:Interfolio-support@elsevier.com).