Advance Faculty Information System

HOW DO I USE THE AUTO-REMINDER FEATURE WHEN SOLICITING REFERENCE LETTERS?

Background

The process for requesting reference letters from Advance has been in use since 2010. The Generalist (Department APA) uses the Manage References page to generate emails to "referees" from Advance that is template-based, informs the referee about the academic review being conducted, and requests that the referee provide appropriate information about the candidate. The Generalist can generate reminder emails as necessary until the referee responds (or does not).

In 2017, an automated process was introduced to relieve the APA from having to come back to each packet to generate reminder emails. The APA can click a checkbox on the Manage Reference page to enable Advance to automatically send reminder emails on a schedule based on the References Due Date. A reminder email is generated 7-days, 2-days, and 0-days from the Reference Due Date.

Step-by-step process

1. After entering referee information on the Reference List page, navigate to the Manage References page

2. **The default for each packet is to have the Auto Reminder feature disabled.**
   To activate the Auto Reminder feature, check the box and click Save.

3. With the Auto Reminder feature activated, any referee who has already been emailed from the Manage References page will receive up to two reminder emails 7-days and 2-days before the References Due Date. The email content is the same as if the reminder email were manually generated from the Manage References page.

Key Considerations

- The Auto Reminder feature will work even if you click the "Auto Reminder" box AFTER you click "email referee(s)".
- The Auto Reminder feature, even if checked, will be disabled in the following situations:
    o Packet is NOT active
    o Reference Due date has passed
    o Packet is NOT at the Department level
    o Packet Effective Date is prior to 7/1/2016
    o Proposed Action is Stewardship Review
- Individual referee names will be skipped in the Auto Reminder process in the following situations:
    o Referee has NOT been emailed from the Manage References page (no initial email sent)
    o Received FLAG has been tripped (when you've received a reference letter off-line)
    o Referee has submitted a reference letter (hyperlinked date appears) or has opted out