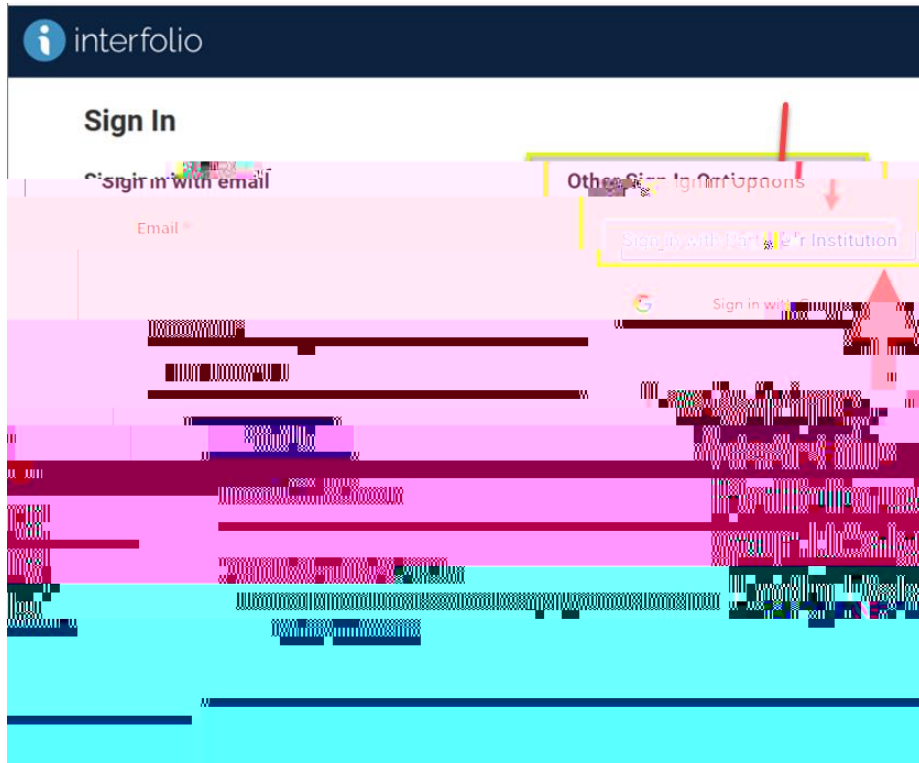


# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

## Contents

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

## ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT



### LOGIN INTO ACADEMIC PORTFOLIO

Login using the link through the portal

>

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

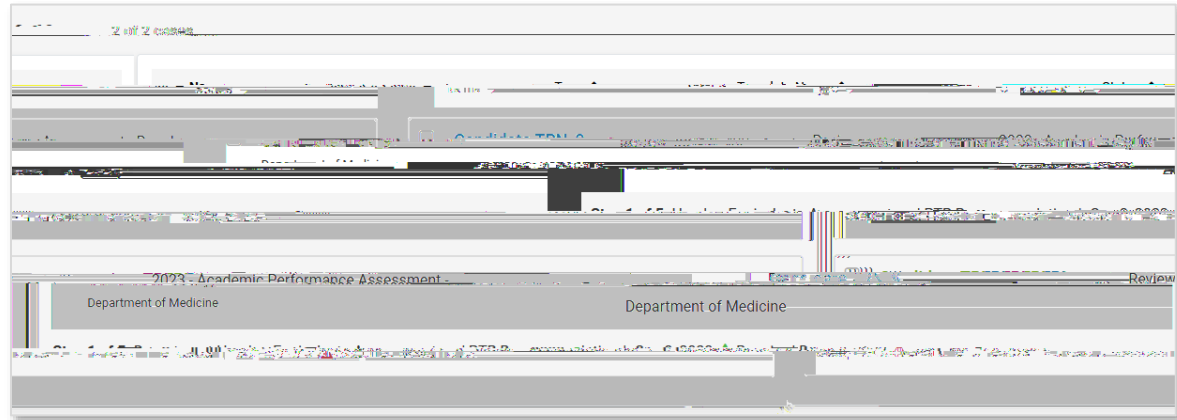
To guide your assessment, review the Academic

Performance Assessment website <https://www.ucalgary.ca/hr/workcompensation/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 Guidelines, etc.).

## ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

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



### (1) OPEN CASE

Click Case Details next to Case Materials

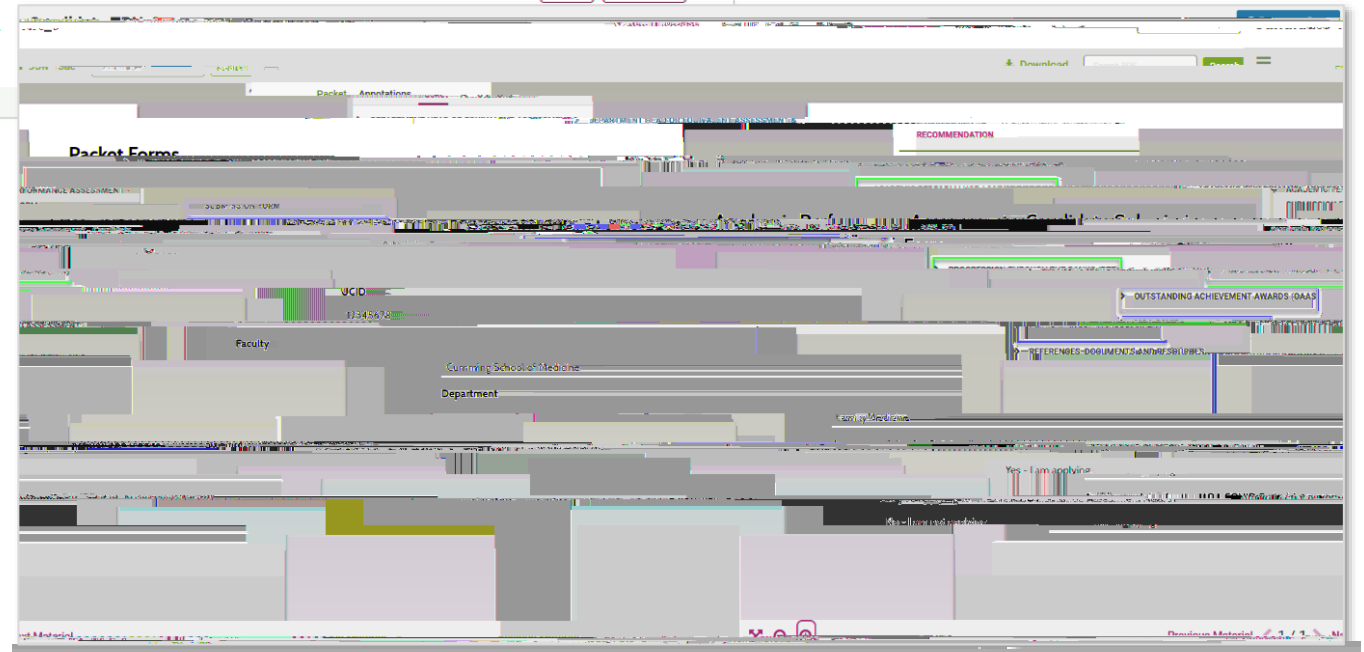
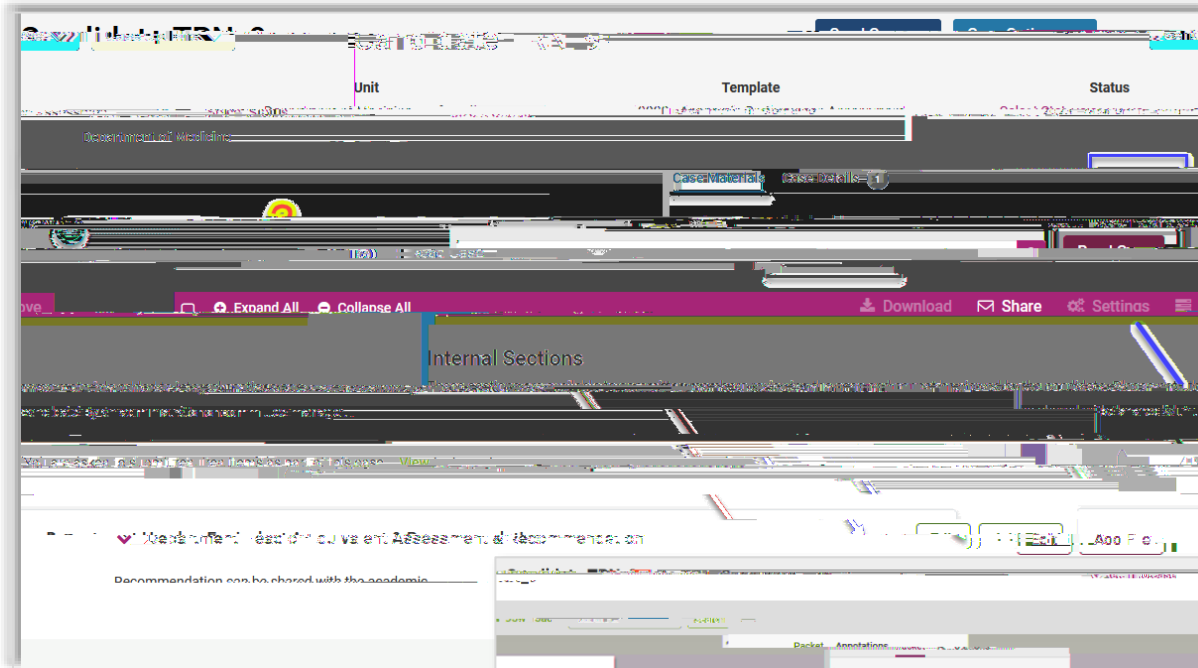




# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

## (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





## ACADEMIC PORTFOLIO JOB 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'

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





## ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

### **(5) SHARE DEPARTMENT HEAD RECOMMENDATION WITH ACADEMIC STAFF MEMBER**

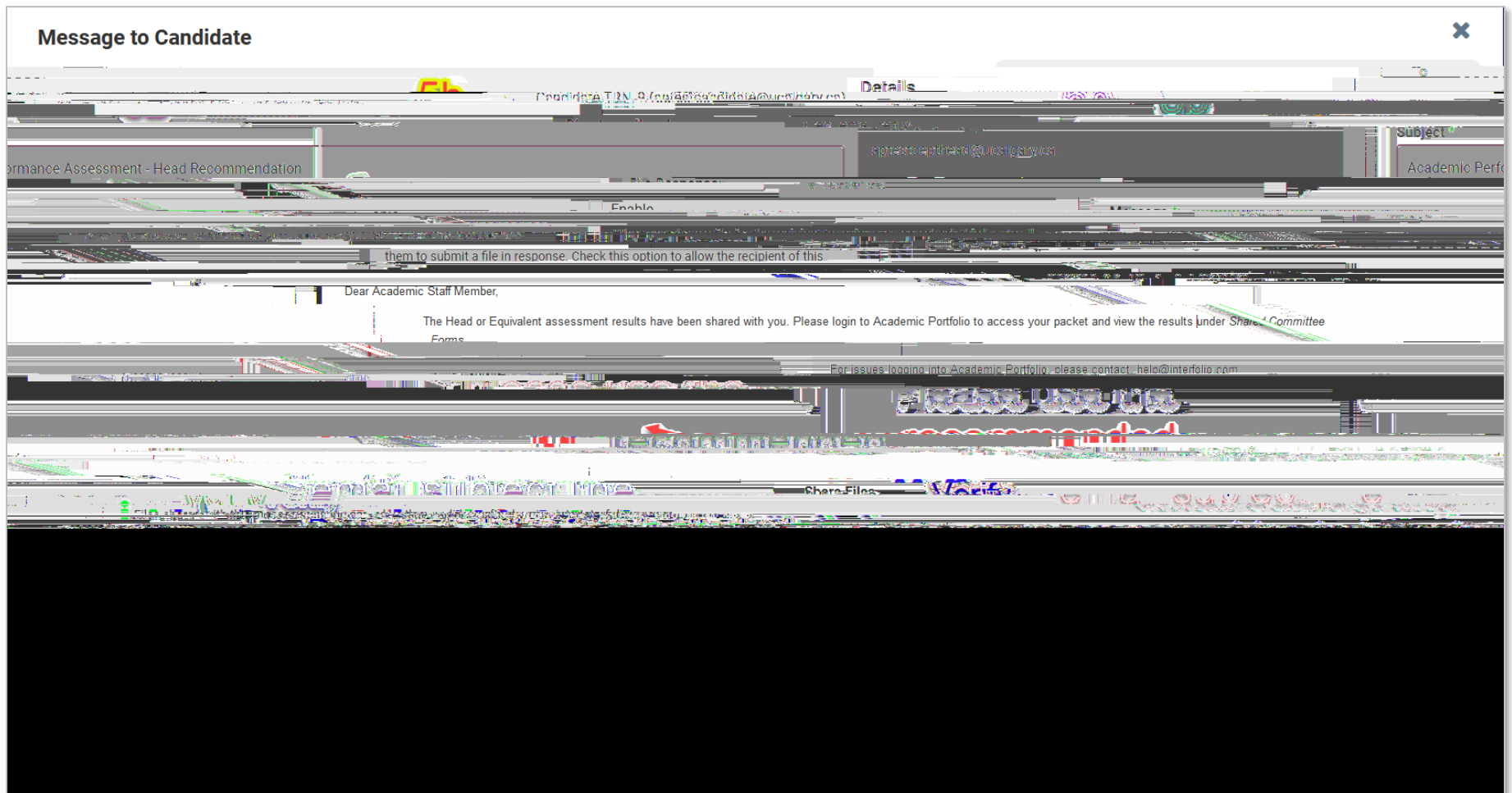
After submitting the Head Recommendation, the Head can still edit their submission before sharing it with the Academic Staff Member by returning to Case Details, then under Required Items.

# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

## ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

### (5b) SEND EMAIL NOTIFICATION TO ACADEMIC STAFF MEMBER TO SHARE RECOMMENDATION

A message to the candidate is created to notify them. Please use the template email provided (next page)





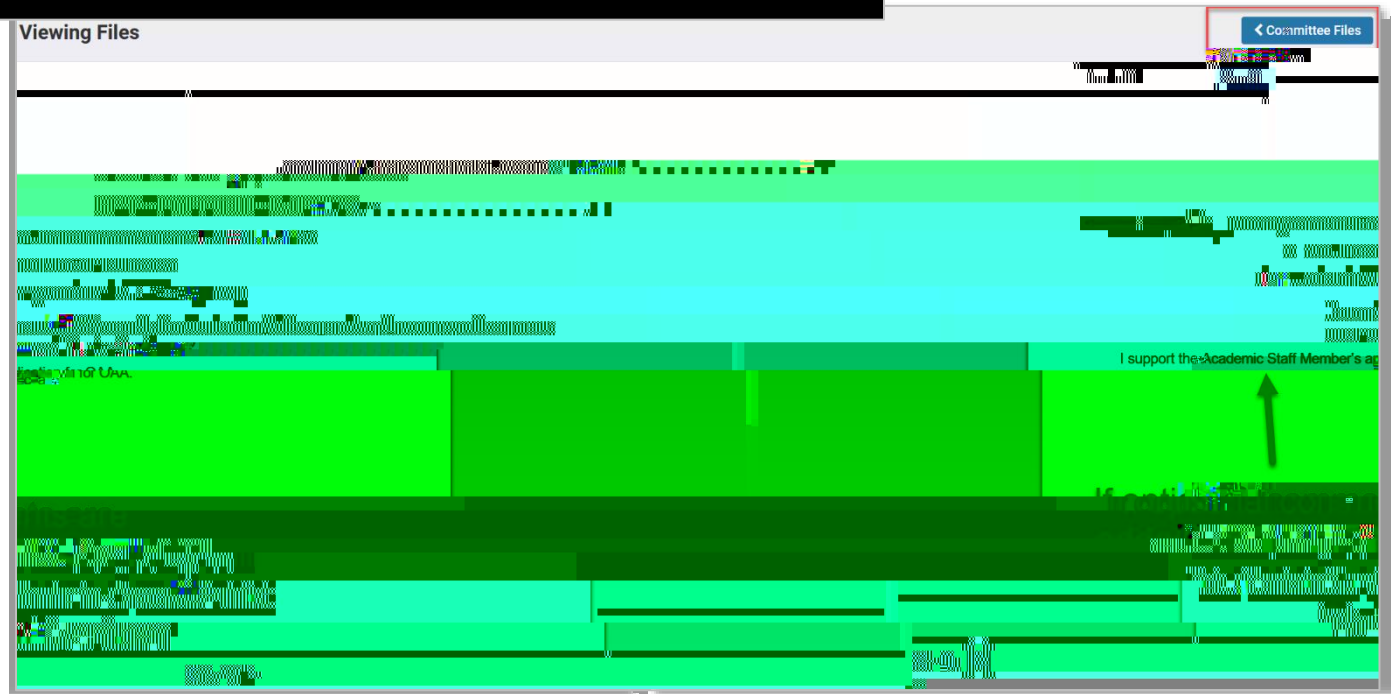
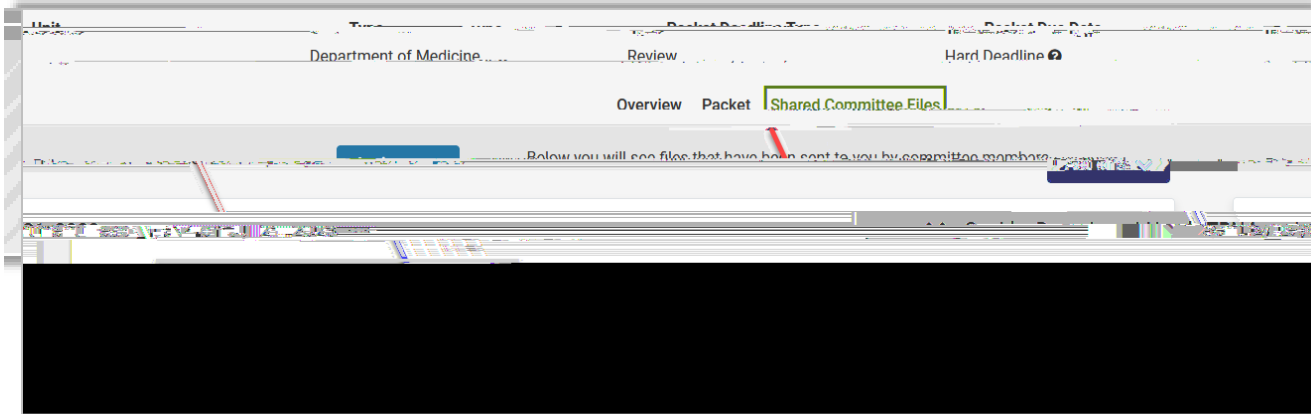
## ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

Message  
preview.

Click

# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

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



## ACADEMIC PORTFOLIO JOB 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







# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT

# ACADEMIC PORTFOLIO JOB HEAD ASSESSMENT