



TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Elements TFoM CPA Report - A Data Entry Guide

Screenshot Instructions - Guidance for Academic Leaders and Staff

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Please Note

1. Elements cannot explain what qualifies as a CPA activity. For definition of CPA and its categories, please consult the University of Toronto's [Temerty Faculty of Medicine Manual for Academic Promotion](#).
2. Optionally, have your CPA Report available as reference, before organizing your CPA report in Elements.

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Table of Content (In Your CPA report)

Hyperlinks to the relevant sections have been added for easy navigation.

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Other Instructions

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1. Introduction

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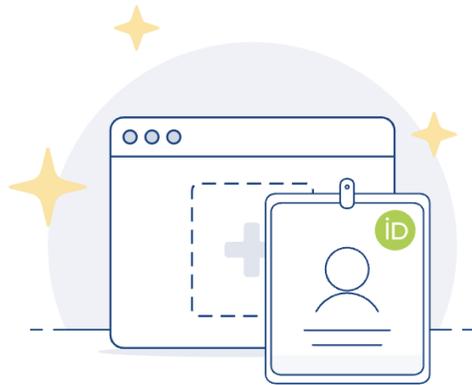
Introduction

1: Introduction

[Introduction of CPA]

Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**Introduction to CPA (MED).**"
3. Fill the remaining fields based on the data in your information.
4. Please remember to check the box labelled "**Print in CPA?**" to ensure the introduction will appear in your **TFoM CPA report.**
5. Click the **"Save" button** once you've finished editing.



Add your ORCID iD

Adding your ORCID iD can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account.

ADD



Kex Zhang
Temerty Faculty of Medicine

✉ [redacted]@mail.utoronto.ca

EDIT MY PROFILE



Scholarly & creative works

Claimed

You have no claimed scholarly & creative works.

+ ADD NEW

VIEW ALL

Grants & contracts

Claimed

You have no claimed grants or contracts.

+ ADD NEW

VIEW ALL

Professional activities

You have no activities.

+ ADD NEW

VIEW ALL

Teaching & supervision

You have no activities.

+ ADD NEW

VIEW ALL

Add a new professional activity



Select professional activity type

Activity or Event Organizing

Activity or Event Participation

Award Application
Assessment

Committee Membership

Community Service

Community / Patient
Workshop

Conference Review /
Referee

Consulting / Advisory

Honour / Award / Distinction

Editorial

Expert Witness

Grant Application
Assessment

Institutional Review

Journal Review / Referee

Media Relation

Membership

Non-research Presentation

Office Held

Professional Mentorship

Introduction to CPA (MED)

CPA Activity (MED)

CANCEL

Add introduction to cpa (med)

Professional activity privacy

PRIVATE
 INTERNAL
 PUBLIC

This professional activity will be visible to other users of DiscoverResearch but should not be displayed publicly.

*** Relationship privacy**

PRIVATE
 INTERNAL
 PUBLIC

This professional activity and its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

Start Date 📅

End Date 📅

Introduction to CPA

This **privacy setting** controls whether your **CPA activity** and **Relationship Privacy** are publicly visible on [DiscoverResearch](#)

Delegates impersonating a faculty member should select **“Internal”** as the privacy setting.

Introduction to CPA

20000 characters remaining.

Print in CPA?

CANCEL **SAVE**

? Provide a brief introduction to the CPA which will appear on the CPA report.

? ? ?

Check the box if you want the record to print in your **CPA report**, and don't forget to click **Save** button.
 NOTE: You can create multiple records and choose which one should print in report.



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2. Professional Innovation and Creative Excellence

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Professional Innovation and Creative Excellence

2: Professional Innovation and Creative Excellence

1. [CPA TITLE]

([Start – End Dates])

Description: [Description].

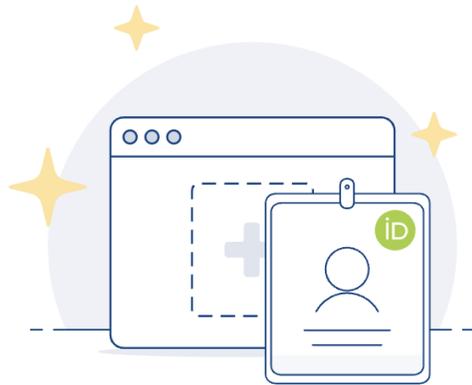
Impact: [Impact].

Documentation:

[Note: Below are samples of all activities that could be attached to a CPA title. Include only activities directly related to this CPA title]

Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**CPA Activity (MED).**"
3. Fill the remaining fields based on the data in your information.
4. Please remember to check the box labelled "**Attach to CPA**" to ensure the record will appear in your **TFoM CPA report.**
5. Click the **Save** button once you've finished editing.



Add your ORCID iD

Adding your ORCID iD can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account.

ADD



Kex Zhang
Temerty Faculty of Medicine

✉ [redacted]@mail.utoronto.ca

EDIT MY PROFILE



Scholarly & creative works

Claimed

You have no claimed scholarly & creative works.

+ ADD NEW

VIEW ALL

Grants & contracts

Claimed

You have no claimed grants or contracts.

+ ADD NEW

VIEW ALL

Professional activities

You have no activities.

+ ADD NEW

VIEW ALL

Teaching & supervision

You have no activities.

+ ADD NEW

VIEW ALL

Add a new professional activity



Select professional activity type

Activity or Event Organizing

Activity or Event Participation

Award Application
Assessment

Committee Membership

Community Service

Community / Patient
Workshop

Conference Review /
Referee

Consulting / Advisory

Honour / Award / Distinction

Editorial

Expert Witness

Grant Application
Assessment

Institutional Review

Journal Review / Referee

Media Relation

Membership

Non-research Presentation

Office Held

Professional Mentorship

Introduction to CPA (MED)

CPA Activity (MED)

CANCEL

Add cpa activity (med)

Professional activity privacy



This professional activity will be visible to other users of DiscoverResearch but should not be displayed publicly.

* Relationship privacy



This professional activity and its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

Start Date



End Date



CPA Category

[None]

Title

Contributions to the Development of Professional Practices

Exemplary Professional Practice

Description

Professional Innovation and Creative Excellence

? Enter the start time period for which you are reporting the activity.

? Enter the end time period for which you are reporting the activity.

? Select the type of creative professional activity from this picklist. For definitions of the different categories, please refer to the Academic Promotions Manual available at <http://www.facmed.utoro>

This **privacy setting** controls whether your **CPA activity** and **Relationship Privacy** are publicly visible on [DiscoverResearch](#)

Delegates impersonating a faculty member should select **"Internal"** as the privacy setting.

Please select the appropriate CPA category based on the type of your CPA activity. For this section, choose **"Professional Innovation and Creative Excellence"** to ensure your record appears under the corresponding section in the printed report.

Title	<input type="text"/>	?	Enter the title of the activity (titles should be unique and theme-based).
Description	<div style="border: 1px solid #ccc; height: 380px;"></div>	?	Provide a description of the creative professional activity here.
Impact	<div style="border: 1px solid #ccc; height: 380px;"></div>	?	Describe the impact of the activity.

Fill in the details of your CPA (**CPA Titles must be unique**). Make sure the title clearly identifies the record. We will need to use the title later to attach documentation to this CPA record.

Please enter as much details as you can.

Supplementary Documentation

Print Order

Attach to CPA

CANCEL SAVE

? Provide supplementary documentation.

? Specify the print order of your record in your CPA dossier within each category (records print in reverse chronological order by default). The use of this field is optional.

Checked-off the **"Attach to CPA"** checkbox and click the **"Save"** button, then the CPA activity will appear in the printed report.



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3. Contribution to the Development of Professional Practices

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3: Contributions to the Development of Professional Practices

Note: See Professional Innovation and Creative Excellence.

Add cpa activity (med)

Professional activity privacy

PRIVATE INTERNAL PUBLIC

This professional activity will be visible to other users of DiscoverResearch but should not be displayed publicly.

* Relationship privacy

PRIVATE INTERNAL PUBLIC

This professional activity and its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

Start Date

End Date

CPA Category Contributions to the Developr

Title Contributions to the Development of Professional Practices

Description Professional Innovation and Creative Excellence

?
?
? Select the type of creative professional activity from this picklist. For definitions of the different categories, please refer to the Academic Promotions Manual available at <http://www.facmed.utoro>
?

To add CPA activities under the **"Contributions to the Development of Professional Practices"** section, follow the same steps as for **"Professional Innovation and Creative Excellence,"** but select **"Contribution to the Development of Professional Practices"** as the CPA category instead.



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4. Exemplary Professional Practice

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4: Exemplary Professional Practice

Note: See Professional Innovation and Creative Excellence.

To add CPA activities under the "**Exemplary Professional Practice**" section, follow the same steps as for "**Professional Innovation and Creative Excellence**," but select "**Exemplary Professional Practice**" as the CPA category instead.

Add cpa activity (med)

Professional activity privacy



This professional activity will be visible to other users of DiscoverResearch but should not be displayed publicly.

* Relationship privacy



This professional activity and its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

Start Date

End Date

CPA Category

Title

Description



Select the type of creative professional activity from this picklist. For definitions of the different categories, please refer to the Academic Promotions Manual available at <http://www.facmed.utoro>



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Linking CPA Activities to other Records as Documentation

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Method 1

Homepage

MY ACTIONS (1 of 3)

Add your ORCID iD

Adding your ORCID iD can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account.

ADD

Kex Zhang
Temerty Faculty of Medicine

EDIT MY PROFILE

Scholarly & creative works ⋮

Claimed

- 1 team research project

+ ADD NEW VIEW ALL

Grants & contracts ⋮

Claimed

You have no claimed grants or contracts.

+ ADD NEW VIEW ALL

Professional activities

- 1 membership
- 1 office held
- 1 introduction to cpa (med)
- 7 cpa activities (med)

+ ADD NEW VIEW ALL

Teaching & supervision

- 1 course taught

+ ADD NEW VIEW ALL

Step 1: Open an existing publication record - for example, select **"Team Research Project"** under **"Scholarly & Creative Works"** Module.

My claimed scholarly & creative works



CLAIMED (1) PENDING (0) REJECTED (4)

showing 1 - 1 out of 1

view: 10 per page

sort by: Reporting date (newest first)

EXPORT REJECT

focus on: summary

Demo Test for Team Research Project Record

TEAM RESEARCH PROJECT [Zhang K](#)
University of Toronto. Formation Date: 01 Jan 2026
End Date: 31 Mar 2026
Reporting Dates: 01 Jan 2026 - 31 Mar 2026

SUMMARY METRICS (0) LABELS (0) RELATIONSHIPS (1) SOURCES (1) HISTORY (2)

Filters

Applied filters

Scholarly & creative work type clear all filters

Scholarly & creative work type clear

- Artifact
- Book Review
- Book
- Chapter
- Commercialization

Relationship type

- Author of

Step 2: Click on the existing title you want to link to the CPA activity.

TEAM RESEARCH PROJECT [↗](#)

Demo Test for Team Research Project Record

[Zhang K](#) [see details \(1\)](#)

📍 University of Toronto. Formation Date: 01 Jan 2026

Data sources

Manual Demo Test for Team Research Project Record ✎ ☆ ^

ID: C3F2F4FA-9ED5-4A93-92E5-54FE216CFCD0 [More source info](#)

Team Initiative Title: Demo Test for Team Research Project Record

Team Members: [Zhang, Kex](#)
see details (1)

Primary Location or Institution: University of Toronto

Formation Date: 01 Jan 2026

End Date: 31 Mar 2026

REPORTING DATES

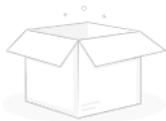
01 Jan 2026 - 31 Mar 2026 ↻

RELATIONSHIPS

Users 1 >

CREATE NEW

Team Research Project Contribution



No Team Research Project Contribution has been added to this team research project [Add...](#)

+

HISTORY

04 Mar 2026 08:28 Manual source (...6CFCD0) updated.
[Kex Zhang](#)

04 Mar 2026 08:27 Manual scholarly & creative work created.
[Kex Zhang](#)

ADD NOTE

Step 3: Locate the **“Team Research Project Contribution”** section and click **“+”**

Add team research project contribution

Information entered on this form is private and will not be visible to most other users of DiscoverResearch. Other linked users will not be able to view this information.

Essential Information

Supervisor(s) ?

Role 37 characters remaining. ?

Most Significant Contribution

Most Significant Contribution Details 1000 characters remaining.

Attach to Audience in TER

Primary Audience

Attach to CPA

CANCEL

SAVE

Step 4: : Fill the remaining fields based on your information, then checked-off **"Attach to CPA"** checkbox if you want this record to appear in your CPA report after linking, then click **"Save"** button.

Team Initiative Title: Demo Test for Team Research Project Record

Team Members: [Zhang, Kex](#)
see details (1)

Primary Location or Institution: University of Toronto

Formation Date: 01 Jan 2026

End Date: 31 Mar 2026

Team Research Project Contribution

Supervisor(s)
No Supervisor

Role
Research Lead

Most Significant Contribution
False

Attach to Audience in TER
False

Primary Audience
Graduate Education

Attach to CPA
True

[delete](#)

RELATIONSHIPS

Users 1 >

CREATE NEW

HISTORY

04 Mar 2026 08:28 Manual source (...6CFCD0) updated.
[Kex Zhang](#)

04 Mar 2026 08:27 Manual scholarly & creative work created.
[Kex Zhang](#)

ADD NOTE

Step 5: After saving, navigate to the right side of the screen and locate the **RELATIONSHIPS** section. Click the **"CREATE NEW"** button.

Create links to this scholarly & creative work



Select category to link to

Scholarly & creative work	Grant & contract	Professional activity	User
Teaching & supervision	Group		

CANCEL

Step 6: Select "**Professional Activity**" only, as all CPA activity records are organized under this category.

Create links between...
 Scholarly & creative works
 Professional activities
 Grants & contracts
 Teaching & supervision

... and...
 Scholarly & creative works
 Professional activities
 Grants & contracts
 Teaching & supervision

Scholarly & creative works

You are currently defining links for a single scholarly & creative work. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

- Demo Test for Team Research Project Record [View](#)
- [Existing links \(to a user\)](#)

Or you could...

[+](#) Add a new scholarly & creative work

Professional activities

Current filters: [Change](#)

- Linked to: Me
- Date range: from 30/07/2022

We've found 10 matching results:

[Select all](#)

- It is a Test [View](#)
- [Existing links \(to a user\)](#)
- Membership 1, University of Toronto, Toronto, Canada [View](#)
- [Existing links \(1 to a user\)](#)
- BIOKEX CONTRIBUTION [View](#)
- [Existing links \(1 to a user\)](#)
- BIOKEX Exemplary [View](#)
- [Existing links \(to a user\)](#)
- BIOKEX 1 [View](#)

Or you could...

[+](#) Add a new professional activity

You have selected to link:

- Demo Test for Team Research Project Record with
 - It is a Test

[Create one new link](#)

Step 7: Scroll to find the title of the CPA activity you want to link to. **Check the box** next to it, then click the **"Create one new link"** button. The link will be created successfully. You may link multiple records to a single CPA activity as supporting documentation.

Method 2

Homepage

MY ACTIONS (1 of 3)

Add your ORCID iD

Adding your ORCID iD can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account.

ADD

Kex Zhang
Temerty Faculty of Medicine

EDIT MY PROFILE

Scholarly & creative works

Claimed

- 1 team research project

+ ADD NEW VIEW ALL

Grants & contracts

Claimed

You have no claimed grants or contracts.

+ ADD NEW VIEW ALL

Professional activities

- 1 membership
- 1 office held
- 1 introduction to cpa (med)
- 7 cpa activities (med)

+ ADD NEW VIEW ALL

Teaching & supervision

- 1 course taught

+ ADD NEW VIEW ALL

Step 1: Click on the existing "CPA activity" record under "Professional Activities" module.

Noted: Before proceeding, make sure the record you intend to link has the "Attach to CPA" checkbox checked.

How to checked the "Attach to CPA" checkbox? (page 21-24)

My Work

My professional activities

showing 1 - 7 out of 7

view: 10 per page

sort by: Reporting date (newest first)

EXPORT

focus on: summary

It is a Test

CPA ACTIVITY (MED) [↗](#)

Start Date: 11 Jul 2022

End Date: 11 Jul 2025

CPA Category: Professional Innovation and Creative Excellence

Title: It is a Test

SUMMARY | LABELS (0) | RELATIONSHIPS (1) | SOURCES (1) | HISTORY (1)

BIOKEX Exemplary

CPA ACTIVITY (MED) [↗](#)

Start Date: 08 Jul 2025

End Date: 11 Jul 2025

CPA Category: Exemplary Professional Practice

Title: BIOKEX Exemplary

SUMMARY | LABELS (0) | RELATIONSHIPS (1) | SOURCES (1) | HISTORY (1)

BIOKEX CONTRIBUTION

CPA ACTIVITY (MED) [↗](#)

Start Date: 01 Jul 2025

Filters

Applied filters

Activity type ×

[clear all filters](#)

Activity type [clear](#)

- Activity or Event Organizing
- Activity or Event Participation
- Award Application Assessment
- Committee Membership
- Community Service

Relationship type

- Associated with

Title

Reporting date

From To

Step 2: Click on any **CPA Activity Title** you want to link.

My Work > [Professional Activities](#)

Professional activity details

+ ADD ANOTHER

CPA ACTIVITY (MED) [↗](#)

It is a Test

Data sources

 Manual	It is a Test	↗ ☆ ^
ID:	A5DBAC0E-6DCC-4FDA-A662-10AE4787ACCC3	
Start Date:	11 Jul 2022	
End Date:	11 Jul 2025	
CPA Category:	Professional Innovation and Creative Excellence	
Title:	It is a Test	
Description:	Test for CPA activity (Description Section)	
Impact:	Test for CPA activity (Impact Section)	
Supplementary Documentation:	Test for CPA activity (Supplementary Documentation Section)	
Print Order:	1	
Attach to CPA:	true	

RELATIONSHIPS

Users 1 >

CREATE NEW

HISTORY

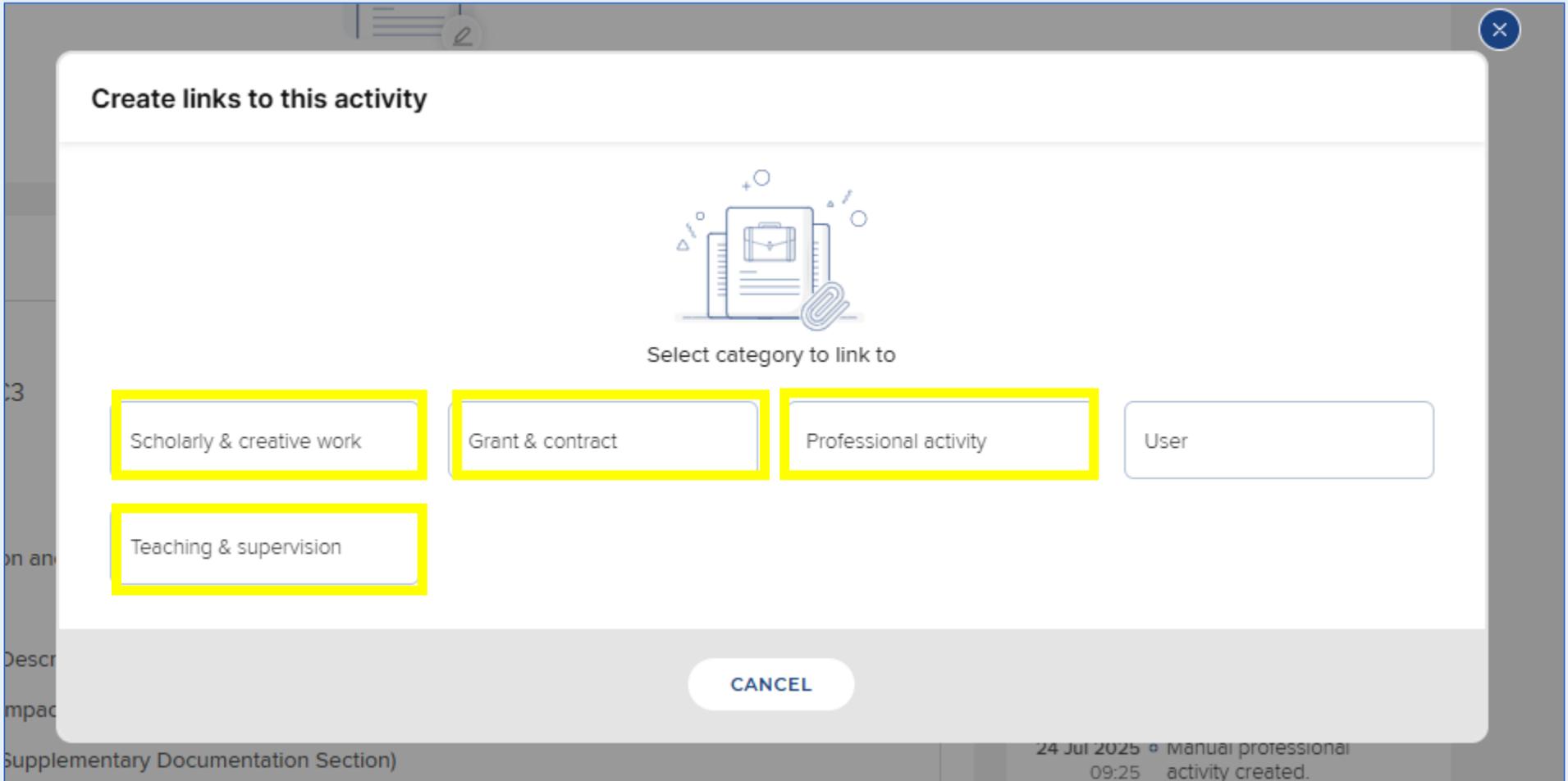
24 Jul 2025 09:25 Manual professional activity created.

 [Kex Zhang](#)

ADD NOTE

Labels

Step 3: Click on “Create New” in the “Relationships” section on the right side of the page.



Step 4: Select the Module that houses the record you would like to link (such as **Scholarly & Creative Work, Grant and Contract, Creative Professional Activity, or Teaching and Supervision** — **excluding User**).

[< Return to the previous page](#)

Create links

Create links between...

- Scholarly & creative works
 Professional activities
 Grants & contracts
 Teaching & supervision

... and...

- Scholarly & creative works
 Professional activities
 Grants & contracts
 Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

It is a Test [View](#) 

 Existing links (to a user)

Or you could...

 Add a new professional activity 

Scholarly & creative works

Current filters:

[Change](#)

- *Linked to:* Me
- *Published:* from 24/07/2022

We've found 1 matching result:

[Select all](#)

Demo Test for Team Research Project Record [View](#) 

 Existing links (to a user)

Or you could...

 Add a new scholarly & creative work 

Step 5: Click the **Check Box** next to the title of the record.

[Return to the previous page](#)

Create links

Create links between...

Scholarly & creative works Grants & contracts Professional activities Teaching & supervision

... and...

Scholarly & creative works Grants & contracts Professional activities Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

It is a Test [View](#)

[Existing links \(to a user\)](#)

Or you could...

[+ Add a new professional activity](#)

Scholarly & creative works

Current filters: [Change](#)

- **Linked to:** Me
- **Published:** from 24/07/2022

We've found 1 matching result:

[Select all](#)

Demo Test for Team Research Project Record [View](#)

[Existing links \(to a user\)](#)

Or you could...

[+ Add a new scholarly & creative work](#)

You have selected to link:

- It is a Test with

- Demo Test for Team Research Project Record

[Create one new link](#)



[Return to the previous page](#)

Create links

Create links between...

Scholarly & creative works Grants & contracts Professional activities Teaching & supervision

... and...

Scholarly & creative works Grants & contracts Professional activities Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

It is a Test [View](#)

[Existing links](#)

Or you could...

[+ Add a new professional activity](#)

Scholarly & creative works

Current filters: [Change](#)

- **Linked to:** Me
- **Published:** from 24/07/2022

We've found 1 matching result:

[Select all](#)

Demo Test for Team Research Project Record [View](#)

[Existing links](#)

Or you could...

[+ Add a new scholarly & creative work](#)

[Click to remove the following link:](#)

- It is a Test with

- Demo Test for Team Research Project Record

Step 6: Click **“Create one new link”** button to successfully create a link for your CPA activity. You may link multiple records to a single CPA activity as supporting documentation.

< Return to the previous page

Create links

Create links between...

Scholarly & creative works
 Grants & contracts
 Professional activities
 Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

It is a Test [View](#)

Existing links

Or you could...

[+ Add a new professional activity](#)

... and...

Scholarly & creative works
 Grants & contracts
 Professional activities
 Teaching & supervision

Scholarly & creative works

Current filters: [Change](#)

- *Linked to:* Me
- *Published:* from 24/07/2022

We've found 1 matching result:

[Select all](#)

Demo Test for Team Research Project Record [View](#)

Existing links

Or you could...

[+ Add a new scholarly & creative work](#)

[Click to remove](#) the following link:

- It is a Test with

- Demo Test for Team Research Project Record

< Return to the previous page

Create links

Create links between...

Scholarly & creative works
 Grants & contracts
 Professional activities
 Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

It is a Test [View](#)

Existing links (1 to a user)

Or you could...

[+ Add a new professional activity](#)

... and...

Scholarly & creative works
 Grants & contracts
 Professional activities
 Teaching & supervision

Grants & contracts

Current filters: [Change](#)

- *Linked to:* Me
- *Date range:* from 24/07/2020

We've found 1 matching result:

[Select all](#)

Demo Test for Sponsored Research Agreement [View](#)

Existing links (to a user)

Or you could...

[+ Add a new grant & contract](#)

After creating a link, you can also create a new link to a record from this screen by clicking the module housing the record at the top of the page.



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Create a New Record from the Create Links Page

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[Return to the previous page](#)

Create links

Create links between...

- Scholarly & creative works Grants & contracts
 Professional activities Teaching & supervision

... and...

- Scholarly & creative works Grants & contracts
 Professional activities Teaching & supervision

Professional activities

You are currently defining links for a single professional activity. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

- It is a Test [View](#)
- [Existing links \(1 to a user\)](#)

Or you could...

[+ Add a new professional activity](#)

Grants & contracts

Current filters:

- *Linked to:* Me
- *Date range:* from 24/07/2020

[Change](#)

We've found 1 matching result:

[Select all](#)

- Demo Test for Sponsored Research Agreement [View](#)
- [Existing links \(to a user\)](#)

Or you could...

[+ Add a new grant & contract](#)

We've found 1 matching result:

- [Add a new sponsored research agreement](#)
- [Add a new other research agreement](#)
- [Add a new financial conflict \(med\)](#)
- [Add a new salary support and other funding \(med\)](#)
- [+ Add a new grant & contract](#)

[Agreement View](#)

You may add a new record by clicking the “**Add a new [xxx]**” button. For example, if you select the “**Grants & Contracts**” option, the dropdown menu will display only the information types available under the “**Grants & Contracts**” module. To add records from other modules, please change the toggle options above.

We've found 1 matching result:

- Add a new sponsored research agreement
- Add a new other research agreement** [View](#)
- Add a new financial conflict (med)
- Add a new salary support and other funding (med)

[+ Add a new grant & contract](#)

Add other research agreement

Grant & contract privacy

PRIVATE INTERNAL PUBLIC

This grant & contract may be displayed publicly by UoT.

* What is your relationship with this other research agreement?

Funded by Principal investigator of
 Co-investigator of

Relationship privacy

PRIVATE INTERNAL PUBLIC

This grant & contract may be displayed publicly by UoT. Its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

* Title

* Funder

Funder Reference

* Start Date

For example, click **"Add a New Other Research Agreement"** option, and you'll be taken directly to the corresponding creation page. You can then link the new record to any CPA activity by following the steps outlined on **Page 25-27**.



TEMERTY FACULTY OF MEDICINE
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Edit a Relationship on the CPA with a Record

Temerty
Medicine

Method 1

My Work > Professional Activities

Professional activity details

+ ADD ANOTHER

CPA ACTIVITY (MED) [↗](#)

It is a Test

Data sources

Manual	It is a Test	↗	☆	^
ID:	A5DBAC0E-6DCC-4FDA-A662-10AE4787ACC3			
Start Date:	11 Jul 2022			
End Date:	11 Jul 2025			
CPA Category:	Professional Innovation and Creative Excellence			
Title:	It is a Test			
Description:	Test for CPA activity (Description Section)			
Impact:	Test for CPA activity (Impact Section)			
Supplementary Documentation:	Test for CPA activity (Supplementary Documentation Section)			
Print Order:	1			
Attach to CPA:	true			

RELATIONSHIPS

Scholarly & creative works 1 >

Users 1 >

CREATE NEW

HISTORY

24 Jul 2025 09:44 Added link of type "Associated with" to: Demo Test for Team Research Project Record (Scholarly & cre_more) [↗](#)
Kex Zhang

24 Jul 2025 Removed "Associated"

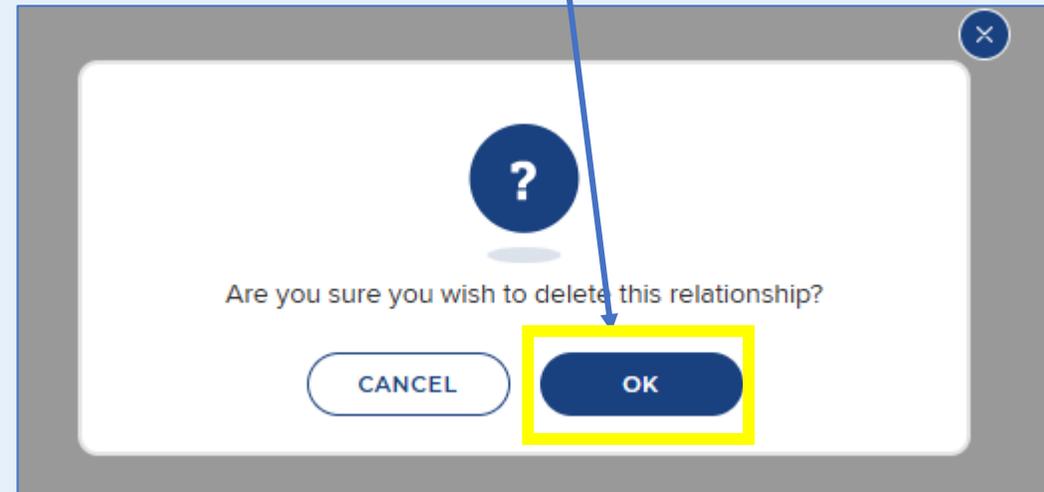
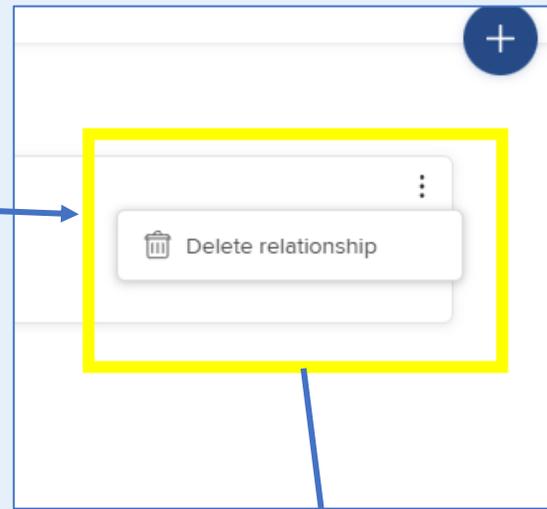
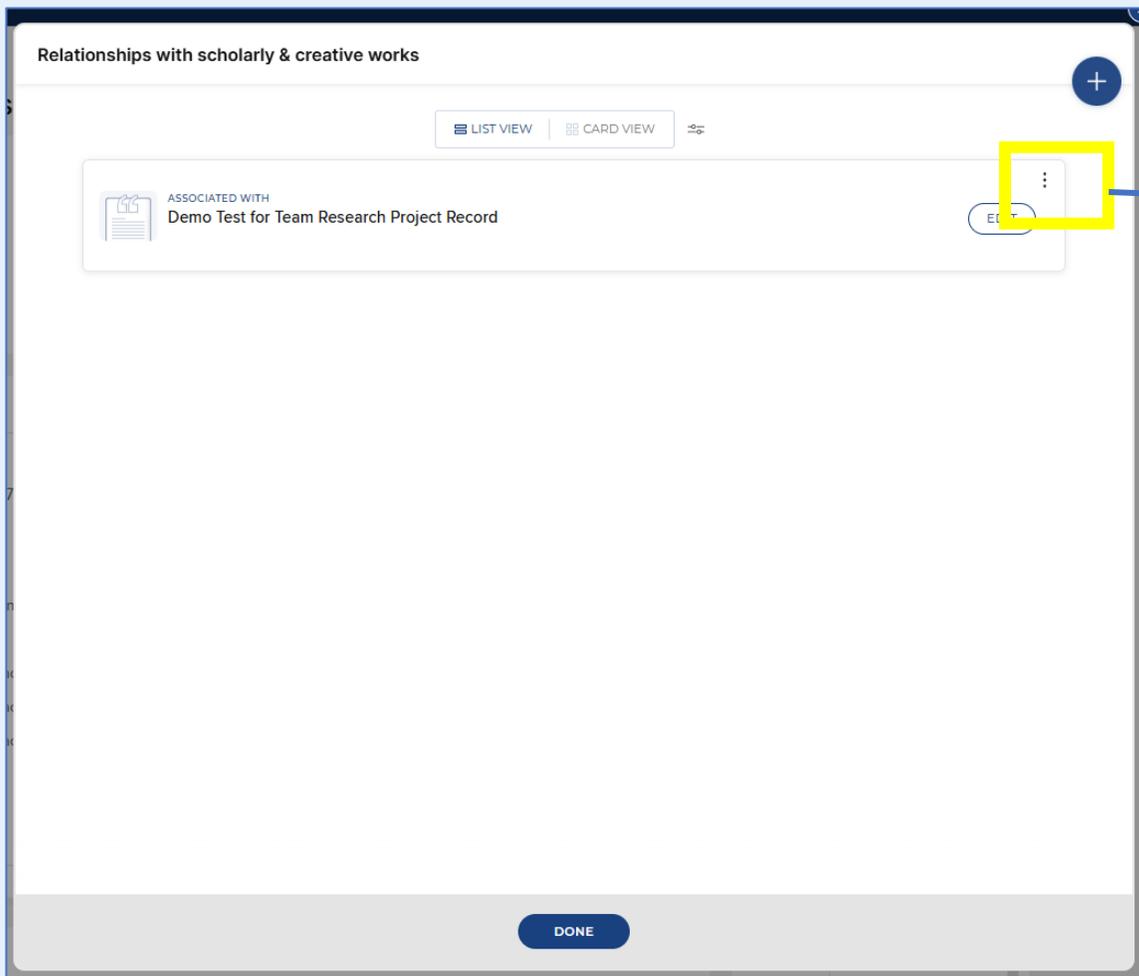
RELATIONSHIPS

Scholarly & creative works 1 >

Users 1 >

CREATE NEW

On the record page, locate the “**Relationships**” section on the middle-right side, then click the **small arrow** to expand all records linked within this module.



Find the record from which you want to remove the link, click the **Ellipsis Icon** (three dots) in the top-right corner, and select **“Delete Relationship”** and **“OK”** to remove the link.

Method 2

The screenshot shows a web interface with a list of links. At the bottom, a button labeled "Click to remove the following link" is highlighted with a yellow box. A blue arrow points from this button to the "Confirmation" dialog box shown in the adjacent image.

Existing links

Or you could...

+ Add a new grant & contract

Select all

It is a Test [View](#)

Existing links

Membership 1, University of Toronto, Toronto, Canada [View](#)

Existing links (1 to a user)

BIOKEX CONTRIBUTION [View](#)

Existing links (1 to a user)

BIOKEX Exemplary [View](#)

Existing links (to a user)

BIOKEX 1 [View](#)

Or you could...

+ Add a new professional activity

[Click to remove](#) the following link

- with

- It is a Test

The image shows two overlapping dialog boxes. The top one is titled "Confirmation" and asks "Are you sure you want to remove the new link?". It has two buttons: "Yes" (highlighted in yellow) and "No". A blue arrow points from the "Yes" button to the "Information" dialog box below. The "Information" dialog box says "The new link has been removed." and has an "OK" button.

Confirmation

Are you sure you want to remove the new link?

Yes No

Information

The new link has been removed.

OK

If you've just created a link and realize it was made in error, while still on the linking page, you can remove it by clicking **"Click to Remove"** and confirming with **"Yes"** button.



TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

How to Generate the TFoM CPA Report

Temerty
Medicine



How to Generate your CPA Report through Elements

1. **Log in to Elements.** The Elements Profile Homepage opens.
2. Within the homepage, click **"Edit My Profile"** to export the CPA report.

The screenshot displays the 'Homepage' interface. At the top left, it says 'Homepage'. Below this is a large card titled 'MY ACTIONS (1 of 3)' with a sub-header 'Add your ORCID iD'. The card contains an illustration of a computer monitor and a document with an 'ID' icon, and a blue 'ADD' button. To the right of this card is a profile card for 'Kex Zhang' from 'Temerty Faculty of Medicine', featuring a circular profile picture and a yellow 'EDIT MY PROFILE' button. Below these are four columns of activity: 'Scholarly & creative works' (1 team research project), 'Grants & contracts' (1 sponsored research agreement, 2 other research agreements), 'Professional activities' (1 membership, 1 office held, 1 introduction to cpa (med), 7 cpa activities (med)), and 'Teaching & supervision' (1 course taught, 1 student mentoring). Each column has '+ ADD NEW' and 'VIEW ALL' options at the bottom.



How to Generate your CPA Report through Elements

1. In the top-right corner of the **"Edit Mode"** page, click **"CV and Reports."**
(A **"CV and Reports"** dialog box will open, which will prompt you to select a report type)
2. Choose **TFoM CPA**, then click **"NEXT."**

Kex Zhang (Edit mode)

VIEW MODE EDIT MODE **CV AND REPORTS**

Kex Zhang
Preferred name can be managed on the [account settings page](#).

Primary group
Temerty Faculty of Medicine

Institutional email
[Redacted] Always internal

Email addresses
[None]
+ ADD EMAIL ADDRESS

Phone numbers
[None]
+ ADD PHONE NUMBER

CANCEL SAVE

Profile privacy
Internal
This privacy level is set at a system level. Please contact your system administrator if you believe it is incorrect.
You can learn more on the [privacy page](#).

Other profiles
Certain types of personal website and claimed identifier will appear here.
You can [add a personal website](#) on this page, or [go to the Automatic Claiming page](#) to claim an identifier.

Links
[View all links](#)

Find a colleague

CV and Reports

Select report

- Academic CV (custom)
An academic CV populated with personal details from your profile, including associated research outputs (by type), activities and grants.
- NIH biographical sketch (2015)
Required for due dates on or after May 25 2015 and encouraged for applications due on or after January 25 2015, using data available on your profile.
- NIH biographical sketch (pre-2015)
Required for due dates before January 25 2015, using data available on your profile.
- TFoM CPA**
CPA
- TFoM CV

CLOSE **NEXT**



How to Generate your CPA Report through Elements

Run report

TFoM CPA

User

 Kex Zhang
Temerty Faculty of Medicine

Dates

If supplied, the export will only contain data relevant to the specified date range.

Start date
Valid formats: dd/mm/yyyy, 28 Sept 2023
 

End date
Valid formats: dd/mm/yyyy, 28 Sept 2023
 

Format

 PDF  DOCX

1. If you want to **export data from a specific time (Optional)**, enter the **Start Date** and **End Date** under the Dates section. **If you leave all data fields blank, the system will include all records up to the present in the report.**
2. Choose the output format under the Format Section (**We recommend selecting PDF for best results.**)
3. Click **"RUN"** to proceed. The report will be downloaded in your computer.



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Happy Curation :)

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