TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Elements TFoM CPA Report - A Data Entry Guide

Screenshot Instructions - Guidance for Academic Leaders and Staff

Temerty Medicine

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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.

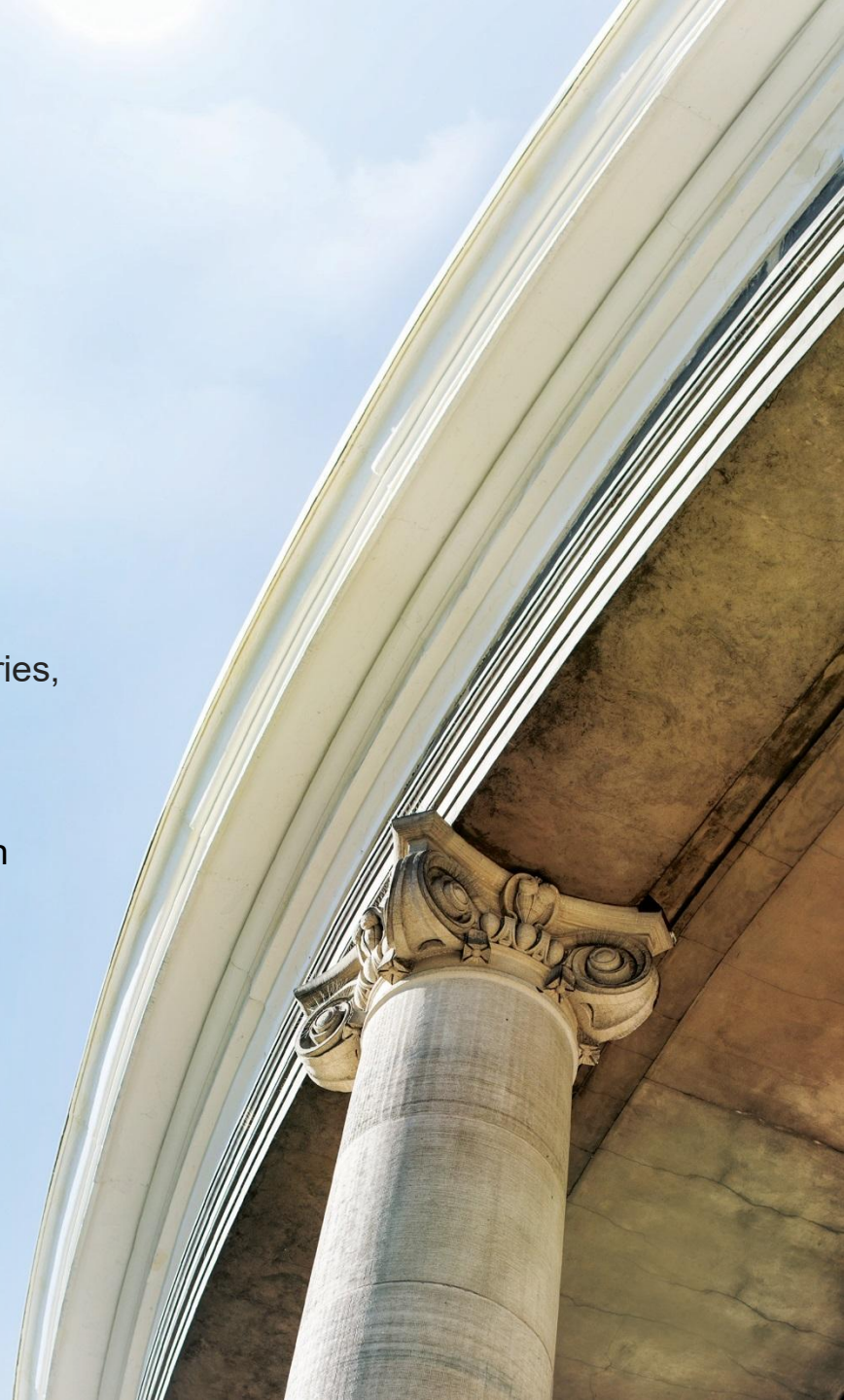

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Table of Content (In Your CPA report)

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

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3. Contributions to the Development of Professional Practices (Page 16)
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1. Introduction

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Medicine

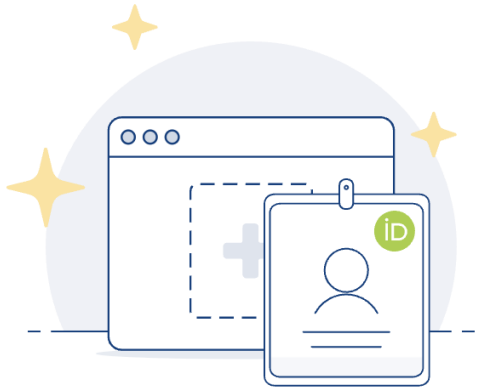
Introduction

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

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Temerty Faculty of Medicine

ail.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

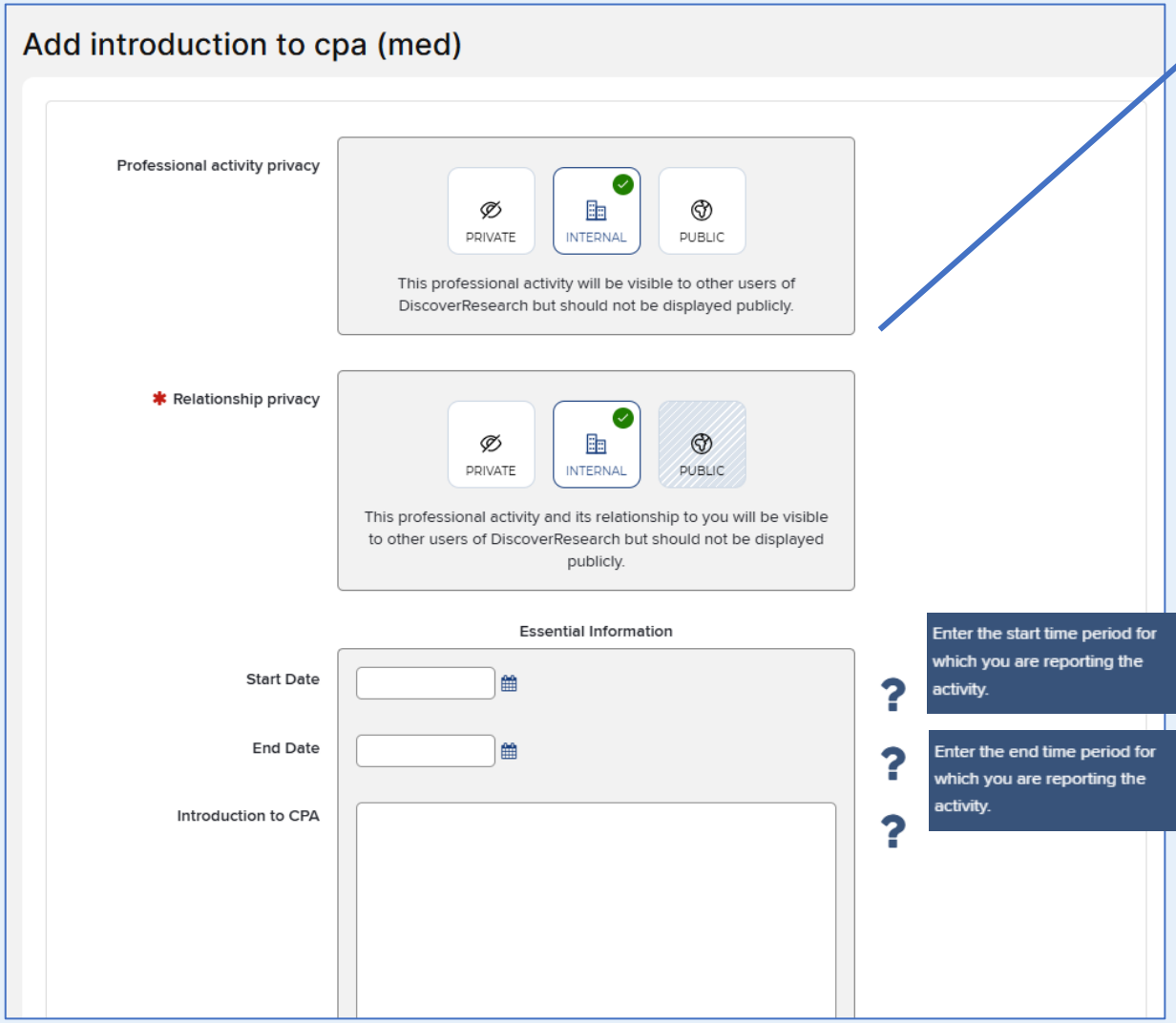
Select professional activity type

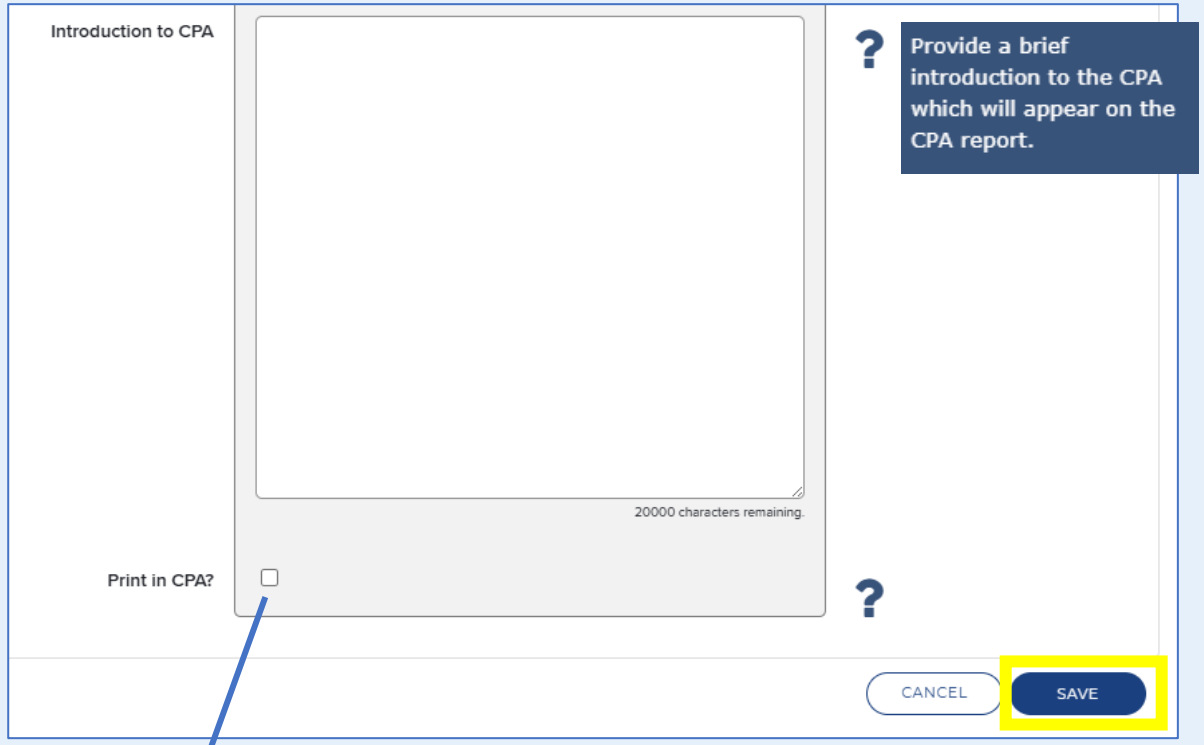
- Activity or Event Organizing
- Activity or Event Participation
- Award Application Assessment
- Committee Membership
- Community Service
- Community / Patient Workshop
- Conference Review / Referee
- Consulting / Advisory
- Honour / Award / Distinction
- Editorial
- Expert Witness
- Grant Application Assessment
- Institutional Review
- Journal Review / Referee
- Media Relation
- Membership
- Non-research Presentation
- Office Held
- Professional Mentorship
- Introduction to CPA (MED)
- CPA Activity (MED)

CANCEL

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.





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].

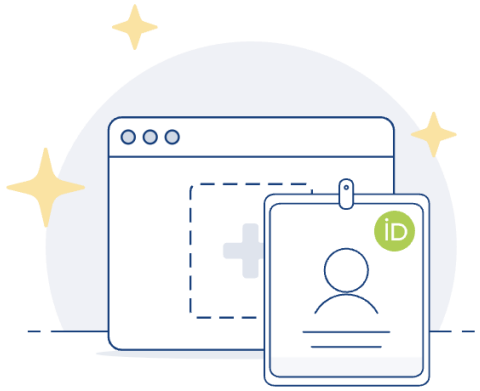
Impact: [Impact].

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

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Temerty Faculty of Medicine

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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.

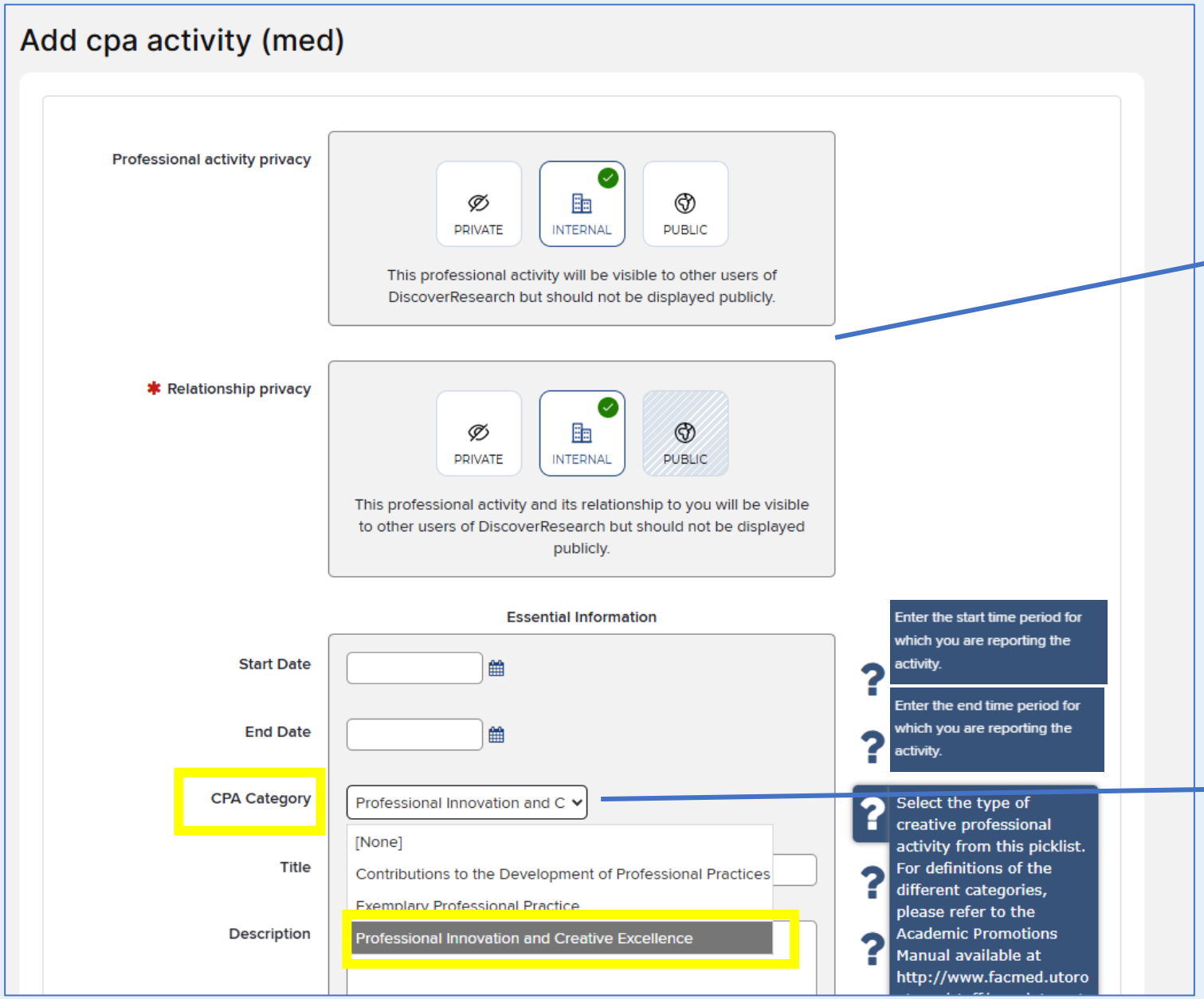
+ ADD NEW VIEW ALL

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)			

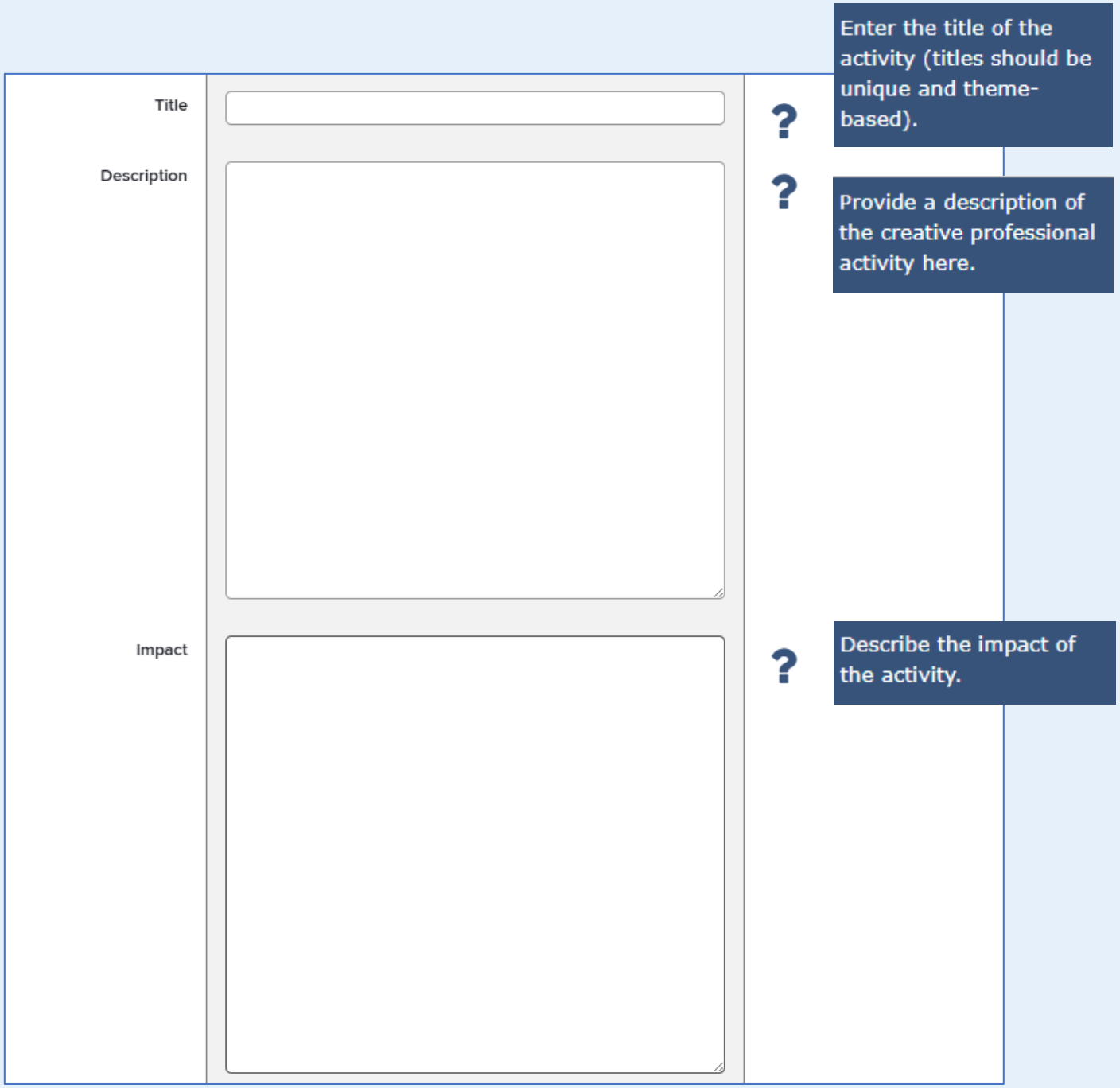
CANCEL



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

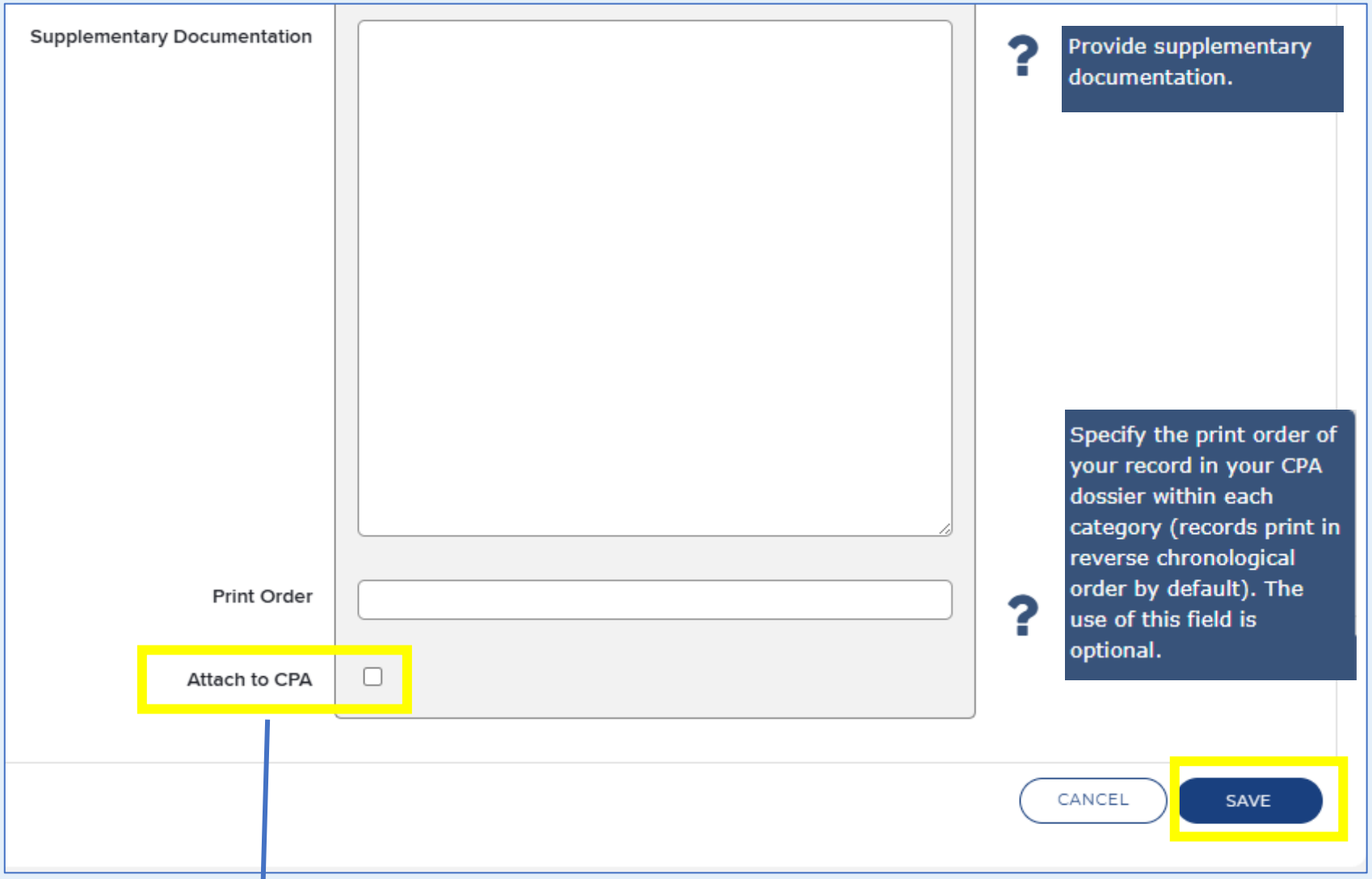
Delegates impersonating a faculty member should select **“Internal”** as the privacy setting.

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.



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.



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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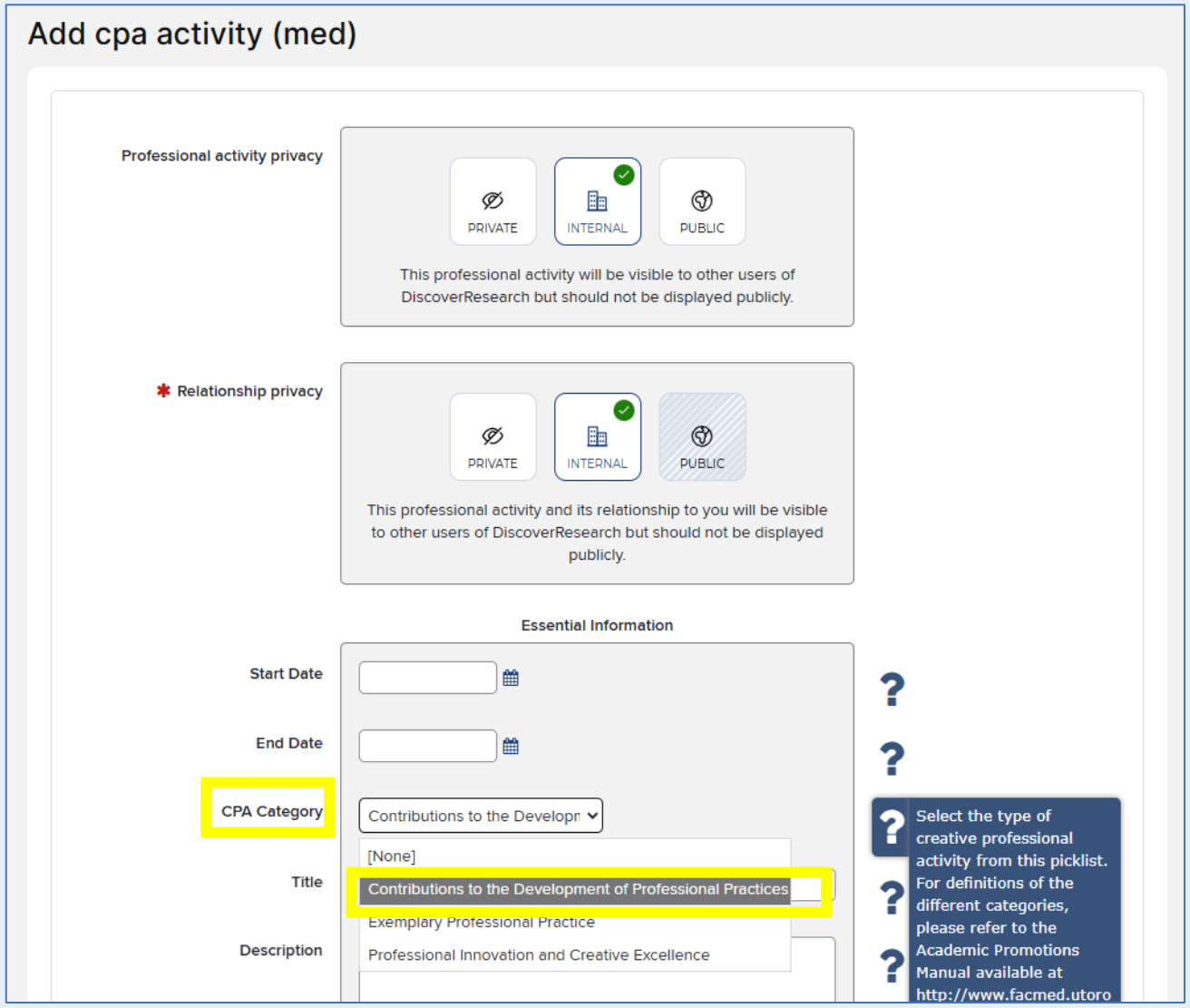
3: Contributions to the Development of Professional Practices

Note: See Professional Innovation and Creative Excellence.



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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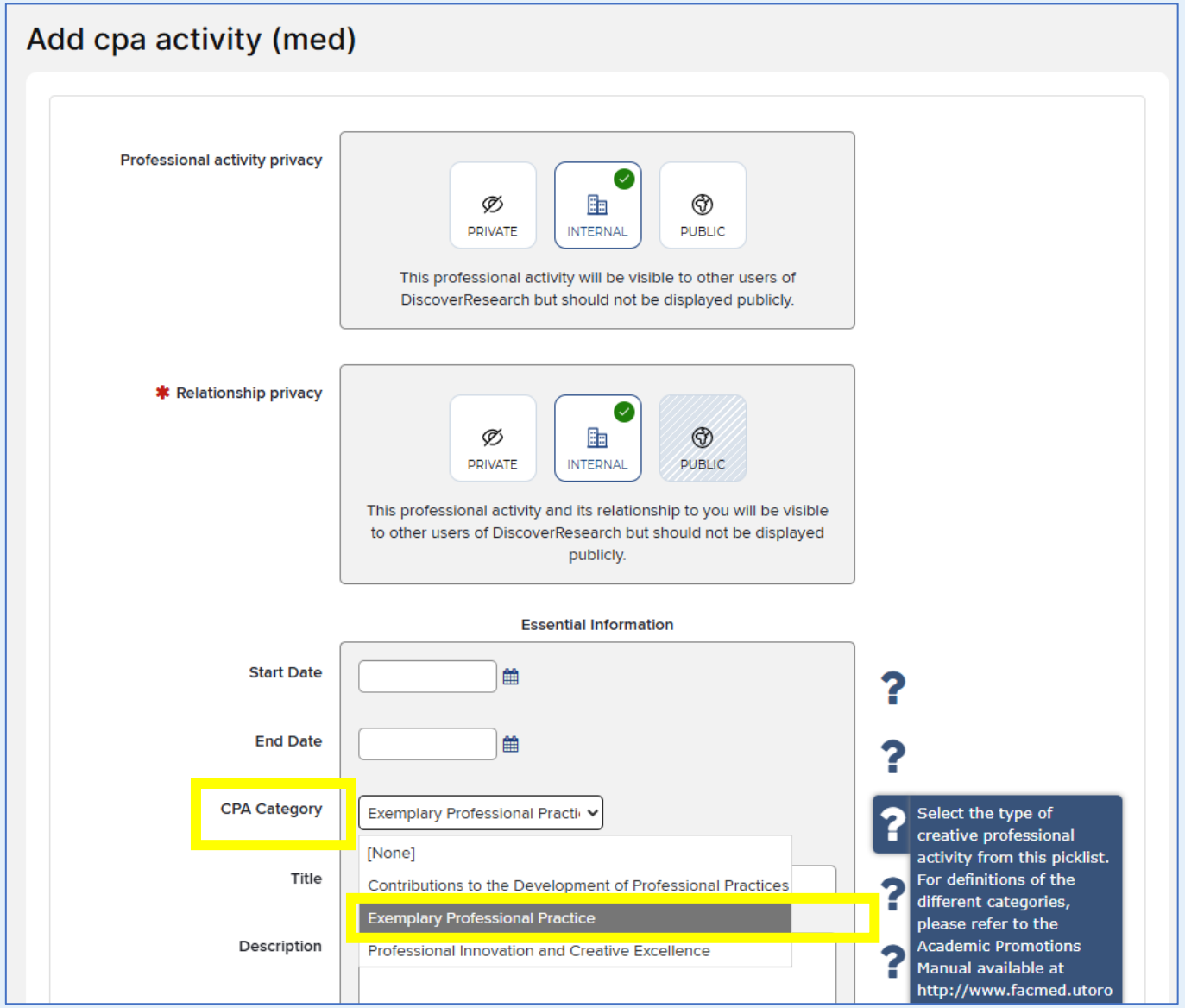
4: Exemplary Professional Practice

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.



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Linking CPA Activities to other Records as Documentation

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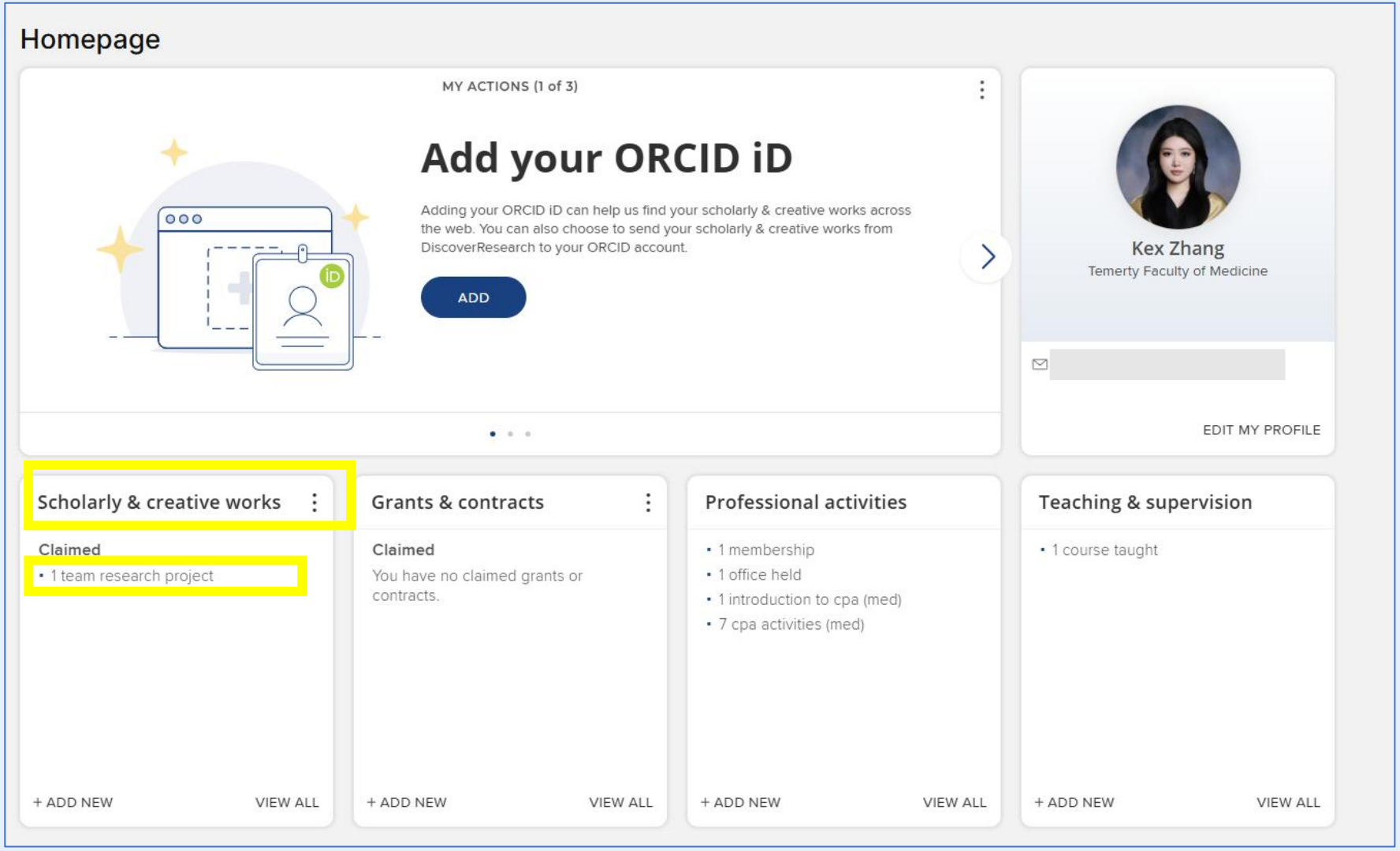
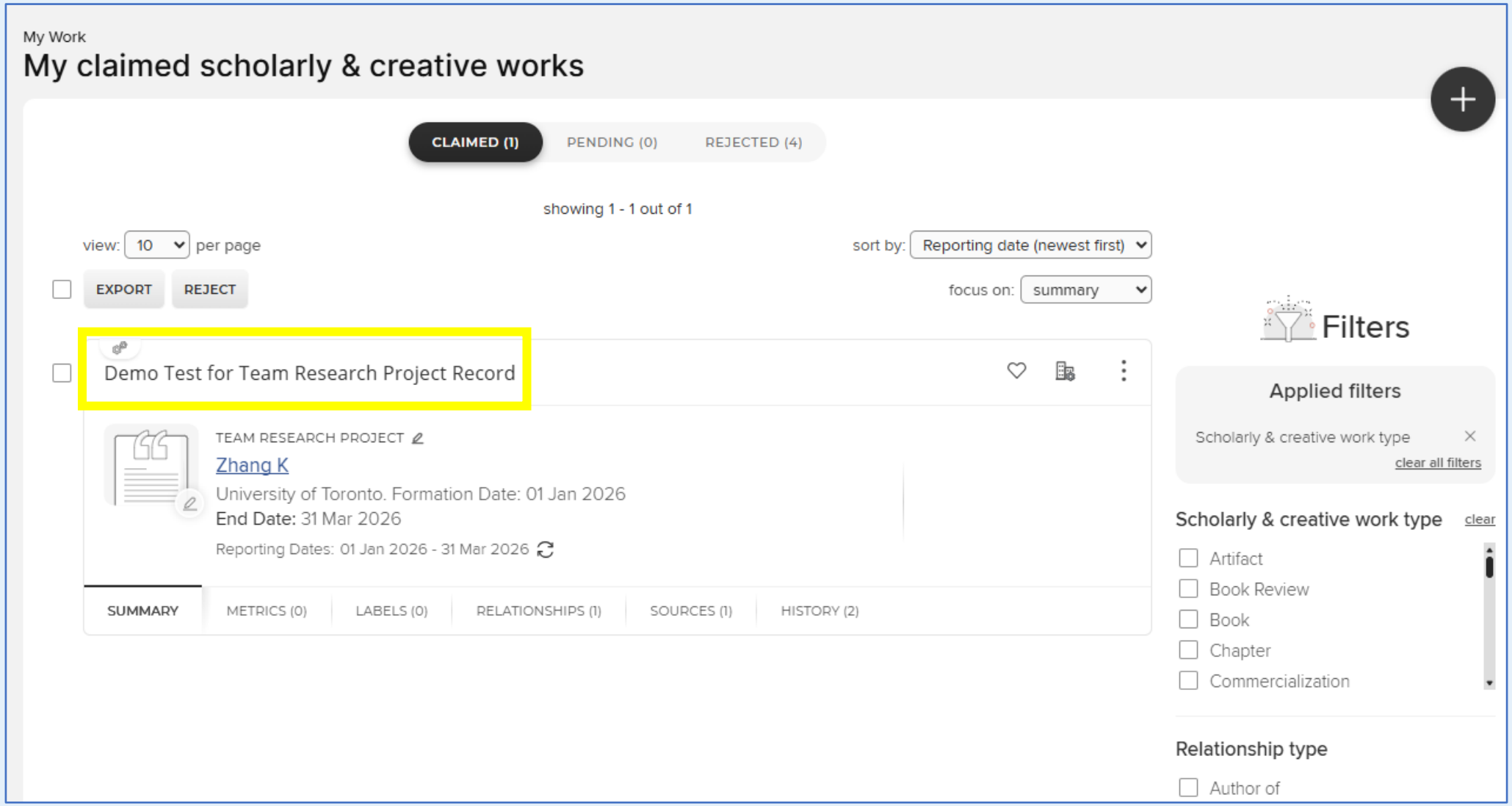
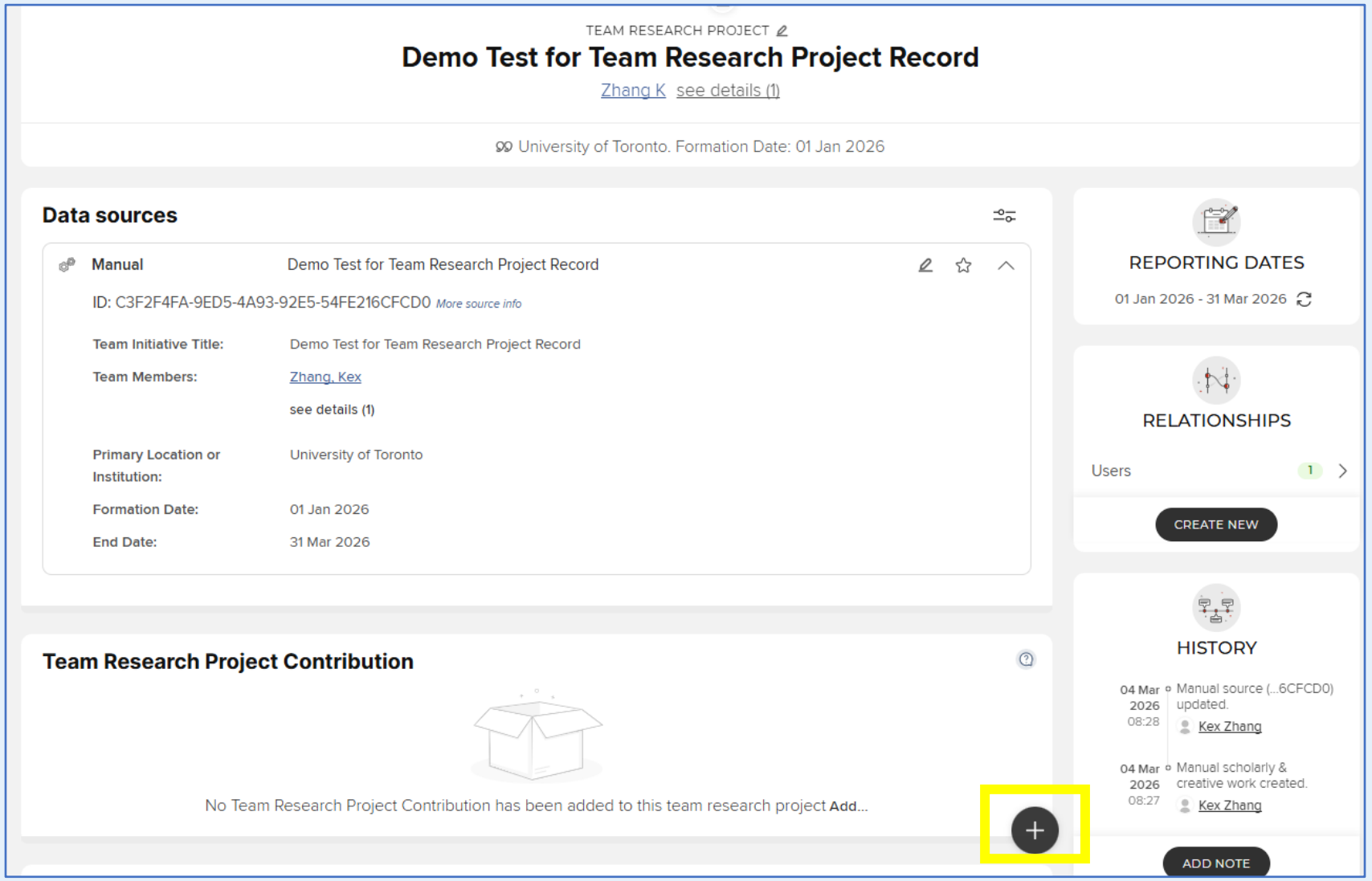
Method 1



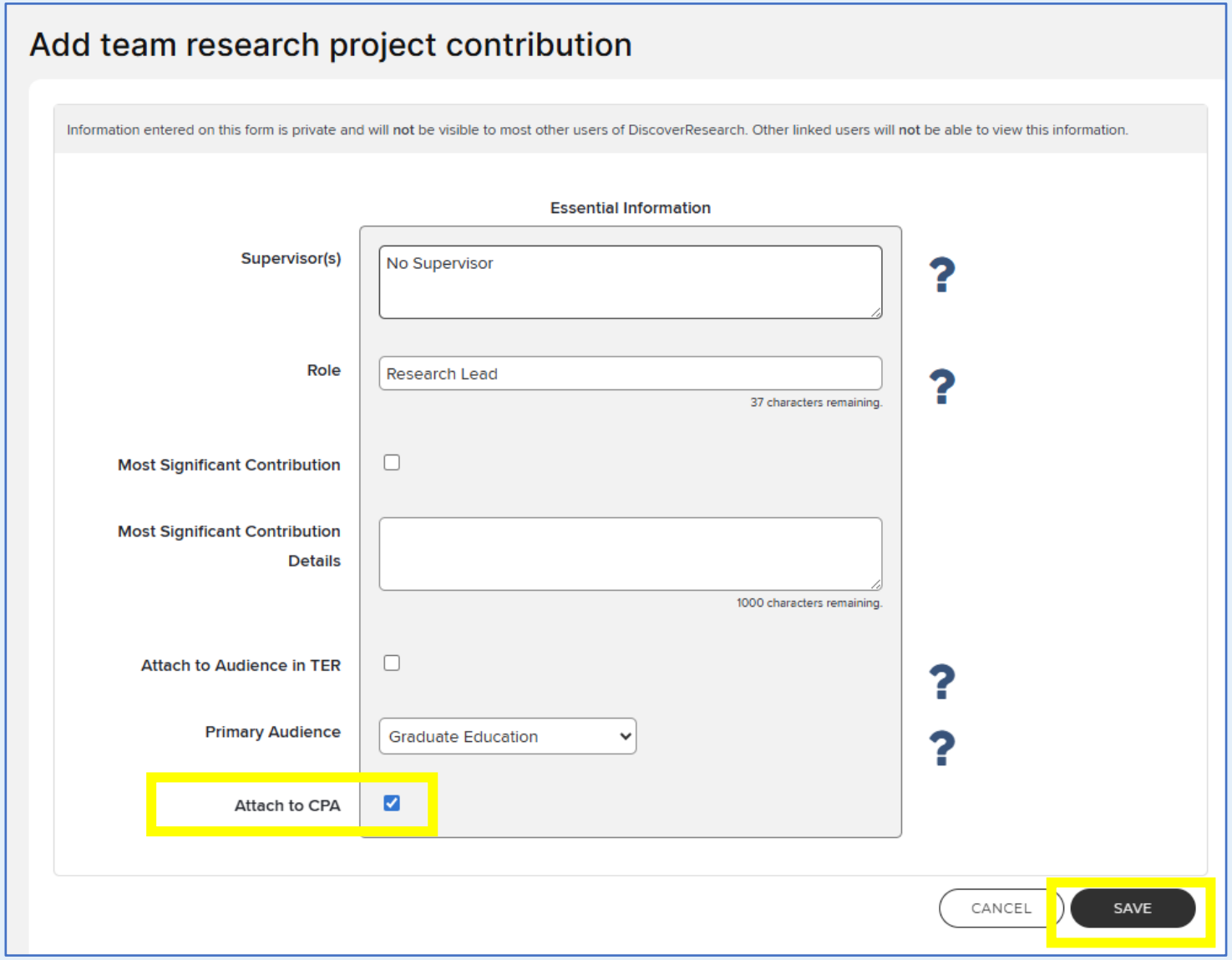
Step 1: Open an existing publication record - for example, select **"Team Research Project"** under **"Scholarly & Creative Works"** Module.



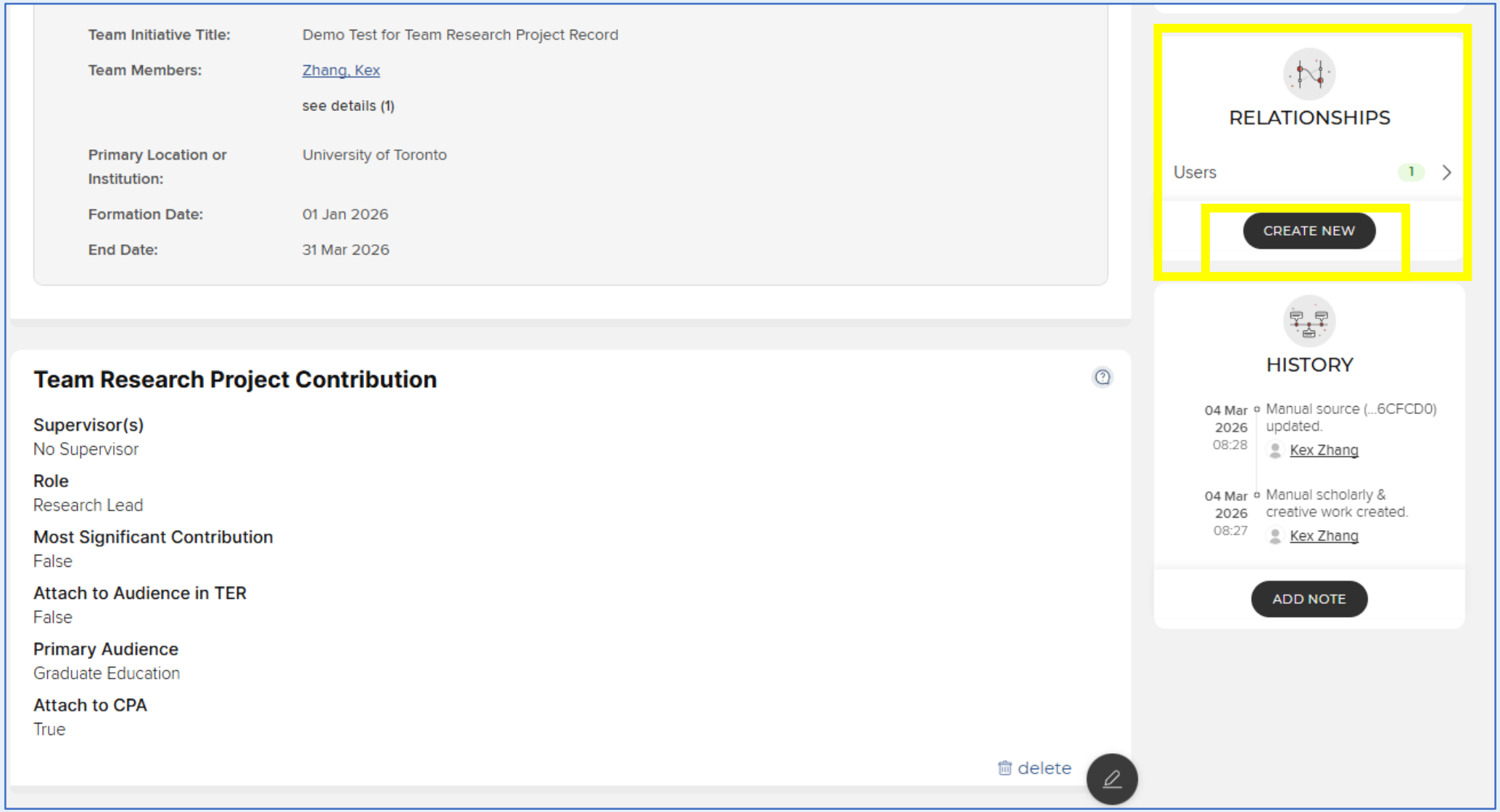
Step 2: Click on the existing title you want to link to the CPA activity.



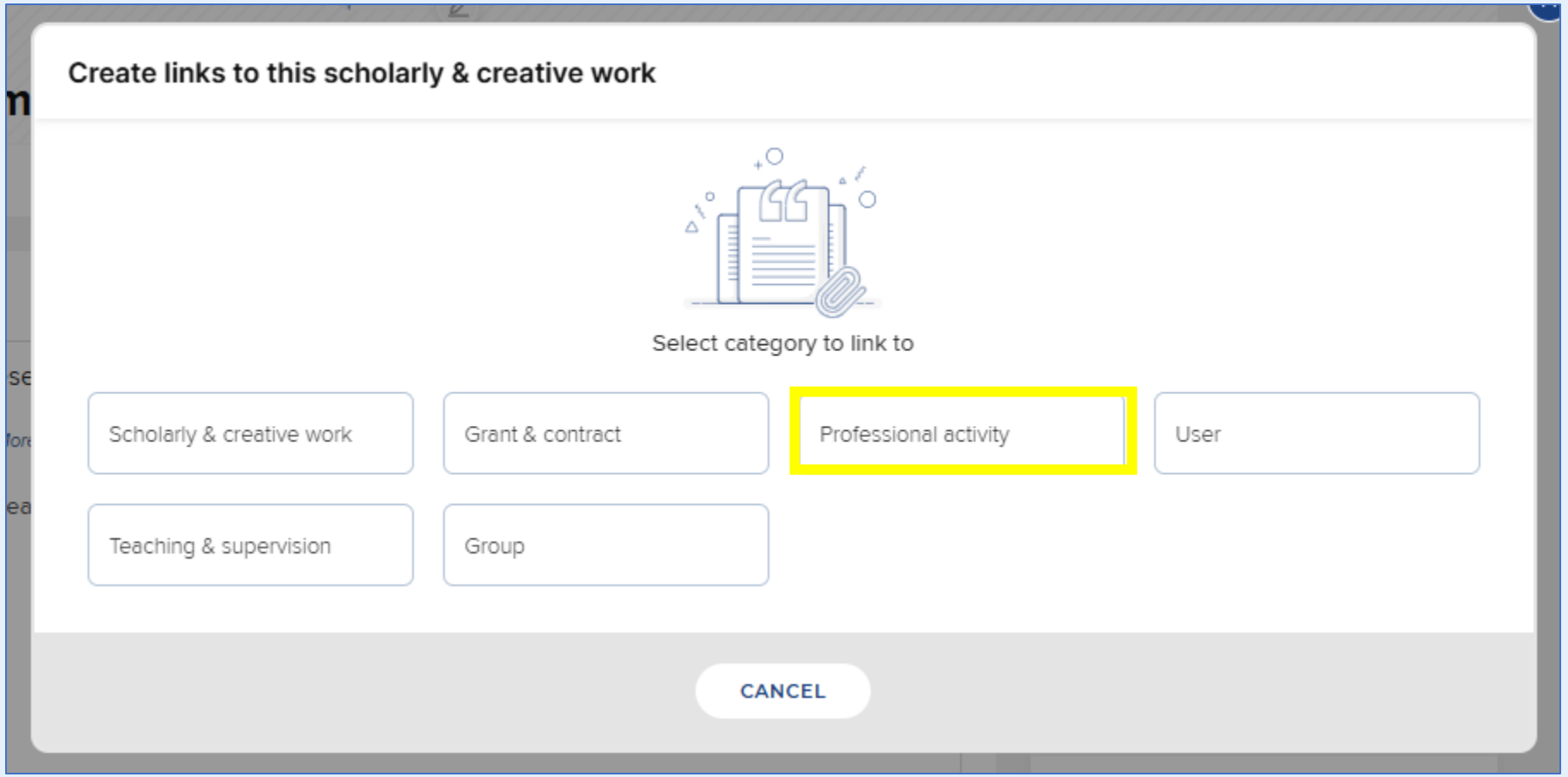
Step 3: Locate the **"Team Research Project Contribution"** section and click **"+"**



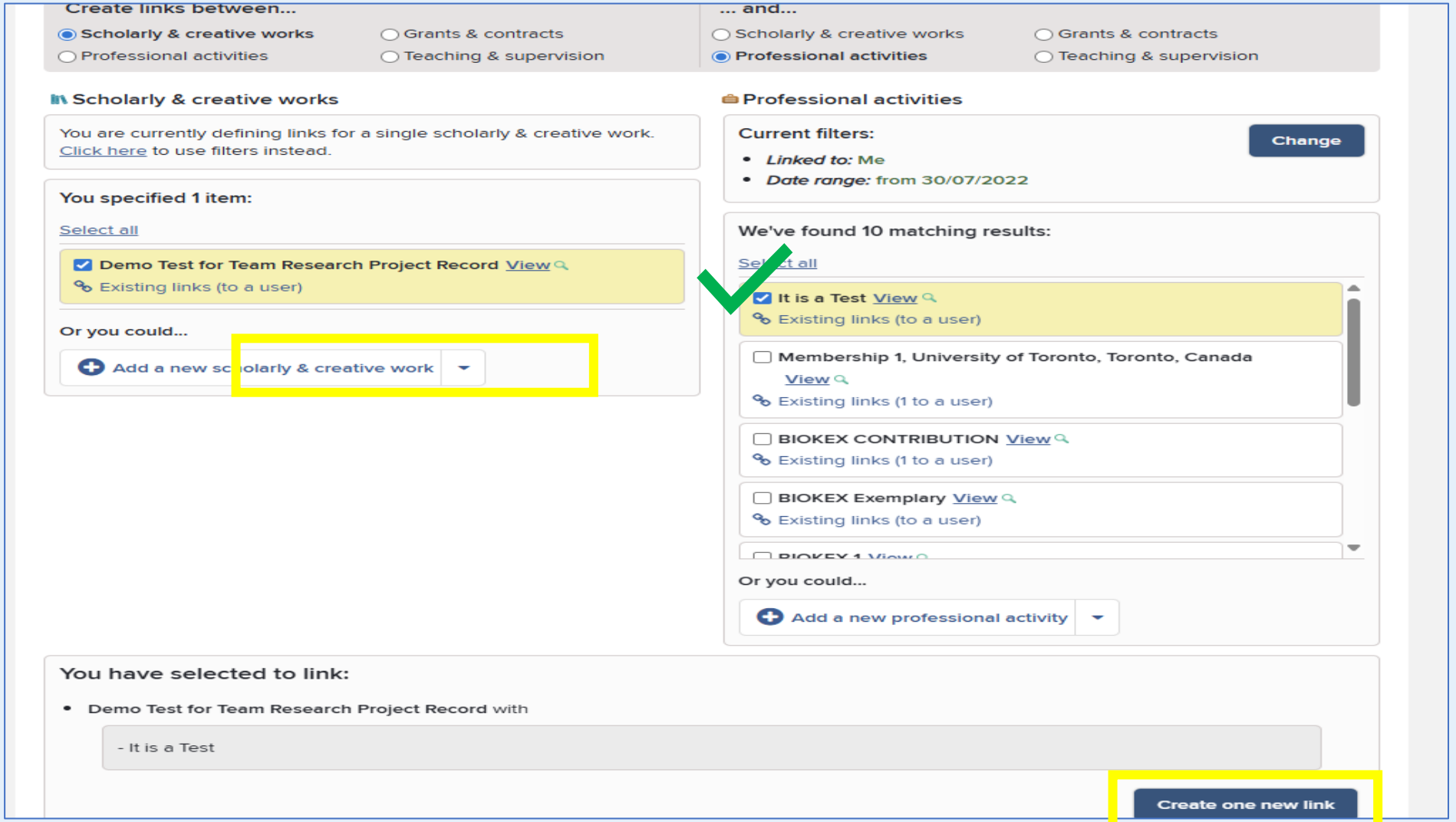
Step 4: : Fill the remaining fields based on your information, then checked-off **"Attach to CPA" checkbox** if you want this record to appear in your CPA report after linking**,** then click **"Save"** button.



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

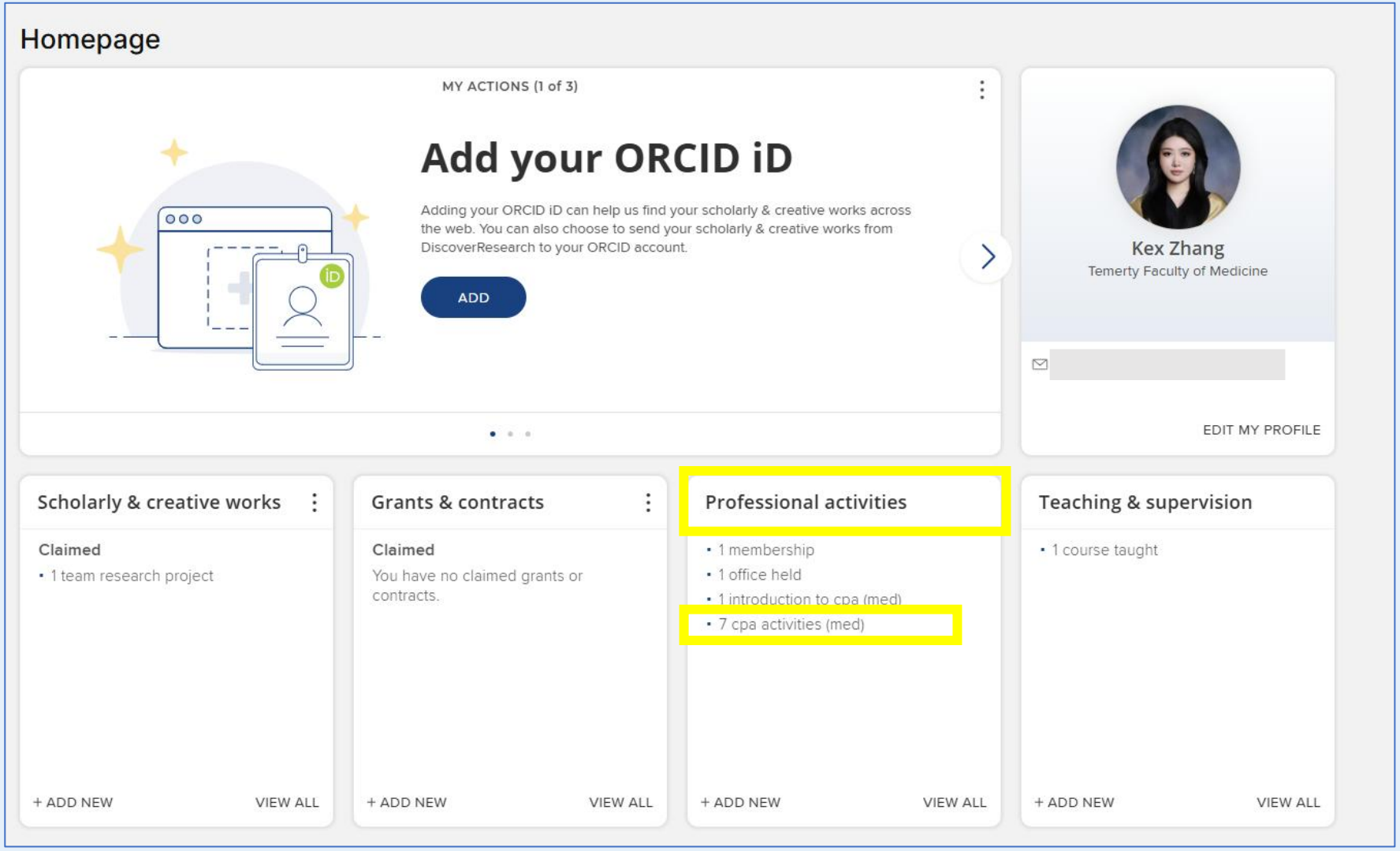


Step 6: Select "**Professional Activity"** only, as all CPA activity records are organized under this category.



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.

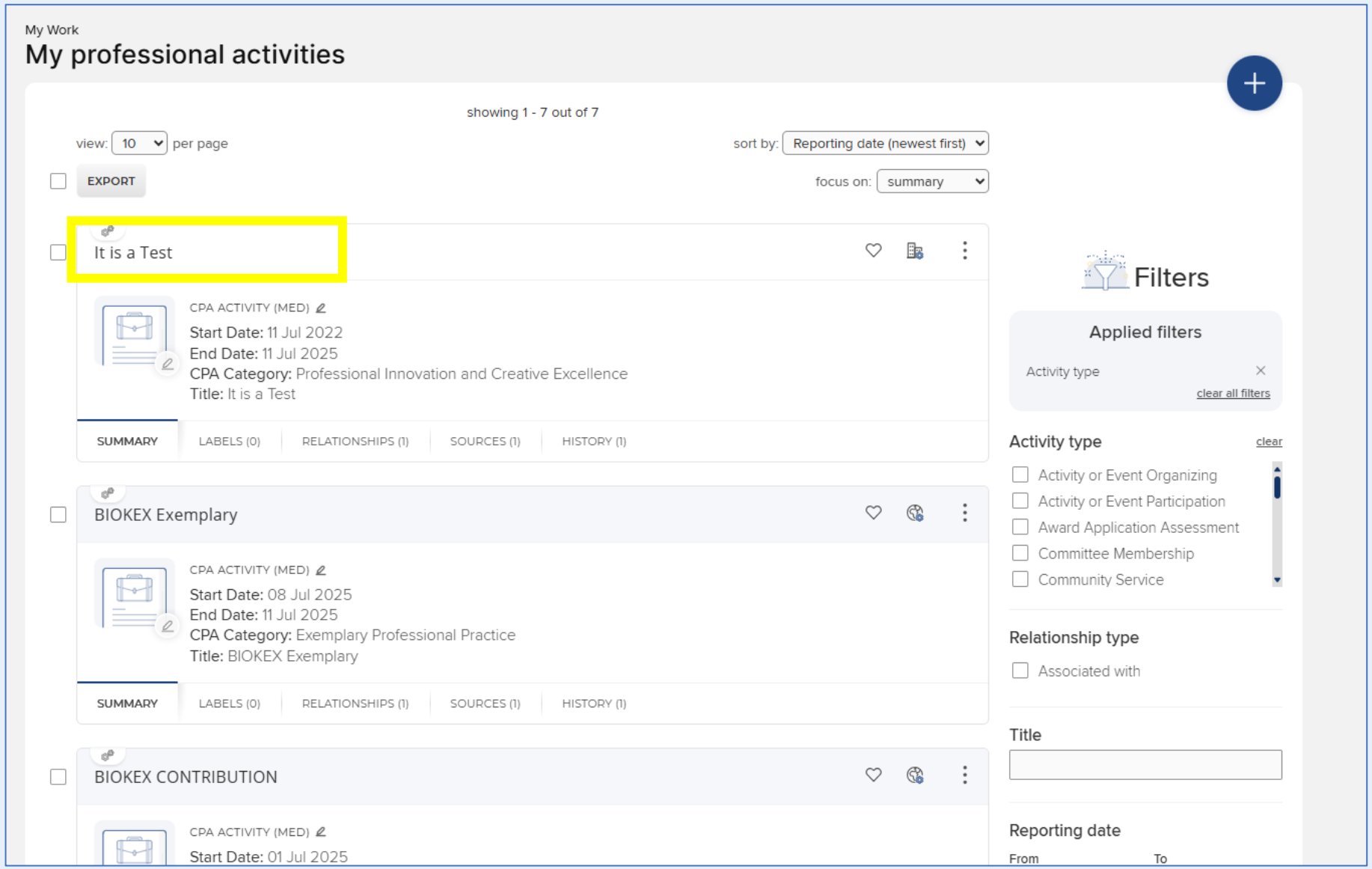
Method 2



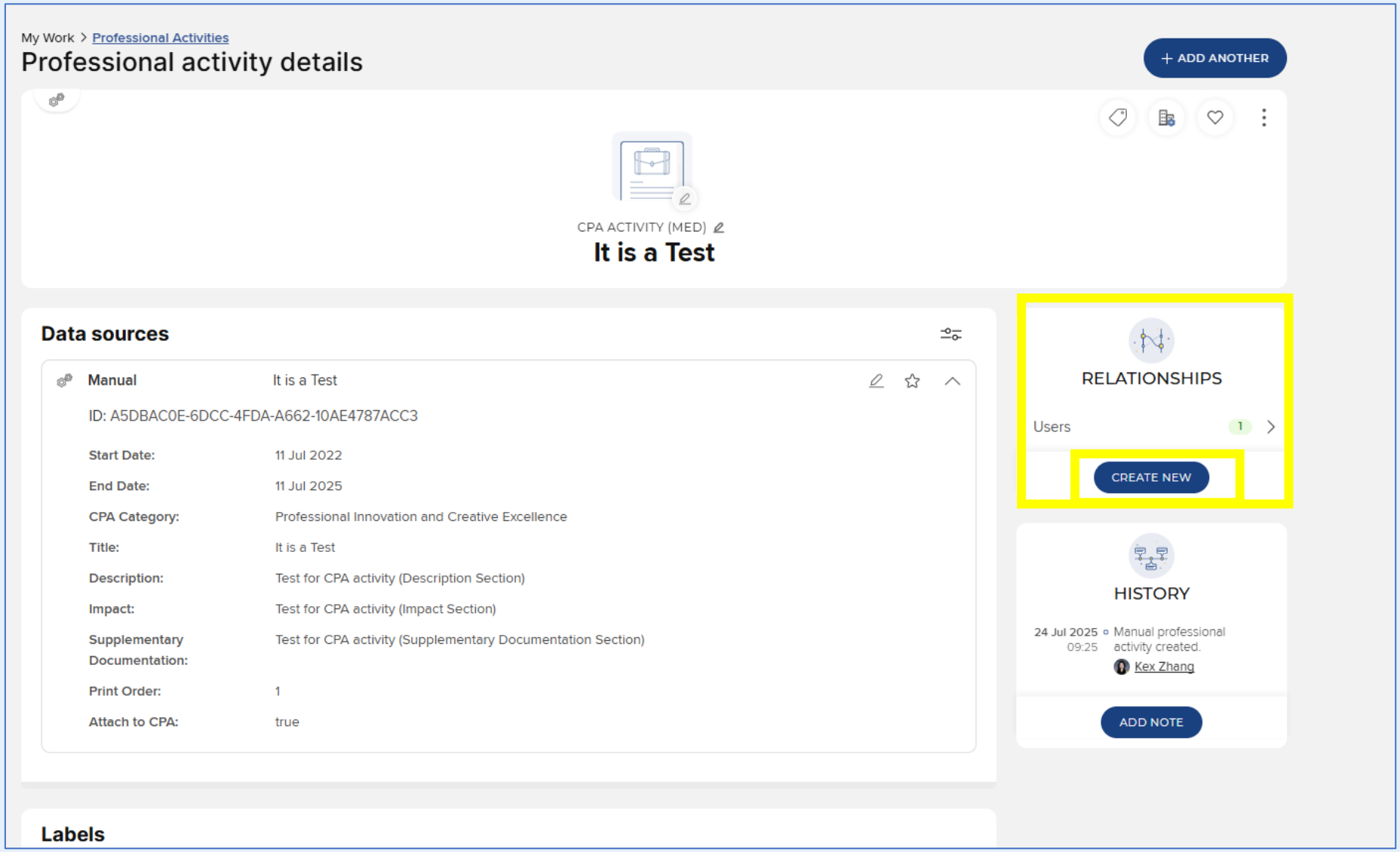
Step 1: Click on the existing **"CPA activity"** record under **"Professional Activities"** module.

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

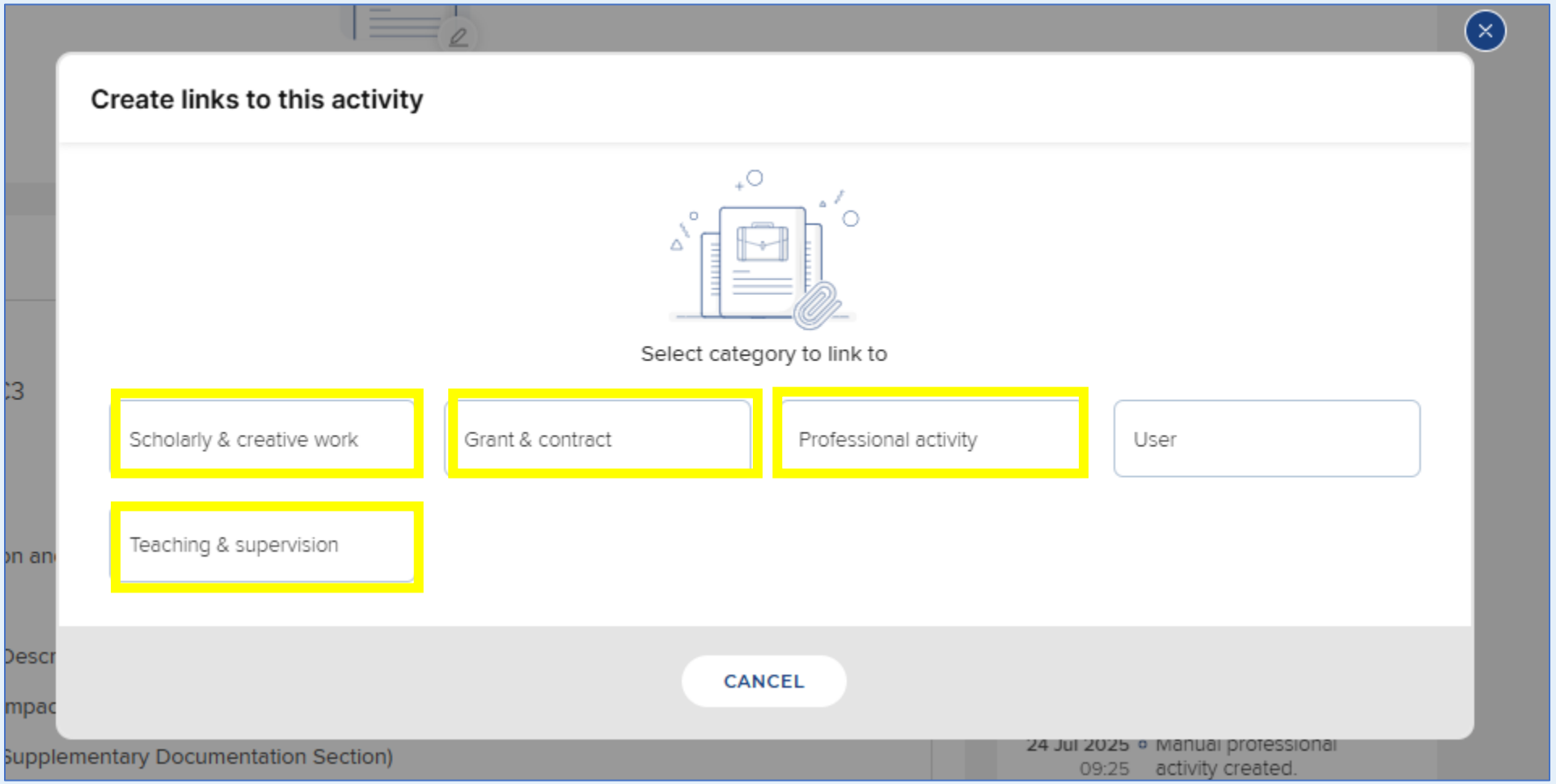
How to checked the "Attach to CPA "checkbox? (page 21-24)



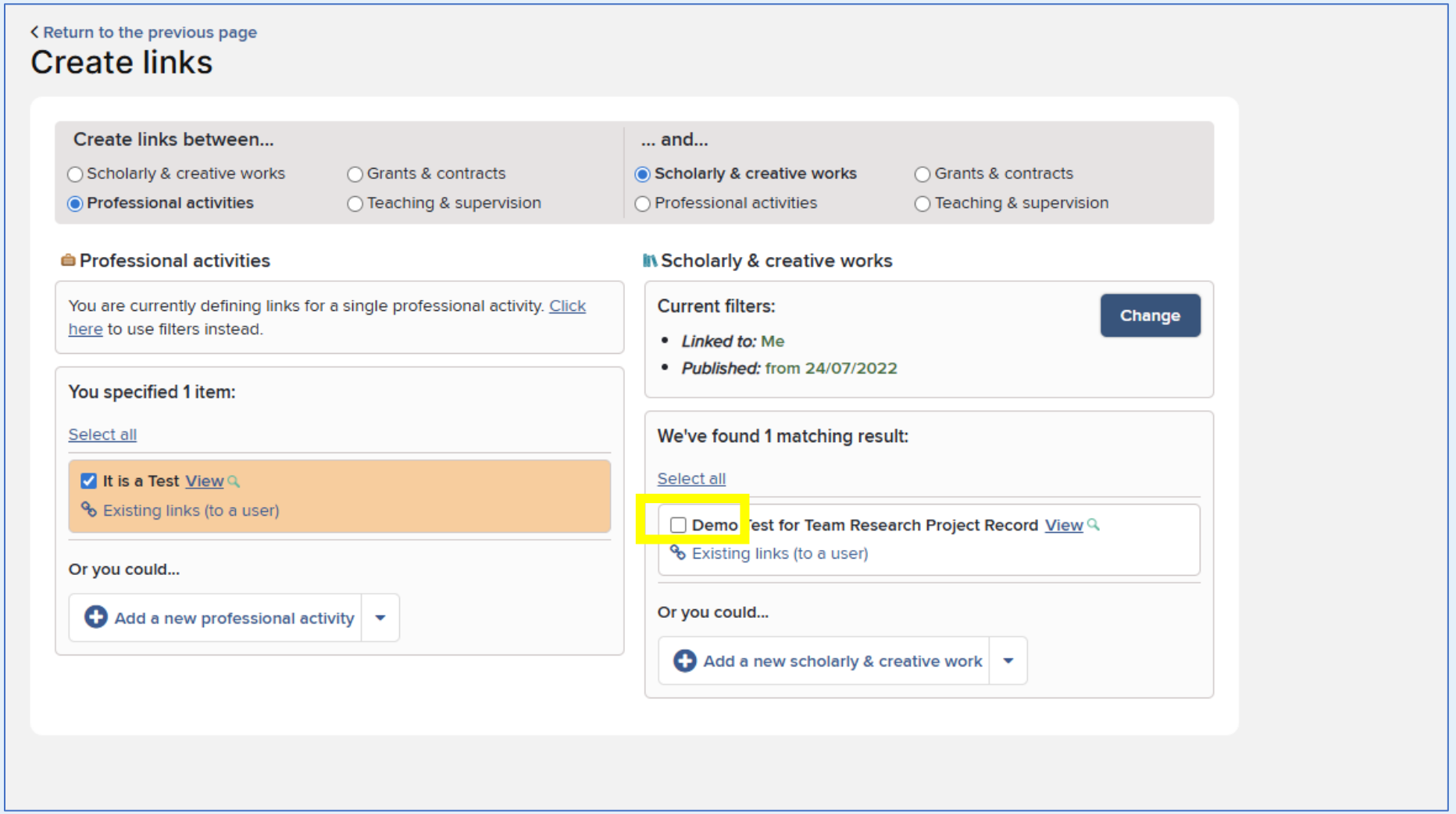
Step 2: Click on any **CPA Activity Title** you want to link.



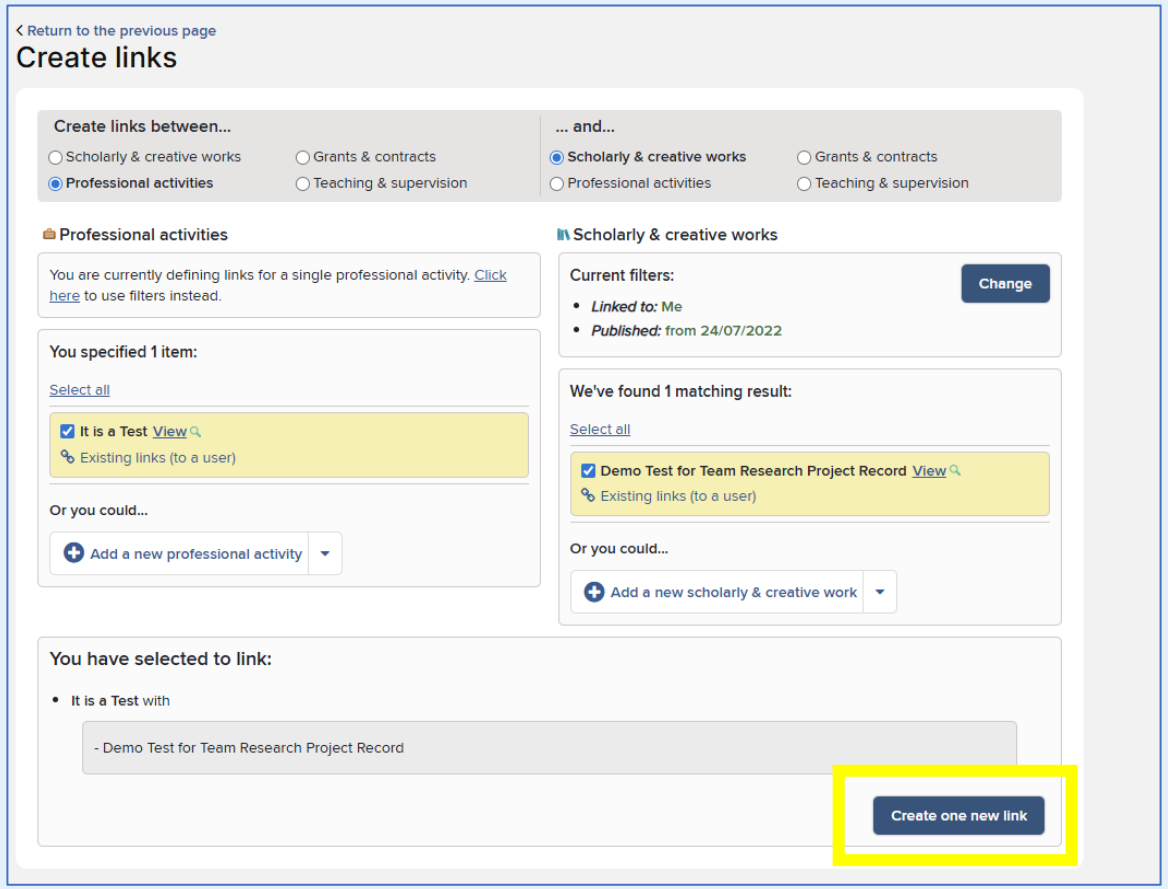
Step 3: Click on **“Create New”** in the **“Relationships”** section on the right side of the page.

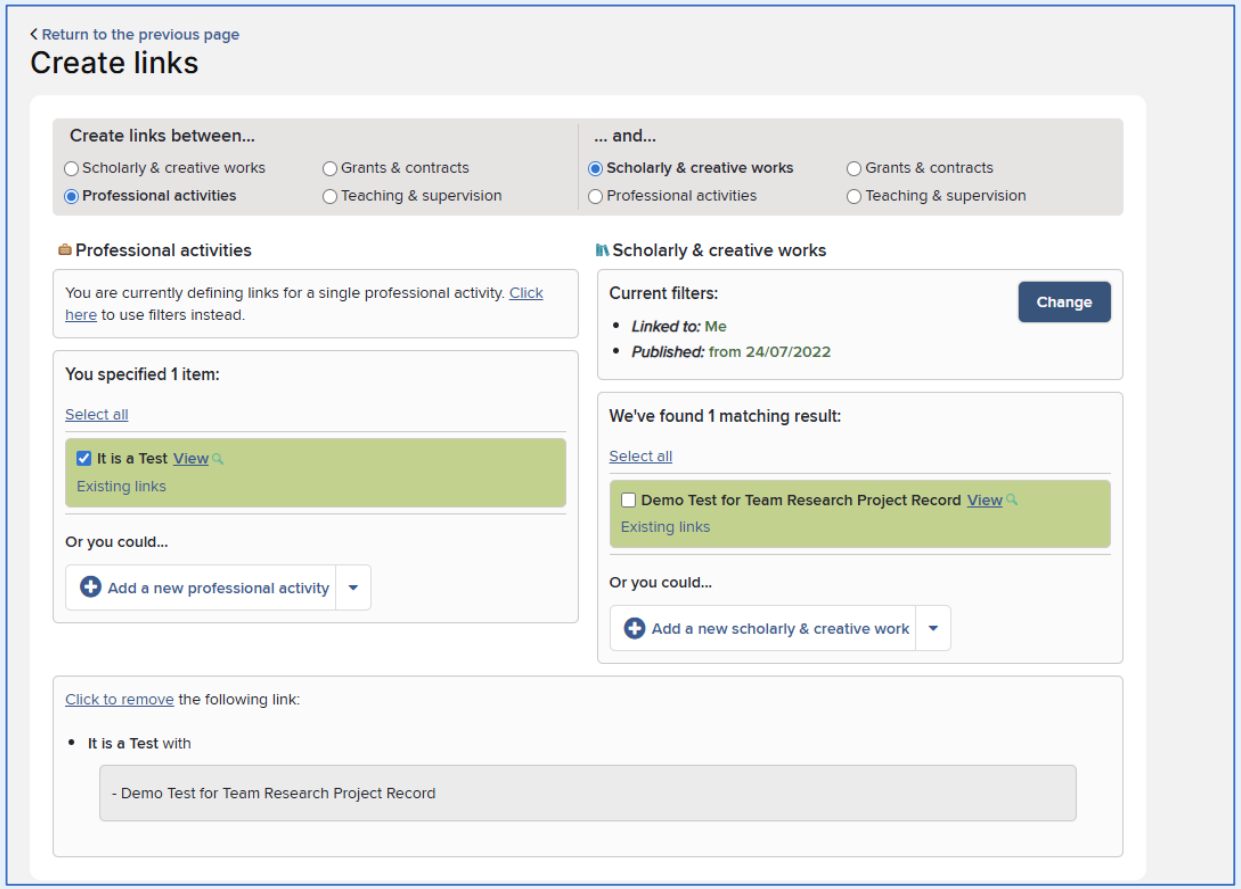


Step 4: Select the Module that houses the record you would like to link (such as **Scholarly & Creative Work, Grant and Contract, Creative Professional Activity, or Teaching and Supervision — excluding User**).

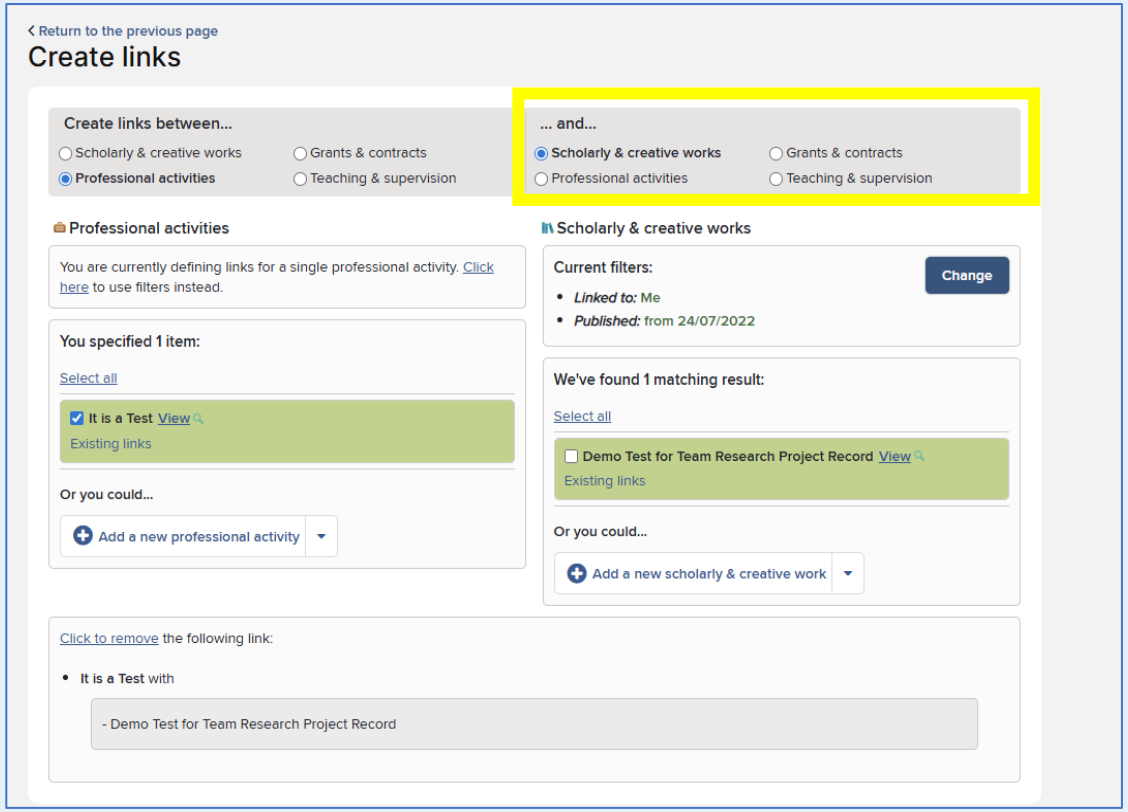


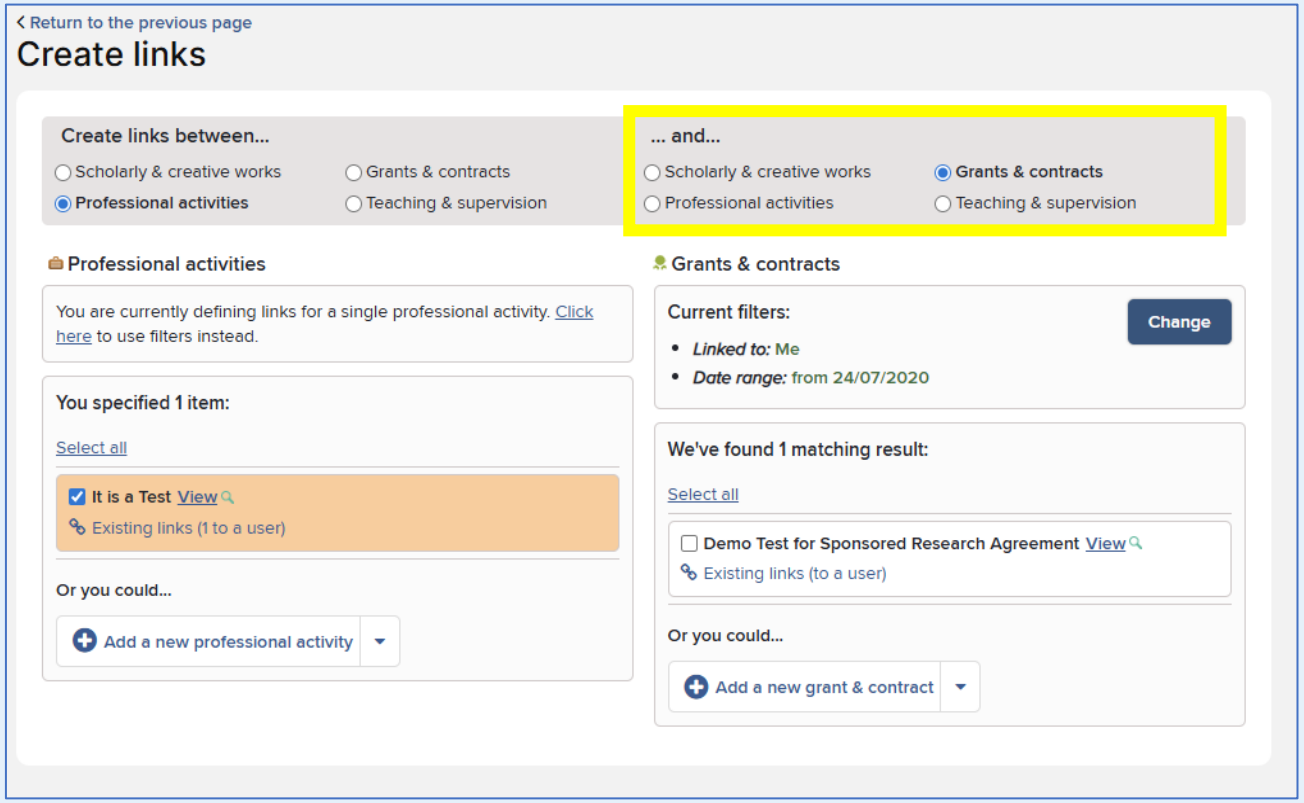
Step 5: Click the **Check Box** next to the title of the record.





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.





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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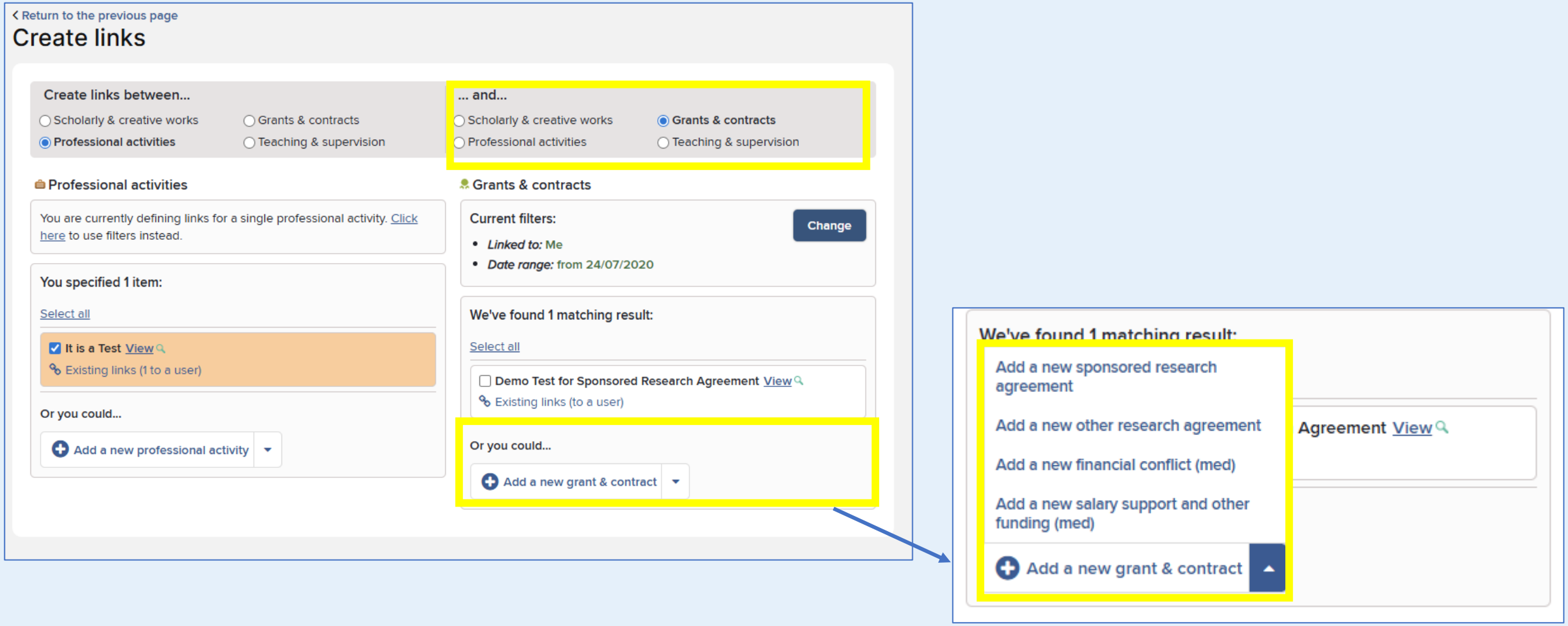
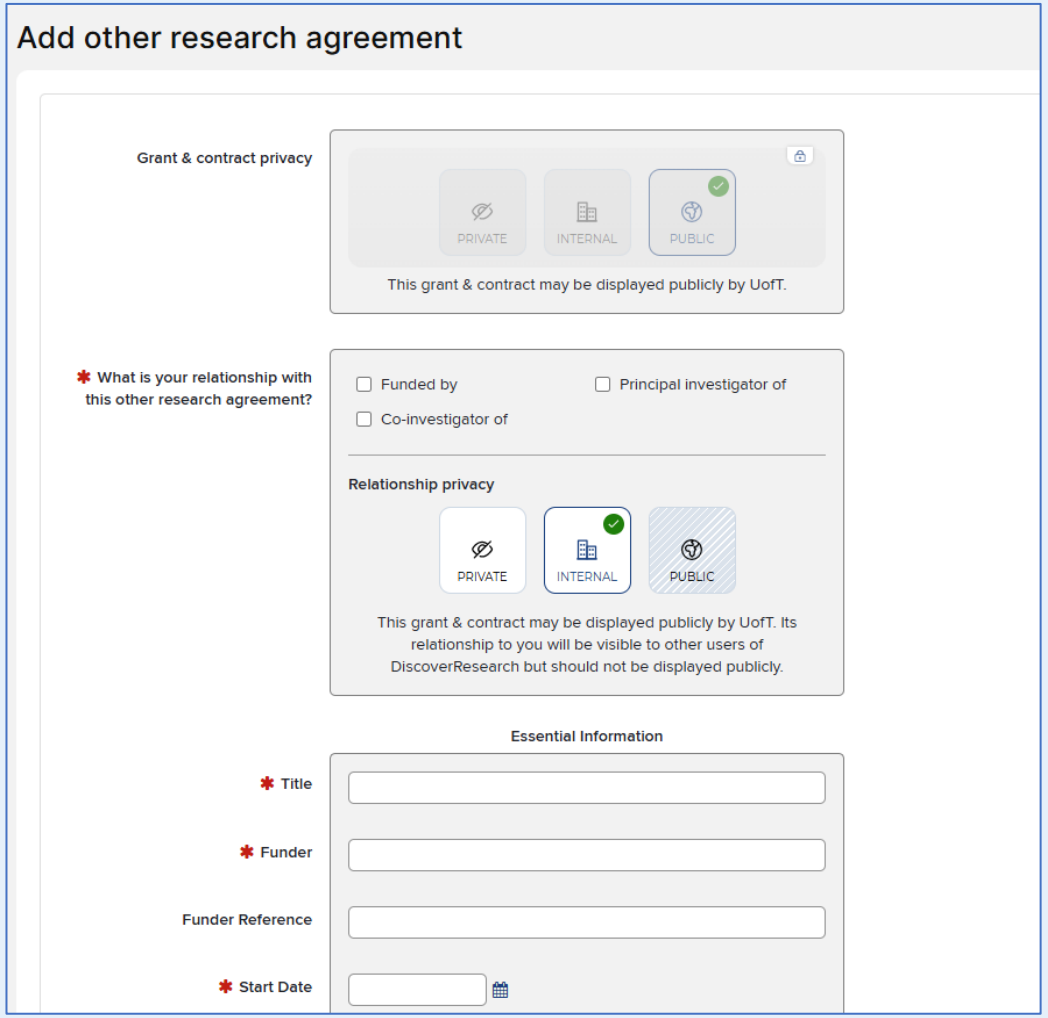


You may add a new record by clicking the **“Add a new [xxx]”** button. For example, if you select the **“Grants & Contracts”** option, the dropdown menu will display only the information types available under the **"Grants & Contracts"** module. To add records from other modules, please change the toggle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



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**.

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Edit a Relationship on the CPA with a Record

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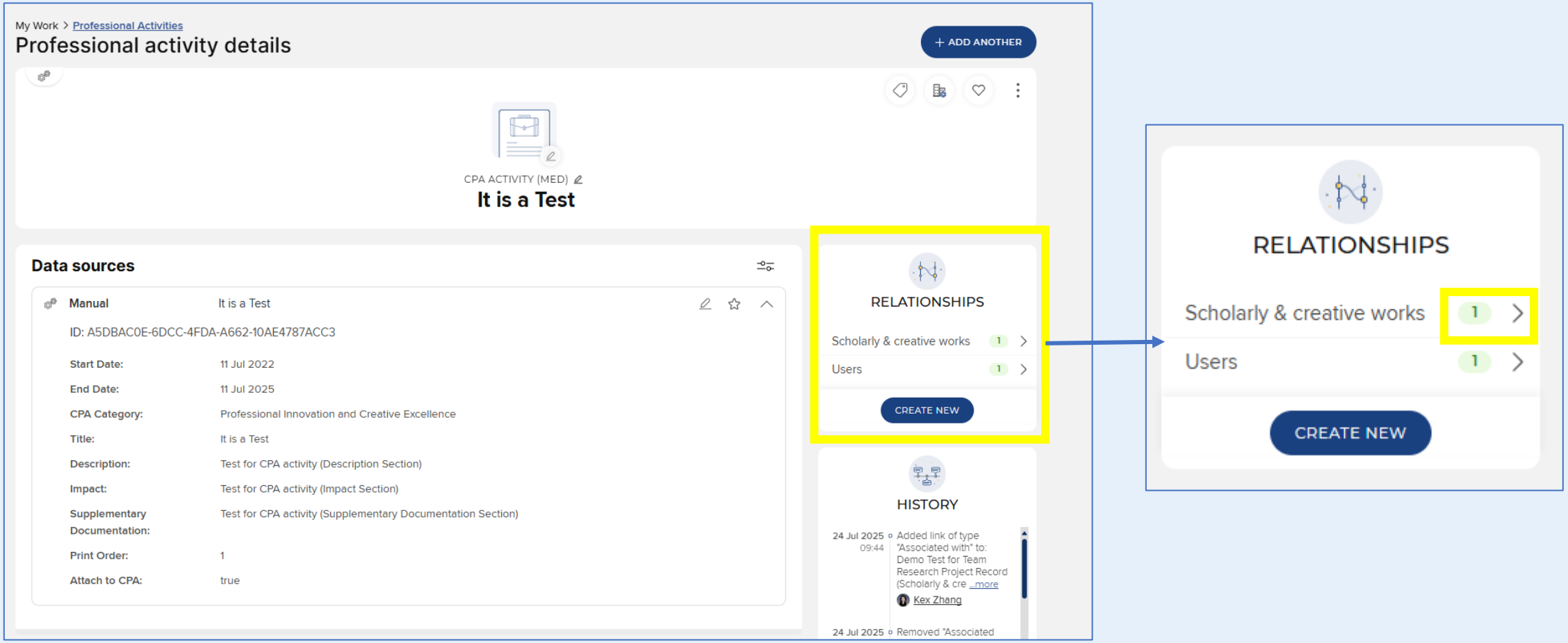
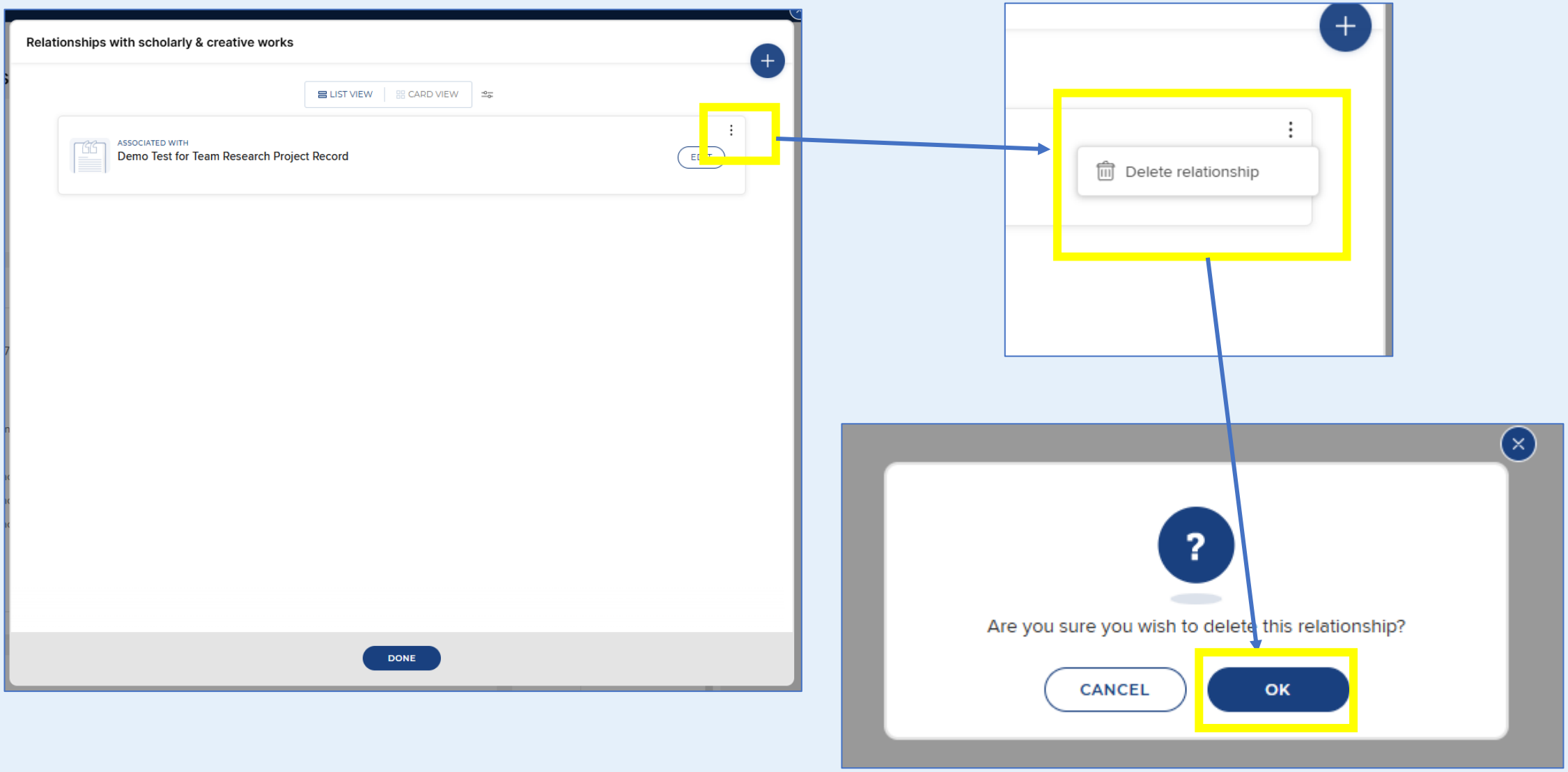
Method 1

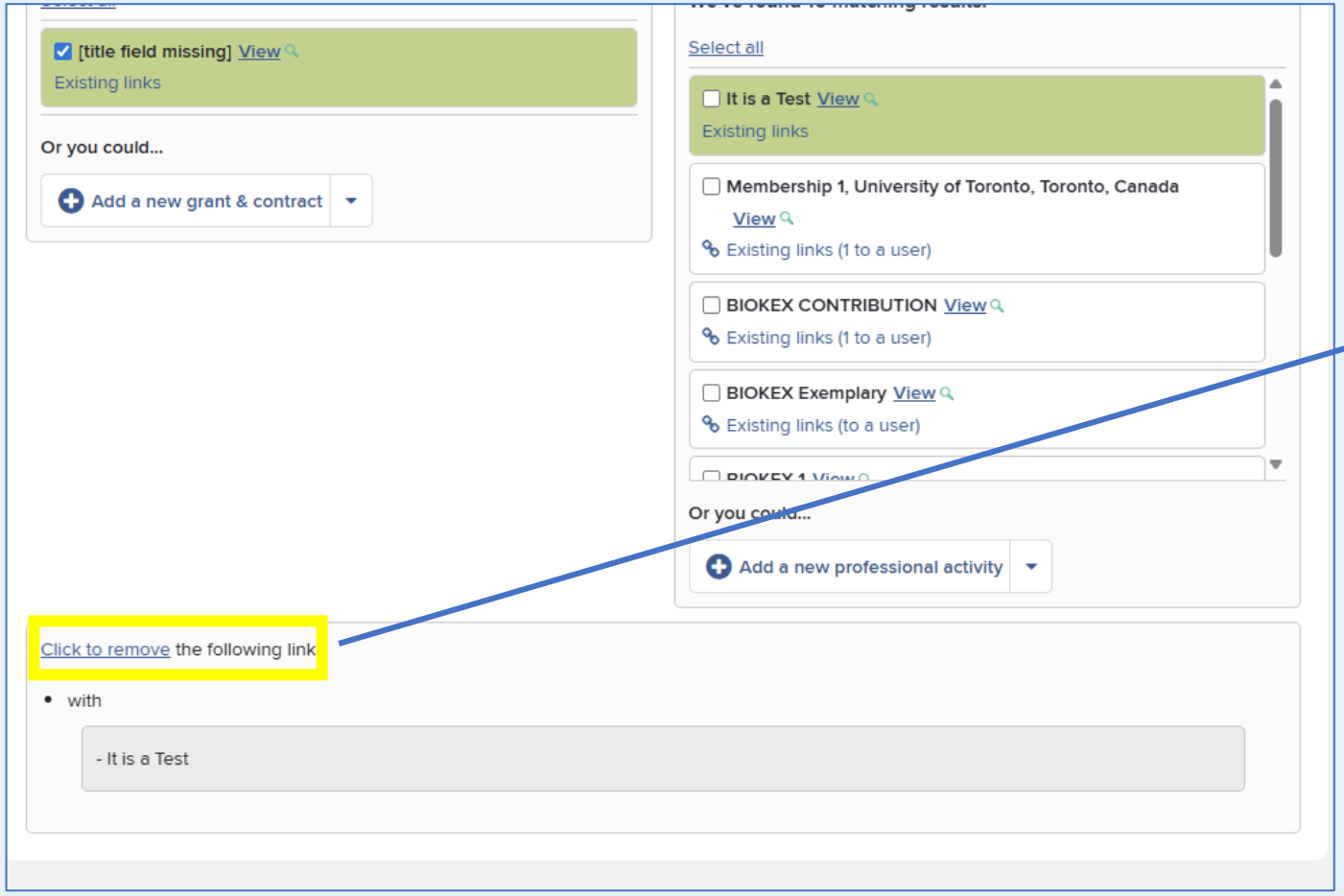


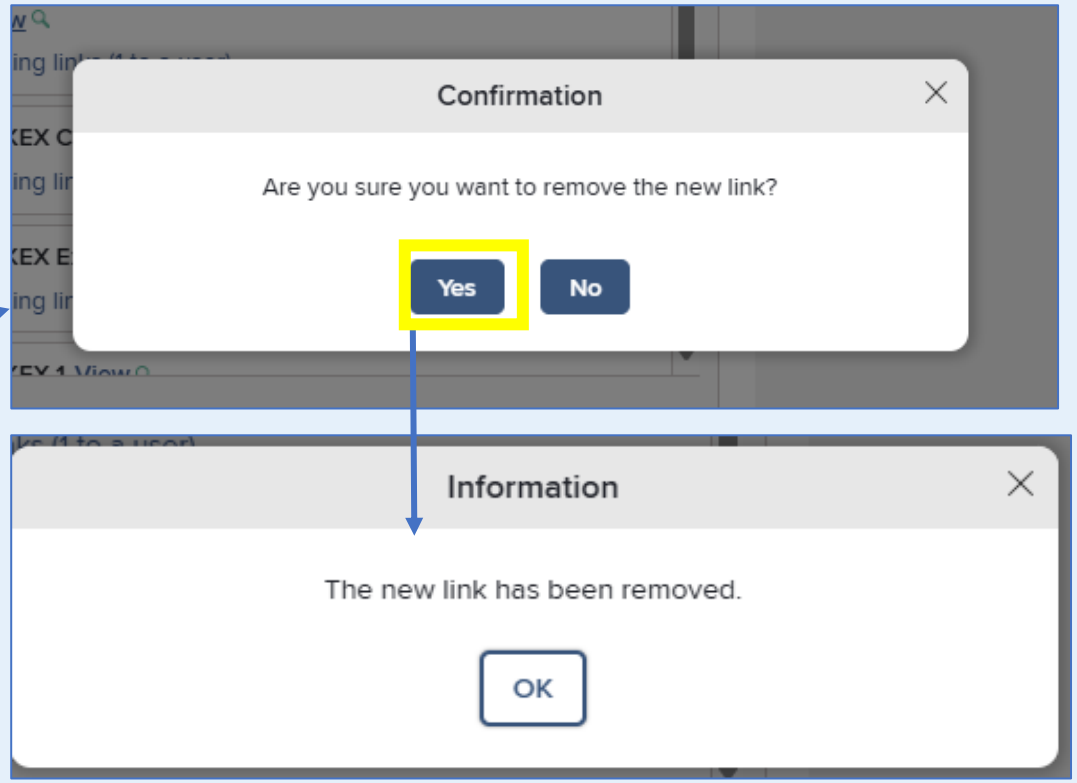
On the record page, locate the **“Relationships”** section on the middle-right side, then click the **small arrow** to expand all records linked within this module.



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





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.

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How to Generate the TFoM CPA Report

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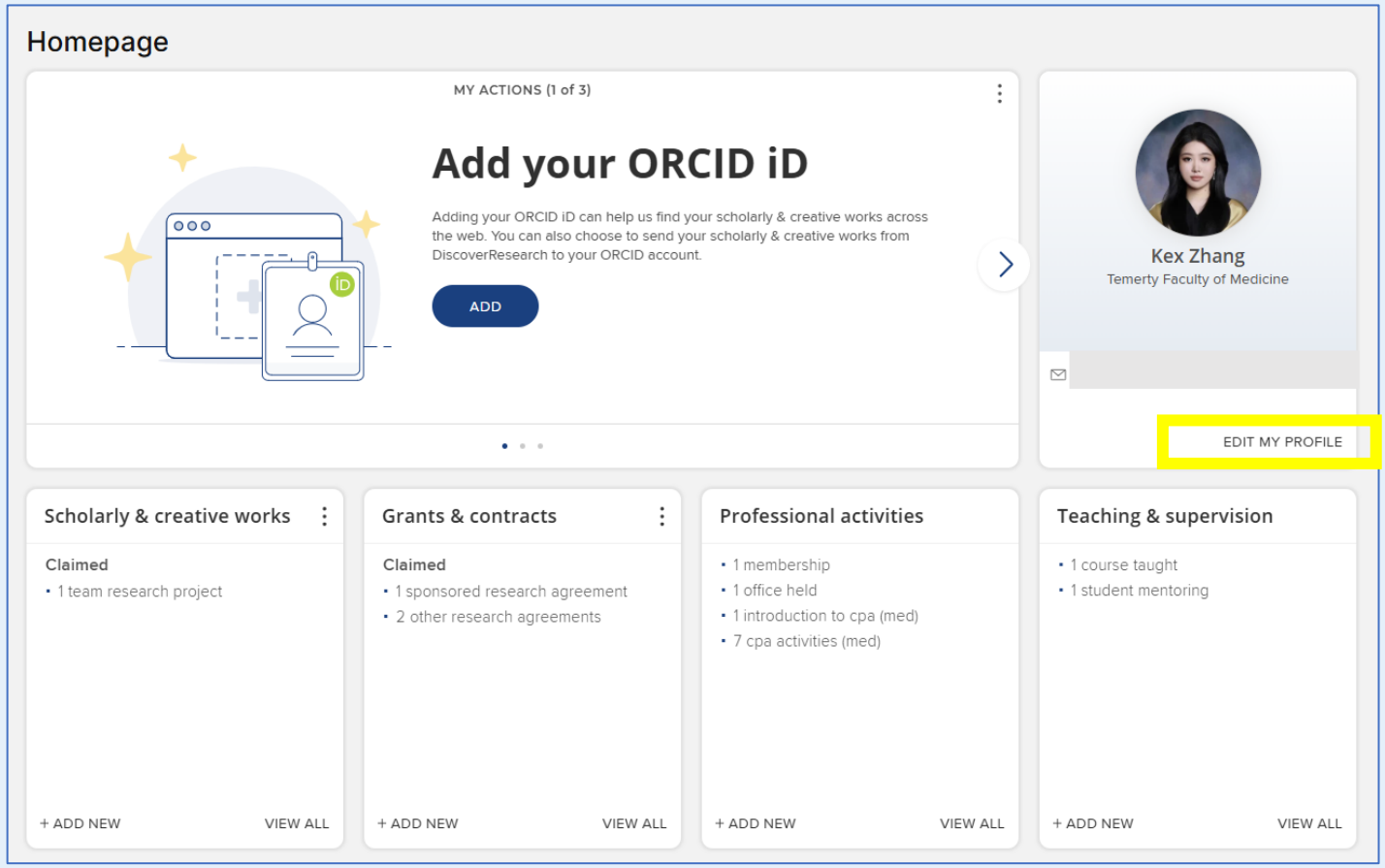
How to Generate your CPA Report through Elements

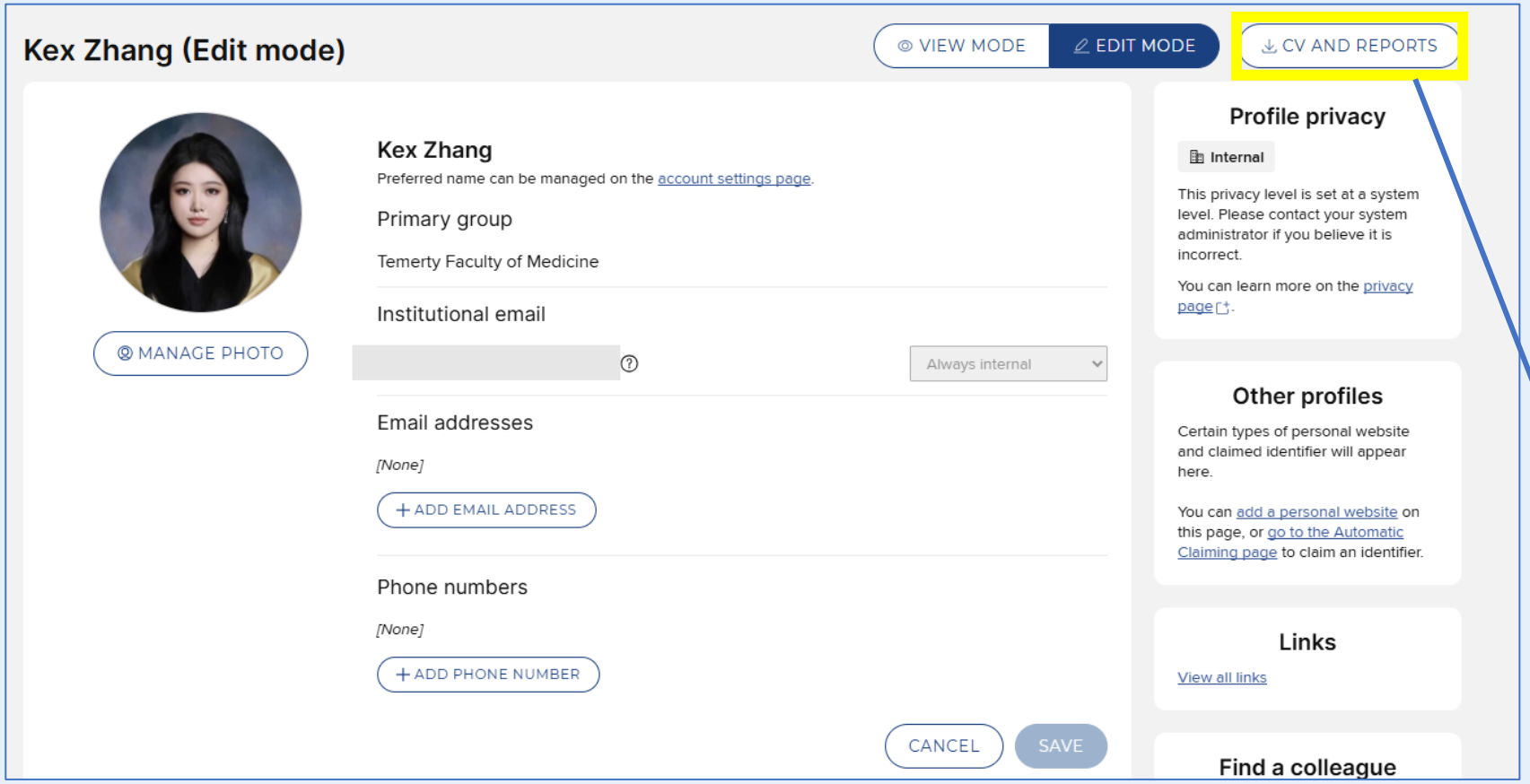
1. **Log in to Elements.** The Elements Profile Homepage opens.
2. Within the homepage, click **"Edit My Profile"** to export the CPA report.

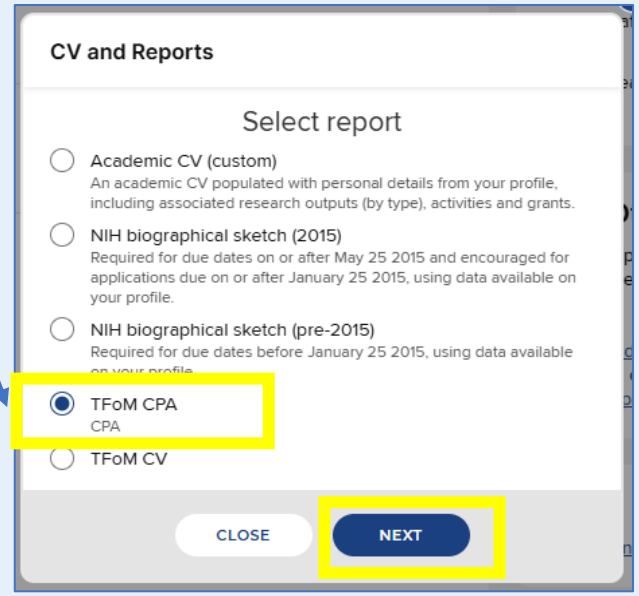


How to Generate your CPA Report through Elements

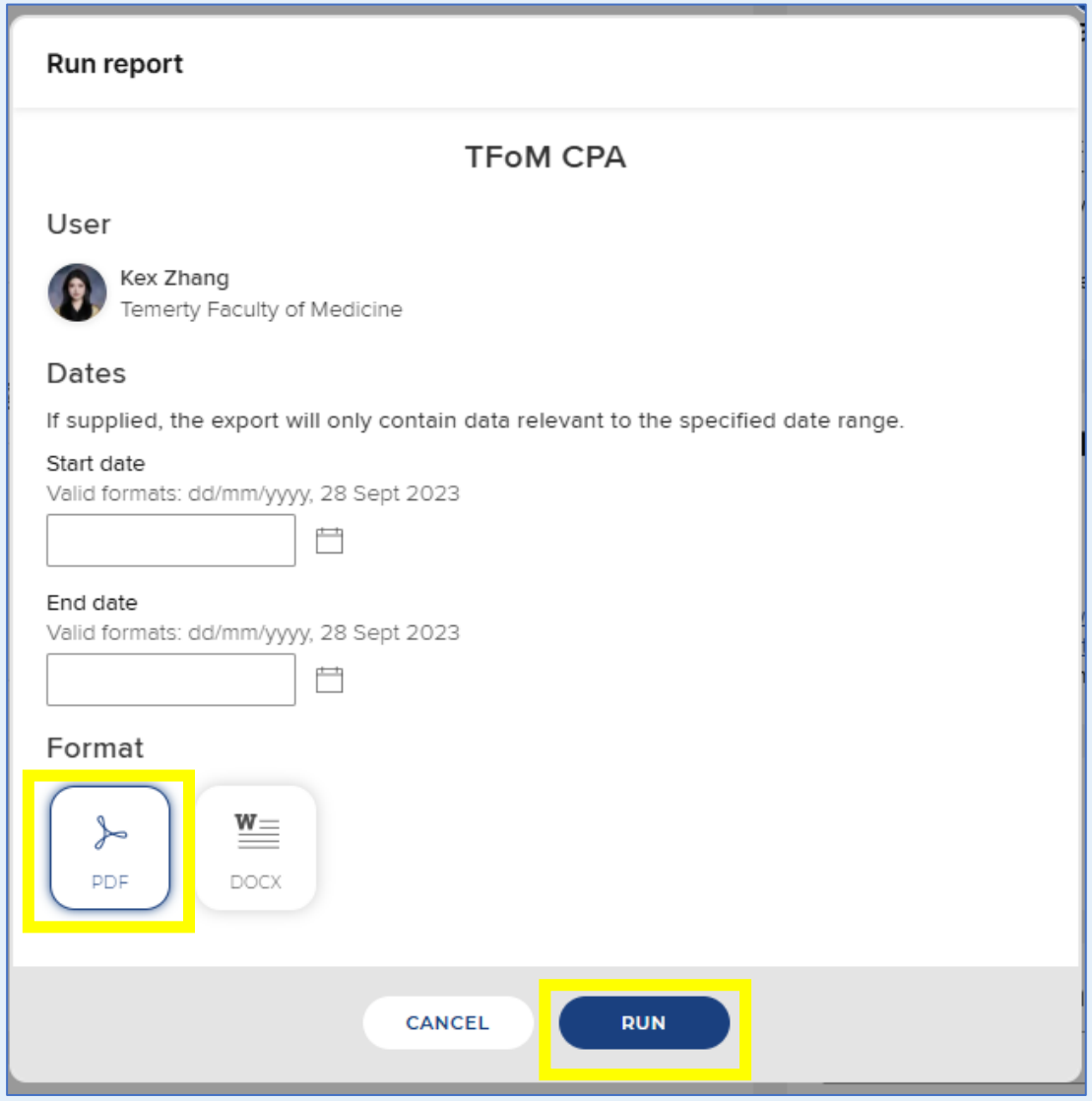
1. In the top-right corner of the **"Edit Mode" page**, click **"CV and Reports."**
   (A **"CV and Reports"** dialog box will open, which will prompt you to select a report type)

2. Choose **TFoM CPA**, then click "**NEXT.**"





How to Generate your CPA Report through Elements



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.

TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Happy Curation :)

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