


## Help and Customer Support

### Advance Customer Support (ITS 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

This document is designed to help you begin Packet Tracking in Advance. It assumes you have already logged into MyAccess. Once in MyAccess, click Advance to open the Advance application (new browser will open). The first page you will see is the Overview page. From the Overview page you will be able to have quick access to the following:

1. Click on the hyperlinks under **Name** to access the **Candidate Profile** page.
2. Click on the hyperlinks under **Location** to access the **Manage Packet** page.



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

You can also quickly search for name by using the Search tool bar. Simply enter the last name and click on "Search". Names that closely match will populate.

## Overview Candidate Mgmt Department Mgmt

Last name:  First name:

## 1. Set up Faculty Profile

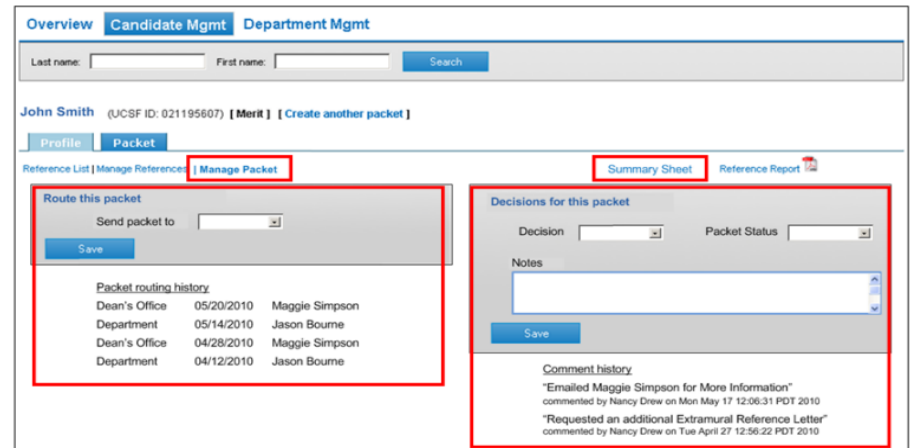
Faculty Profile can be found under the Candidate Mgmt. tab. Data originally maintained in the Vice Provost's office will now be maintained on the Faculty Profile page.

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**.

## 2. How to Manage Packet

Depending on your role this page will allow you to:

1. Change the location of the packet by Routing the Packet:
  - 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.
  - 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.



## 3. Print Summary Sheet

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. Simply click on the Summary Sheet hyperlink. Review the sheet for accuracy then print.

