



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

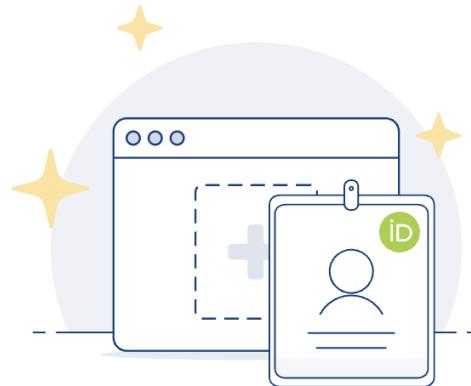
[Introduction of CPA]

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

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

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

?

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

?

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

?

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

Introduction to CPA

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

20000 characters remaining.

Print in CPA?

CANCEL **SAVE**

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:

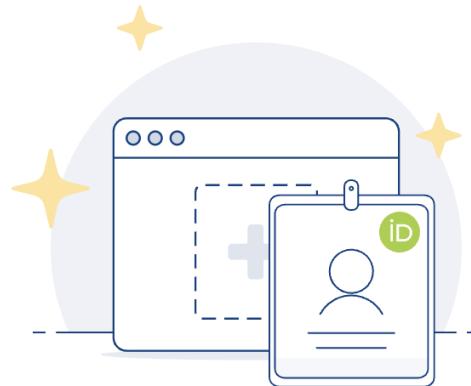
[Note: Below are samples of all activities that could be attached to a CPA title. Include only activities directly related to this CPA title]

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

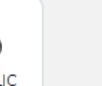
Professional Mentorship

Introduction to CPA (MED)

CPA Activity (MED)

CANCEL

Add cpa activity (med)

Professional activity privacy		
 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	<input type="text"/> 	
End Date	<input type="text"/> 	
CPA Category	 Enter the start time period for which you are reporting the activity.  Enter the end time period for which you are reporting the activity.	
Title	 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	
Description	 Professional Innovation and Creative Excellence	

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	<input type="text"/>	Provide a description of the creative professional activity here.
Impact	<input type="text"/>	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

?

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.

CANCEL SAVE

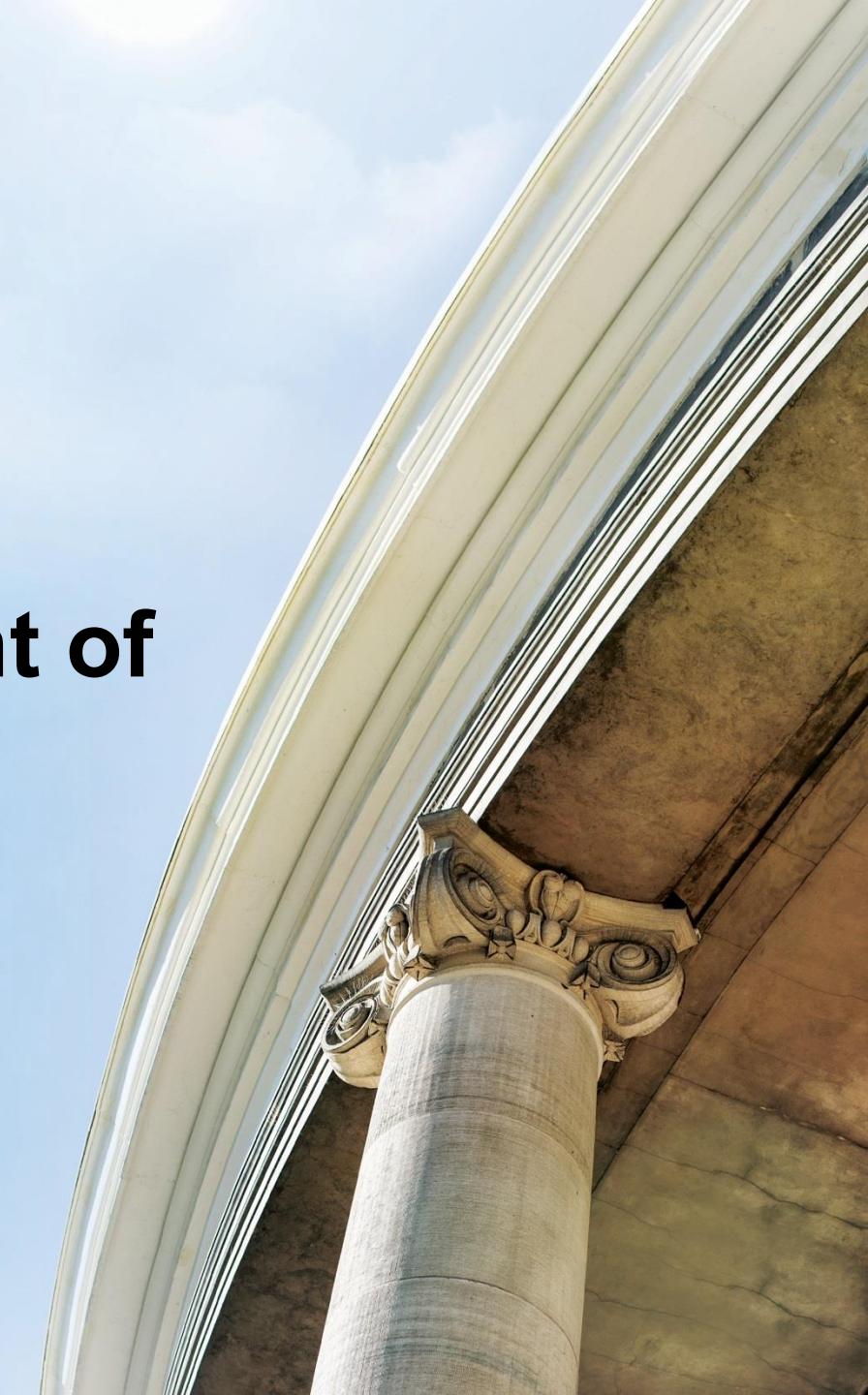
Checked-off the **"Attach to CPA"** checkbox and click the **"Save"** button, then the CPA activity will appear in the printed report.



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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
	<p>This professional activity will be visible to other users of DiscoverResearch but should not be displayed publicly.</p>		
* Relationship privacy	 PRIVATE	 INTERNAL	 PUBLIC
	<p>This professional activity and its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.</p>		
Essential Information			
Start Date	<input type="text"/> 		
End Date	<input type="text"/> 		
CPA Category	<input type="text" value="Contributions to the Development of Professional Practices"/>		
Title	<input type="text" value="Contributions to the Development of Professional Practices"/>		
Description	<input type="text" value="Exemplary Professional Practice"/> <input type="text" value="Professional Innovation and Creative Excellence"/>		
	<p>? Select the type of creative professional activity from this picklist.</p> <p>? For definitions of the different categories, please refer to the Academic Promotions Manual available at https://www.framed.utsc.ca</p>		

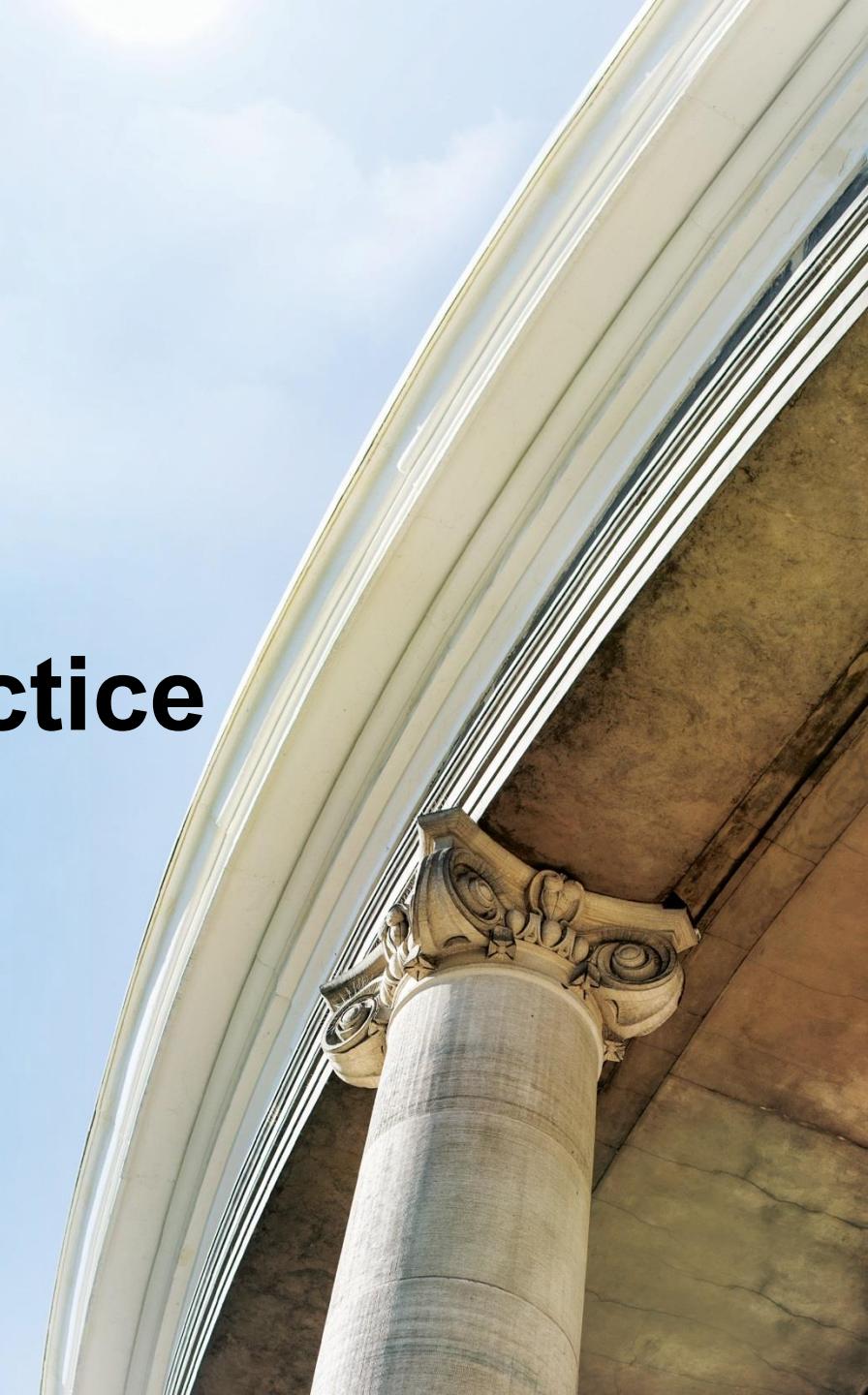
To add CPA activities under the "**Contributions to the Development of Professional Practices**" section, follow the same steps as for "**Professional Innovation and Creative Excellence**," but select "**Contribution to the Development of Professional Practices**" as the CPA category instead.



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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

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	<input type="text"/>
End Date	<input type="text"/>
CPA Category	<input type="text" value="Exemplary Professional Practice"/>
Title	<input type="text" value="Contributions to the Development of Professional Practices"/>
Description	<input type="text" value="Exemplary Professional Practice"/> 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>



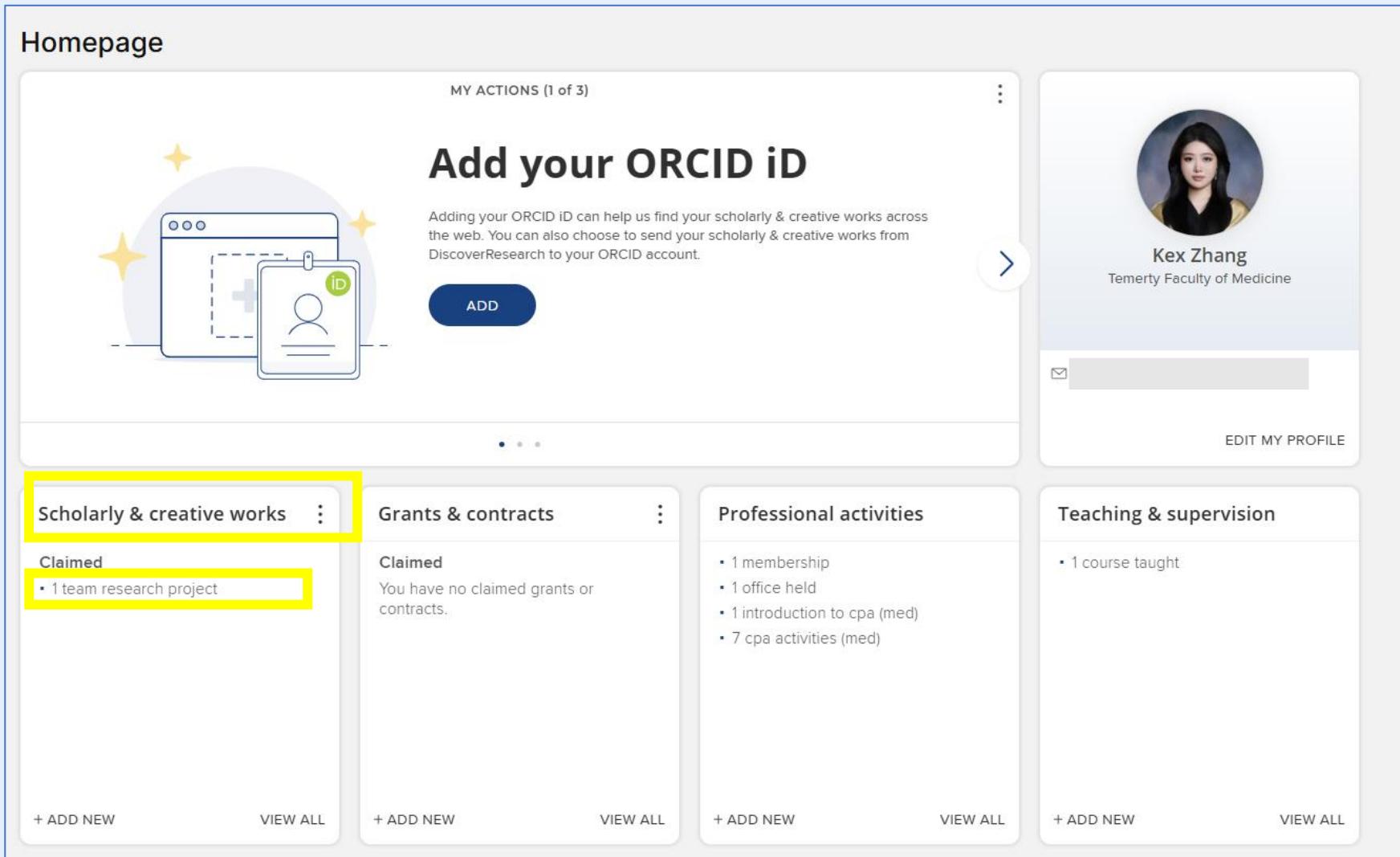
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Linking CPA Activities to other Records as Documentation

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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](#)

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](#)

Kex Zhang
Temerty Faculty of Medicine

[EDIT MY PROFILE](#)

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

My Work

My claimed scholarly & creative works



CLAIMED (1)

PENDING (0)

REJECTED (1)

showing 1 - 1 out of 1

view: 10 per page

sort by: Reporting date (newest first)

focus on: summary



EXPORT

REJECT



Demo Test for Team Research Project Record



TEAM RESEARCH PROJECT

University of Toronto. Formation Date: 30 Jul 2025

End Date: 08 Jul 2025

Role: Student

Primary Audience: Graduate Education

Reporting Dates: 30 Jul 2025 - 08 Jul 2025

SUMMARY

METRICS (0)

DEPOSITS (0)

LABELS (0)

RELATIONSHIPS (1)

SOURCES (1)

HISTORY (15)



Filters

Applied filters

Scholarly & creative work type



[clear all filters](#)

Scholarly & creative work type



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.

Scholarly & creative work details

+ ADD ANOTHER

The screenshot shows a 'TEAM RESEARCH PROJECT' record titled 'Demo Test for Team Research Project Record'. The record is associated with the 'University of Toronto' and was formed on '30 Jul 2025'. The 'Data sources' section shows the record was created 'Manually' with the ID '048D7AC2-8140-457C-A9C6-BAD0215499D0'. The 'Edit record' button is highlighted with a yellow box. The 'Data sources' table includes the following fields:

Team Initiative Title:	Demo Test for Team Research Project Record
Primary Location or Institution:	University of Toronto
Formation Date:	30 Jul 2025
End Date:	08 Jul 2025
Role:	Student
Most Significant Contribution:	false
Attach to Audience in TER:	false
Primary Audience:	Graduate Education
Attach to CPA:	true

Other sections visible on the right include 'REPORTING DATES' (30 Jul 2025 - 08 Jul 2025), 'RELATIONSHIPS' (1 user), and 'HISTORY'.

Step 3: Ensure that the "Attach to CPA" status is set to **TRUE** if you want this record to appear in your CPA report after linking. If it shows **FALSE**, click the **Edit Record** icon to update it.

Additional Information 7 additional fields ^

Supervisor(s) ?
No Supervisor(s) - please add...
[Add a person](#)

Role ?
Student
43 characters remaining.

Most Significant Contribution ?

Most Significant Contribution Details ?

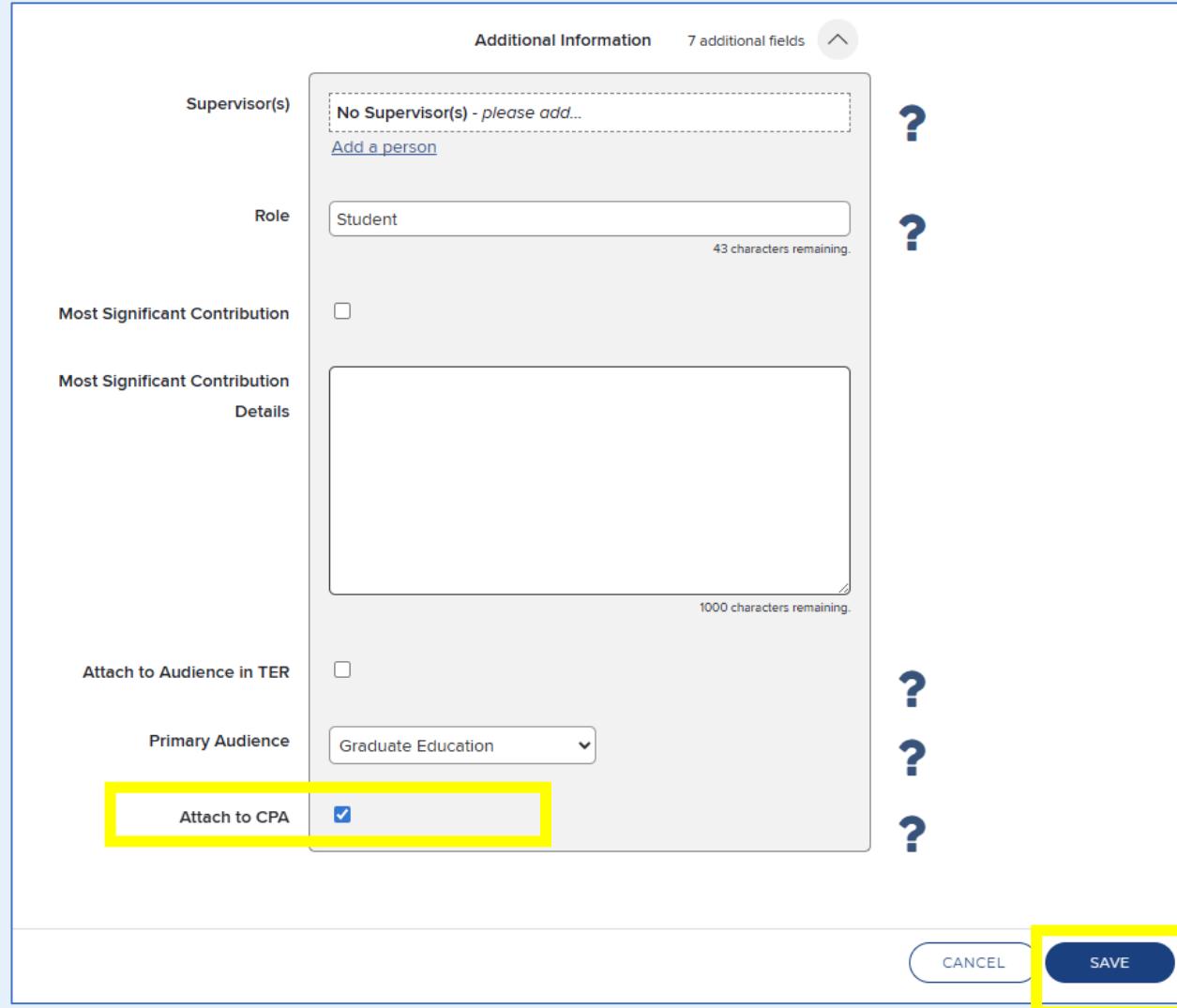
1000 characters remaining.

Attach to Audience in TER ?

Primary Audience ?
Graduate Education

Attach to CPA ?

CANCEL SAVE



Step 4: Scroll to the bottom of the record and locate the **"Attach to CPA"** checkbox under **Additional Information**. **Check it off**, then click **"Save"** button.

Scholarly & creative work details

+ ADD ANOTHER

The screenshot shows a 'TEAM RESEARCH PROJECT' record titled 'Demo Test for Team Research Project Record'. The record is associated with the 'University of Toronto' and was formed on '30 Jul 2025'. The 'Data sources' section lists the record as 'Manual' with ID '048D7AC2-8140-457C-A9C6-BAD0215499D0'. The 'REPORTING DATES' are '30 Jul 2025 - 08 Jul 2025'. The 'RELATIONSHIPS' section, highlighted with a yellow box, shows '1 User' and a 'CREATE NEW' button. The 'HISTORY' section is partially visible below.

TEAM RESEARCH PROJECT

Demo Test for Team Research Project Record

University of Toronto. Formation Date: 30 Jul 2025

Data sources

Manual Demo Test for Team Research Project Record

ID: 048D7AC2-8140-457C-A9C6-BAD0215499D0 [More source info](#)

Team Initiative Title:	Demo Test for Team Research Project Record
Primary Location or Institution:	University of Toronto
Formation Date:	30 Jul 2025
End Date:	08 Jul 2025
Role:	Student
Most Significant Contribution:	false
Attach to Audience in TER:	false
Primary Audience:	Graduate Education
Attach to CPA:	true

REPORTING DATES

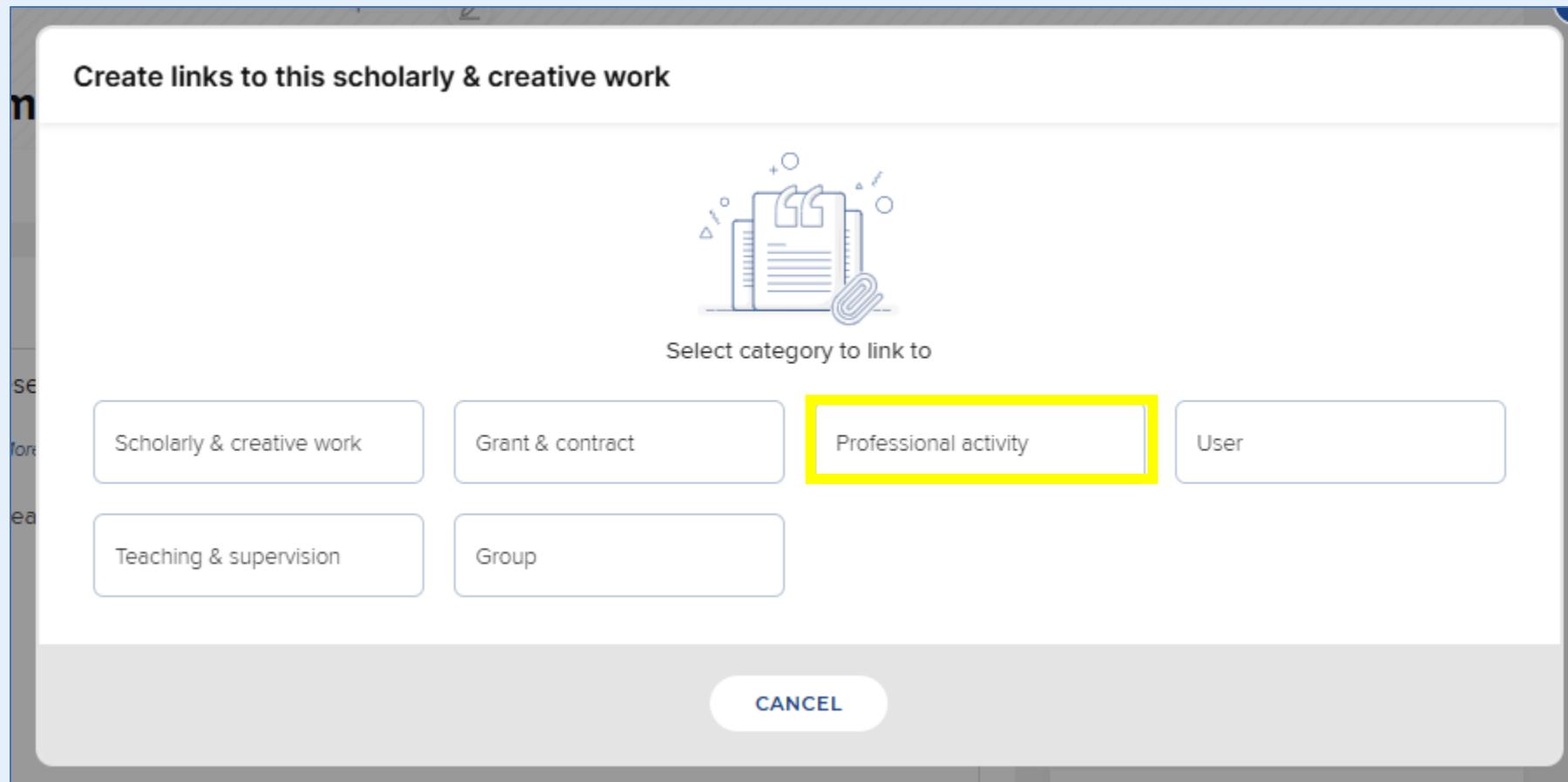
30 Jul 2025 - 08 Jul 2025

RELATIONSHIPS

Users 1 >

HISTORY

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.

Create links between...

<input checked="" type="radio"/> Scholarly & creative works	<input type="radio"/> Grants & contracts	<input type="radio"/> Scholarly & creative works	<input type="radio"/> Grants & contracts
<input type="radio"/> Professional activities	<input type="radio"/> Teaching & supervision	<input checked="" type="radio"/> Professional activities	<input type="radio"/> 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:

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

Change

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

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

Kex Zhang
Temerty Faculty of Medicine

EDIT MY PROFILE

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)

focus on: summary

EXPORT

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



Applied filters

Activity type

[X](#)

[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-A662-10AE4787ACC3

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

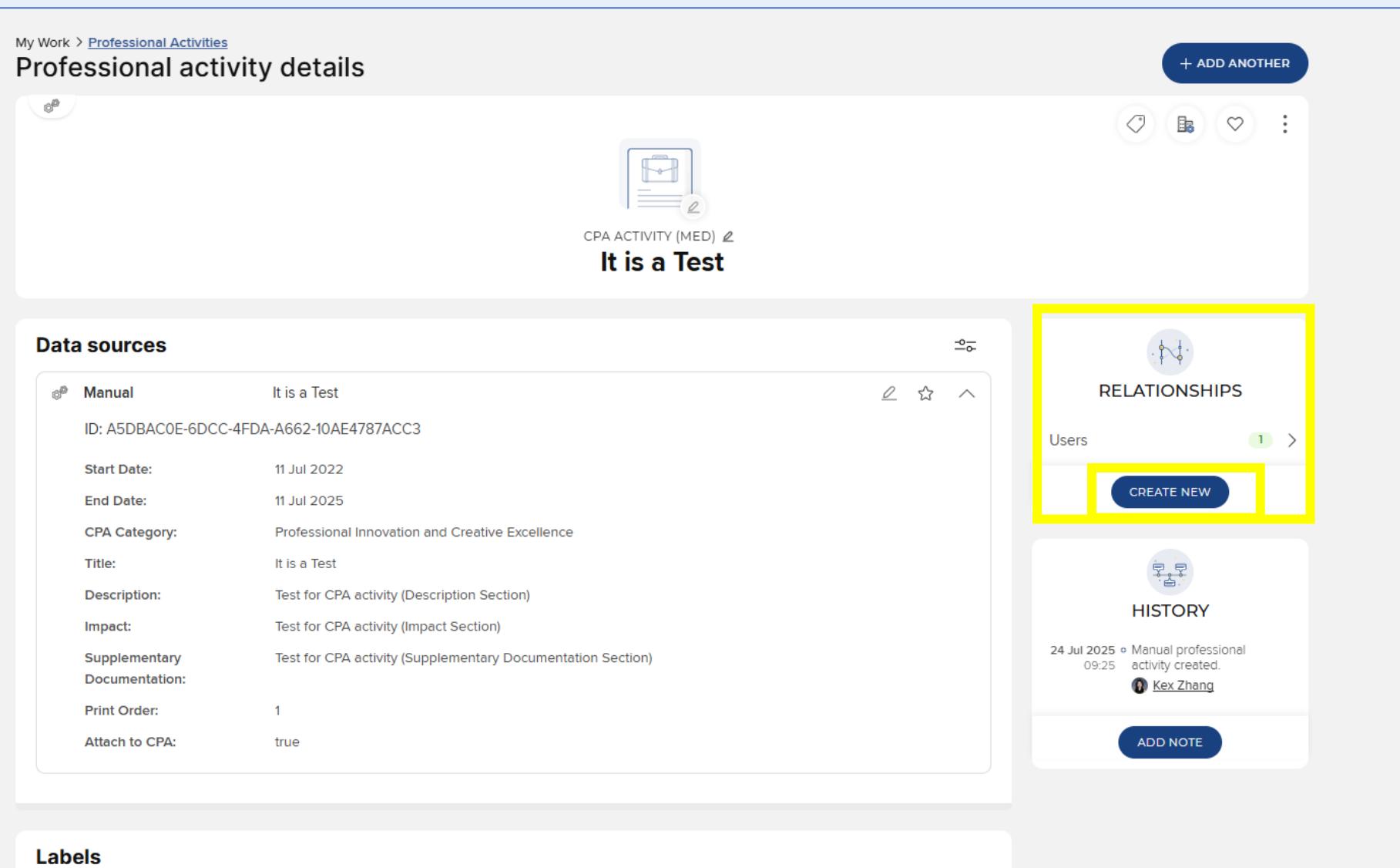
Relationships

Users 1 > **CREATE NEW**

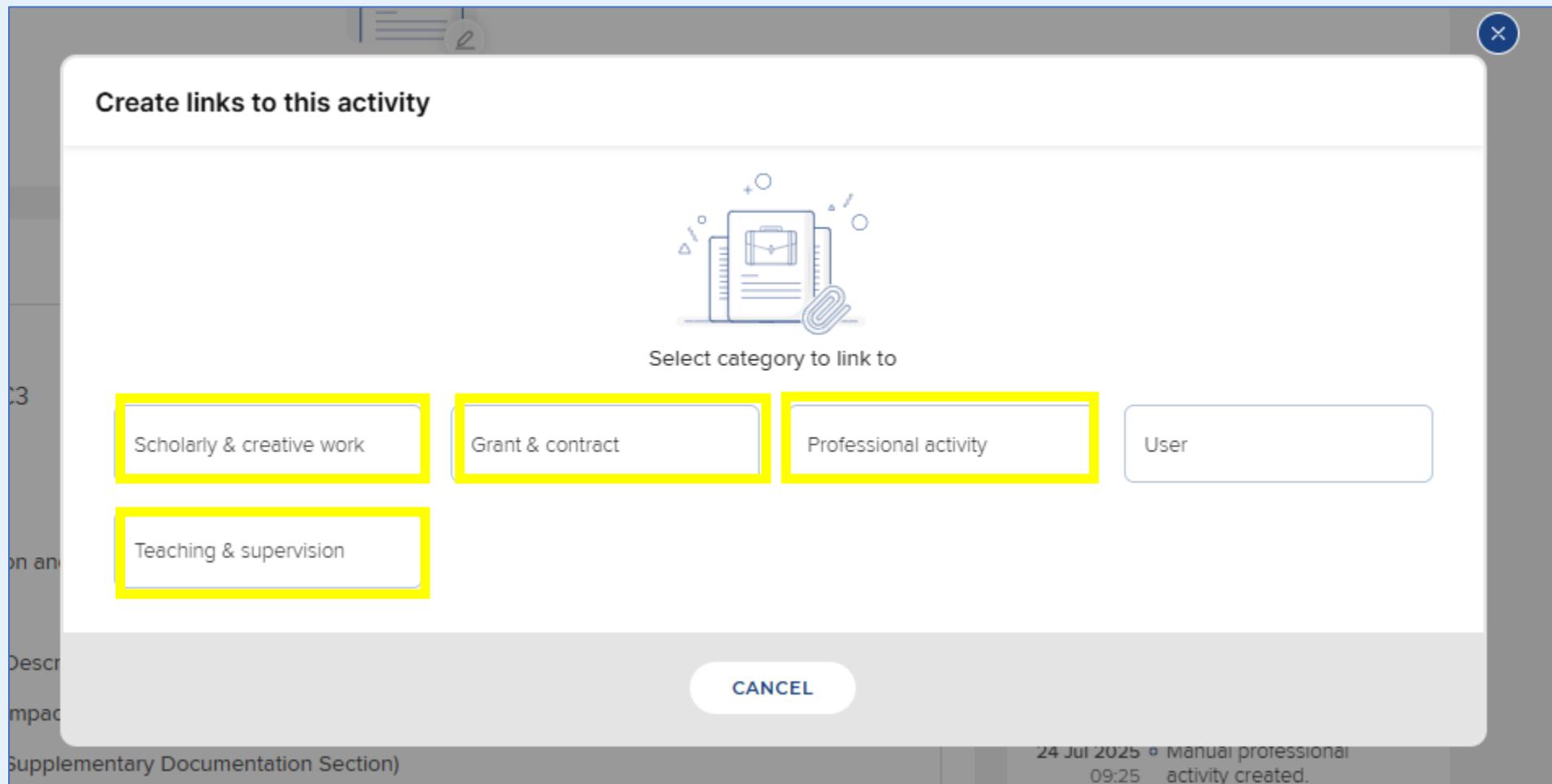
HISTORY

24 Jul 2025 • Manual professional activity created. **Kex Zhang**

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 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:

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

Change

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:

- [Linked to: Me](#)
- [Published: from 24/07/2022](#)

[Change](#)

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:

- [Linked to: Me](#)
- [Published: from 24/07/2022](#)

[Change](#)

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](#)

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

• It is a Test with

- Demo Test for Team Research Project Record

... and...

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

Scholarly & creative works

Current filters:

- [Linked to: Me](#)
- [Published: from 24/07/2022](#)

[Change](#)

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](#)

[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](#)

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](#)

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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Medicine



[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](#) [Edit](#)
 Existing links (1 to a user) [View](#) [Edit](#)

Or you could...

[Add a new professional activity](#)

... and...

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

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](#) [Edit](#)
 Existing links (to a user) [View](#) [Edit](#)

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](#)

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

Other Research Agreement [View](#) 

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**.

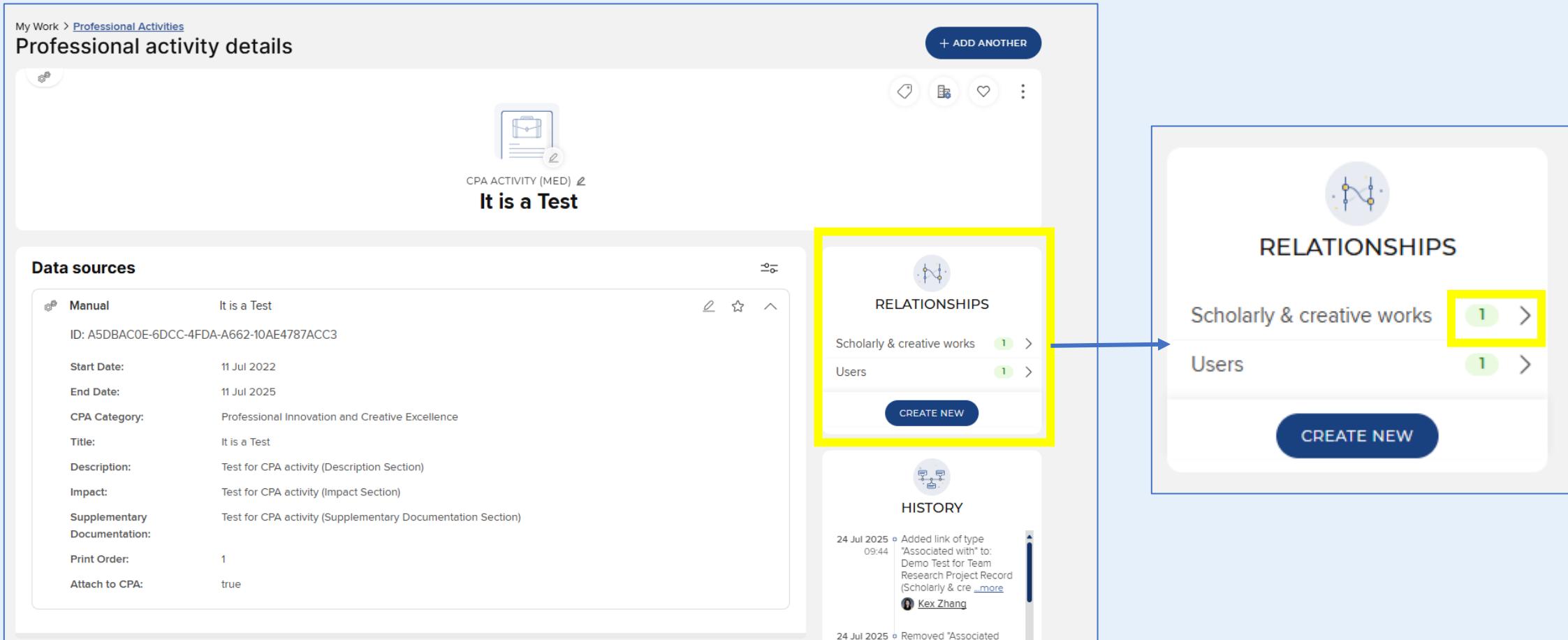


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Edit a Relationship on the CPA with a Record

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Medicine

Method 1



The screenshot shows the 'Professional activity details' page for a record titled 'It is a Test'. The page includes a 'Data sources' section with various fields and a 'Relationships' section. A blue arrow points from the 'Relationships' section on the main page to a callout window titled 'RELATIONSHIPS'.

Professional activity details

My Work > Professional Activities

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) >

HISTORY

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

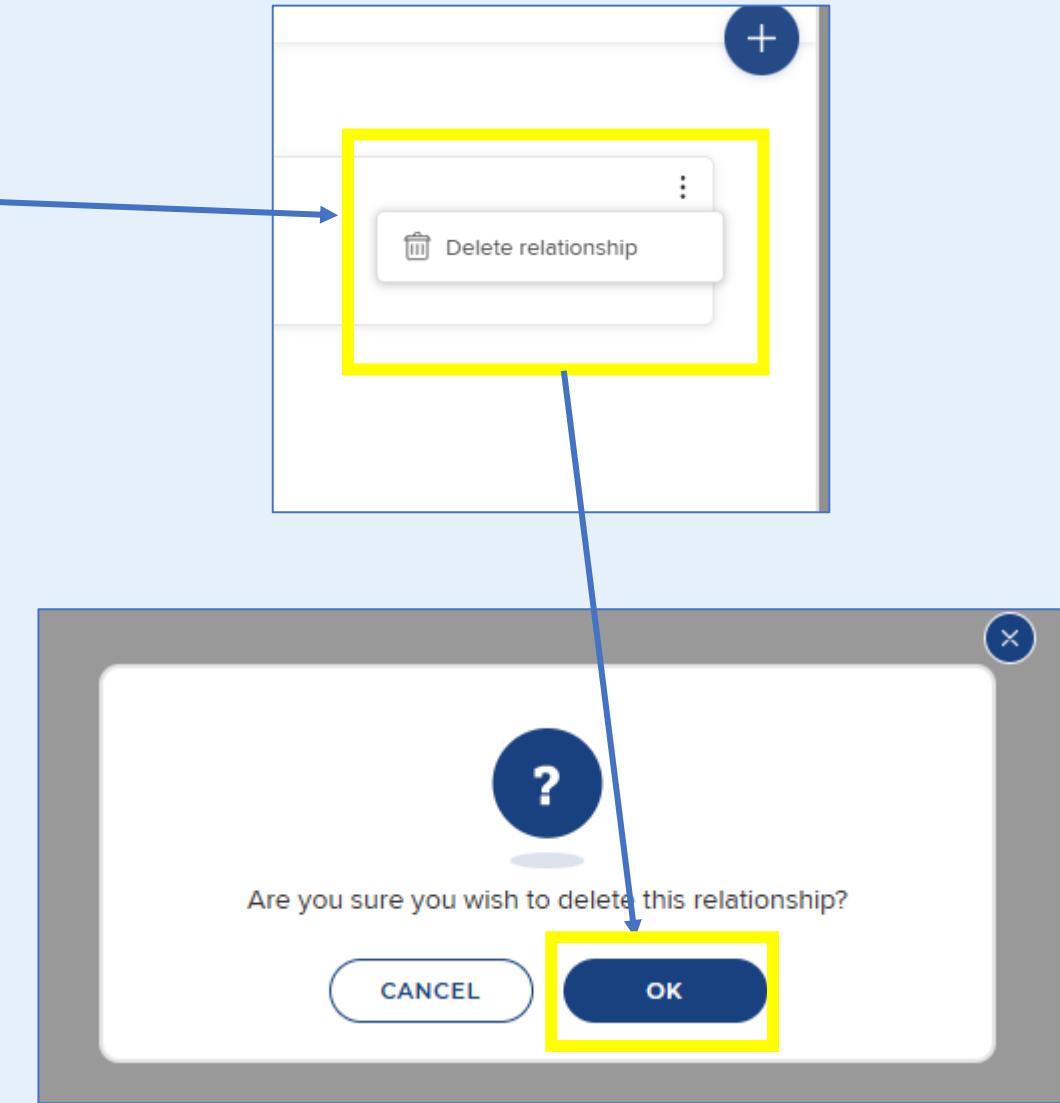
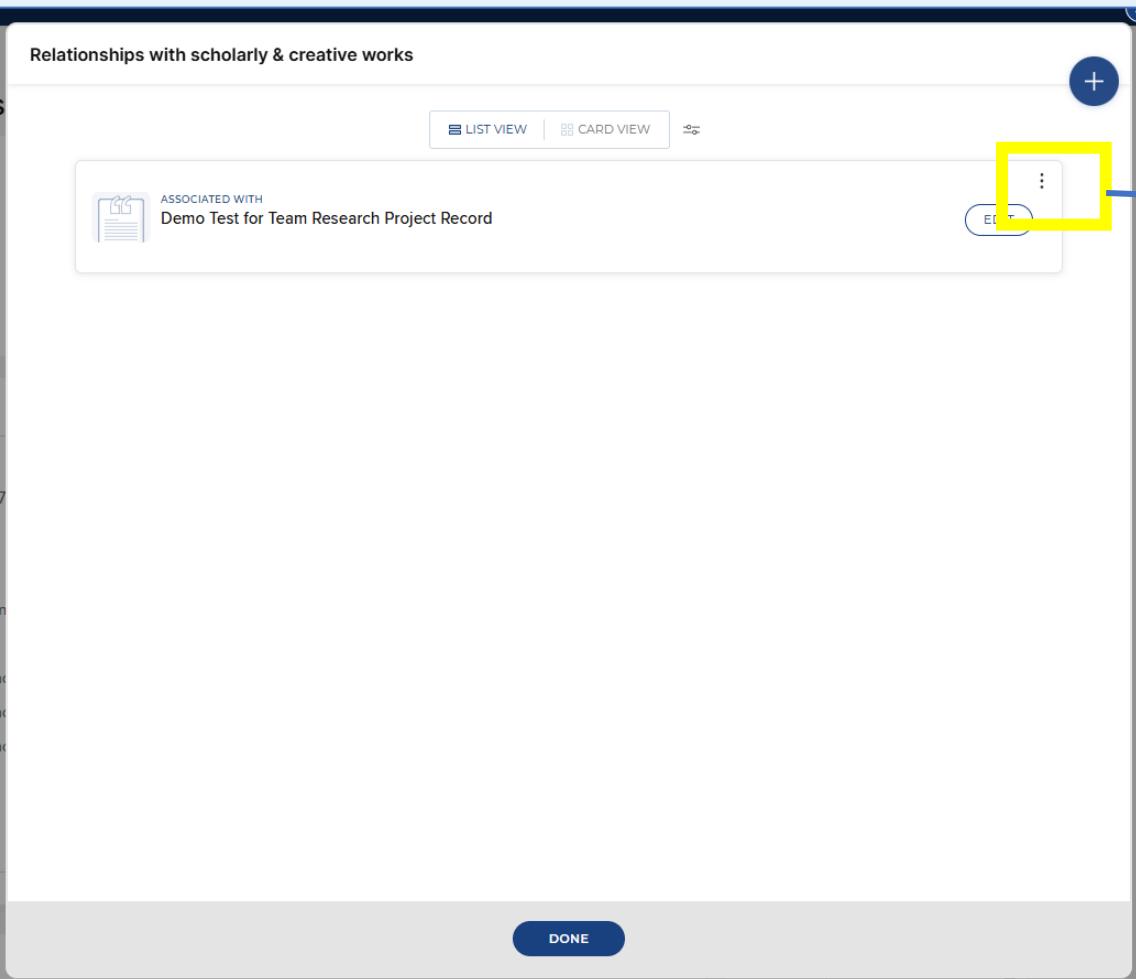
24 Jul 2025 Removed "Associated with" link to: Demo Test for Team Research Project Record (Scholarly & creative works) [more](#) Kex Zhang

RELATIONSHIPS

Scholarly & creative works (1) >
Users (1) >

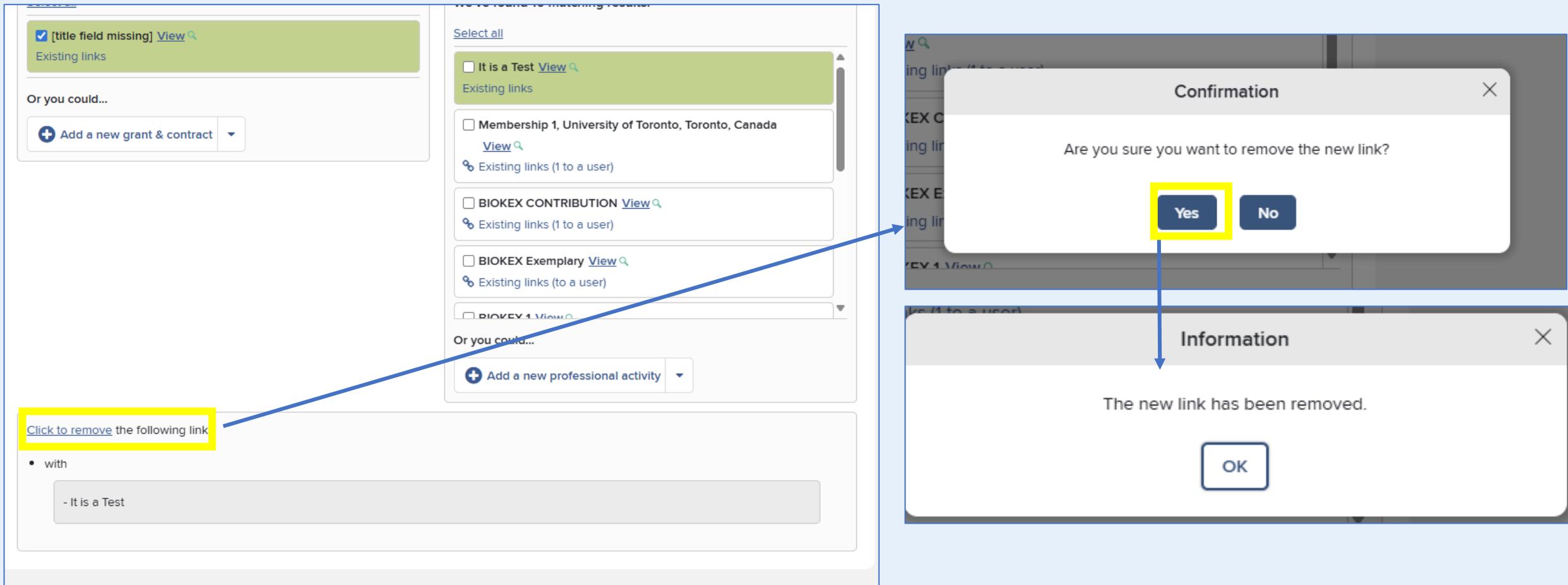
CREATE NEW

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



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

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 shows the Elements Profile Homepage. At the top, there is a callout for adding an ORCID iD. Below this, a profile card for 'Kex Zhang' from 'Temerty Faculty of Medicine' is displayed, with an 'EDIT MY PROFILE' button highlighted in yellow. The main content area is divided into four sections: 'Scholarly & creative works', 'Grants & contracts', 'Professional activities', and 'Teaching & supervision', each with a '+ ADD NEW' and 'VIEW ALL' button.

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

Grants & contracts

Claimed
• 1 sponsored research agreement
• 2 other research agreements

+ ADD NEW

Professional activities

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

+ ADD NEW

Teaching & supervision

• 1 course taught
• 1 student mentoring

+ ADD NEW



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.**"

The image shows a composite of two screenshots. On the left is the 'Edit Mode' page for 'Kex Zhang'. It features a profile picture, a 'MANAGE PHOTO' button, and sections for 'Primary group' (Temerty Faculty of Medicine) and 'Institutional email' (with a dropdown set to 'Always internal'). Below these are sections for 'Email addresses' (None) and 'Phone numbers' (None). At the bottom are 'CANCEL' and 'SAVE' buttons. On the right is a 'CV and Reports' dialog box. It has a 'Profile privacy' section (Internal), an 'Other profiles' section (with a note about adding a personal website or using the Automatic Claiming page), a 'Links' section (with a 'View all links' button), and a 'Find a colleague' section. The 'CV and Reports' section contains a 'Select report' list with the following options:

- 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

At the bottom of the dialog box are 'CLOSE' and 'NEXT' buttons, with 'NEXT' highlighted by a yellow box. A blue arrow points from the 'CV AND REPORTS' button on the Edit Mode page to the 'TFoM CPA' option in the dialog box.



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

 CANCEL  RUN

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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