

How to create an Appointment Packet for a staff employee who is being appointed to an academic title

NOTE: This process should be used for non-academic employees who have a UCSF ID number. If they DO NOT have a UCSF ID, use the process detailed in the document: How to create an Appointment packet – New Hire.

1. Log into Advance
2. Navigate to the Candidate Mgmt page
3. Enter the last name of the staff employee into the search bar on the Candidate Mgmt page
4. Click **Non-Academic Search**

IMPORTANT: the Non-Academic Search returns records regardless of your Dept Code

5. Select the staff employee name from the resulting selection set
6. You are now on the staff employee's Profile page
 - a. Verify/change the Academic Department so it displays your department
IMPORTANT: Change the Academic Department to one that you have access to.
 - b. Click Save if you've changed any values on this page
IMPORTANT: If you save the Profile with an Academic Department you do not have access to, you will not be able to access this person's Advance record.
7. Navigate to the Packet page and enter Proposed:
 - a. Action (Appointment)
 - b. Series
 - c. Rank
 - d. Step
 - e. Appointment %
 - f. And enter the three dates at the bottom:
 - i. Effective Date
 - ii. Packet Deadline
 - iii. References Due
8. Click Save

You now have an Advance record and packet for this soon-to-be academic. Use Advance to collect References, print a summary sheet to collect signatures, and use the Manage packet page to "route" the packet to the Dean's Office.