



UNIVERSITY OF TORONTO FACULTY OF MEDICINE

Frequently Asked Questions (FAQ)

Status-Only Review and Re-Appointments

Using Web Forms and LaserFiche

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Table of Contents

Frequently Asked Questions (FAQ)	0
Status-Only Review and Re-Appointments	0
FAQ for Status-Only Review and Re-Appointments	2
Faculty member should not be included in Re-Appointments process.....	2
Faculty member reconsiders submission.....	2
Revising activity report after submission.....	4
Adding documents to an archived folder	4
Lost passwords for Activity Report drafts.....	4
Missing Submissions	5
Changing Email Address, Mailing Address, CPSO Number, or Faculty Name.....	5
Column Configuration in the Read-Only Portal	6
Reformatting Emails that are sent to faculty members	6
Emails not received by faculty members.....	6
Missing Options in Activity Report Form	7
Unable to add an attachment to an Activity Report.....	7
Problems viewing the online form.....	8

FAQ for Status-Only Review and Re-Appointments

Faculty member doesn't require Re-Appointment, only Annual Review

- i. **What should I do if an end date has been adjusted after the pink dossiers were created and a faculty member previously included for re-appointment only requires annual review?**

- ❖ **If you are the primary department**

- i. Double check the end dates in HRIS and confer with any departments with whom the faculty member holds a concurrent appointment.
- ii. Correct the end date in the yellow-barred permanent dossier
- iii. Change the **Review-Re-Appointment Status** field of the pink-barred folder to Pending Annual Review
- iv. Click: Save
- v. In the pink-barred Activity Reporting folder, change the **Activity Report Status SO** to 2. Send Request for Activity Report

Result: This will send a new email to the faculty member with a correct link to submit an activity report.

- ❖ **If you are not the primary department**

- i. Follow the same procedure as outlined above for the primary department.

Faculty member reconsiders submission

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

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

- ❖ **If you are the primary department**

Note: If the faculty member has accidentally declined re-appointment in LaserFiche through the re-appointments process, then the permanent (yellow-barred) dossier has been moved to Archives (for the primary department and for any departments with whom the faculty member holds concurrent appointments); the ability to take any further action on the temporary pink-barred activity reporting folder has been discontinued.

- i. Send an email to discovery.common@utoronto.ca and provide them with your department name, and the faculty member's name and personnel number. An Application Support Specialist can drag the permanent folders in the primary and concurrent department's archives section back to the permanent records area.
- ii. When the permanent dossier is back in the permanent record area, change the **Activity Report Status SO** in the pink-barred dossier from 4. Re-Appointment Declined back to 2. Send Request for Activity Report. This will send another email, prompting the faculty member to complete the process again.
- iii. Back in the yellow-barred permanent dossier, in a sub folder called Administrative Documents, delete the pdf file called Reappointment Declination.

Note: If the Department has accidentally refused the appointment, the permanent (yellow-barred) 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.

❖ **If you are not the primary department**

- i. Notify the primary department

❖ **Faculty member has submitted an activity report, but meant to decline:**

❖ **If you are the primary department**

- i. Change the **Activity Report Status SO** from 4. 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.

❖ **If you are not the primary department**

- i. Notify the primary department

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 overwrite the first PDF in the pink-barred folder (all PDFs are date stamped) and will 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.

Adding documents to an archived folder

Note: If a faculty member declines or, is refused re-appointment, there must be a letter documenting the decision in their permanent (yellow-barred) dossier. If the declination web form was used to record the declination, then this document was created automatically and placed in a subfolder called Administrative Documents in the yellow-barred permanent dossier. If not, the department coordinator is responsible for uploading a document themselves.

4. What do I do if the permanent (yellow-barred) dossier is no longer accessible through the permanent document storage?

The permanent (yellow-barred) dossier automatically moves to the archives if the **Review-Re-Appointment Status** field moves to 'ReAppointment Declined' or 'ReAppointment Refused by DAC'. You must upload the file into the Archives > Current Year > Faculty Member Dossier.

Highlight the correct dossier on in the left-side panel and click the Upload icon (up arrow) in the menu bar in the top right of the screen. Follow the upload wizard. Do not assign a template to this document, or nay others.

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 their password?

Laserfiche encrypts the faculty member's password on the draft and it is not possible for the Discovery Commons to de-encrypt it. In this circumstance, the faculty member must begin the submission process again. Then the faculty member can save another draft.

6. What can be done if a faculty member attempts to save a draft of 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.

Missing Submissions

7. What if a faculty member has submitted their Activity Report, the Activity Report Status SO shows 4. Activity Report Received, but there is no Activity Report found in the pink-barred folder?

- i. Check your emails; if the faculty member successfully submitted a web form they and you would have received confirmation of that, and the pdf would have been attached to that email.
- ii. Check that the Activity Report field values are populated in the pink-barred folder. If not, contact discovery.common@utoronto.ca.
- iii. Check for the Activity Reports subfolder in the yellow-barred 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-barred 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 field values of the permanent (yellow-barred) 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 field values of the permanent (yellow-barred) 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 field values of the permanent (yellow-barred) 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 saved to the Read Only Portal at a time.

Reformatting Emails that are sent to faculty members

12. Can Emails sent to faculty members be reformatted to include signatures or remove text boxes?

No. The format of Emails cannot be changed for individual departments. Formats are determined by HR and must be consistent across all departments.

Emails not received by faculty members

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

- ❖ If the department coordinator has copy of the email

- i. Confirm the faculty member's email address. *If the address in the field value of the permanent dossier is incorrect, edit the email address in the metadata of the permanent (yellow-barred) 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.common@utoronto.ca to request a copy of the Activity Report request text
 - ii. Edit the email with the faculty member's Appointment ID and Last Name.
 - iii. Email edited request to faculty member using your department's email address.

14. What should I verify when an email address is correct and functioning, but a faculty member says that they did not receive their Activity Report Request?

- i. Ask them to look in their junk folders for an email from HRAppts.medicine@utoronto.ca.
- ii. Email discovery.common@utoronto.ca. An Application Support Specialist will check the workflow to see if it is ending without sending an email.

Missing Options in Activity Report Form

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

The list of approved values in the drop down lists on the web forms has been vetted by Human Resources and the office of Clinical Affairs. Any inquiries about this list should be directed to Human Resources, Faculty of Medicine.

Unable to add an attachment to an Activity Report

16. A faculty member is unable to add an attachment to their Activity Report while at a hospital site, even though it is a required field for your department.

Hospital networks are extra secure to preventing the possibility of uploading patient records. In this case, the faculty member can either:

- a. Locate a computer that is on another network other than the hospital network
- b. Submit the activity report from home

Problems viewing the online form

17. When clicking the link to access the Activity Report web form, my faculty members report an error “Your connection is not secure.” The owner of documents.med.utoronto.ca has configured their website improperly. To protect your information from being stolen, Firefox has not connected to this website”.

Firstly, know that the LaserFiche server itself conforms to all University of Toronto requirements for online security and is continually monitored for security updates. This message is actually referring to a missing security certificate in the individual browser application. The user has two options:

- i) Accept a temporary download of the security certificate;
 - a) Click Advanced on the message box
 - b) Click Add Exception
 - c) Click Confirm Security Exception
- ii) Use another browser and/or use another device.

18. Faculty Members report that they are unable to select single values in check boxes or other small anomalies when trying to fill in the form.

This occurs with some versions of the Safari browser. LaserFiche forms are only supported by later versions of the IE, Firefox and Chrome browsers. Safari and Edge are not supported. Ask the faculty member to use another browser. If they are on a desktop MAC they should be able to use Firefox.