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)

☐ 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