FAST|FAC
Faculty Appointment and Promotion System
Stanford University School of Medicine

User Reference Guide
April 2014

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OVERVIEW

FAST|FAC is the system developed by the Stanford University School of Medicine to provide rosters of all of the School's faculty, individual faculty member appointment history[1], and to compile a professorial appointment, reappointment or promotion file (the "Long Form").[2] The Office of Academic Affairs (OAA) collaborates with Med IRT to support FAST|FAC and the portal to the system appears on http://med.stanford.edu/academicaffairs/fastfac/.

USER ACCESS

User permissions are required to access FAST|FAC. Access is determined by org code and user role (access cannot be granted for individual long form actions). Below are the available user roles; direct requests for new user access and access changes to OAA.

Role	Single or Multiple	Access
Department Chair (required)	Single	For all department faculty can view roster pages, person academic history, long forms
Associate Department Chair	Multiple	For all department faculty can view roster pages, person academic history, long forms
Division Chief	Single	For all division faculty can view roster pages, person academic history, long forms
Associate Division Chief	Multiple	For all division faculty can view roster pages, person academic history, long forms
Department Finance Administrator	Multiple	For all department faculty can view roster pages, person academic history, long forms
Department Faculty Affairs Administrator	Multiple	For all department faculty can view roster pages, person academic history and can update long forms
Division Faculty Affairs Administrator	Multiple	For all division faculty can view roster pages, person academic history and can update long forms
Department Central Office User	Multiple	For all department faculty can view roster pages, person academic history; no long form access
Division Central Office User	Multiple	For all division faculty can view roster pages, person academic history; no long form access

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[1] Faculty appointment history in FAST|FAC is from September 1, 2003 to the present. Prior history is available from two other sources to those with authorized access: the Provost's Office STF-FAAS database queried with the OBI FIT report https://reportobiprd.stanford.edu and the School of Medicine's ReportMart1 Individual Roster report https://reportmart1.stanford.edu/workspace/index.jsp.

[2] Modifications to a professorial appointment are conducted in the University's Faculty Academic Staff Appointments (FASA) system. That system is slated for to handle non-professorial appointments, reappointments and promotions in a future development phase.

BACKGROUND INFORMATION

This document is designed to provide help to a Faculty Affairs Administrator (FAA) use FAST|FAC to assemble a professoriate long form. It does not provide assistance to beginners. The FAA is expected to be knowledgeable about the professorial appointment, reappointment and promotion processes, including the forms used and the evidentiary requirements. In addition to the helpful Academic Affairs Glossary available on the Office of Academic Affairs website at http://med.stanford.edu/academicaffairs/administrators/orientation/glossary.html, important background information can be obtained from OAA's "Administrators" page http://med.stanford.edu/academicaffairs/administrators/ and the links that appear there. However, here are ideas for how to avoid and resolve problems users have encountered in FAST|FAC.

WEB BROWSER

Users are advised to use a browser such as FireFox, Internet Explorer, Chrome or Safari that is up to date with all releases. Check that the browser's security settings include an exception for med.stanford.edu if set to disallow popups.

GETTING HELP

If you encounter a system problem that you cannot resolve with one of the below tips, click on the "Help" link that appears at the top every FAST|FAC page. This will alert a FAST|FAC developer that you need help. Be specific in describing the problem. Do not submit a HelpSU ticket for assistance, as this will cause a delay in resolving the issue while it is routed through various University IT groups to Med IRT developers.

LANDING IN FAST|FAC

A user entering FAST|FAC sees a page with three tabs: "Actions in Process", "Upcoming Actions" and "All People".

Actions in Process
Actions in Process presents a dashboard of active long forms. Users authorized to update or view a long form access it by clicking on the candidate's name.

All People
All People provides a roster of faculty with current appointments in the organization (department or division) for which the user has access permissions.. "Faculty" includes all School of Medicine faculty lines. The roster allows the list to be sorted, filtered and exported to Excel. The default view is 20 names; expand by clicking on "Show All" if you want the entire list exported to Excel. Contact Kathleen Warmoth (kwarmoth at Stanford dot edu) if a faculty member does not appear on the roster or if the faculty member's data is incorrect.

Person History
Clicking on an individual's name goes to his/her Person History page on which appears basic information about the individual in a header area (including a link to his/her Community Academic Profile), a list of and links to active and inactive long form actions (for professoriate only), upcoming actions warning that an appointment end date approaches (professoriate appear 18 months beforehand; non-professoriate 6 months beforehand), appointment history and leave history.

If clicking on an individual's name returns an error that he/she has 2 primary appointments, the user is advised to contact Kathleen Warmoth in OAA (kwarmoth at Stanford dot edu) and request that the individual's appointment record be corrected.

Upcoming Actions
Upcoming Actions provides a roster of the subset of All People whose appointment end dates are approaching. Members of the Professoriate appear on this list 13 months before the end of their appointment; non-professoriate faculty are placed on the list six months in advance of the end of their appointments.

Advance notice enables the department to determine its plan for the review and ideally, if the faculty member has multiple departmental affiliations, secure the approval of the other department(s) for OAA to include a renewal of that affiliation coincident with reappointment or promotion by the primary department. If a concurrent secondary or courtesy affiliation renewal is not started along with the primary action in FAST|FAC, the user should discuss options with OAA – one of which is to wait until the conclusion of the review and initiate a transaction in the FASA system to address the oversight.

WORKING WITH LONG FORMS

There are 5 forms for professorial actions. In general, the forms have much in common. However, there are two differences. B1 and B5 are used for initial appointments and gather information about the search or waiver in Section 2. B2, B3 and B4 are used for reappointment or promotion and in Section 8 allow for the addition of counseling information if appropriate to the action. Users are expected to be familiar with the long form and the University's instructions and the School of Medicine's instructions, all of which are available at http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html.

The Status Page
The user entering a long form lands on the Status page. The header area summarizes the action and action milestone dates.

The Progress timeline is a graphical display of the relevant OAA timeline for the action type (see http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html). Working from a "placeholder" date by which the transaction is projected to be concluded (the date will change to reflect the efficiency of the review process), the timeline shows the process tasks in order of performance and the state of completion as of the beginning of the month due. The color orange signals in advance from the beginning of the month that a subsection due date is

imminent or that it is overdue. The Progress display is different from the linear list of the long form itself that appears in Section Status. In both, a "chiclet" icon is a link to the corresponding subsection in which the data is entered. Section Status indicates whether a subsection is required – the subsection "Started" and "Completed" dates are identical to the "Action Commenced" date in the header (unless the process is completed in an exceptionally efficient manner). Concentrate on subsections that are not completed.

The user is advised to set the "Completed" date when he/she finishes a section. ("Finish" is defined as adding the minimum amount of data and/or documents required as described in blue on the long forms and in the school-specific instructions found at http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html.) If the user has complied with the requirements and while setting the "Completed" date receives an error that the section cannot be completed because it has not been started, try these three steps: add to the section a placeholder Word document comprised of one word ("placeholder"); set the completed date; delete the placeholder document.

Notifications Pertaining to a Long Form
The "Notifications" sections make it possible for the user to anticipate future or past system-generated notifications related to the long form action. When an action is started FAST|FAC schedules a reminder for every incomplete section. A reminder will be cancelled if the section's "Completed" date is set before it is sent.

A reminder can be rescheduled for an earlier date or reassigned to others through the calendar icon that appears on each section. Users are advised to ensure that all reminders are addressed to themselves and none to the candidate, especially the CV and candidate's statement sections.

A reminder cannot be reschedule for a later date, but the user may create a tickler (an email to him/herself) for any section by clicking on the small box in the upper right hand corner marked with a "T". A popup will appear in which the user schedules the tickler and enters the text of the email to be sent. More than one tickler can be created.

Adding Documents, General Considerations
FAST|FAC accepts Word or PDF documents. The system creates a PDF of any Word document and attempts to merge it with a "dummy" document to confirm that it is problem free. A PDF document similarly undergoes the merge test. If the test fails, the user is sent an email alerting him/her to a problem with the document.

Some documents, such as referee letters received by email may be very large. A PDF created in FAST|FAC cannot be compressed to a smaller file size (although this can be done outside the system using Adobe Acrobat Pro), so users are advised to check the document size before adding it. The user can try other techniques including using Adobe Acrobat Pro to optimize the file and compress it to a reduced file size. Alternatively, the user can print and rescan the document.

A document may contain problematic characteristics (tracked changes, comments or markups; electronic signatures; embedded fonts; live hyperlinks and print buttons; color headers, boxes, or

backgrounds). Err on the side of caution and print the document, scan it and add the scanned version to FAST|FAC.

When scanning documents in preparation for adding them to FAST|FAC, note that simple high-resolution (≥300 dpi) black and white documents are best. The user is cautioned to note the settings so that the product is a true PDF document, not an Adobe Portfolio of documents. FAST|FAC will not accept a Portfolio which, when opened, displays a black header area listing the documents.

For a few sections, notably the Curriculum Vitae section, the order in which documents are added determines the order in which they appear in a long form – *first in* the numbered section, *last out* of the PDF (FILO). Consequently, the user is advised to either add one PDF containing all of the correctly ordered documents or add multiple documents in reverse order to which they must appear in the long form. The order of other sections, e.g., referee letters, student/trainee letters, teaching and clinical evaluations, is prescribed.

Setting the Section "Completed" Date
Users must set the "Completed" date for each section after adding the required data and/or documents. The "Completed" date serves as an indicator that section remains incomplete. It does not prevent the user from deleting documents, replacing documents or adding additional documents. It can be deleted, returning the section status to an incomplete state, and reset in the future.

Occasionally FAST|FAC prevents the user from setting the "Completed" date for the referee section even though the "Pre-approved" box was checked. In this circumstance, users are advised to follow these steps for each referee: reopen the referee's record, uncheck the "Pre-approved" box, save the referee's record, reopen the referee's record, check the "Pre-approved" box, and once more save the referee's record.

Similarly, FAST|FAC occasionally prevents the user from setting the "Completed" date for the peer comparison set section even though the "Pre-approved" box was checked. In this circumstance, users are advised to follow these steps for each named peer: reopen the referee's record, uncheck the "Pre-approved" box, save the named peer's record, reopen the named peer's record, check the "Pre-approved" box, and once more save the named peer's record.

SPECIFIC FORM SECTIONS REQUIRING DATA ENTRY

Every section requires some evidence in the form of data or a document. The School of Medicine evidence tables for each form are available at
http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html.

Forms B1 and B5, Section 1A: Departments
Users are advised to verify the accuracy of the department, division and position information appearing in this section.

Forms B1 and B5, Section 1B: Position and Search Authorization
The School's instructions on conducting a search to fill a professorial position are posted at
http://med.stanford.edu/academicaffairs/administrators/orientation/searches_offers.html. Certain
information obtained during the search is to be added to Section 1B; follow the instructions
posted at http://med.stanford.edu/academicaffairs/communique/2011AprilCommunique.pdf

Forms B1 and B5, Section 2A: Search and Evaluation Committees
There may be only one committee that conducts the search and evaluates the candidate or these
tasks may be performed by two separate committees; FAST|FAC allows for both cases. Note
that the Evaluation Committee is typically a small group that conducts the review of the
candidate of choice and refers him/her to the larger faculty group and the department chair. If
there is only one committee, add members through the "Add Member" link under Evaluation
Committee Membership. The popup contains a box that, if checked, allows the user to indicate
that the member served on both committees. If a search waiver was obtained for the candidate, it
is assumed that the person(s) who identified the candidate comprise the Search Committee. If
the same person(s) comprised the Evaluation Committee, as well, add the names through the
Evaluation Committee "Add Member" link.

The start date of the member's service on the search committee can be any date in the past. The
start date of the member's service on the evaluation committee defaults to today's date; change it
to be the same as the "Action Commenced" date appearing in the header so that the vote count is
accurate. There must be a chair designated and a meeting date and vote entered for each
committee. The Search Committee Meeting Date can be a date in the past. Enter the Evaluation
Committee Meeting Date to be the same as the "Action Commenced" date appearing in the
header.

To add a Search Committee member who is neither a Stanford faculty member nor a student
(e.g., a hospital administrator), click on "Add Member", then select "Add Student Member" (at
the bottom of the popup), enter information about the individual, select "Other" from the
"Student Type" menu. An Explanation field exists to further explain the circumstances.

Forms B2, B3 and B4, Section 1A: Evaluation Committee
The start date of the member's service on the Evaluation Committee defaults to today's date;
change it to be the same as the "Action Commenced" date appearing in the header so that the
vote count is accurate. Enter the Evaluation Committee Meeting Date to be the same as the
"Action Commenced" date appearing in the header.

There must be a chair designated and a meeting date and vote entered for the Evaluation
Committee.

Making committee membership or meeting date changes: the committee's vote must equal the
number of members active at the time of the vote. Click on the name of any member and enter
an end date if his/her service concludes before the committee's vote. To modify committee
membership or a meeting date after a meeting date and vote have been entered, click on the
meeting date. If votes have been recorded, change "Vote" from "Yes" to blank, and all votes to
blank then save the popup. Click on the meeting date again. Go to the bottom of the popup and

select "Delete Meeting". To modify membership, click on committee member's name and enter a service end date or go to the bottom of the popup and select "Delete Member", as appropriate.

Forms B1 and B5, Section 2C: Advertisements and Solicitations
Certain information obtained during the search is to be added to Sections 2C; follow the instructions posted at
http://med.stanford.edu/academicaffairs/communique/2011AprilCommunique.pdf

Forms B1 and B5, Section 2D: Applicant Pool Information
Compliance with the University's requirement to collect gender and race / ethnicity data from applicants during a search is mandatory. Instructions are available at
http://med.stanford.edu/academicaffairs/administrators/orientation/FASIuserInstructions.pdf.
The "final" applicant pool grid as described in number 9 of these instructions is to be added to Section 2D.

Forms B1 and B5, Section 2E: Finalists
Certain information obtained during the search is to be added to Sections 2E; follow the instructions posted at
http://med.stanford.edu/academicaffairs/communique/2011AprilCommunique.pdf. For a search, in addition to the finalist, at least one other applicant must be listed.

If multiple finalists emerge from a search and are recommended for appointment (with different billet numbers), the user must regard each long form in FAST|FAC as dealing with an individual position and candidate. Therefore, CandidateTwo is rejected as the finalist for the position identified in CandidateOne's long form. Conversely, CandidateOne is rejected as the finalist for the position identified in CandidateTwo's long form.

Form B1, Section 3A: Curriculum Vitae
This is the section into which the transcript of a candidate for an Assistant Professor position is added along with his/her CV. General guidelines, a sample CV, and suggestions for annotating middle-authored articles can be found at
http://med.stanford.edu/academicaffairs/administrators/orientation/longform_sections.html.

Forms B5, Section 3G and B3, Section 2F: Biosketch
A brief biosketch for the Board of Trustees is required for appointments (Form B5) and for reappointments and promotions conferring tenure (Form B3). The biosketch section is normally marked "not required" when the action is started. Users are to contact Craig Spencer (cspence at Stanford dot edu) for submission instructions if the circumstances require a biosketch. Normally the bioscketch is a Word document providing:
Candidate's Name (Last,First,Middle), Full Title, Department (Division) if applicable
Academic History: M.D., degree granting institution, degree year
                   Ph.D., degree granting institution, degree year
In one paragraph (no longer than 200 words), in terms that are understandable to a lay person, and referring formally to the candidate as "Professor" or "Dr.", summarize the candidate's role and major scholarly academic accomplishments. For example, describe:

1. When the candidate came to Stanford, including title, department, and anything unusual about the appointment.
2. The focus of the candidate's scholarship and contributions to the field. The Dean's memo recommending appointment or promotion to tenure, the candidate's statement, and the Scholarship section of the candidate's action may provide this information.
3. Major publications (books, if relevant) and major grants received.
4. Major recognition awards and prizes.
5. Unusual accomplishments or interests.

Information about training and postdoctoral appointments may be excluded.

Forms B1 and B5, Section 3H: Candidate's Publications
Forms B2, B3, B4, Section 2G: Candidate's Publications

This section is no longer required. However, for actions started before the candidate's publications requirement was eliminated in July 2013, users encounter a problem setting the "Completed" date. To resolve it, the user must add one placeholder document to start the section, set the completed date, then delete the placeholder document.

Forms B1 and B5, Section 4A-C: Scholarly Work, Clinical Activities, Teaching and Advising
Forms B2, B3, B4, Section 3A-C: Scholarly Work, Clinical Activities, Teaching and Advising
Check the following web page for advice on the document(s) to appear in this section.
http://med.stanford.edu/academicaffairs/administrators/orientation/longform_sections.html
One or more documents may be added. For each document, be sure to check all of the applicable document types pertaining to the candidate's role described in it.

Forms B1 and B5, Section 5A, B, D, E: Referees and Referee Letters
Forms B2, B3 and B4: Section 4 A, B, D, E: Referees and Referee Letters
This page presents a Gantt chart to reflect the progress of assembling the referee grid, and two tabs, labeled "Referees" and "Referee Letters" respectively. Data about referees appears on the "Referees" tab.

Adding a Referee
Clicking on the "Add Referee" link brings up window that asks if the referee is a Stanford person. If the answer is "Yes", the system will retrieve and automatically enter required information about the referee. If the answer is "No", the user is given the option to either search the system to see if the referee was previously added to an action and if so retrieve his/her contact, degree and professional accomplishment information from the previous action (verification of the information, if used, is encouraged). If the user wishes to skip the search, click on "Create New". On the referee information collection page complete the fields marked with red and green asterisks; that information is required. The user is advised to use the referee's proper name. If the referee is known colloquially by a name other than his/her proper name, include it but in parentheses not quotation marks.

"Stanford person" translates to "internal" referee. Members of Stanford's professoriate are considered "internal" referees and their letters count toward the required number. An emeritus/a

faculty member or a Clinician Educator may be an "internal" referee, but his/her letter does not count toward the required number. (If the emeritus/a faculty member's name is struck through, this merely means that he/she has no recall appointment.) A former member of the Stanford professoriate now elsewhere and Adjunct Clinical Faculty (ACF) are considered "external" referees, so when adding select "No" to the question "Is this a Stanford person?"

When searching for a Stanford person, users are advised to search on the last name only. FAST|FAC displays the individual's official first name as it appears in PeopleSoft, not his/her "preferred" name. The user will be able to determine the correct individual from the search results that correspond to other known facts such as rank and department.

Occasionally a Stanford person's SUNetId is missing in FAST|FAC. If the search results in inform the user of this, open a FAST|FAC help ticket through the link at the top of the page, explain the problem and supply at least the referee's full name and as much other factual information about the individual as is readily known, department, for example.

Check the evidence tables (referred to as "School Instructions" at http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html) for the number of referee letters required for the form used and action type, rank and faculty line. Additional guidelines are available at med.stanford.edu/academicaffairs/faaTools/refereeGridCookbook.doc.

In the upper left hand corner the "Included" box must be checked for each referee to be solicited. The include value tells FAST|FAC to associate solicitation data and a document with the referee's name.

For a new appointment (using the B1 or B5 form) the user has the option to check the upper right hand corner box labeled "Pre-approved by OAA during search" for each referee added in lieu of submitting the referee grid to OAA. (There may be instances were some referees were approved during the search and some referees added during the evaluation process that required OAA approval. In this case, check the "Pre-approved" box only for those for whom it is appropriate and submit the grid to OAA for approval for the newly added referee.)

Entering address and contact information allows the user to use Word's mail merge function in creating the referee solicitation letters for which templates are available at http://med.stanford.edu/academicaffairs/administrators/letters.html#Refs.

Users are advised to add factual and concise text into the academic distinction (if required) and reason selected as referee fields as the information will appear in the PDF as a table.

Users are cautioned to be patient and not to press the save button more than once; doing so will create two entries for the referee. FAST|FAC will refresh the page after the referee's data has been saved. If two records appear for the same referee, the user is to follow the instructions (below) on how to delete a referee record.

There is prescribed order in which the referees appear on the referee grid. The first level sort is

"Included" and "Excluded". The second level sort is "External" and "Internal". The third level sort is "Relationship to the Candidate" per specified suborder. And the fourth level sort is last name alphabetically.

Submitting the Referee Grid for Approval
If using a B2, B3 or B4 form, FAST|FAC is designed to expect OAA approval of the referee grid in advance of the solicitation process. The user must click on the "Submit to OAA" button to notify OAA and obtain approval of the referee grid. (If the OAA staff person handling the action is on vacation, alert the OAA covering in his/her absence to obtain timely review.)

In some instances, OAA will return the grid to the user for additional information or revision. The Gantt progress chart in this section will indicate with a red bar that the grid is "In department assembly". The user must resubmit the grid to OAA after complying with the request.

Modifying the Referee Grid
Users may add new referee names and delete unsolicited referees from the referee grid before OAA's approval is obtained. If the grid has been approved (this will be indicated in the section's Gantt chart with 4 red bars for each milestone) these changes must be resubmitted to OAA. After OAA approves the changes, the grid is returned to the department enabling the user to manage the solicitation of a new referee who has been "included" or to delete an unsolicited referee who has been "excluded".

Managing Referee Solicitations and Adding Referee Letters
After a referee is pre-approved or approved as part of a grid submission, his/her name becomes a link on the "Referee Letters" tab. This allows the user to maintain the *current* status of the solicitation (one entry per referee) and click on the "+" link in the referee's solicitation record to add the letter received in response. (Referee letters do not go in the section entitled "Solicitation Letter" – that section is for the sample solicitation letter.) The solicitation date must be as of or after the date OAA approved the referee grid appearing in the Gantt progress chart in this section.

A calendar appears in the referee's solicitation record when an email address has been saved as part of the referee's contact information. The system does not automatically send reminders to referees and it is recommended that the user's email client (Zimbra, Outlook, Mail) be used to remind referees, rather than this feature of FAST|FAC, to ensure a record of the communication is retained.

If no response is received from the referee despite two reminders, the user appropriately updates the solicitation data from the menu choices and adds a PDF of the reminders in lieu of a referee letter.

Referee Grid Explanation
The Referee Grid Explanation is a text field in which information about the grid can be provided for OAA temporarily during the grid review and approval process or for inclusion in the PDF for committee reviewers.

Forms B1 and B5, Section 5C: Peer Comparison Set
Forms B2, B3 and B4: Section 4C: Peer Comparison Set
In some actions the candidate must be compared to set of named peers. Check the evidence tables (referred to as "School Instructions" at
http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html.

Adding a Named Peer
If a peer comparison is required, this is where to enter the names and information about the peer set before submitting the referee grid to OAA.

Modifying the Comparison Peer Set
Users may make changes to add or delete named peers before OAA has approved the list. If the comparison peer set has been approved, to delete a named peer the user must select the individual and change him/her from "Included" to "Excluded". All required fields must contain text. The list must be resubmitted to OAA by clicking on the "Submit to OAA" button that appears above in the Referee section. The user can delete a named peer after OAA approves the change and returns the comparison peer set to the department.

If OAA inadvertently designated this section as required when it is not, to set the "Completed" date the user is advised to add a "placeholder" named peer entering data only in the fields with red asterisks, set the "Completed" date, then delete the "placeholder" named peer.

Forms B1 and B5, Section 6A-C: Students/Trainees and Student/Trainee Letters
Forms B2, B3 and B4: Section 5A-C: Students/Trainees and Student/Trainee Letters
This page also contains two tabs, "Students/Trainees" and "Student/Trainee Letters" that function is much the same manner as those in the referee section to add student/trainee names, manage a singular *current* solicitation status for each, and add the responsive letters. However, there is no separate "Submit to OAA" button. OAA expects the students/trainees section to be completed before the referee grid (and peer comparison set, if required) is submitted for review.

Forms B1 and B5, Section 7: Teaching and Clinical Evaluations
Forms B2, B3 and B4, Section 6: Teaching and Clinical Evaluations
Select the radio button for either "Teaching Evaluations" or "Clinical Evaluations"

Teaching Evaluations
For "Teaching Evaluations" the user is required only to enter text in the "Document Title" field and browse for the document. Required fields are indicated by a red asterisk; the fields entitled "Number", "Title" and "When" are optional fields. Users are advised to compile the responsive documents into one PDF to be added.

Clinical Evaluations
For "Clinical Evaluations", the radio button for "Upload Document" is pre-selected. The user must enter text in the "Document Title" field and browse for the document. The "Referee Response Document" part of the popup should be ignored. Users are advised to compile the responsive documents into one PDF to be added. Instructions and other information concerning the Clinical Excellence Core Competencies Evaluation (CECCE) are available at

http://med.stanford.edu/academicaffairs/administrators/forms.html. Export the survey summary to Word format rather than PDF format for legibility.

Forms B2, B3 and B4: Section 8B: Actual Counseling Memo
The user adds the draft counseling memo to Section 8A for the review, if it is required. When the Provost's Office's approval is received, OAA notifies the department to proceed with the counseling session. OAA must enter the "Date notification received from Provost" into Section 9C (if entered, the date (which must be in the past) also appears in the action header area to enable the department to add the counseling meeting date and signed counseling memo to Section 8B. If there are no links to add the date and document, contact the OAA staff responsible for the action and remind him/her to enter the "Date notification received from Provost".

If OAA inadvertently designated this section as required when it is not, to set the "Completed" date the user is advised to add a "placeholder" meeting date and document, set the "Completed" date, then delete the "placeholder" meeting date and document.

Forms B1, B2, B3, B4 and B5: Section 9A: Department Review
This is the section into which are added 1) the document that responds to the School's and University's questions concerning the departmental review (see Section 9 of the long form at http://med.stanford.edu/academicaffairs/administrators/orientation/longform.html) and the department chair's transmittal memo.

The Cover Sheet
The long form cover sheet (also sometimes referred to as the "appointment form face sheet") can be generated through FAST|FAC by clicking on the red "Cover" button in the subsection entitled "Cover Sheets". The user must save the document to his/her computer and add it back into the subsection using the "+Add Document" link provided. The user is encouraged to generate the cover sheet as soon as the action is started so that it can be included in any PDF generated during the review process. The unsigned copy must be replaced with a signed version before the form is submitted to OAA for review.

If the faculty member is affiliated with more than one department and separate cover sheets were signed by the department chairs, the user is advised to create one PDF containing all cover sheets to be added to FAST|FAC.

OAA is responsible for Sections 9B and 9C, including closing the action.

PDFs: CREATING, TROUBLESHOOTING, DOWNLOADING AND SUBMITTING

Creating a PDF
The PDF button takes the user to the page on which the PDF is created, save and deleted, from which it is downloaded, and from which a final long form is submitted electronically to OAA.

There are two types of long form PDFs: partial and final. There is no limit to the number of PDFs that a user may create. Users are encouraged to delete partial and preliminary final PDFs.

The system will regard as work product any PDF in the subsections entitled "Long Forms in Process" and "Long Form PDFs" (other than the final long form PDF submitted to OAA) and delete it when the action is closed.

The partial long form PDF begins with a confidentiality statement. Intended for the review of department chairs, division chiefs and departmental review committees (excluding a transmittal memo), it may comprise selected sections (the user gets to choose), the only requirement is that there be data in the section. If the user intends to select several documents in a section (they appear in the column entitled "Documents"), this can be accomplished easily by clicking on the name that appears in the column entitled "Item within Section". The "Section" name is navigation and clicking on it will take the user to the section itself.

OAA must approve the referee grid before a PDF of it and the peer comparison set grid can be created. In the interim the user can print the entire page (or a selection) displaying the referee and comparison peer set using the browser's Print functionality.

To create a final long form PDF all sections must contain a "Completed" date. The final long form PDF will be comprised of all of the data and documents that have been added to the action in the order the School of University have specified.

The order in which referee letters appear in the long form PDF corresponds to the University's requirements:
1. External referees
  a. Relationship to candidate (per order below)
    (1) Alphabetically by last name
      Suborder for the relationship to candidate types:
        • Independent
        • Service client
        • Mentor (former)
        • Mentor (current)
        • Collaborator (former)
        • Collaborator (current)
        • Other
2. Internal referees (same as external)
  b. Relationship to candidate
    (1) Alphabetically by last name
      Suborder for the relationship to candidate types:
        • Independent
        • Service client
        • Mentor (former)
        • Mentor (current)
        • Collaborator (former)
        • Collaborator (current Department colleague
        • Other

A ordering is also prescribed for student/trainee letters:
1. Relationship to candidate (former student/trainee, current student/trainee)
   (1) Alphabetically by last name

For other sections, if the user wishes to reorder the documents, there is a mechanism: when creating a PDF, scrolling down to the section and hovering over the document name and a four-headed arrow will let the user change the order of the documents within the section – but only for the PDF being created. Consequently, if more PDFs will be generated in the future, the user must remember to reorder the documents in every instance.

Troubleshooting
If a document that the user knows to have been deleted appears as a choice for inclusion in the PDF to be created, the user is advised to open a FAST|FAC help ticket through the link at the top of the page to request that an orphaned document be deleted ("orphaned" because the user deleted one copy from the section to which it was added but this second copy FAST|FAC saved to create the PDF failed to be deleted as well). To ensure that the correct document is deleted the user is advised to identify the section in which the orphaned document appears, the document name, and the faculty_action_document_id (visible in the lower left hand corner of the window when the user hovers over the orphaned document name).

FAST|FAC normally notifies the user by email if there is a problem creating a PDF and when a PDF has been successfully created. If there is a problem creating a PDF, it is usually attributable to one or more problematic documents (see *Adding Documents* above). The user is advised to use the process of elimination to create a series of PDFs, one section at a time until the PDF fails to generate. Once the failing section has been identified and if it contains more than one document, the user can create a series of PDFs adding one document each time until the problematic document is identified so that it can be replaced.

However, occasionally the PDF is created but blank pages may appear with stating "insufficient data". This is also caused by a problematic document and, while the user knows which section, the same process of elimination described in the preceding paragraph can be used to identify the problematic document (viewing it with Adobe Acrobat may cause an out of memory error) so that it can be replaced and a new PDF created.

Users have reported that the size of the PDF created is sometimes larger than that permitted for email attachments (for sending to review committee members). Determine the size of all individual documents appearing in the candidate's action and replace any unusually large ones with a printed and rescanned document. The user must create a new PDF to incorporate the replacement document(s). Alternatively, the user can try other techniques to reduce the size of the downloaded PDF for distribution including using Adobe Acrobat Pro to optimize the file, compress the file to a reduced file size, or print and rescan the downloaded PDF.

Downloading a PDF
To download a PDF the user clicks on the file name, reads and confirms his/her understanding of the confidential nature of the long form process, and then clicks on "Download PDF". In the second popup that appears the user may disregard FAST|FAC's "Add PDF Distribution Log

Entry" and hit the "Cancel" button and proceed to respond to the browser's download instructions to open or save the file. Given the potential size of a final long form PDF, saving the file should be the user's default operation. Appending the mime type (.pdf) to the file name when saving the file ensures that Adobe Acrobat recognizes and opens the file when the file is selected afterward.

Submitting a PDF to OAA Electronically
A final long form PDF is submitted to OAA by clicking on the calendar icon in the "Actions" column and entering the date. Failure to do so will result in incomplete milestone tracking in the system and the date will not appear in the action header area. If OAA accepts the long form for School committee review, the OAA staff person handling the action is to set the "Department final long form accepted" date.

Printed Copies
OAA's instructions for long form copies are available at
http://med.stanford.edu/academicaffairs/documents/longformcopylist08172011.doc. Questions should be directed to the OAA handling the action. If content is truncated (cut off) on the printed version, the user is advised to check the file's Adobe Acrobat Page Setup settings and orientation and scale in particular.

STOPPING AND CLOSING AN ACTION

OAA closes an action after the review process concludes. The department must coordinate with OAA to suspend or stop an incomplete action. If a concluded action continues to appear on the user's Actions in Process dashboard, the user is advised to contact the responsible OAA. A candidate may have only one action active at a time, consequently all concluded actions must be stopped and closed by OAA before a new action can be started.

FAST|FAC sends an email notification when an action is stopped and closed. The notification provides a link to the closed action (the link also appears on the faculty member's Person History page in a section entitled "Stopped and Closed Actions") and reminds the department to retain only the final department long form and destroy all other digital and hard copies in a manner that preserves confidentiality of the content.

OTHER NOTIFICATIONS

20 Month Notice
FAST|FAC notifies the department that a faculty member's appointment is ending in 20 months and the date on which the next review is scheduled to begin. The intent is the give the department an opportunity to consider whether a faculty member is to be considered for renewal and, if not, to give the faculty member the requisite 14 month notice of non-renewal if there is no intent to give him/her a terminal year reappointment

Post-Tenure Review Reminder
On the first of each month, FAST|FAC checks for the tenure five year anniversary of all tenured UTL Associate Professors and, for each person for whom an anniversary is found and if there is

no promotion action in process, FAST|FAC reminds the department to consider the appropriateness of a promotion review.