

HOW TO CREATE THE ELIGIBILITY LIST

Background

The packet cycle begins with an eligibility list. Advance maintains information about each academic and when s/he is eligible for appraisal, merit or promotion. As a Service Center AP generalist, you need to generate the eligibility list to review with the Department Chair to determine who will be reviewed during the current cycle. To do this, simply do a search based on series and effective dates.

Step-by-step process

1. Navigate to the Search page

2. If you only want to see records within one or more specific series, use the Series drop-down to select the series you want to see; you can also de-select specific series like Volunteer Clinical
3. Select Effective Dates, that is, the date range when the person is eligible for the merit or promotion
 - a. The range runs from 7/2/YYYY through 7/1/YYYY + 1 to ensure that everyone eligible for the year up to and including July 1st will appear in the list
4. Click Search
 - a. The Results page displays in groups of 20. If the list is long, it may benefit you to click the Download to Excel link on the top of the list and review the results using Excel.

Name	UCSF ID	Academic Dept	Appt %	Series	Rank	Step	Yrs at Rank	Yrs at Step	Next Eligible	Action	Home Dept
Small, Joseph M.	023456789	Medicine	100	Clinical X	Associate	2	6	2	07/01/13	Merit	Med-Geriatrics
Simee, Charles	024455333	Medicine	100	Adjunct	Associate	3	4	2	07/01/13	Merit/Promotion	Med-Geriatrics
Smith, John Samuels	027654321	Medicine	100	Clinical X	Associate	1	2	2	07/01/13	Merit	Med-Geriatrics
Smote, Anne	029384785	Medicine	0	HS Clinical	Full		4	4	07/01/13	Merit	Med-Geriatrics

Key Issues

- You do not have to select a School or Department – Advance will only return records you have access to. However, If you have access to multiple Schools/Departments, you may want to restrict the search using the School/Department fields
- If a candidate has a packet in process, he/she will not be returned in the list because Advance is not capable of calculating the next action when a packet is active
 - Likewise, if the PPS record for a paid academic doesn't include a step, Advance cannot calculate the next action