


## Help and Customer Support

**Advance Customer Support (OAAIS Customer Support):**  
 514-4100, Option 2 (7-6 Monday-Friday), or customersupport@ucsf.edu  
**Advance URL:** <https://myaccess.ucsf.edu/>  
**Help tips within Advance:** If you have questions about the information displayed within Advance, click on the  symbol for help with that section.

## Getting Started – Six easy steps

This document is designed to help you begin the References process in Advance. It assumes you have already logged into MyAccess. Once in MyAccess, click Advance to open the Advance application (it opens in a new browser window). The first page you see will be your Overview page (see below for a description of this page), but go to Department Management to

1. Set up your department
2. Create a packet
3. Enter referee information (names of referees who will be contacted)
4. Send reference emails
5. Print references
6. Print reference report

## 1. Set up your department

Before you can do anything related to packets or references, you are required to enter some department information. If this has already been done, go to #2.

- Click the Department Mgmt tab
- Enter the Chair's UCSF ID and press enter; the name fills in
- Alter the Modified name if necessary (appears in the email subject line)
- Enter the Chair Email Signature (text appears at end of emails to referees)
- Set the Reference Deadline (can be modified for each packet)
- Click Save

**IMPORTANT:** The text you enter into the Chair Email Signature field will appear at the end of the reference request email to the referee.

## 2. Create a packet

In order to start the References process, you need to create a packet for the candidate for whom you are gathering references. There are two ways to create a new packet for a candidate. If a packet already exists, go to #3.

- An on-time action
  - Click the Search hyperlink (upper right)
  - Find the person you want to create a packet for
  - Click the Action hyperlink for that person
  - Modify/verify each of the values for the new packet and click Save
- Other actions (Acceleration, Change in Series, Five Year Review, etc.)
  - 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

Once you have created packets for your department, you can manage those packets and any reference data from the Overview page (see below).

## 3. Enter referee information

Use Advance to create a list of referees to fulfill the requirement for reference letters from Intramural and Extramural referees. This is also where you will list people who can comment on the candidate's Teaching/Mentoring abilities.

- From within the packet, click the Reference List hyperlink (on the left)
- To add a new referee information click on "Add a Reference"
- Enter/select each of the values for the new referee and click on **Add** to save, **Clear** to start over, and **Cancel** to cancel
  - Source identifies who gave you the referee information
  - Referee Type: Intramural, Extramural, Teaching/Mentoring
  - Email is a required field
- To edit referee information click on the name
- To delete referee, click on the red X on the far left

	Source	Name	Title	Institution	Email	Reference Type	Candidate Do Not Contact	Chair Do Not Contact
X	Candidate	Thomas, Clarence	Justice	US Supreme Court	ned.hamilton@ucsf.edu	Extramural	Yes	
X	Candidate	Roberts, John G.	Chief Justice	US Supreme Court	ned.hamilton@ucsf.edu	Extramural		Yes
X	Candidate	Roberts, John Paul	Justice	US Supreme Court	ned.hamilton@ucsf.edu	Teaching/Mentoring		
X	Chair	Dariker, Peter	Associate Professor	UCSF	ned.hamilton@ucsf.edu	Intramural		

## 4. Send reference emails

Once you have added some referees to your list, you can send reference request emails to them.

- From within the packet, click the Manage Reference hyperlink
- Preview the email by clicking the preview icon on the left
- Click 'Show PDF Attachments' to Attach a CV that can be viewed by referees (Teaching/Mentoring referees do not get to see the attachment)
- Select referees by checking the box under 'Email' or 'Reminder Email'
- Click 'Email Referee(s)' or 'Email Reminder(s)' to send emails

Source	Name	Institution	Reference Type	Email	Received	Reminder Email
Chair	Parker, Peter	UCSF	Intramural	<input type="checkbox"/>		
Candidate	Roberts, John G.	US Supreme Court	Extramural	<input type="checkbox"/>		
Chair	Breyer, Stephen	US Supreme Court	Extramural	03/19/2010		03/19-03-19 (1 sent)
Candidate	Roberts, John Paul	US Supreme Court	Teaching/Mentoring	03/19/2010	03/19/2010	
Candidate	Thomas, Clarence	US Supreme Court	Extramural	<input type="checkbox"/>		
Chair	Ginsburg, Ruth Bader	US Supreme Court	Extramural	<input type="checkbox"/>		

## 5. Print references

You will need to print the reference "letters" to include in the paper packet.

- From within the packet, click the Manage Reference hyperlink
- In the Received column, the hyperlink dates indicate which referees have submitted a reference "letter"
- Click one of these hyperlink dates to view the reference "letter"
- Click Print to print the reference "letter"

## 6. Print reference report

You will need to print your list of referees to include in the paper packet.

- From within the packet, click the Manage Reference hyperlink
- Click the Reference Report hyperlink (upper right) to generate a PDF of the Reference List
- Use your normal printing method to print this report

## Overview page

This is the first page you will see when you log into Advance. It lists all of the packets your department has in process.

- Click on the headers (Name, Action, etc.) to sort by that column
- Click on Action to go to the Packet page
- Click on #, #, # (References column) to go to "Manage Reference"
  - #, #, # tells you how many Intramural / Extramural / Teaching – Mentoring references have been received

Name	Action	Effective Date	References (I, E, TM)	Reference Due Date
Adams, John	Merit	07/01/2011	3, 2, 4	05/15/2010
Adams, John Quincy	Merit	07/01/2011	1, 1, 1	05/15/2010
Arthur, Chester A.	Promotion	07/01/2011	0, 0, 0	05/15/2010
Buchanan, James	Promotion	07/01/2011	2, 2, 2	05/15/2010
Buren, Martin Van	Promotion	07/01/2011		

## Candidate Mgmt page

This page enables you to search for Advance records you have access to.

- Enter any part of a name and click Search
- The results will display in a "splash" screen
- Select one of the results to view that record or close the splash page
- When you select a candidate, that name will appear beneath the search
  - If a candidate already has a packet in process, to the right of the candidate's UCSF ID you will see the action for that packet – click on the action to view the packet

The Candidate Mgmt page has two tabs

- Profile gives you some basic information about the candidate
  - Packet enables you to view an existing packet or create a new packet
    - If no packet exists for this candidate, enter/select each of the values for the new packet and click the Save button
    - If a packet already exists, and you want to create a second packet, modify/verify each of the values for the new packet and click the Save as New button
- IMPORTANT:** Advance will not allow you to create two packets that have the same action.
- Below the Packet tab are the two tabs for managing the References process (see #3 and #4, above)