	Appt. to Instructor	Appoint- ments	Change in Series	Promotion	Normal Merit/ Accel. to next step	Merits Prof. step 5 to 6; 9 to Above Scale; Accel. beyond one step
Curriculum Vitae from Advance My CV (follow UCSF CV guidelines) ¹	х	Х	х	Х	Х	х
Intramural/Extramural Letters of Evaluation ²		see note*		3/3		3/3
Formal Evaluations for Teaching Activity ³		see note*		Х	Х	Х
Important Points for Discussion Upload as attachment in Advance		Х	Х			
Titles and Institutions of all referees on reference list page ⁴		Х	х	Х		Х
Department Chair Letter, including:						
 Four Categories: Teaching and Mentoring, Research/Creative Work, Professional Competence, University/Public Service⁵ If applicable, include statement confirming ORU concurrence in "additional comments" section 	x	Х	х	Х	Х	Х
Faculty Vote ⁶		Х	Х	Х		Х
Justification for accelerated/decelerated action				х	Х	Х
Justification for appointment or advancement to or from a special step (Assistant step V, VI; Associate step IV, V)		х	х	Х	х	Х
Concurrence of joint department, and/or School where individual has an academic appointment	х	х	х	Х	х	х
Dean Letter w/ Recommendation (obtained by Academic Affairs)	Х	Х	Х	х	Х	Х

Notes:

• Advancement from Instructor to Assistant is considered a new appointment, NOT a promotion.

*Letter requirements for Appointments and Change in Series:

- Reference letters (Assistant, Associate, Full) = minimum of 3 in any combination
- Teaching assessments (Assistant, Associate, Full) = minimum of 3

¹ Adjunct WOS who are *not paid by Affiliates* may attach a PDF version of their CV (see Adjunct WOS checklist); paid Adjunct or Adjunct WOS who are paid by Affiliates must use the My CV section of Advance.

² If not available, please address in Chair's Letter.

³ If no formal course evaluations are available, at least 5 teaching/mentoring references are required (3 for appointment/change in series). References may be included in addition to but not in lieu of formal evaluations, if formal evaluations are available.

⁴ Referees must be at or above the candidate's proposed rank

⁵ A balance of significant contributions in all 4 categories is not required, i.e. exceptional achievements in 1 area may compensate for lesser contributions in another area.

⁶ For actions effective 7/2/2014 or later. Non-Senate (Adjunct, Health Sciences Clinical) packets for HSCP faculty or faculty appointed at 51% time or greater may need a vote: <u>http://academicaffairs.ucsf.edu/academic-</u>personnel/appointment-advancement-reviews/media/Guidelines_for_Voting.pdfFor actions effective 7/2/2014 or later.