

Activity Insight

Entry Screen Coding

Use this guide along with highlighters of the following colors to review a historical CV before entering it into Activity Insight. This can take a large amount of time up front but will help you as you go in to entry each activity into the system. The following pages include the CV Quick Guide with the coordinating highlight color.

Section	Screen	Color/#
General	Personal and Contact Information	1
General	Education	2
General	Postgraduate Education and Training	3
General	Professional Experience	4
General	Administrative Leadership	5
General	Board/Practice Certification, and Licensure	6
General	Honors and Awards	7
General	Professional Memberships	8
General	Professional Growth & Development	9
General	Media Contributions	10
Teaching	Teaching & Course Instruction	1
Teaching	Graduate Medical Education (GME)	2
Teaching	Professorial & Continuing Education Instruction	3
Teaching	Directed Student Learning and Mentorship	4
Scholarship/Research	Contract, Grants, and Sponsored Research	1
Scholarship/Research	Publications and Intellectual Contributions	2
Scholarship/Research	Innovative Teaching Materials	3
Scholarship/Research	Intellectual Property	4
Scholarship/Research	Presentations	5
Service	Clinical Service	1
Service	Organizational Service	2
Service	Professional Service	3
Service	Editor, Editorial Board, Journal Reviewer	4
Service	Personal Community Service	5
	Items needing clarification	
	Items not to be included in AI	X

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CV Section and Subsections (In Order of Report)	Activity Description	Helpful Hints	AI Screen(s) Feeding to This Section
CV Header	Name and credentials, primary academic department, division/section, primary administrative role, contact information	To add an administrative role or honor to CV Header, mark the checkbox under the Title field in that activity screen See: Honors & Awards and Administrative Leadership below	<ul style="list-style-type: none"> ▪ Personal and Contact Information ▪ Yearly Data ▪ Administrative Leadership ▪ Honors and Awards
Postgraduate Education and Training	Internship, residency, fellowship, postgraduate research	Keep the Title field simple, i.e. "Resident" or "Fellow" and utilize the department and section fields to describe the rest of the activity	Postgraduate Education and Training
Education	Education leading to formal academic degrees		Education
Professional Experience <ul style="list-style-type: none"> ▪ Academic ▪ Administrative ▪ Government ▪ Hospital/Agency ▪ Other Professional U.S. Military Experience	Current and previous professional employment history	<ul style="list-style-type: none"> ▪ Administrative leadership roles such as Dean, Program Director, Chair, and Chief will also fall under this section, but are to be entered on the Administrative Leadership screen. ▪ Mark the checkbox under Title of Position on the Administrative Leadership screen to add a prominent title to the CV Header. ▪ Committee roles should not appear here. Those roles are to be entered on the Service screens and will fall under Service on the CV report. Professional Experience Decision Tree	<ul style="list-style-type: none"> ▪ Professional Experience ▪ Administrative Leadership
Honors and Awards	Honors, awards, special recognition, distinguished professorship, endowed positions	<ul style="list-style-type: none"> ▪ Do not list Honors or Awards received as a student ▪ Mark the checkbox under Title of Distinguished Professor or Endowed Position to add this title to your CV Header 	Honors and Awards
Board Certification	Specialty certification that is required for professional practice within your discipline	<ul style="list-style-type: none"> ▪ Certification received as a result of continuing education will not appear here. That should be entered on the Professional Growth and Development screen. ▪ Use "active" if your certification is officially considered "re-certified" 	Board Certification, Practice Certification, and Licensure
Licensure	Professional licensure required for professional practice within your discipline	Do not enter license numbers	Board Certification, Practice Certification, and Licensure
Scholarship Contracts, Grants, and Sponsored Research <ul style="list-style-type: none"> ▪ Current ▪ Pending ▪ Completed 	Examples: <ul style="list-style-type: none"> ▪ Clinical Trial Agreement ▪ Grant ▪ Non-Funded Research ▪ Research Agreement ▪ Other 	<ul style="list-style-type: none"> ▪ If applicable, indicate current funding (total cost per year) and total direct costs. ▪ Indicate percent effort if PI or Co-PI. ▪ If any mentees were contributors to this activity, go to the record in the system and check the box(es) beneath their name(s). Mentees will appear with an asterisk (*) by their name in the entry on your CV report. ▪ "Sponsoring" and "Awarding" Organization are the same. ▪ A Role must be selected for each investigator listed. ▪ To find out what type of organization is awarding the grant/ contract, an online search for the website or organization description will help. 	Contracts, Grants, and Sponsored Research

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<p>Scholarship</p> <p><i>Publications</i></p> <ul style="list-style-type: none"> ○ Peer-Reviewed and Refereed ○ Non-Refereed <ul style="list-style-type: none"> ▪ Scientific/Scholarly Journals ▪ Book Chapters ▪ Books ▪ Commentary ▪ Published Abstracts ▪ Other ▪ Published Teaching Materials ▪ Non-Authored Publications 	<p>Examples:</p> <ul style="list-style-type: none"> ▪ Book ▪ Book Chapter ▪ Book Review ▪ Conference Proceeding ▪ Editorial ▪ Journal Article ▪ Online Publication ▪ Pamphlet ▪ Research Report ▪ Scholarly Review ▪ Textbook ▪ Other 	<ul style="list-style-type: none"> ▪ Citations may be imported from PubMed, SCOPUS, Web of Science, and Crossref or via BibTeX from external systems such as Google Scholar or EndNote. See the Faculty User Guide page 12 for details. ▪ Be sure to review the Contribution Type on all imported items to ensure that it is correct. ▪ Only records with a Current Status of “Published” or “Accepted” will appear on the CV report. ▪ The default setting for “Was this peer-reviewed/refereed?” field is “Yes”. Publications that are not peer-reviewed or refereed must be manually changed to “No” in this field. ▪ Published Abstracts are captured under the “Conference Proceedings” contribution type. ▪ A role must be selected for each author listed. ▪ If any mentees were contributors to your publication, go to the record in the system and check the box(es) beneath their name(s). Mentees will appear with an asterisk by their name (*) in the citation on your CV. 	<p>Publications and Intellectual Contributions</p>
<p>Scholarship</p> <p><i>Innovative Teaching Materials</i></p> <ul style="list-style-type: none"> ▪ Peer-Reviewed and Refereed ▪ Non-Refereed 	<p>This section captures non-published teaching materials developed for instruction within a formal curriculum. These items should be instructional materials that are widely disseminated and adopted for use in curricula across programs or departments.</p>	<ul style="list-style-type: none"> ▪ Do not include syllabi or materials developed for a single class. Do not include materials that have been developed for your sole use as an instructor. ▪ Indicate whether or not materials were peer-reviewed or refereed, who reviewed them, and the date they were peer-reviewed or refereed. 	<p>Innovative Teaching Materials</p>
<p>Scholarship</p> <p><i>Intellectual Property</i></p> <ul style="list-style-type: none"> ▪ Copyright ▪ Patent 	<p>Copyrights and patents</p>	<p>Not all of the date fields need to be completed, only one is necessary.</p>	<p>Intellectual Property</p>
<p>Presentations</p> <ul style="list-style-type: none"> ○ Abstracts ○ Other Presentations <ul style="list-style-type: none"> ▪ Scope: National/International ▪ Scope: Local/Regional 	<p>Original invited lectures and oral presentations delivered to audiences that are NOT your regular students or departmental colleagues and are NOT part of a formal curriculum</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Exhibit ▪ Keynote/Plenary Address ▪ Oral Presentation ▪ Panel ▪ Paper ▪ Poster ▪ Workshop ▪ Other 	<ul style="list-style-type: none"> ▪ Abstracts of conference posters or presentations included in conference proceedings, whether or not they been subsequently published in a scholarly journal, should be entered here. ▪ If this presentation was of an abstract, mark the checkbox below Presentation Type. ▪ If any mentees were contributors to your presentation, go to the record in the system and check the box(es) beneath their name(s). Mentees will appear with an asterisk (*) by their name in the entry on your CV. <p>Teaching/ Presentations Decision Tree</p>	<p>Presentations</p>

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CV Section and Subsections (In Order of Report)	Activity Description	Helpful Hints	AI Screen(s) Feeding to This Section
<p>Teaching and Instruction</p> <p><i>Teaching and Course Instruction</i></p> <ul style="list-style-type: none"> ▪ OUHSC/ SCM ▪ Institutions Outside of OUHSC/ SCM 	<p>Instruction delivered through scheduled courses in degree programs (UME, Graduate, Pharmacy, etc.)</p>	<ul style="list-style-type: none"> ▪ Scheduled courses have a prefix, course number, section number, and official title. ▪ Do not enter Course Director or Coordinator roles here. Those roles should be entered on the Organizational Service screen as Organizational Administration. ▪ Click on the Course Catalog link under Course Prefix and Course Number to go directly to the OUHSC Course Catalog to search for course identification. ▪ Do not complete Average Enrollment per Year and Number of Credit Hours per Year ▪ The Primary Learner Audience should be those who the lecture or instruction was created for regardless of if other learners also attended. <p>Teaching/ Presentations Decision Tree</p>	<p>Teaching and Course Instruction</p>
<p>Teaching and Instruction</p> <p><i>Graduate Medical Education (GME)</i></p>	<p>Formal instruction delivered to residents and fellows at OUHSC and previous academic institutions where you were a faculty member</p>	<p>Do not enter Course or Seminar Director roles here. Those roles should be entered on the Organizational Service screen as Organizational Administration.</p> <p>Teaching/ Presentations Decision Tree</p>	<p>Graduate Medical Education (GME)</p>
<p>Teaching and Instruction</p> <p><i>Professional and Continuing Education Instruction</i></p>	<p>Instruction delivered to colleagues and other healthcare/research professionals as continuing education or as part of a formal program or curriculum</p>	<p>Teaching/ Presentations Decision Tree</p>	<p>Professional and Continuing Education Instruction</p>
<p>Teaching and Instruction</p> <p><i>Mentoring and Advising</i></p>	<p>Mentoring and advising activities at OUHSC and in other formal programs</p>	<ul style="list-style-type: none"> ▪ These activities are individual mentoring relationships you have developed with students, residents, or junior faculty. ▪ Group mentoring or advising belongs in organizational service. ▪ A short description is all that is needed in the Role and Mentee Achievements/ Outcomes fields. 	<p>Directed Student Learning and Mentorship</p>
<p>Teaching and Instruction</p> <p><i>Graduate or Research Committee Membership</i></p>	<p>Graduate or research committee membership relating to thesis, dissertation, or program completion</p>	<p>A short description is all that is needed in the Role and Mentee Achievements/ Outcomes fields.</p>	<p>Directed Student Learning and Mentorship</p>
<p>Clinical Service</p> <ul style="list-style-type: none"> ▪ Clinical/Patient Care ▪ Clinical Administration and Leadership ▪ Clinical Committee Service 	<p>Clinical/Patient Care provided as a physician or other clinician faculty member</p> <p>Clinical Leadership and Administration provided in your faculty role. Service planning, coordinating, delegating supervision, or facilitating guidance of clinic team, health professionals, and/or support staff.</p> <p>Committee service related to clinical/patient care</p>	<p>Setting Examples include:</p> <ul style="list-style-type: none"> ▪ OU Medical Center ▪ Stephenson Cancer Center ▪ Dean McGee Eye Institute ▪ Oklahoma Children’s Hospital <p>Service Decision Tree</p>	<p>Clinical Service</p>

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<p>Organizational Service</p> <ul style="list-style-type: none"> ○ Organizational Administration and Leadership ○ Organizational Committee Service <ul style="list-style-type: none"> ▪ Scope: Division/Section ▪ Scope: Department ▪ Scope: College ▪ Scope: Campus/University 	<p>Service provided as part of your faculty role within the University of Oklahoma academic system</p> <p>Organizational Administration and Leadership activities may include educational planning and directing/coordinating courses or seminars.</p> <ul style="list-style-type: none"> ▪ Course/ Clerkship (Co-) Director ▪ Curriculum Design <p>Organizational Committee Service activities may include serving on educational committees at differing levels.</p> <ul style="list-style-type: none"> ▪ Residency Interview Committee ▪ Curriculum Committee 	<ul style="list-style-type: none"> ▪ Scopes examples include: Department, College of Medicine, Campus ▪ Mentoring and advising of students and graduate or research committee membership will be captured in the Teaching and Instruction section. ▪ Assign proper scope for each activity to be categorized correctly in the CV Report <p>Service Decision Tree</p> <p>Determining Scope Tree</p>	<p>Organizational Service</p>
<p>Professional Service</p> <ul style="list-style-type: none"> ▪ National/International Service ▪ Local/Regional Service ▪ Editor, Editorial Board, Journal Reviewer ▪ Current Service to Other Academic Institutions ▪ Previous Service to Other Academic Institutions 	<p>Service provided outside of the University of Oklahoma to professional organizations at either the National/International or Local/Regional level. Activities may include leadership, consulting, serving on study sections, serving as a grant reviewer, or serving on committees.</p> <p>Service provided as a journal editor, editorial board member, or journal reviewer will be captured on the Editor, Editorial Board, Journal Reviewer screen.</p> <p>“Current Service to Other Academic Institutions” is service to other academic institutions while you are employed at the University of Oklahoma.</p> <p>“Previous Service to Other Academic Institutions” is service to other academic institutions prior to your employment at the University of Oklahoma.</p>	<p>Membership only to professional and scientific organizations will be captured on the Professional Membership screen and will appear in the Professional Memberships section of the CV.</p> <p>Service Decision Tree</p>	<ul style="list-style-type: none"> ▪ Professional Service ▪ Editor, Editorial Board, Journal Reviewer
<p>Personal Community Service</p>	<p>Personal service to lay and other relevant community organizations</p>	<p>Service Decision Tree</p>	<p>Personal Community Service</p>
<p>Media Contributions</p>	<p>Contribution of professional expertise in the media (Internet, magazine, newspaper, radio, or television)</p>	<p>Do not include social media posts</p>	<p>Media Contributions</p>
<p>Professional Memberships</p>	<p>Membership <u>only</u> to professional and scientific organizations</p>	<p>Offices held or leadership positions within professional organizations are captured on the Professional Service screen.</p>	<p>Professional Memberships</p>

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Professional Growth and Development <ul style="list-style-type: none"> ▪ Certification ▪ Faculty Fellowships and Internships ▪ Formal Course Work ▪ Sabbaticals ▪ Seminars, Workshops, and Other Training ▪ Conferences and Meetings ▪ Other Professional Development 	<p>These are activities you attended or completed to enhance your career.</p> <p>You may include items where you earned CME but each activity listed here does not have to have been for CME credit.</p>	<p>Continuing Education completed should include items particularly relevant to improving your knowledge and skills in education, research, and clinical/professional service. If the list is extensive, include especially those items most recent and/or relevant to your current roles in these areas.</p>	<p>Professional Growth and Development</p>

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General Tips
Do not enter USA, US, or United States in the Country field on any screen
Spell out the full name of the section or department (e.g. Section of Genetics, Department of Pediatrics)
Be consistent throughout the CV when listing names, states, abbreviations (i.e. OK or Oklahoma)
Do not list the same activity in multiple categories
Do not use all capitalized letters unless it is an abbreviation
Not every field on every screen needs to be filled
Click on the question mark by the field name for more information on how to complete that field