### Getting Started – Introduction & Quick Overview

This user guide will provide instructions to help you through the Reference process. Essentially, there are six main steps to complete that will assist you in the paper packet process.

<table>
<thead>
<tr>
<th>Six easy steps for the References process.</th>
<th>1. Set up your department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Set up your department</td>
<td>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.</td>
</tr>
<tr>
<td>2. Create your packet</td>
<td>2. Create a packet</td>
</tr>
<tr>
<td>3. Enter referee information</td>
<td>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. 1. An on-time action 2. Other actions (Acceleration, Change in Series, Five Year Review, etc.) Once you have created packets for your department, you can manage those packets and any reference data from the Overview page.</td>
</tr>
<tr>
<td>4. Send reference emails</td>
<td>3. Enter referee information</td>
</tr>
<tr>
<td>5. Print references</td>
<td>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</td>
</tr>
<tr>
<td>6. Print references report</td>
<td>4. Send reference emails</td>
</tr>
<tr>
<td></td>
<td>Once you have added some referees to your list, you can send reference request emails to them.</td>
</tr>
<tr>
<td></td>
<td>5. Print references</td>
</tr>
<tr>
<td></td>
<td>You will need to print the reference “letters” to include in the paper packet.</td>
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<td></td>
<td>6. Print reference report</td>
</tr>
<tr>
<td></td>
<td>You will need to print your list of referees to include in the paper packet.</td>
</tr>
</tbody>
</table>
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)
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 (OAAIS Customer Support)
415-514-4100, Option 2
(7 am to 6 pm Pacific Monday – Friday) OR customersupport@ucsf.edu
The updated Search Results page will have a column for **Action**. Links under Action will take the user to the Packet page so they can define the packet.

**Things to know:**

- Hyperlinks on the **Actions** under Action will take you to the Packet Definition page.
- The Best Practice for Creating a Packet is to click on the hyperlink from the Search results page.
### Setting up your Department

This page will be seen by the APA and the DO-APA roles only. This page **cannot** be seen by the candidate or by Advance users who do not have either the APA or DO-APA roles.

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

1. Chair’s UCSF ID: Enter ID and press enter for the name to auto populate.

2. Modified Name: Modify if necessary as you would like it to appear on the subject line of the Email.

3. Chair Email Signature: Enter in the Signature as you would like it to appear on the emails to the referee.

4. Reference Deadline: Set the deadline for the reference. This can be modified for each packet.

5. Hit **Save**

**Things to know:**
- Information entered will appear on the Reference request email to the referee.
- You must set up your department page before sending out your reference requests.
- If you have already completed your Department page then continue to **Create a Packet**.

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![Advance Faculty Information System](image)

**1. Chair's UCSF ID**

**2. Modified Name**

**3. Chair Email Signature**

**4. Reference Deadline**

**5. Save**
Creating a Packet

There are two ways to create a new packet for a candidate:

1. 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

2. 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

Things to know:
- The auto fill data in the packet page will assume the values for the Action selected on the Search Results page.
- To start the Reference process you need to create a packet for the candidate for whom you are gathering references.
- The candidate can have more than one active packet.
- There are two ways to create a new packet for a candidate.
Overview

This will be your landing page when you have packets in process. This page will help you identify Actions in progress as well as references in progress.

Things to know:

- To sort click on the column headers to sort in ascending or descending order.
- Hyperlinks under the Action column will take you to the Packet page.
- Hyperlinks under the References column will take you to the Manage References page.
- #, #, # tells you how many of Intramural / Extramural / Teaching – Mentoring references have responded.
Reference List

To enter or edit Referee information:
1. Click on Packet then Reference List here you will see your list of references if you have some entered.

2. Click on Add Reference

3. Enter referee information and click on Add to save information. Clear will clear fields so you can start over or Cancel to cancel out of entering reference information.

Source drop down list identifies the request coming from either Chair or Candidate

Referee Type drop down list identifies the reference as Intramural (UCSF), Extramural, or Teaching/Mentoring.

Candidate Do Not Contact check box is for the candidate to request a do not contact, however it does not prevent Advance from emailing the referee.

Chair Do Not Contact check box is for the Chair to request a do not contact. This selection does prevent Advance from emailing the referee.

4. To Edit referee information click referee’s name from the list. Information will populate on top.

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.
Manage References – Send Emails to Referees

This page will be seen by the APA and the DO-APA roles only. This page cannot be seen by the candidate or by Advance users who do not have the APA and the DO-APA roles only. This page displays the referee information that was entered on the Reference List page and will allow you to send reference request and reminders by Email.

1. Upload PDF Attachments. Click on the garbage can icon to delete.

2. Preview emails by clicking on the Preview icon next to Source.

3. Select referees by checking marking the boxes under Email and click on the Email Referee(s) button to execute.

4. To send a reminder check the box under Reminder Email and click on Email Reminder(s) button to execute.

5. Click for a Printable Reference report.

6. If you need any assistance on this page, click on the help icon.
**Manage References Continued**

**Things to know:**

- **Date under Email and Reminder Email** is the date reference request was sent. (# sent) indicates the number of reminders sent.

- Dates under **Received** are hyperlinks. This means the referee has responded. Click on the link to view and print the referee’s response.

- Click on the headers to sort in either ascending or descending order.

- **Reference Report** is a hyperlink that will generate a contiguous list of references from this packet.
<table>
<thead>
<tr>
<th>Table: Referee’s Response (Intra/Extramural)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The referee will receive an email with a hyperlink. The hyperlink will take the referee to a secure site where they have the option to opt out or continue with the reference process. If they choose to continue they will be presented with either a Intramural/Extramural form or a Teaching/Mentoring form.</strong></td>
</tr>
<tr>
<td><strong>Below is the Intra/Extramural reference form.</strong></td>
</tr>
</tbody>
</table>

1. **Attachment** can be opened and viewed.

2. **Criteria for Review** hyperlink will explain to the referee the criteria for reference response.

3. **Confidentially Statement** needs to be checked by the referee in order to submit.

4. Referee can cut and paste his reference into the boxes. The top box is not subject to redaction while the bottom box will be subject to redaction.

Once complete, referee can submit and print for his/her records. Referee has the option to Save as Draft to complete before the deadline date.
Referee’s Response (Teaching/Mentoring)

The referee will receive an email with a hyperlink. The hyperlink will take the referee to a secure site where they have the option to opt out or continue with the reference process. If they choose to continue they will be presented with either a Intramural/Extramural form or a Teaching/Mentoring form.

Below is the Teaching/Mentoring reference form.

1. **Criteria for Review** hyperlink will explain to the referee the criteria for reference response.

2. **Confidentially Statement** needs to be checked by the referee in order to submit.

3. Referee will complete the five questions and enter in text into the text boxes provided. The referee can cut and paste text or type directly into the text boxes. The top box is not subject to redaction while the bottom box will be subject to redaction.

Once complete referee can **Submit** and print for his/her records.

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![Advance Faculty Information System](image)

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2. **Confidentially Statement** needs to be checked by the referee in order to submit.

3. Referee will complete the five questions and enter in text into the text boxes provided. The referee can cut and paste text or type directly into the text boxes. The top box is not subject to redaction while the bottom box will be subject to redaction.

Once complete referee can **Submit** and print for his/her records.
### Referee’s Response (APA to Print Intra/Extramural)

1. This section is not subject to redaction.

2. This section is subject to redaction.

3. Print the version you need.

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**Advance Faculty Information System**

**Candidate:**
Peter Ohara  [Promotion to Associate Professor, Step 1]

**Reference Submitted By:**
Stephen Breyer  
Justice  
US Supreme Court  
Extramural

**Recommendation:**
Dr. Arthur has always displayed an enormous capacity for investigative tenacity. A promotion to the proposed level seems almost a courtesy.

**Relationship to Peter Ohara**

I have never met the man!
To get to this page click on the hyperlink date under the Email column on the Manage Reference page. You will be able to print the reference letter to include in the paper packet. You can print a full version or the redacted version.

1. This section is not subject to redaction.

2. This section is subject to redaction.

3. Print the version you need.

**Advance** Faculty Information System

**Teaching/Mentoring Assessment**

Thank you for submitting a Teaching/Mentoring Assessment for Peter Ohara. Please use your browser print feature to print a copy for your records.

**Candidate:**

Peter Ohara  [Promotion to Associate Professor, Step 1]  03/19/2010

**Your responses:**

- Stimulated interest in topic  Outstanding
- Conveyed up-to-date information  Outstanding
- Displayed interest and concern in the quality of teaching/mentoring  Outstanding
- Effective role model  Outstanding
- Overall teaching/mentoring ability  Outstanding

**Additional Comments (not redacted):**

All of my interactions with Dr. Ohara have been thought-provoking and insightful. He has a brilliant mind and is richly deserving of the proposed Promotion.