

Cyclical Assessment: Core Requirements Standardized Reporting Template

The purpose of this form is to assist your organization in reporting certain results of your cyclical assessment conducted in **2026-2027**. You are requested to use this form to report on the results of your examination of compliance with the following core requirements in appointments and appointment processes:

- Merit
- Official languages
- Priorities
- Order of preference
- Identification of biases and barriers

The form also includes a section seeking details on the sample of appointment files used for your assessment and whether a risk assessment was conducted to inform the scope of your review.

In completing your organization's cyclical assessment, please include both the core requirements **in addition to** any other observations and conclusions, and corrective actions (taken or planned) resulting from the assessment. The Deputy-approved final cyclical assessment report is to be submitted to the Public Service Commission, as per the [Appointment Delegation and Accountability Instrument](#).

Should you have any questions, you are encouraged to contact your [PSC Staffing Support Advisor](#).

Merit

Instructions:

For each appointment file included in your sample, review the assessment material to identify if the person appointed met the **essential qualifications**, as well as any **asset qualification(s), operational requirement(s), or organizational need(s)** that were applied in the appointment decision.

Information to consider in your review could include:

- Valid Second Language Evaluation results
- Assessment of the first official language
- CV, applications
- Assessment results: e.g., screening board reports, assessment board reports, narrative assessments
- Employment Equity self-declaration (if applicable)
- Affirmation of Indigenous Identity Form (if applicable)
- Articulation of selection decision

The appointee met each essential qualification required for the position (including official language proficiency and the applicable qualification standard):

# (%)	Files where the appointee met each essential qualifications applied in the appointment decision
# (%)	Files where the appointee did not meet each essential qualifications applied in the appointment decision
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable

The appointee met asset qualification(s) applied in the appointment decision:

# (%)	Files where the appointee met asset qualification(s) applied in the appointment decision
# (%)	Files where the appointee did not meet asset qualification(s) applied in the appointment decision

# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable (e.g., assets were not applied in the appointment decision)

The appointee met operational requirement(s) applied in the appointment decision:

# (%)	Files where the appointee met operational requirement(s) applied in the appointment decision
# (%)	Files where the appointee did not meet operational requirement(s) applied in the appointment decision
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files were this was not applicable (e.g., operational requirements were not applied in the appointment decision)

The appointee met organizational need(s) applied in the appointment decision:

# (%)	Files where the appointee met organizational need(s) applied in the appointment decision
# (%)	Files where the appointee did not meet organizational need(s) applied in the appointment decision
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable (e.g., organizational need(s) were not applied in the appointment decision)

Official languages

Instructions:

For each appointment file included in your sample, review the French and English versions of the **advertisement (including merit criteria)** and the **priority clearance request** and identify if there are any differences that could have had an impact on persons eligible to apply, or those with a priority entitlement participating in the appointment process. Differences to look for could include inaccurate translations, or missing text in translations.

Information to consider in your review could include:

- Public Service Resourcing System (PSRS) and non-PSRS English and French advertisements
- Priority Information Management System (PIMS) priority clearance information

There were differences between the French and English versions of the advertisement, including merit criteria:

# (%)	Files where there were differences in translations that may have had an impact on persons applying.
# (%)	Files where there were no differences , or the differences were minor and would not have had an impact on persons applying
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable

There were differences between the French and English versions of the priority clearance request:

# (%)	Files where there were differences in translations that may have had an impact on persons with a priority entitlement
# (%)	Files where there were no differences , or the differences were minor and would not have had an impact on persons with a priority entitlement
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable

Priority consideration

Instructions:

For each appointment file included in your sample, review to identify if a **priority clearance number** was obtained, and whether there were differences between the **requirements used in the request for priority clearance and those used to make the appointment** that may not have allowed persons with a priority entitlement to be considered. Particular attention should be paid to appointment process type, tenure, location, group and level, essential qualifications, conditions related to the appointment and employment.

Information to consider in your review could include:

- PIMS priority clearance request and number
- Merit criteria
- Narrative assessment
- Assessment material
- Articulation of selection decision
- Letter of offer

A priority clearance number was obtained for the appointment:

#	(%)	Files where a priority clearance number was obtained for the appointment
#	(%)	Files where a priority clearance number was not obtained for the appointment
#	(%)	Files where the information was not accessible electronically or through other means
#	(%)	Files where this was not applicable (e.g., as per section 43 of the <i>Public Service Employment Act</i>)

There were differences between the requirements used in the request for priority clearance and those used to make the appointment:

#	(%)	Files where there were differences between the essential qualifications, or type of employment, or location or group and level, or conditions of employment in the priority clearance request and those used in the appointment decision.
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#	(%)	Files where there were no differences in any of these elements, or the differences were minor and would not have had an impact on persons with a priority entitlement.
#	(%)	Files where the information was not accessible electronically or through other means
#	(%)	Files where this was not applicable (e.g., as per section 43 of the <i>Public Service Employment Act</i>)

Order of preference

Instructions:

For each appointment from an **externally advertised** process included in your sample, review any application, screening, or assessment information on file to determine whether the **order of preference** was respected.

Information to consider in your review could include:

- Advertisements
- List of applicants
- Screening results
- Service numbers
- Preference eligibility start dates
- Proof of Canadian citizenship or permanent resident status

For advertised external appointment processes only: Was the order of preference respected?

# (%)	Files where the order of preference was respected
# (%)	Files where the order of preference was not respected
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable (e.g., a person with a priority entitlement was appointed)

Biases and barriers

Instructions:

For each appointment file included in your sample, review to identify if an evaluation was conducted to:

- Identify whether the assessment method and the manner in which it was applied included or created biases or barriers that could disadvantage persons belonging to any equity-seeking group and,
- If one was identified, reasonable efforts were made to remove the biases and barriers or to mitigate its impact on those persons.

Information to consider in your review could include:

- Evidence or documentation that an evaluation of assessment methods was conducted, with dates for when it was conducted
- Assessment information (including dates for when assessment was performed)
- Documentation on what was done to remove or mitigate the impact of any biases or barriers (if applicable)

Identify whether the assessment method and the manner in which it was applied was evaluated to determine if they included or created biases and barriers that could disadvantage persons belonging to any equity-seeking group

# (%)	Files where the assessment method and the manner in which it was applied were evaluated
# (%)	Files where the assessment method and the manner in which it was applied were not evaluated
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable (e.g., process was launched prior to July 1, 2023)

If biases and barriers were identified, reasonable efforts were made to remove or to mitigate their impact on those persons belonging to an equity-seeking group

# (%)	Files where reasonable efforts were made to remove or mitigate their impact equity-seeking group members
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# (%)	Files where reasonable efforts were not made to remove or mitigate their impact on equity-seeking group members
# (%)	Files where the required information was not accessible electronically or through other means
# (%)	Files where this was not applicable (e.g., no biases or barriers had been identified; process launched before July 1, 2023)

Information on sample of appointment files

The assessment should examine a sample of appointment files for compliance. The scope of the assessment should include an adequate sample to understand the health of your staffing system from a compliance perspective.

What was the total number of appointment files included in your sample (indeterminate appointments and term appointments greater than 6 months):

#

Sample breakdown:

#	External advertised appointments
#	Internal advertised appointments
#	External non-advertised appointments
#	Internal non-advertised appointments

What percentage of your organization’s total staffing activities conducted in 2026-2027 was represented in the sample:

%

Breakdown of organizational staffing activities undertaken in fiscal year 2026-2027 (indeterminate, term appointments greater than 6 months):

Year	Internal advertised appointments	External advertised appointments	Internal non-advertised appointments	External non-advertised appointments	Total
2026-2027	#	#	#	#	#

Information on risk assessment performed

A risk assessment should be conducted to identify the areas and requirements that the cyclical staffing assessment should focus on.

Was a risk assessment undertaken to identify the areas and requirements that your cyclical assessment focused on (please check the response that applies)?

___ **Yes**, a risk assessment was undertaken specific to the conduct of the cyclical assessment in order to identify areas of focus

___ **No**, a risk assessment was not undertaken to identify the areas of focus for the cyclical assessment (i.e., all requirements were reviewed; we leveraged the results from our organizational ongoing monitoring activities that are risk-based)

If yes, please identify what sources of information were consulted (select all that apply):

- ___ previous organizational monitoring results
- ___ staffing-related complaints
- ___ grievances or investigations requests
- ___ dialogue with human resources practitioners and bargaining agents
- ___ PSC system-wide oversight findings, including the System-Wide Staffing Audit
- ___ Survey of Non-Partisanship and Staffing
- ___ any other relevant information

Open field: /500 characters