



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# Elements TFoM Teaching and Education Report (TER) - A Data Entry Guide

Screenshot Instructions - Guidance for Academic Leaders and Staff

Temerty  
Medicine



# Please Note

1. We highly recommend referring to the document [Understanding Your Elements TFoM TER Template and Mapping](#) when uploading your records, and using this screenshot guide as a supplementary reference. It provides the all record formats, and using both documents together will ensure greater accuracy.
2. Please remember to manually save any changes after each edit by clicking the **"Save"** button.
3. When adding records, be sure to expand the **"Additional Information"** and/or the **"Contribution"** sections to ensure all required fields are filled.
4. Fields marked with **asterisk (\*)** are mandatory fields, and it is important to select the appropriate options from the dropdown menu.
5. [How to export the Teaching & Education Report \(TER\)?](#) (page 60)

# Table of Content (In Your TER)

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

1. [Teaching Introduction and Philosophy](#)
2. [Teaching Landmarks](#)
  - I. [Multilevel Education \(Teaching Events with Multiple Levels of Trainees\)](#) (page 18)
    - a. [Teaching and Education Awards](#) (page 20)
    - b. [Innovation and Development in Teaching and Education](#) (page 21)
    - c. [Leadership in Education](#) (page 22)
    - d. [Administrative Service in Education](#) (page 23)
    - e. [Aggregate Teaching Evaluations](#) (page 24)
    - f. [Teaching Activities](#) (page 25)
    - g. [Professional Associations](#) (page 28)
    - h. [Honors and Career Awards](#) (page 29)
    - i. [Other Noteworthy Activities](#) (page 30)
    - j. [Patents and Copyrights](#) (page 31)
    - k. [Grants, Contracts, and Clinical Trials](#) (page 32)
    - l. [Salary Support and Other Funding](#) (page 33)
    - m. [Publications](#) (page 34)
    - n. [Presentations](#) (page 35)
    - o. [Peer-Review Activities](#) (page 36)
    - p. [Other Research and Professional Activities](#) (page 37)
  - II. [Undergraduate Education --- XI. Clinical Research Fellow \(MD\)](#) (page 38)
  - XII. [Creative Professional Activity in Teaching and Education](#) (page 39)
    1. [Professional Innovation and Creative Excellence](#) (page 40)
    2. [Contribution to the Development of Professional Practices](#) (page 55)
    3. [Exemplary Professional Practice](#) (page 57)



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# 1. Teaching Introduction and Philosophy

[Return to Table of Contents](#)

Temerty  
Medicine

# Teaching Introduction, Philosophy and Summary

## Teaching Introduction and Philosophy

[Teaching Introduction and Philosophy] *(This should come from Profile>Teaching summary)*

## Curation Steps

1. Find and Click "**Edit My Profile**" module
2. Find and edit "**Teaching Summary**" under the "**About**" Section
3. Click the "**Save**" button once you've finished editing

# 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

✉ [redacted]@mail.utoronto.ca

EDIT MY PROFILE



### Scholarly & creative works



#### Claimed

You have no claimed scholarly & creative works.

### Grants & contracts



#### Claimed

You have no claimed grants or contracts.

### Professional activities

You have no activities.

### Teaching & supervision

You have no activities.

Research interests

**B** *I* U  $x^2$   $x_2$           

Privacy level: Match profile: Internal

Teaching summary

**B** *I* U  $x^2$   $x_2$           

Privacy level: Match profile: Internal

Please click **Save** to finalize the entry



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

## 2. Teaching Landmarks

The records that appear in this section will also show up again in the more detailed sections later on.

[Return to Table of Contents](#)

Temerty  
Medicine



## Teaching Landmarks [Start - End Dates]

---

*Teaching Awards (Presented in reverse chronological order by date, below records should come from Professional activities> Honour/Award/Distinction, where the Recognition for = Teaching and Education)*

---

[start-date – end-date] [Honour, Award or Distinction Name], [Faculty], [FOM Department], [Division], [Organization (Name, Organization, Street address, City, State or province, Country)], [Nomination Status].

---

*Innovations and Development in Teaching and Education (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course developed)*

---

[start-date – end-date] [Course title], [Primary Audience], [Faculty], [FOM Department], [Division], [Organization (Name, Organization, Street address, City, State or province, Country)], Total hours: [Total Hours].

---

*Leadership in Education (Presented in reverse chronological order by date, below records should come from Professional Activities> Office Held, where the Attach to Audience in TER is checked)*

---

[start-date – end-date] [Office held type], [Office name], [Faculty], [FOM Department], [Division], [Institution (Name, Organization, Street address, City, State or province, Country)]. ([Type]).

---

*Administrative Service in Education (Presented in reverse chronological order by date, below records should come from Professional Activities> Committee Membership, where the Attach to Audience in TER is checked)*

---

[start-date – end-date] [Committee role], [Committee name], [Primary Audience], [Faculty], [FOM Department], [Division], [Institution (Name, Organization, Street address, City, State or province, Country)]. Total Hours: [Hours].

Please follow the **red instructions** for each record, noting that differences (**usually marked in blue font**) are usually in choosing different information types, selecting options from a dropdown menu or check-off the checkbox.

This guide will provide an example each for **Teaching Awards** and **Leadership in Education**. You may follow the same logic approach to upload **Innovation and Development in Teaching and Education** and **Administrative Service in Education**.

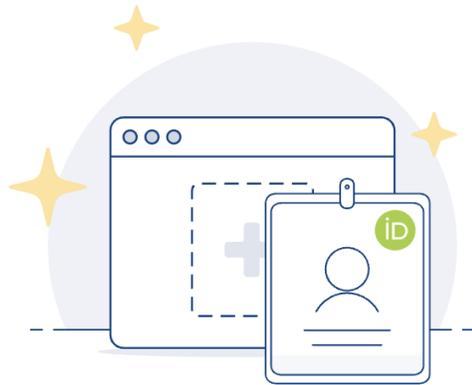
# Example for Teaching Awards

*Teaching Awards (Presented in reverse chronological order by date, below records should come from Professional activities> Honour/Award/Distinction, where the Recognition for = Teaching and Education)*

[start-date – end-date] [Honour, Award or Distinction Name], [Faculty], [FOM Department], [Division], [Organization (Name, Organization, Street address, City, State or province, Country)], [Nomination Status].

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New**"
2. Find and Click "**Honour/Award/Distinction**"
3. Choose "**Teaching and Education**" for "**Recognition for**"
4. Fill the remaining fields based on the data in your information, and don't forget to **fill other items under Additional Information**.
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

**Step 1: Find "Teaching & Supervision" and Click "Add New"**

## Step 2: Find and Click "Honour/Award/Distinction"

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

**Step 3:** Fill in as many entries as possible. Don't forget to **expand Additional Information** and complete those fields,

### Add honour / award / distinction

Professional activity privacy

PRIVATE INTERNAL PUBLIC

This professional activity may be displayed publicly by UofT.

\* Relationship privacy

PRIVATE INTERNAL PUBLIC

This professional activity may be displayed publicly by UofT. Its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

\* Honour, Award or Distinction Name

\* Organization

No Organization - please add...

Name

**Step 5:** Click **SAVE** after editing

**Step 4:** Choose "Teaching and Education" for "Recognition for"

\* Type [Select an option]

\* Recognition for

Geographic Scope

Nomination Status

✓ [Select an option]

Research or Innovation

Teaching and Education

Leadership or Service

Creative Professional Activity

Student or Trainee

Attach to Audience in TER

Primary Audience [None]

Year/Stage [None]

Attach to CPA

CANCEL SAVE

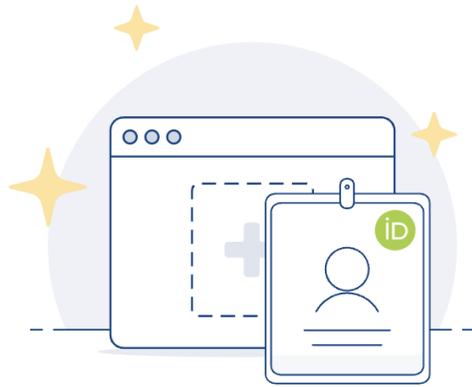
# Example for Leadership in Education

*Leadership in Education (Presented in reverse chronological order by date, below records should come from Professional Activities> Office Held, where the Attach to Audience in TER is checked)*

[start-date – end-date] [Office held type]. [Office name], [Faculty], [FOM Department], [Division], [Institution (Name, Organization, Street address, City, State or province, Country)]. ([Type]).

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New**"
2. Find and Click "**Office Held**"
3. Checked-off "**Attach to Audience in TER**"
4. Fill the remaining fields based on the data in your information, and don't forget to **fill other items under Additional Information.**
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

**Step 1: Find "Teaching & Supervision" and Click "Add New"**

## Step 2: Find and Click "Office Held"

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

**Step 3:** Fill in as many entries as possible. Don't forget to **expand Additional Information** and complete those fields,

**Add office held**

Professional activity privacy

PRIVATE INTERNAL PUBLIC

This professional activity may be displayed publicly by UofT.

\* Relationship privacy

PRIVATE INTERNAL PUBLIC

This professional activity may be displayed publicly by UofT. Its relationship to you will be visible to other users of DiscoverResearch but should not be displayed publicly.

Essential Information

\* Office name

Office held type [None]

Institution No Institution - please add...

Attach to Audience in TER

Primary Audience [None]

Attach to CPA

?

?

CANCEL SAVE

? This is to indicate that this record should print in TER.

**Step 4:** Checked-off "Attach to Audience in TER"

**Step 5:** Click **SAVE** after editing



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# I. Multilevel Education (Teaching Events with Multiple Levels of Trainees)

[Return to Table of Contents](#)

Temerty  
Medicine



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

- a. [Teaching and Education Awards](#) (page 20)
- b. [Innovation and Development in Teaching and Education](#) (page 21)
- c. [Leadership in Education](#) (page 22)
- d. [Administrative Service in Education](#) (page 23)
- e. [Aggregate Teaching Evaluations](#) (page 24)
- f. [Teaching Activities](#) (page 25)
- g. [Professional Associations](#) (page 28)
- h. [Honors and Career Awards](#) (page 29)
- i. [Other Noteworthy Activities](#) (page 30)
- j. [Patents and Copyrights](#) (page 31)
- k. [Grants, Contracts, and Clinical Trials](#) (page 32)
- l. [Salary Support and Other Funding](#) (page 33)
- m. [Publications](#) (page 34)
- n. [Presentations](#) (page 35)
- o. [Peer-Review Activities](#) (page 36)
- p. [Other Research and Professional Activities](#) (page 37)

# Teaching and Education Awards

a) *Teaching and Education Awards (Below records should come from Professional activities > Honour/Award/Distinction, where the Recognition for = Teaching and Education and the Primary Audience = Multilevel Education)*

---

*Received (Presented in reverse chronological order by date, below records should have the Nomination Status = Awarded)*

[start-date – end-date]    **[Honour, Award or Distinction Name]**, [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)],

[Description].

---

*Nominated (Presented in reverse chronological order by date, below records should have the Nomination Status = Nominated)*

*(Record format same as for "Received" record)*

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**Honour/Award/Distinction**"
3. Set **Recognition for** to "**Teaching and Education**"
4. Checked-off "**Attach to Audience in TER.**"
5. Set the **Primary Audience** to "**Multilevel Education.**"
6. Set the **Nomination Status** to "**Awarded**" or "**Nominated**" based on the data in your information.
7. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
8. Click the "**Save**" button once you've finished editing.

# Innovation and Development in Teaching and Education

b) *Innovations and Development in Teaching and Education (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course developed, where the Primary Audience = Multilevel Education)*

---

[start-date – end-date]	[Course title]. [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)]. [Description]. [Impact]. Total Hours: [Total Hours]
-------------------------	---

## Curation Steps

1. Find "Teaching & Supervision" module and Click "Add New."
2. Find and Click "Course developed"
3. Set the Primary Audience to "Multilevel Education."
4. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
5. Click the **"Save" button** once you've finished editing.

# Leadership in Education

c) *Leadership in Education (Below records should come from Professional activities> Office Held, where Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

[start-date – end-date]      **[Office name]**. [Faculty], [FOM Department], [Division], [Institution (Name, organisation, Street address, City, State or province, Country)]. ([Type])  
[Description].

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**Office Held**"
3. Checked-off "**Attach to Audience in TER.**"
4. Set the **Primary Audience** to "**Multilevel Education.**"
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
6. Click the "**Save**" button once you've finished editing.

# Administrative Service in Education

d) *Administrative Service in Education (Below records should come from Professional activities> Committee Membership, where Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

---

[start-date – end-date]    **[Committee role]**, [Committee name], [Faculty], [FOM Department], [Division], [Institution (Name, Organisation, Street address, City, State or province, Country)].  
[Description].  
Total Hours for Entire Activity: [Hours]

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**Committee Membership**"
3. Checked-off "**Attach to Audience in TER.**"
4. Set the **Primary Audience** to "**Multilevel Education.**"
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
6. Click the "**Save**" button once you've finished editing.

# Aggregate Teaching Evaluations

e) *Aggregate Teaching Evaluations (Presented in reverse chronological order by date, below records should come from Teaching & supervision>Aggregate Teaching Evaluation, where Primary Audience = Multilevel Education)*

---

[start-date – end-date]    **[Source].** [Faculty], [Department], [Division], Number of Student Evaluations: [Number of Student Evaluations].  
Teaching Evaluation Score (Individual Mean): [Teaching Evaluation Score]  
City Wide Mean: [City-Wide Mean]  
Hospital Mean: [Hospital Mean]  
Division Mean: [Division Mean]  
Quintile: [Quintile]  
*Evaluation Details: [Evaluation Details].*

## Curation Steps

1. Find **"Teaching & Supervision"** module and Click **"Add New."**
2. Find and Click **"Aggregate Teaching Evaluation"**
3. Set the **Primary Audience** to **"Multilevel Education."**
4. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
5. Click the **"Save"** button once you've finished editing.

# Teaching Activities

**Lectures** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Lectures)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Seminars** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Seminars)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Small Group or PBL Teaching** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Small Group or PBL Teaching)

---

[Start – End Dates] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Workshops** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Workshops)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Examinations** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Examinations)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

## Teaching Rounds

**Formal Teaching Rounds (Scheduled Centrally)** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Formal Teaching Rounds)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Informal Teaching Rounds (Scheduled by Teacher)** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Informal Teaching Rounds)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]  
 Teaching Evaluation Score: [Teaching Evaluation Score]  
 Evaluation Details: *[Teaching Evaluation Details].*

**Simulations** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Simulations)

---

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
*[Activity Description].*  
 Total Hours for Entire Activity: [Total Hours]  
 Total Number of Students: [Number of students]

# Teaching Activities

**Labs** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Labs)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].  
Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Practicum** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Practicum)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].  
Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Individual Consultations** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Individual Consultations)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].  
Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Peer Coaching** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Peer Coaching)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].  
Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Remediation** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Remediation)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].  
Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Other Teaching Activities** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Course Taught, where the Primary Audience = Multilevel Education and the Teaching Activity Type = Other and/or Null)

[start-date – end-date] [Course title], [Year/Stage], [Faculty], [FOM Department], [Division]. Location of Teaching: [Name of institution (Name, Organisation, Street address, City State or province, Country)].  
[Activity Description].

Total Hours for Entire Activity: [Total Hours]  
Total Number of Students: [Number of students]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

## Clinical Supervision

**Assigned** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Clinical Supervision, where the Primary Audience = Multilevel Education and the Type of Supervision = Assigned)

[start-date – end-date] **[Clinical Supervision Role]**, [Year/Stage], [Faculty], [Department], [Division]. Location of Teaching: [Location of Supervision].  
[Activity Description].  
Number of Students: [Number of Students]  
Unit: [Unit Type], Number of Unit(s): [Number of Units]  
Total Hours: [Total Hours]  
  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

# Teaching Activities

**Elective** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Clinical Supervision, where the Primary Audience = Multilevel Education and the Type of Supervision = Elective)

[start-date – end-date] **[Clinical Supervision Role]**, [Year/Stage], [Faculty], [Department], [Division]. Location of Teaching: [Location of Supervision].  
[Activity Description].  
Student Name(s): from [Student Name(s)]:  
a. [Last name]; [First name]  
b. [Last name]; [First name] – add row for each student  
Number of Students: [Number of Student(s)]  
Unit: [Unit Type], Number of Unit(s): [Number of Unit(s)]  
Total Hours: [Total Hours]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Other** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Clinical Supervision, where the Primary Audience = Multilevel Education and the Type of Supervision = Other and/or Null)

[start-date – end-date] **[Clinical Supervision Role]**, [Year/Stage], [Faculty], [Department], [Division]. Location of Teaching: [Location of Supervision].  
[Activity Description].  
Student Name(s): from [Student Name(s)]:  
a. [Last name]; [First name]  
b. [Last name]; [First name] – add row for each student  
Number of Students: [Number of Student(s)]  
Unit: [Unit Type], Number of Unit(s): [Number of Unit(s)]  
Total Hours: [Total Hours]  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

**Research Supervision** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Research-based Degree Supervision, where Primary Audience = Multilevel Education)

[start-date – end-date] **[UofT Supervisory Role]**, [Faculty], [FOM Department], [Division].  
Student Details: [Student name], Student's Current Position: [Supervisee Position], Student's Current Institution: [Supervisee institution (Organisation, Street address, City, State or province, Country)].  
Degree: [Year/Stage], [Level of Study]  
Research Project: [Thesis title]  
Awards: [Supervisee Awards Attained]  
Collaborators: [Collaborators]  
Completed: [Year Completed]  
Total Hours: [Total Hours]  
[Description].

**Mentorship/Preceptorship** (Presented in reverse chronological order by date, below records should come from Teaching & supervision> Student mentoring, where the Primary Audience = Multilevel Education)

[start-date – end-date] [Mentee/Preceptorship Type], [Mentee], [Mentee Institution (Name, Organisation, Street address, City, State or province, Country)], [Mentee Title], [Year/Stage].  
[Faculty], [FOM Department], [Division], [Institution/Organization (Name, Organisation, Street address, City, State or province, Country)]. ([Formal] -print if c-med-ts-formal is checked, No. of Encounters per Year: [Number of Encounters], Total Hours: [Total Hours]).  
[Description].

## Curation Steps

1. Find "Teaching & Supervision" module and Click "Add New."
2. Find and Click "Course Taught"
3. Set the Primary Audience to "Multilevel Education."
4. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
5. Click the "Save" button once you've finished editing.



# Honours and Career Awards

## Curation Steps

1. Find **"Professional Activity"** module and Click **"Add New."**
2. Find and Click **"Honour/Award/Distinction"**
3. Set the **Recognition for** is not equal to **Teaching and Education** if the **"Honours and Career Award" is received.**
4. Set the **Nomination Status** to **"Awarded"** or **"Nominated"** based on the data in your information.
5. Checked-off **"Attach to Audience in TER."**
6. Set the **Primary Audience** to **"Multilevel Education."**
7. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
8. Click the **"Save"** button once you've finished editing.

h) *Honours and Career Awards*

*Received (Presented in reverse chronological order by date, below records should come from Professional activities> Honour/Award/Distinction, where the Primary Audience = Multilevel Education and the Nomination Status = Awarded) and Recognition for is not equal to Teaching and Education*

[start-date – end-date]      **[Honour, Award or Distinction Name]**, [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)]. ([Type], [Recognition for], Specialty: [Specialty], [Year/Stage], [Geographic Scope]).  
Awardee Name: [Student Recipient Name].  
Role: [Role]  
Total Amount: [Funds Awarded] [Currency]  
[Description].

*Nominated (Presented in reverse chronological order by date, below records should come from Professional activities> Honour/Award/Distinction, where the Primary Audience = Multilevel Education and the Nomination Status = Nominated)*

[start-date – end-date]      **[Honour, Award or Distinction Name]**, [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)]. ([Type], [Recognition for], Specialty: [Specialty], [Year/Stage], [Geographic Scope]).  
Awardee Name: [Student Recipient Name].  
Role: [Role]  
Total Amount: [Funds Awarded] [Currency]  
[Description].

# Other Noteworthy Activities

i) *Other Noteworthy Activities (Presented in reverse chronological order by date. Below records should come from Professional Activity>Activity or Event Participation, where the Attach to an Audience in TER is checked and the Primary Audience = Multilevel Education)*

---

[event-start-date – event-end-date]    Type: [Event type]. Audience: [Audience]. [Organization Type (Name, Organisation, Department, Street address, City, State or province, Country)].  
[Event Description].  
Results / Evaluation: [Results/Evaluation].

## Curation Steps

1. Find **"Professional Activity"** module and Click **"Add New."**
2. Find and Click **"Activity or Event Participation"**
3. Checked-off **"Attach to Audience in TER."**
4. Set the **Primary Audience** to **"Multilevel Education."**
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
6. Click the **"Save"** button once you've finished editing.

# Patents and Copyrights

j) *Patents and Copyrights (Presented in reverse chronological order by date. Below records should come from Scholarly & Creative Work > Commercialization, where the Attach to an Audience in TER is checked and the Primary Audience = Multilevel Education)*

---

[start-date – finish-date]      **[Title].** [Type], *Print label* Applied, *and/or* Granted – *if the Applied and/or Granted field is checked.*  
Patent or Copyright#: [Patent number], [Territory], Joint Holder Names: [Authors].  
[Notes].

## Curation Steps

1. Find "**Scholarly & Creative Work**" module and Click "**Add New.**"
2. Find and Click "**Commercialization**"
3. Checked-off "**Attach to Audience in TER.**"
4. Set the **Primary Audience** to "**Multilevel Education.**"
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Contribution section.**
6. Click the "**Save**" **button** once you've finished editing.

# Grants, Contracts and Clinical Trials

k) Grants, Contracts and Clinical Trials ↵

---

*Funded (Presented in reverse chronological order by date. Below records should come from Grants & contracts> Sponsored Research Agreement, where the Attach to Audience in TER is checked, the Primary Audience = Multilevel Education and the Grant Status = Funded)↵*

---

[start-date – end-date]↵      **[Role] or [relationship with the grant].** [Title]. [Funder], [Sponsor Program], [Sponsor Reference ID]. PI: [Principal Investigator]. Collaborators: [Collaborators]. ([Funding Type]).↓  
Total Amount: [Total Award Amt] [Currency].↓  
[Description].↵

---

*Declined (Presented in reverse chronological order by date. Below records should come from Grants & contracts> Sponsored Research Agreement, where the Attach to Audience in TER is checked, the Primary Audience = Multilevel Education and the Grant Status = Awarded but declined)↵*

---

[start-date – end-date]↵      **[Role] or [relationship with the grant].** [Title]. [Funder], [Sponsor Program], [Sponsor Reference ID]. PI: [Principal Investigator]. Collaborators: [Collaborators]. ([Funding Type]).↓  
Total Amount: [Total Award Amt] [Currency].↓  
[Description].↵

## Curation Steps

1. Find **"Grants & Contracts"** module and Click **"Add New."**
2. Find and Click **"Sponsored Research Agreement"**
3. Set **Grant Status** to **"Funded"** or **"Awarded but declined"** based on the date in your information.
4. Checked-off **"Attach to Audience in TER."**
5. Set the **Primary Audience** to **"Multilevel Education."**
6. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Contribution section.**
7. Click the **"Save"** button once you've finished editing.

# Salary Support and Other Funding

## l) Salary Support and Other Funding

---

*Personal Salary Support (Presented in reverse chronological order by date. Below records should come from Grants & contracts> Salary Support and Other Funding, where the Attach to Audience in TER is checked, the Primary Audience = Multilevel Education and the Funding Type = Personal Salary Support)*

---

[start-date – end-date]                      **[Funding Title]**, Trainee Name: [Student Name], [Funding Source (Name, Organisation, Department, Street address, City, State or province, Country)]. Specialty: [Specialty].  
Total Amount: [Total Amount] [Currency].

---

*Trainee Salary Support (Presented in reverse chronological order by date. Below records should come from Grants & contracts> Salary Support and Other Funding, where the Attach to Audience in TER is checked, the Primary Audience = Multilevel Education and the Funding Type = Trainee Salary Support)*

## Curation Steps

1. Find **"Grants & Contracts"** module and Click **"Add New."**
2. Find and Click **"Salary Support and Other Funding"**
3. Set the Funding Type to **"Personal Salary Support"** or **"Trainee Salary Support"**
4. Checked-off **"Attach to Audience in TER."**
5. Set the **Primary Audience** to **"Multilevel Education."**
6. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information section.**
7. Click the **"Save"** button once you've finished editing.

# Publications

m) Publications
<i>Journal Articles (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Journal article, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>
[Authors]. [Title]. [Journal]. [Publication date (Year Month Day)]; [Volume] ([Issue]);[Pageination]. [Status]. Impact Factor: [Journal Impact Factor]. Trainee Publication – if Trainee Publication is checked. [Trainee Details]. <b>[Publication Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].
<i>Books and Books Edited (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Book, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>
[Authors]. [Title]. [Edition]. [Series]. [Editors], editor(s). [Publication date (Year Month Day)]; [Volume] ([Issue]);[Pageination]. [Publisher]. [Place of publication], Impact Factor: [Journal Impact Factor]. Trainee Publication – if Trainee Publication is checked. [Trainee Details]. <b>[Publication Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].
<i>Book Chapters (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Chapter, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>
[Authors]. [Title]. In: [Editors], editor(s). [Book title], [Edition]. [Volume]. [Place of publication]: [Publisher]; [Publication date (Year Month Day)]; p. [Pageination]. Impact Factor: [Journal Impact Factor]. Trainee Publication – if Trainee Publication is checked. [Trainee Details]. <b>[Publication Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].
<i>Monograph (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Monograph, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>

[Authors]. [Title]. [series]. [Place of Publication]: [Publisher]. [Publication Date (Year Month Day)]. Trainee Publication – if Trainee Publication is checked. [Trainee Publication Details]. <b>[Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].
<i>Report/Policy Document (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Report / Policy Document, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>
[Authors]. [Title]. Report number: [Report Number]. [Place of publication]. [Publication date (Year Month Day)], p. [Pageination]. [Report title], [Commissioning body], [Publisher]. Impact Factor: [Journal Impact Factor]. Trainee Publication – if Trainee Publication is checked. [Trainee Details]. <b>[Publication Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].
<i>Other Publications (Presented in reverse chronological order by date. Below records should come from Scholarly &amp; creative works&gt; Other Publication, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)</i>
[Authors]. [Title]. [Edition]. [Series]. [Publishing/Availability Date (Year Month Day)]; [Issue]. [Publisher]. Available from: [URL]. Impact Factor: [Journal Impact Factor]. Trainee Publication – if Trainee Publication is checked. [Trainee Publication Details]. <b>[Publication Role]</b> .
Most Significant Publication - if Most Significant Publication is checked. [Most Significant Contribution Details].

# Curation Steps

1. Find "Scholarly & Creative Works" module and Click "Add New."
2. Find and Click "Journal Article," "Book," "Chapter," "Monograph," "Report/Policy Document," or "Other Publication" based on the data in your information.
3. Checked-off "Attach to Audience in TER."
4. Set the Primary Audience to "Multilevel Education."
5. **If the Publication is the Most Significant Publication, please checked-off the checkbox.**
6. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Contribution section.**
7. Click the "Save" button once you've finished editing.

# Presentations

n) **Presentations** (Below records should come from *Scholarly & creative works*> *Presentation and/or Poster and/or Conference*); and/or *Professional activities*> *Media Relation where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education*)

*International (Presented in reverse chronological order by date, the Geographical Scope = International)*

*For Presentation/lecture, see format below:*

[publication-date – end-date] **[Presentation Role] or [Presentation Role Other] or relationship with..** [Title], ([Type]), [Organizer (Name, Organisation, Department, Street address, City, State or province, Country)], Presenter(s): [Presenter], Trainee Presentation – *if Trainee Presentation is checked.* [Presentation Type]. [record type].  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

*For Conference, see format below:*

[start-date – finish-date] **[Presentation Role] or [Presentation Role Other] or relationship with.** [Title], [Name of conference], [Addresses (Name, Organisation, Department, street address, State or province, Country)] or [location] *if [addresses] is null.* Presenter(s): [Presenters], [Abstract], Trainee Presentation – *if Trainee Presentation is checked.* [record type].  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

*Publication Details:*

[Authors], [Published proceedings]. [Publication date], [Volume], [Issue]: [Pagination], [Notes], [Publication Role], [Status].

*For Poster, see format below:*

[publication-date] **[Presentation Role] or [Presentation Role Other] or relationship with.** [Title], [Presented at], [Addresses]. Presenter(s): [Presenters], [Abstract], Trainee Presentation – *if Trainee Presentation is checked.* [record type].  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

*Publication Details:*

[Authors]. [Journal Name]. [Publication date], [Volume], [Issue]: [Page Range], [Notes], [Publication Role].

*For Media Relation, see format below:*

[start-date – end-date] **[Presentation Role].** [Media Activity], [Topic], Interviewer: [Interviewer name], [Network or Publisher], [City], [Province/State], [Country], Presenter(s): [Presenters], Trainee Presentation. – *if Trainee Presentation is checked.* [record type].  
Teaching Evaluation Score: [Teaching Evaluation Score]  
Evaluation Details: [Teaching Evaluation Details].

*National (Presented in reverse chronological order by date, the Geographical Scope = National)*

*(Records format same as for International)*

*Regional / Provincial (Presented in reverse chronological order by date, the Geographical Scope = Provincial/Regional)*

*(Records format same as for International)*

*Local (Presented in reverse chronological order by date, the Geographical Scope = Local)*

*(Records format same as for International)*

# Curation Steps

1. Find "**Scholarly & Creative Works**" module and Click "**Add New**" if you are looking for the information type "**Presentation/Lecture**" "**Conference,**" or "**Poster**"
2. Find "**Professional Activities**" module if you are looking for the information type "**Media Relation**"
3. Set the Geographical Scope to "**International,**" "**National,**" "**Regional/Provincial**" or "**Local**"
4. Checked-off "**Attach to Audience in TER.**"
5. Set the **Primary Audience** to "**Multilevel Education.**"
6. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Contribution section.**
7. Click the "**Save**" button once you've finished editing.

# Peer Review Activities

## Curation Steps

1. Find "**Professional Activities**" module and Click "**Add New.**"
2. Find and Click "**Editorial,**" "**Grant Application Assessment,**" "**Jornal Review/Referee**" or "**Conference Review/Referee**" based on your Peer Review Activities type.
3. Checked-off "**Attach to Audience in TER.**"
4. Set the **Primary Audience** to "**Multilevel Education.**"
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Additional Information.**
6. Click the "**Save**" **button** once you've finished editing.

### o) Peer Review Activities

*Associate or Section Editing/Editorial Boards (Presented in reverse chronological order by date. Below records should come from Professional activities> Editorial, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

[start-date – end-date] [Role]. [Publication], Number of Reviews: [Works reviewed/refereed during time frame].

*Grant Reviews (Presented in reverse chronological order by date. Below records should come from Professional activities> Grant Application Assessment, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

[start-date – end-date] [Role]. [Institution (Name, Organisation, Department, City, State or province, Country)]. Funding Organisation: [Funding Organisation (Name, Organisation, Department, Country)], Number of Reviews: [Number of applications assessed].

*Manuscript Reviews (Presented in reverse chronological order by date. Below records should come from Professional activities> Journal Review / Referee, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

[start-date – end-date] [Role]. [Journal], Number of Reviews: [Works reviewed/refereed during time frame].

*Presentation Reviews (Presented in reverse chronological order by date. Below records should come from Professional activities> Conference Review / Referee, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

[start-date – end-date] [Role]. [Conference host (Name, Organisation, Department, City, Country)], Number of Reviews: [Works reviewed/refereed during time frame].

# Other Research and Professional Activities

p) *Other Research and Professional Activities*

---

Research Projects *(Presented in reverse chronological order by date. Below records should come from Scholarly & creative work> Team Research Project, where the Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

---

[publication-date – finish-date]      **[Role].** [Team Initiative Title]. [Primary Location or Institution]. [Contribution Organizations (Name, Organisation, Department, City, State or province, Country)], Supervisor(s): [Supervisors]. Collaborator(s): [Team Members].

---

Thesis Projects *(Presented in reverse chronological order by date. Below records should come from Scholarly & creative work> Thesis / Dissertation, where Attach to Audience in TER is checked and the Primary Audience = Multilevel Education)*

---

[filed-date – publication-date]      **[Role].** [Title]. [Addresses (Name, Organisation, Department, City, State or province, Country)], Supervisor(s): [Supervisors]. Collaborator(s): [Collaborators].

## Curation Steps

1. Find "**Scholarly & Creative Works**" module and Click "**Add New**"
2. Find and Click "**Team Research Project**" or "**Thesis/Dissertation**"
3. Checked-off "**Attach to Audience in TER.**"
4. Set the **Primary Audience** to "**Multilevel Education.**"
5. Fill the remaining fields based on the data in your information, and **don't forget to fill other items under Contribution section.**
6. Click the "**Save**" button once you've finished editing



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

## For

- II. Undergraduate Education
- III. Graduate Education
- IV. Undergraduate MD
- V. Postgraduate MD
- VI. Continuing Education
- VII. Faculty Development
- VIII. Patient and Public Education
- IX. Research Associate
- X. Postdoctoral Research Fellow (MD)
- XI. Clinical Research Fellow (MD)

The **record level format** is the same as for **Multilevel Education**; the only difference is that the **Primary Audience** should be updated to each respective category.

Temerty  
Medicine



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

## XII. Creative Professional Activities in Teaching and Education

Table level details are same as for **CPA Report (insert the link to CPA report screenshot guide?/CPA mapping docs)** and each record should have the **"Attach to Audience in TER"** and **"Attached to CPA"** checked-off.

[Return to Table of Contents](#)

Temerty  
Medicine



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# XII. Creative Professional Activities in Teaching and Education

## 1. Professional Innovation and Creative Excellence

[Return to Table of Contents](#)

Temerty  
Medicine

# Professional Innovation and Creative Excellence

## 2: Professional Innovation and Creative Excellence

### 1. [CPA TITLE]

([Start – End Dates])

Description: [Description].

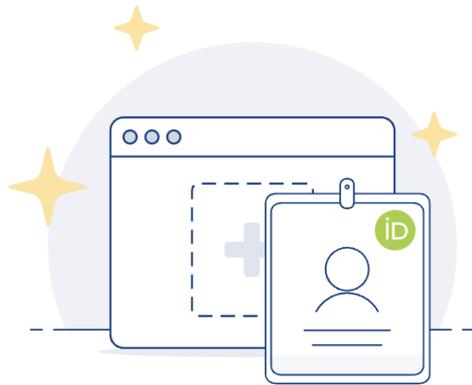
Impact: [Impact].

#### 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. Select "**Professional Innovation and Creative Excellence**" in CPA Category.
4. Fill the remaining fields based on the data in your information.
5. Please remember to check the box labelled "**Attach to CPA**" to ensure the record will appear under the **CPA in TER section** of your **TFoM Teaching and Education Report.**
6. 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

Description

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.



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# Linking CPA Activities to other Records as Documentation

Temerty  
Medicine

## 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 (1)

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  
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.

My Work > [Scholarly & Creative Works](#)

## Scholarly & creative work details

+ ADD ANOTHER

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 <a href="#">More source info</a>	
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

CREATE NEW

#### HISTORY

**Step 3:** Ensure that the "Attach to CPA" status is set to **TRUE** if you want this record to appear under the CPA in TER section of your TFoM Teaching and Education 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:** Fill the remaining fields based on your information. Don't forget to check-off the **“Attach to Audience in TER”** and select **“Primary Audience”**. Also, checked-off **"Attach to CPA"** checkbox to make this record appear in your CPA report after linking. Then, click **"Save"** button.

My Work > [Scholarly & Creative Works](#)

## Scholarly & creative work details

+ ADD ANOTHER

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 <a href="#">More source info</a>		
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

CREATE NEW

#### HISTORY

**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	<b>Professional activity</b>	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.



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# XII. Creative Professional Activities in Teaching and Education

2. Contributions to the Development of Professional Practices

[Return to Table of Contents](#)

Temerty  
Medicine



## 2. Contributions to the Development of Professional Practices

Where [c-med-pa-cpa-category] = Contributions to the Development of Professional Practices

1. 1<sup>st</sup> title

([start-date] – [end-date])

**Description:** [description].

**Impact:** [c-med-pa-cpa-impact].

*(Table level details are same as for the first title).*

### Supplementary Documentation:

*Note: Any additional documentation can be included here such as email content.*

[Supplementary Documentation].

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.

## 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>



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# XII. Creative Professional Activities in Teaching and Education

## 3. Exemplary Professional Practice

[Return to Table of Contents](#)

Temerty  
Medicine



### 3. Exemplary Professional Practice

Where [c-med-pa-cpa-category] = Exemplary Professional Practice

1. 1\* title

([start-date] – [end-date])

**Description:** [description].

**Impact:** [c-med-pa-cpa-impact].

*(Table level details are same as for the first title).*

#### Supplementary Documentation:

*Note: Any additional documentation can be included here such as email content.*

[Supplementary Documentation].

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>

Documentation

*[Below are samples of all activities that could be attached to a CPA title. (Relationship between the title above and the records below should have been already established)]. To create relationships, please see page*

a) *Professional Associations (Presented in reverse chronological order by date, below record should come from Professional Activity> Membership)*

[Start – End Dates]	[Role], [Society/Other organisation (Name, Organisation, Department, City, Street address, City State or province, Country)], [Membership/License#]
---------------------	---

b) *Positions Held and Leadership Experience (Presented in reverse chronological order by date, below record should come from Professional Activity> Office Held)*

[Type]	
[Start – End Dates]	[Office name], [Institution (Name, Organisation, Street address, State or province, Country)], [Description].

c) *Honours and Career Awards (Presented in reverse chronological order by date, below record should come from Professional Activity> Honour/Award/Distinction)*

[Nomination Status]	
[Start – End Dates]	[Honour, Award or Distinction Name], [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)]. ([Type], Specialty: [Specialty], [Primary Audience], [Year/Stage]) Awardee Name: [Student Receptient Name], Role: [Role], Total Amount: [Funds Awarded]. [Description].

d) *Patents and Copyrights (Presented in reverse chronological order by date, below record should come from Scholarly & creative works> Commercialization)*

[start-date]	[Title], [Status], Filing Date: [Filed date], Type: [Type], Patent/Copyright #: [Patent number], [Addresses (Name, Organisation, Department, Street address, City, State or province, Country)], Joint Holder Name(s): [Authors]. [Notes].
--------------	---

e) *Grants, Contracts and Clinical Trials (Presented in reverse chronological order by date, below record should come from Grants & contracts> Sponsored Research Agreement)*

[Grant Status]	
[Start – End Date]	[Role] or [report owner relationship with the grant], [Title], [Funder], [Sponsor Programme], [Sponsor]

n) *Mentorship (Presented in reverse chronological order by date, below record should come from Teaching & supervision> Student Mentoring)*

[Primary Audience]	
[Start – End Dates]	[Mentee/Preceptorship Type], [Mentee], [Institution/Organization (Name, Organszation, Street address, City, State or province, Country)], [Year/Stage], [Faculty], [FOM Department], [Division]. (If true, display Formal, No. of Encounters per Year: Number of Encounters), Total Hours: [Total Hours] [Description].

o) *Innovations and Development in Teaching and Education (Presented in reverse chronological order by date, below record should come from Teaching & supervision> Course Developed)*

[Primary Audience]	
[Start – End Dates]	[Course title], [Faculty], [FOM Department], [Division], [Organization (Name, Organisation, Street address, City, State or province, Country)]. If true display Program Develop or Course Developed. [Description], [Impact], Total Hours: [Total Hours]

p) *Aggregate Teaching Evaluations (Presented in reverse chronological order by date, below record should come from Teaching & supervision> Aggregate Teaching Evaluation (MED))*

[Primary Audience]	
[Start – End Dates]	[Source], [Faculty], [Department], [Division]. Teaching Evaluation Score (Individual Mean): [Teaching Evaluation Score], City Wide Mean: [City Wide Mean], Hospital Mean: [Hospital Mean], Division Mean: [Division Mean], Quintile: [Quintile]. Evaluation Details: [Evaluation Details].

q) *Administrative Activities (Presented in reverse chronological order by date, below record should come from Professional activities> Committee Membership)*

[Institution] (Records associated with the same institution should be listed beneath a single instance of that institution's name (just the Name and Organization - do not print the Department, Street, etc.)	
[Start – End Dates]	[Committee role], [Committee name], [Faculty], [FOM Department], [Division], [Primary- Audience], Part of the institution should appear here such as [street address, City, State or province, Country, Zip code/postcode], [Geographical Scope]. [Description], Total Hours: [Hours].

There are partial samples of all activities that could be associated with a CPA title. (For full samples, please refer to the document [\(Understanding Your Elements TFoM TER Template and Mapping\)](#)).

The relationship between the titles above and the records below should already be established. To create or verify these relationships, please follow the step-by-step process outlined in the next few pages. You can also explore more detailed instructions in the [\(Understanding Your Elements TFoM CPA Template and Mapping\)](#).



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

# How to Generate the TFoM Teaching & Education Report (TER)

[Return to Table of Contents](#)

Temerty  
Medicine

# ? How to Generate your Teaching & Education Report through Elements

1. **Log in to Elements.** The Elements Profile Homepage opens.
2. Within the homepage, click **"Edit My Profile"** to export the **TFoM Teaching & Education Report (TER)**.

The screenshot displays the 'Homepage' of the Elements profile. At the top, it says 'MY ACTIONS (1 of 3)'. The main feature is a large card titled 'Add your ORCID iD' with a blue 'ADD' button. Below this, there are four summary cards: '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 card has '+ ADD NEW' and 'VIEW ALL' options. On the right side, there is a profile card for 'Kex Zhang' from 'Temerty Faculty of Medicine' with a circular profile picture and a blue 'EDIT MY PROFILE' button highlighted with a yellow box.

# ? How to Generate your Teaching & Education 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 Teaching & Education Report (TER)**, then click **"NEXT."**

The screenshot displays the 'Edit Mode' profile page for Kex Zhang. The top right corner features three buttons: 'VIEW MODE', 'EDIT MODE', and 'CV AND REPORTS'. The 'CV AND REPORTS' button is highlighted with a yellow box. An arrow points from this button to a 'CV and Reports' dialog box on the right. The dialog box has a title 'CV and Reports' and a subtitle 'Select report'. It contains a list of report options with radio buttons: 'Academic CV (custom)', 'NIH biographical sketch (2015)', 'NIH biographical sketch (pre-2015)', 'TFoM Annual Activity Report (AAR)', 'TFoM Creative Professional Activity (CPA) Report', 'TFoM CV', and 'TFoM Teaching & Education Report (TER)'. The 'TFoM Teaching & Education Report (TER)' option is selected and highlighted with a yellow box. At the bottom of the dialog box, there are two buttons: 'CLOSE' and 'NEXT'. The 'NEXT' button is highlighted with a yellow box.

# ? How to Generate your Teaching & Education 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.



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO

**Happy Curation :)**

Temerty  
Medicine

