UNIVERSITY OF TORONTO
FACULTY OF MEDICINE

Frequently Asked Questions (FAQ)

Adjunct and Part Time Clinical Re-Appointments
Using Web Forms and Laserfiche

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FAQ for Adjunct and Part Time Clinical Re-Appointments

Faculty member refused re-appointment before process has started

1. **What should I do if the Chair or the DAC has already decided not to re-appointment a faculty member and does not want to send the faculty member a request for an activity report?**

    i.   Change the **Activity Report Status Clinical** in the pink dossier to 7. Re-Appointment Refused.

Result: This automatically moves the permanent (yellow) dossier to the Archives area. The end date in the metadata will remain unchanged (i.e. June 30th). If necessary, the end date may be changed by revising it in the Candidate Information Template metadata of the permanent (yellow) dossier.

Note: It is not necessary to delete the pink Activity Reporting folder for the faculty member

Faculty member reconsiders submission

2. **What should I do if a faculty member has reconsidered their response?**

    ❖ **Faculty member has accidentally declined re-appointment:**

Note: If the faculty member has accidentally declined re-appointment in LaserFiche through the re-appointments process then the permanent (yellow) dossier has been moved to Archives and the ability to take any further action on the temporary pink activity reporting folder is discontinued.

    i.   Send an email to discovery.commons@utoronto.ca and they can drag the folder from the archives back to the permanent document storage.
    ii. When the permanent dossier is back in the permanent record area, change the **Activity Report Status Clinical** in the pink dossier from 7. Re-Appointment Refused back to 2. Send Request for Activity Report. This will send another email to the faculty member and they will be required to complete the process again.

Note: If the Department has accidentally refused the appointment, the permanent (yellow) dossier will also be moved to the Archives folder as mentioned above. If this occurs, follow the same steps to reinstate the dossier back to a different status.

❖ **Faculty member has submitted an activity report, but meant to decline:**
   i. Change the **Activity Report Status Clinical** from 7. Activity Report Received back to 2. Send Request for Activity Report. This will send another email to the faculty member giving them the URL to a webform where they can decline re-appointment.

Revising activity report after submission

3. **Can changes be made to a faculty member's submission after it is received?**

Once an Activity Report is submitted, the information is saved as data in the Laserfiche system and within a PDF version of the report. It is not possible for a faculty member to change individual field values. If information needs to be changed, a new Activity Report must be submitted. This will create an addition PDF in the pink folder (all PDFs are date stamped) and overwrite the field values. The downloadable excel report will contain the most up-to-date information provided by the faculty member.

Note: In some instances, the accidentally omitted information may not require that the faculty submit an entirely new report. This is at the department's discretion.

4. **What if a faculty member submitted their Activity Report in error? Can I delete this in LaserFiche so that it can be submitted again?**

❖ **Faculty member still has Activity Report request:**
   i. Faculty member can follow the link in the email request to re-submit. This will create a new PDF in the pink folder and overwrite the field values. Your download will contain the most up-to-date information provided by the faculty member.

❖ **Faculty member does not have Activity Report request:**
   i. Change the **Activity Report Status Clinical** from 7. Activity Report Received back to 2. Send Request for Activity Report. This will send another email to the faculty member.
   ii. Faculty member can follow the link in the email request to re-submit. This will create a new PDF in the pink folder and overwrite the field values. Your download will contain the most up-to-date information provided by the faculty member.

Lost passwords for Activity Report drafts

5. **What can be done if a faculty member has saved their Activity Report as a draft, but cannot remember, or has lost their password?**

Laserfiche encrypts the faculty member's password on the draft and it is not possible for the Discovery Commons to de-crypt it. In this circumstance, they must begin the submission process again. Once they have begun a new submission, the faculty member can save another draft.

6. What can be done if a faculty member attempts to save their activity report but mistypes their email address?

The email containing the link to the draft activity report and the draft activity report itself will be lost. The faculty member must begin the submission process again when notified by the department that the email was incorrect. Once they have begun a new submission, the faculty member can save another draft.

Missing Submissions

7. **What if a faculty member has submitted their Activity Report, the Activity Report Status Clinical shows 7. Activity Report Received, but there is no Activity Report found in the pink folder?**
  i. Check for the Activity Reports subfolder in the yellow permanent dossier to see if the PDF was captured.
     - ❖ **Activity Report Found:**
         i. Right click on Activity Report
         ii. Copy File
         iii. Paste copy into pink folder – this will make it visible in the Read Only Portal as well.
     - ❖ **Activity Report not Found:**

        In this case the faculty member must resubmit their Activity Report.

Changing Email Address, Mailing Address, CPSO Number, or Faculty Name

8. **Where do I change a faculty member's Email address?**

Email addresses must be changed in the metadata of the permanent (yellow) dossier. Always click "save" after revising any information in the metadata.

9. **Where do I change a faculty member's mailing addresses?**

Mailing addresses must be changed in the metadata of the permanent (yellow) dossier. Always click "save" after revising any information in the metadata.

10. **Where do I change/verify a faculty member's CPSO number?**

CPSO numbers must be changed/verified in the metadata of the permanent (yellow) dossier. Always click "save" after revising any information in the metadata.

Column Configuration in the Read-Only Portal

11. **Can the Read Only Portal be configured with separate views for Status Only and Clinical?**

No. Only one column configuration can be added to the Read Only Portal at a time.

Emails not received by faculty members

12. **What can I do if the emails to request an Activity Report are rejected by another server?**

❖   If the department coordination has their copy of the email
   i.   Confirm the faculty member's email address*. If the address in LaserFiche is incorrect, edit the email address in the metadata of the permanent (yellow) dossier and resend the request via LaserFiche.*
   ii.   If you are sure the address is valid and functioning, locate the copy of the faculty member's email request that you received and forward the request directly to them using your department's email address.

❖   If the department coordinator does not have a copy of the Activity Report request

      i.   Email discovery.commons@utoronto.ca to request a copy of the Activity Report request text

      ii.   Edit the email with the faculty member's Appointment ID, Last Name and Primary Clinical Site.

      iii.   Email edited request to faculty member using your departments' email address.

Missing Options in Activity Report Form

13. What if a Primary Clinical Site is not included in the activity report dropdown list?

The list of approved **Primary Clinical Sites** has been vetted by the office of Clinical Affairs. Any inquiries about this list can be communicated to Human Resources, Faculty of Medicine.