

# References Incremental Best Practices

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The following represents some FAQs that may help APAs use Advance.

**1. Is there documentation to help me get started with using the new Reference capability?**

Yes, the [Reference Quick Guide](#) and the [Reference User Guide](#) are available on the [Advance Support Website](#). In addition, if you have any questions, feel free to send email to [AdvanceSupport@ucsf.edu](mailto:AdvanceSupport@ucsf.edu).

**2. Am I required to use Advance to generate reference requests?**

Check with your Dean's Office; your school may require using Advance for collecting references. Campus Academic Affairs strongly encourages you to use Advance for the reference process as it will help you become familiar with the system before June, when Advance will be required for tracking packets.

**3. What is the best way to create packets?**

Advance gives you two ways to create packets.

- A. Use the Search page to generate a list of people who need packets for on-time actions. This method is best when you want to create packets for a lot of people – merits, promotions, and appraisals.
- Click the Search hyperlink (upper right)
  - Find the person for whom you want to create a packet
  - Click the Action hyperlink for that person
  - Modify/verify each of the values for the new packet and click Save
- B. Use the Search section on the Candidate Management page to find individuals. This method works best when creating other actions such as Appointment, Career Review, Change in Series, or Five Year Review.
- Click the Candidate Mgmt tab
  - Use the Search feature to find the candidate name
  - Enter/select each of the values for the new packet and click Save

**4. How do I change a packet after referees have been contacted?**

When you change a packet from Promotion to Merit, or Change in Series, etc., the information about the packet changes in several places:

- On new emails sent to referees
- On the page where a referee enters reference information
- On the pages used to print the references for the paper packet

Because these changes happen when you change the packet, you may need to print references before making the change to the packet. So, if you have received references from referees:

- Print the references that have been received under the original packet definition BEFORE changing the packet to the new definition
- Contact the referees off-line to ask whether the reference they have submitted under the original definition can be used for the new definition
- Attach their response to the printed reference

**5. How do I change the Reference Deadline so a referee can submit a reference?**

On the Packet page, modify the date in the Reference Due field. Changing this date will enable referees who have already received an email to access the system until the new date has passed.

**6. I forgot to attach the CV before I sent the emails! What do I do?**

The Attachment can be added after you send the emails. The attachment does not go with the email, but is added to the page where the referee enters his/her reference information. You can add (or change) the attachment at any time.