

This tip sheet is produced by Human Resources Consulting Services at the University of Alberta. For more information on this topic, please contact your [Employment & Pay Advisor](#) at 780-492-4555

Reference:
 Part A – Article 21
 Part B – Article 16
 Common Provisions – Article 8

- Common Provisions – Article 8 (Performance Reviews and Increments) applies to Auxiliary / Auxiliary Trust and Regular / Regular Trust employees **only**.
- Part A – Article 21 and Part B – Article 16 (Postings, Transfers and Responsibility Pay) applies to Casual 2 / Casual 2 Trust and Auxiliary / Auxiliary Trust employees (with some exceptions), and Regular / Regular Trust employees.

Employee Type	<u>Initial Annual Review Date</u>	<u>Annual Review Date when Transferring</u> <i>new position at same grade</i>	<u>Annual Review Date for Promotion and Voluntary Demotion</u> <i>new position at higher or lower grade</i>
Casual 1 / Casual 1 Trust	n/a	n/a	n/a
Casual 2 / Casual 2 Trust	No obligation for an annual performance review, but it is encouraged	No annual review required, but it is encouraged	No annual review required, but it is encouraged
Auxiliary / Auxiliary Trust	12 months from the date the employee: <ul style="list-style-type: none"> • Reached Auxiliary / Auxiliary Trust status in that position, or • Was appointed to an Auxiliary / Auxiliary Trust position 	<ul style="list-style-type: none"> • <i>If coming from a Casual 1 or Casual 2 appointment</i> – one year from the date the Auxiliary appointment commenced. • <i>If coming from an Auxiliary or Regular appointment</i> – annual review date remains unchanged if employee appointed at same step. If appointed at higher step*, review date is 12 months from date of appointment to the new position. 	12 months from the date of the promotion or voluntary demotion
Regular / Regular Trust	<ul style="list-style-type: none"> • 12 months from the date the employee was appointed to the Regular / Regular Trust position, or • If an Auxiliary / Auxiliary Trust position converting to a Regular position, 12 months from the date the employee was appointed to the Auxiliary position 	<ul style="list-style-type: none"> • <i>If coming from a Casual 1 or Casual 2 appointment</i> – one year from the date the Regular appointment commence. • <i>If coming from an Auxiliary or Regular appointment</i> – annual review date remains unchanged if employee appointed at same step. If appointed at higher step*, review date is 12 months from date of appointment to the new position. 	12 months from the date of the promotion or voluntary demotion

* Review date is changed **only** if the employee receives an increase of at least one increment.

Annual Review Date: the date the increment is effective, if applicable:

- The review date **is** adjusted for leaves without pay in excess of one calendar month.
- The review date **is not** adjusted for leaves with pay, maternity/parental leaves, and union leaves.
- The review date **is not** adjusted when an employee's status changes from Auxiliary to Regular in the same position or grade, or when a position is re-evaluated.

Increment: the difference between one step and the next full step (e.g. an increment is the difference between Step 2 to 3 **or** Step 2.5 to 3.5).

Annual Performance Increment: Regardless of whether or not a performance review has been completed and submitted, one increment is awarded at each annual review period to either an Auxiliary or Regular employee, **unless:**

- Unsatisfactory performance has been reported **and** documented (*at least 4 months in advance of the review date and after consultation with Employee Relations*) so the employee is aware that their increment is at risk, or
- The employee has reached Step 9.