

Advance Packet Routing and Tracking User Guide

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<p>Getting Started – Introduction & Quick Overview</p>	<p>This user guide will provide instructions to help you through the Packet Routing and Tracking module.</p>
<p>New features this user guide will cover:</p> <ol style="list-style-type: none"> 1. New links and columns on the Overview page 2. Faculty Profile set up 3. Manage Packet: Routing, Decision, and Packet Status. 4. Summary Sheet print out. 	<p>1. New Links and Columns on the Overview page.</p> <p>From the Overview page you will be able to have quick access to the following:</p> <ol style="list-style-type: none"> 1. Click on the hyperlinks under Action to access the Faculty Profile page. 2. Click on the hyperlinks under Location to access the Manage Packet page. <p>2. Faculty Profile Set Up</p> <p>Faculty Profile can be found under the Candidate Mgmt. tab. Data originally maintained in the Vice Provost's office will now be maintained on the Faculty Profile page.</p> <p>Some data fields will be pre-populated and others fields may be editable depending on your role. Once you have completed the profile page click on Save.</p> <p>3. Manage Packet: Routing, Decision, and Packet Status</p> <p>Depending on your role this page will allow you to:</p> <ol style="list-style-type: none"> 1. Change the location of the packet by Routing the Packet: <ol style="list-style-type: none"> a. Select a location from the drop down list in the Route this packet section b. Save your selection. You will now see the next location under Packet Routing History. 2. Record a decision on a packet and set a status for the packet. <ol style="list-style-type: none"> a. Select a decision from the Decision drop down menu b. For decision "Modify," you must enter in comments in the Notes field. c. Select Packet Status "Complete" when a final decision is made, or "Withdrawn" to withdraw. d. Save your selections. If you entered text in the Notes field you will now see your note under Comment History. <p>4. Summary Sheet Print Out</p> <p>The Summary Sheet can be printed out and placed in the paper packet to collect recommendation signatures. This page can be generated from the Packet page and Manage Packet page and will print out on a normal size sheet of paper.</p> <p>Simply click on the Summary Sheet hyperlink. Review the sheet for accuracy then print.</p>

Getting Started – Logging In

This document is designed to help you begin the Reference process in Advance. To start using the Advance Reference process you must have a log in for MyAccess. Once in My Access, click on Advance to open the Advance application. It will open in a new browser window.

Go to **MyAccess:** (myaccess.ucsf.edu) and login.

Username is derived from your Employee ID. E.g., if your Employee ID is “020583423” then your MyAccess Username is “SF058342”.

Password can be recovered by clicking the “Forgot your password?” link and answering the challenge questions.

Once logged in, click on the link to **Advance**.

Help: Call 415-514-4100 (7am-6pm weekdays)

UCSF University of California, San Francisco | About UCSF | Search UCSF | UCSF Medical Center

MyAccess

Login to MyAccess

Username

Password

Login

[Forgot your ID or password?](#)


By logging in, you agree to abide by UCSF's policy. Use of the UCSF network is governed by the [University of California Electronic Communications Policy](#).

Unauthorized access or use of the UCSF network is prohibited and may be subject to criminal and civil penalties.

System Availability: All times except the third Sunday of each month and announced maintenance events.

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Section Help and Customer Support

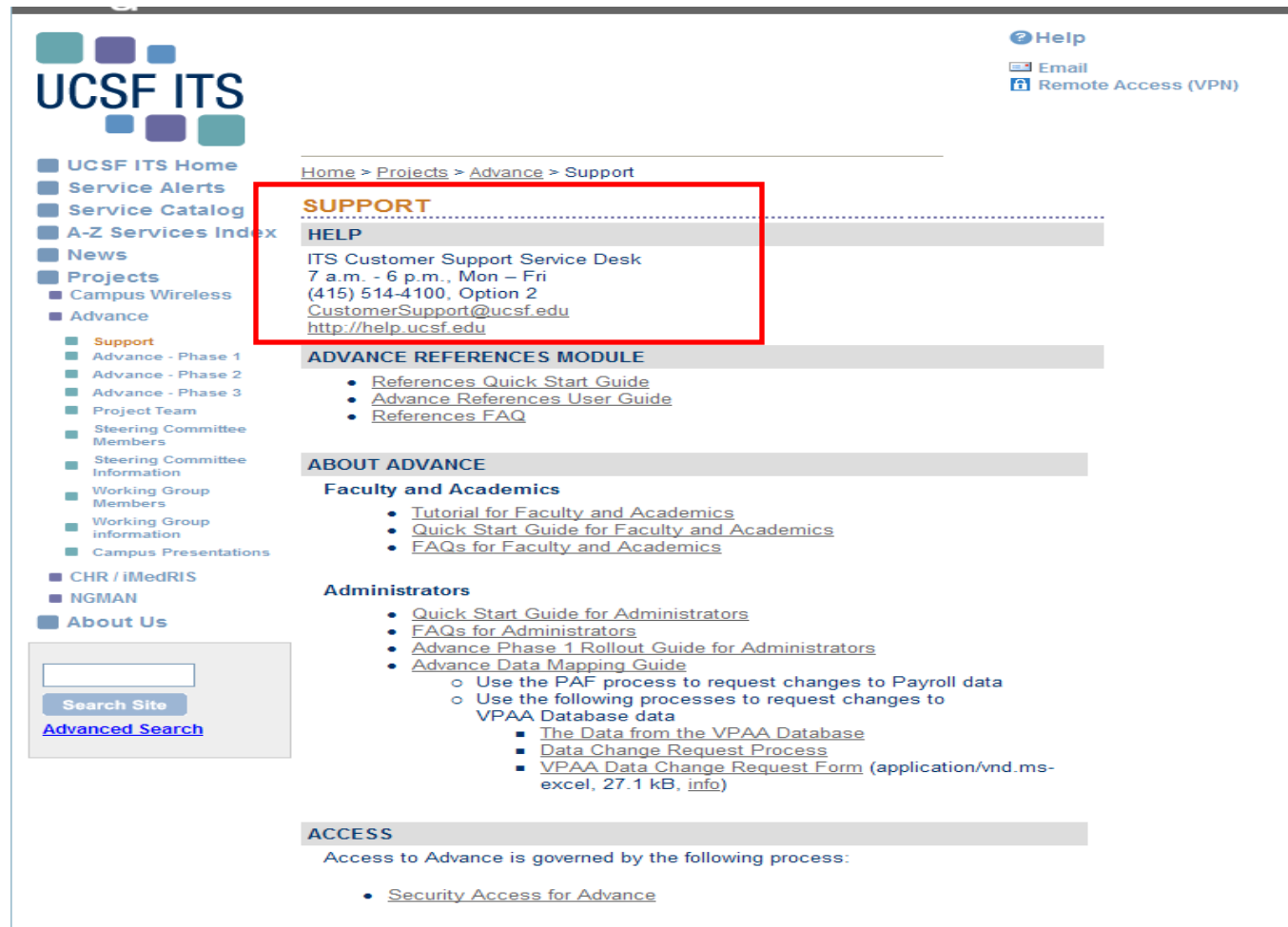
If you have questions about the information displayed within Advance, you can click on  symbol to display help on the section.

Advance Customer Support (ITS Customer Support)
415-514-4100, Option 2
(7 am to 6 pm Pacific Monday – Friday) OR
customersupport@ucsf.edu

Advance Support Website:
<http://oaais.ucsf.edu/OAAIS/projects/facultyadvancement/support.html>

Advance Faculty Information System Edward L Hamilton Search Admin Reports Help Logout

Overview Candidate Mgmt **Department Mgmt** ?



UCSF ITS Help
Email
Remote Access (VPN)

UCSF ITS Home
Service Alerts
Service Catalog
A-Z Services Index
News
Projects
Campus Wireless
Advance
Support
Advance - Phase 1
Advance - Phase 2
Advance - Phase 3
Project Team
Steering Committee Members
Steering Committee Information
Working Group Members
Working Group information
Campus Presentations
CHR / iMedRIS
NGMAN
About Us

Home > Projects > Advance > Support

SUPPORT

HELP

ITS Customer Support Service Desk
7 a.m. - 6 p.m., Mon – Fri
(415) 514-4100, Option 2
CustomerSupport@ucsf.edu
<http://help.ucsf.edu>

ADVANCE REFERENCES MODULE

- References Quick Start Guide
- Advance References User Guide
- References FAQ

ABOUT ADVANCE

Faculty and Academics

- Tutorial for Faculty and Academics
- Quick Start Guide for Faculty and Academics
- FAQs for Faculty and Academics

Administrators

- Quick Start Guide for Administrators
- FAQs for Administrators
- Advance Phase 1 Rollout Guide for Administrators
- Advance Data Mapping Guide
 - Use the PAF process to request changes to Payroll data
 - Use the following processes to request changes to VPAA Database data
 - The Data from the VPAA Database
 - Data Change Request Process
 - VPAA Data Change Request Form (application/vnd.ms-excel, 27.1 kB, [info](#))

ACCESS

Access to Advance is governed by the following process:

- Security Access for Advance

Overview Page

The Overview page has been enhanced by adding in key information to the existing Overview page.

Features:

- ❖ **APA** column will list the APA who created the packet.
- ❖ **Location** column is defined by the APA on the Manage Packet page. Location data displays where the packet has been routed to and if you click on the hyperlink you will be taken to the Manage Packet page.
- ❖ **Department** column will display the Academic Department of the Candidate.
- ❖ **Sorting Default** is alphabetical by APA, then by Name. However if you have created packets those will appear at the top. In addition, you can sort the items on the Overview page by clicking on the column header.
- ❖ **Excel Download:** Enables you to download the packets listed into Excel.

Overview Candidate Mgmt Department Mgmt

Packets in Process ?

16 records found Excel Download

Name	Department	Action	Effective Date	Location	References (I, E, TM)	Reference Due Date	APA
Adams, John	Biochemistry	Merit	07/01/2011	Department	3, 2, 4	05/15/2010	Jann Fong
Adams, John Quincy	Microbiology...	Merit	07/01/2011	VPAA			Jann Fong
Arthur, Chester A.	Biochemistry	Promotion	07/01/2011	Department	1, 1, 1	05/15/2010	Ned Hamilton
Buchanan, James	Biochemistry	Promotion*	07/01/2011	VPAA			
Buren, Martin Van	Biochemistry	Promotion*	07/01/2011	VPAA			
Bush, George H. W.	Microbiology...	Promotion	07/01/2011	Department	3, 2, 0	05/15/2010	Ned Hamilton
Bush, George W.	Biochemistry	Promotion	07/01/2011	CAP	4, 2, 2	05/15/2010	Ned Hamilton
Carter, James	Biochemistry	Appraisal	07/01/2011	CAP	3, 3, 3	05/15/2010	Marley Quirante
Cleveland, Grover	Biochemistry	Promotion*	07/01/2011	VPAA			
Clinton, William J.	Biochemistry	Promotion	07/01/2011	Department	0, 1, 3	05/15/2010	Ned Hamilton
Coolidge, Calvin	Biochemistry	Promotion	07/01/2011	Department	1, 0, 0	05/15/2010	Ned Hamilton
Eisenhower, Dwight D.	Biochemistry	Promotion	07/01/2011	Department	0, 0, 0	05/15/2010	Ned Hamilton
Fillmore, Millard	Biochemistry	Merit	07/01/2011	Dean's Office			Jann Fong
Ford, Gerald	Biochemistry	Merit	07/01/2011	Dean's Office			Jann Fong
Garfield, James	Microbiology...	Promotion*	07/01/2011	Department			
Grant, Ulysses S.	Biochemistry	Promotion*	07/01/2011	Department			

16 records found

Search

If you need to quickly find a record, simply enter last name in the search field and click on Search.

1. Enter name into the search fields and click on "Search"
2. Names that closely match will populate
3. Click on the correct name.

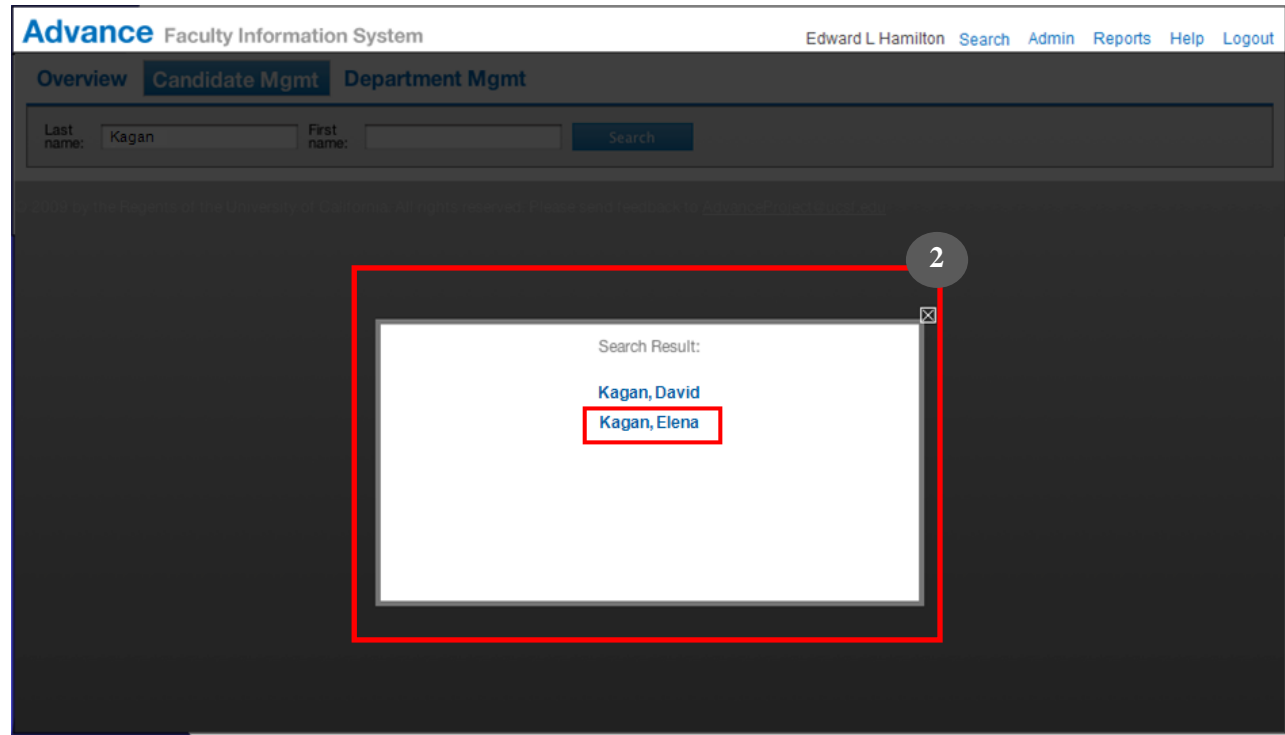


Advance Faculty Information System Edward L Hamilton Search Admin Reports Help Logout

Overview Candidate Mgmt Department Mgmt

Last name: First name:

1



Advance Faculty Information System Edward L Hamilton Search Admin Reports Help Logout

Overview Candidate Mgmt Department Mgmt

Last name: First name:

Search Result:

Kagan, David

2

How to Manage a Packet

The Manage Packet page will be used for three purposes: Generate a Summary Sheet, Route a Packet, Record a Decision, and set Packet Status.

Features:

- 1. Summary Sheet:** To print out the Summary Sheet simply click on the Summary Sheet hyperlink then use your browser print button.
 - Summary sheet will print out on a normal size sheet of paper
 - Place in Packet to collect recommendations and signatures.
- 2. Routing the Packet:** When you are ready to send the paper packet to the next review point (Dept., Dean's Office, VPAA, CAP):
 - Select from the drop down menu, "Send Packet to"
 - Click on "Save"
 - Packet routing history will now display your saved data and will be visible to the candidate.
- 3. Decision and Packet Status:** Ability to make changes to the Decision and Packet Status values depends on your access.
 - Select from the drop down list from "Decision"
 - Select from the drop down from "Packet Status"
 - Enter any Notes if desired
 - Click "Save"

The screenshot displays the 'Manage Packet' interface for John Smith (UCSF ID: 021195607). The page has tabs for 'Overview', 'Candidate Mgmt', and 'Department Mgmt'. Below the search bar, there are tabs for 'Profile' and 'Packet'. The 'Packet' tab is active, showing a 'Manage Packet' link (circled in red and labeled '2'). To the right, there are links for 'Summary Sheet' (circled in red and labeled '1') and 'Reference Report' (circled in red and labeled '3').

Route this packet

Send packet to:

Packet routing history

Dean's Office	05/20/2010	Maggie Simpson
Department	05/14/2010	Jason Bourne
Dean's Office	04/28/2010	Maggie Simpson
Department	04/12/2010	Jason Bourne

Decisions for this packet

Decision: Packet Status:

Notes:

Comment history

- "Emailed Maggie Simpson for More Information" commented by Nancy Drew on Mon May 17 12:06:31 PDT 2010
- "Requested an additional Extramural Reference Letter" commented by Nancy Drew on Tue April 27 12:56:22 PDT 2010

Faculty Profile

The Faculty Profile can be found under Candidate Mgmt tab. Depending on your role and type of packet some data fields will be pre-populated while other fields may be editable and required.

Employee Status: Read Only Data

Source: PPS

Key:

- A = Active
- I = Inactive
- N = Leave without pay
- P = Leave with pay
- S = Separated

Academic Department: Modifiable and Required Field

Source: Vice Provost

Default: Home Department

Joint Dept: Modifiable

Source: N/A

Date of Hire: Read Only Data

Source: PPS

Academic Appt. Date: VPAA can modify, Dean and Dept. APA read only.

Source: Vice Provost

Senate Appt. Date: VPAA can modify, Dean and Dept. APA read only.

Source: Vice Provost

8 Year Review Date: VPAA can modify, Dean and Dept. APA read only.

Source: Vice Provost. Calculated from the Senate Appointment Date only for Senate faculty series (Ladder, In Res, Clin X) with a Rank of Assistant.

The screenshot shows the 'Candidate Mgmt' tab for John Adams (UCSF ID: 023334445). The interface is divided into several sections:

- Search:** Last name: Adams, First name: John, Search button.
- Profile:**
 - Employee Status: Active
 - Academic Department: Radiology
 - Joint Department: None
 - Joint Department: None
 - Date Of Hire: 06/01/1986
 - Academic Appointment Date: 07/01/1994
 - Senate Appointment Date: [Empty]
 - 8 Year Review Date: [Empty]
 - 8 Year Review Comment: [Empty]
 - Appraisal Date: [Empty]
 - Search Number: [Empty]
 - Waiver Date: [Empty]
 - Date Assigned Rank: 07/01/1995
 - Year at Rank: 16
 - Date Assigned Step: 07/01/2007
 - Year at Step: 4
 - Scale: 5
 - Save button
- Academic Appointments:**
 - Professor in Residence, Step 7 (Primary 100%) - Radiology
 - Professor in Residence WOS (Joint) - Neurological Surgery
 - Professor in Residence WOS (Joint) - Pediatrics
 - Professor in Residence WOS (Joint) - Neurology
- Next eligible action:** Packets in process.
- Covered compensation:** \$210,600, Scale: 5.

8 Year Review Comment: VPAA can modify, Dean and Dept. APA read only. 500 Character limit.

Source: Vice Provost

Appraisal Date: Read Only Data

Source: Vice Provost. Calculated from the Senate Appointment Date only for Senate faculty series (Ladder, In Res, Clin X) with a Rank of Assistant.

Search Number: VPAA can modify, Dean and Dept. APA read only. 10 Character limit.

Source: Vice Provost

Waiver Date: VPAA can modify, Dean and Dept. APA read only.

Source: Vice Provost

Date Assigned Rank: Open field if Years at Rank is blank. Required field.

Years at Rank: Required field

Date Assigned Step: Open field if Years at Rank is blank. Required field.

Years at Step: Required field

Scale: Required Field by Dept. APA

Source: PPS

Save Button: Click to see and save calculations.

The screenshot displays a web application interface for managing employee profiles. At the top, there are navigation tabs: "Overview", "Candidate Mgmt", and "Department Mgmt". Below these is a search bar with "Last name: Adams" and "First name: John" entered, and a "Search" button. The user's name "John Adams" and UCSF ID "023334445" are shown. The main content area is divided into two sections: "Profile" and "Packet". The "Profile" section contains various fields for employee information, including status, department, hire date, and appointment dates. The "Packet" section shows academic appointments and compensation details. A "Save" button is located at the bottom left of the form.

Field	Value
Employee Status	Active
Academic Department	Radiology
Joint Department	None
Joint Department	None
Date Of Hire	06/01/1986
Academic Appointment Date	07/01/1994
Senate Appointment Date	
8 Year Review Date	
8 Year Review Comment	
Appraisal Date	
Search Number	
Waiver Date	
Date Assigned Rank	07/01/1995
Year at Rank	16
Date Assigned Step	07/01/2007
Year at Step	4
Scale	5

Academic Appointments

- Professor In Residence, Step 7 (Primary 100%)
Radiology
- Professor In Residence WOS (Joint)
Neurological Surgery
- Professor In Residence WOS (Joint)
Pediatrics
- Professor In Residence WOS (Joint)
Neurology

Next eligible action

Packets in process.

Covered compensation

\$210,600 Scale: 5

Be sure to click "Save" to save all changes

Summary Sheet

The Summary Sheet is generated from the Packet page by the APA to place in the Packet to collect signatures and recommendations. The printed version will fit on a normal size sheet.

Below describes the data source for the fields.



Source from Advance record:

- Name
- School
- Home Dept.
- Present Series, Rank, step
- Percent Time
- Packet History
- Dept. Chair / Appt. Info



Source from Packet page:

- Action
- Effective Date
- Proposed Series, Rank, Step
- On-time/Accel/Decel
- Paid by Affiliate
- Present Institution
- Title at Present Institution
- Highest Degree
- Year Earned
- Institution



Source from Profile Page:

- Years at Rank
- Years at Step

Merit Summary Sheet for John Adams

School: Medicine Home Dept.: Medicine
Effective Date: 07/01/2011

Merit from Professor In Residence, Step 8 to Professor In Residence, Step 9
 On-time action

Years at Rank: 15
 Years at Step: 2

Proposed % Time: 100%
 Current % Time: 100%
 Paid by Affiliate: none

New Appointment Information

Present Institution	Title	Highest Degree	Year Earned	Where degree was earned
Stanford University	Assistant Professor	PhD	2004	UC Davis

Packet History

Action	Series	Rank	Step	Accel/Decel	Effective Date	Status
Merit	In Residence	Full	8		07/01/2008	Approved
Merit	In Residence	Full	7		07/01/2005	Approved
Merit	In Residence	Full	6		07/01/2002	Approved

Recommendations Please check the appropriate box, sign, and date. Recommendations must be separately documented.

Department Chair	Approve	Disapprove	Other	Signature	Date
Medicine (Primary 100%)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Obstetrics, Gynecology & Reproductive Sciences (Joint)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Dean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ad Hoc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
CAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
VPAA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		