How to create an Appointment Packet
for a New Hire

NOTE: This process should be used for new appointees who have never had a UCSF ID number OR for those appointees with a UCSF ID number and an OLPPS status of 'Separated'.

STEP 1: HR sets up ID in the IID system as an ACADAP Affiliate

The HR Identity Worker will need specific information from you to set up an Affiliate record for your prospective hire. The process described below includes the data required for the ID process.

1. Log into OLPPS
2. Navigate to the IASN screen and enter:
   a. First Name
   b. Middle name
   c. Last Name
   d. Social Security Number (or 000000000 when no SS# exists for the new hire)
   e. Date of Birth
   f. Birth City, State, Country
3. Navigate to the IDAF screen and enter:
   a. Start date
   b. End date
   c. Dept ID (make sure it is a Dept ID you have access to in Advance)
   d. Title code is ACADAP (if something other than ACADAP is used, Advance will NOT find the record)
4. Press F5 to update the record

STEP 2: Add Profile and packet data to Advance

Advance pulls new data from IID and from PPS each night, so you'll have to wait until the next day to find the newly-created record in Advance.

1. Log into Advance
2. Navigate to the Candidate Mgmt page
3. Enter the last name of the new hire into the search bar on the Candidate Mgmt page
4. Click **Academic Search**
5. Select the new hire name from the resulting selection set
6. You are now on the new hire's Profile page
   a. Verify/change the Academic Department so it displays your department
   b. Click Save if you've changed any values on this page
7. Navigate to the Packet page and enter Proposed:
   a. Action (Appointment)
   b. Series
   c. Rank
   d. Step
   e. Appointment %
   f. And enter the three dates at the bottom:
      i. Effective Date
      ii. Packet Deadline
      iii. References Due
8. Click Save

You now have an Advance record and packet for this new hire academic.