Elements Profile Management Checklist

🔍 Access & Navigation

☐ Navigate to the Discover Research site and search for your public profile

☐ Verify profile visibility settings (public/private)

☐ Log into Elements and update any privacy setting you would like to change

☺ Profile

☐ Add a professional profile photo

☐ Write or update fields in the profile section

☐ Add an overview, research interest and teaching summary

☐ Ensure contact information is current

Publications

☐ Review list of claimed publications

☐ Claim any pending/unclaimed publications

☐ Link ORCID iD and your Scopus IDs to your account

☐ Add missing publications manually (if not already suggested by the automated feed)

☐ Verify profile visibility settings for your Scholarly & creative works (public/private)

💰 Grants

☐ Review all claimed grants

☐ Check funding status (active, pending, completed)

☐ Update grant details (note, if you manually enter grants it may result in a duplicate

record when the data feed is updated)

☐ Verify profile visibility settings for your Grants & contracts (public/private)

🎤 Conferences

☐ Review listed conferences

☐ Confirm start and end dates

☐ Confirm geographic scope (local, national, international)

☐ Confirm your role (speaker, organizer, panelist, attendee)

☐ Add missing conference presentations or posters

☐ Verify profile visibility settings for your Conferences (public/private)

Curriculum Vitae (CV)

Export TFoM CV from profile and review CV for:

☐ Accuracy of publication and grant listings

☐ Up-to-date education and employment history

☐ Inclusion of awards, honors, and affiliations

☐ Teaching experience and supervision

☐ Professional memberships and service roles

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Elements Creative Professional Activity (CPA) Management Checklist

Getting Started

☐ Review the TFoM Promotions Manual for CPA definitions and category

☐ Use your MS Word (or DoM WebCV) version of your CPA report as reference if you have one available

☐ Review the Elements TFOM Creative Professional Activity (CPA) Report – A Data Entry Guide

Access & Navigation

☐ Navigate to the Discover Research site and login to your Elements profile

CPA Introduction

☐ Verify that you have a CPA Introduction (listed under the Professional Activities module). To add a new introduction, do the following.

- ✓ Click "Add New" under Professional Activities
- ✓ Click "Introduction to CPA (Med)"
- ✓ Fill in all fields and be sure to check "Print in CPA?"

CPA Categories and CPA Title/Theme

☐ Verify that you have a CPA Category (listed under the Professional Activities module). To add the category, do the following.

☐ Click "Add New" under Professional Activities

☐ Click “CPA Activity (Med)”

☐ Select the correct category:

☐ Professional Innovation and Creative Excellence

☐ Contributions to the Development of Professional Practices

☐ Exemplary Professional Practice

☐ Fill in all required fields (ensure that the title/theme is unique)

☐ Check “Attach to CPA”

☐ Click “Save”

Tip for delegates

☐ Set privacy to “Internal” if impersonating a faculty member

🔗 Link Supporting Info types (Records)

☐ To create a link between your CPA Title and supporting records, do the following.

☐ Open a record (e.g., publication, grant, presentation)

☐ In the Contribution section, ensure “Attach to CPA” is set to TRUE

☐ Click “Create New” under Relationships

☐ Select “Professional Activity”

☐ Find and check the CPA activity title

☐ Click “Create one new link”

Generate the CPA Report

☐ Go to “Edit My Profile” in Elements

☐ Click “CV and Reports”

☐ Select “TFoM CPA” and click “Next”

☐ (Optional) Enter Start and End Dates

☐ Choose output format (PDF recommended)

☐ Click “Run” to download your report

Quick reference for creating new activity records and editing relationships

Creating New Records from Links Page

☐ Click “Add a new [record type]” from the Create Links page

☐ Fill in details and save

☐ Link the new record to the CPA activity using the steps above

Editing Relationships

☐ To remove a link, go to Relationships section

☐ Click the ellipsis (...) and select “Delete Relationship”

☐ Confirm deletion

☐ Alternatively, use “Click to Remove” on the linking page