College of Pharmacy Quick-Start Guide

Last Updated December 2025

Timelines

Here are the following deadlines for completion of Annual Activity Reports and the annual review process:

- Faculty deadline for completion of Annual Activity Report: **February 3, 2026**
- Departmental completion of peer review activities: **March 6, 2026**
- Department Head completion of faculty annual review reports: **May 8, 2026**

Supplemental Departmental Guidance for Annual Reports

This Quick-Start Guide provides collegiate-level guidance for navigating Works and identifying required or optional reporting elements. Departments may offer additional guidance for completing the annual report to reflect department-specific expectations or requirements associated with peer and department head reviews.

General tips:

- Additional guides and training can be found at http://works.umn.edu/guides-and-training
- Once you log into Works click on "Review a Guide". This will provide guidance for entering information and navigation through the various screens.
- Consider generating a report in the Health Sciences standard format without waiting until you are finished with entries. This will assure that you have entered specific information in the right place. This is also important in the case of imported data, where the report may show more complete information than what appears on any individual screen.
- Verify all imported information for accuracy. Click on individual items and check for complete and relevant information, e.g., role and number of hours.
- Adding items to a specific page: If an "Add New Item" button is not available, it is likely because the data on that screen is imported. In these cases, the information will typically be entered on a different screen. For example, grants should be manually entered on the "Other Grants, Contracts, Gifts, or Earnings (manual entry)" screen.
- Use boxes marked "annotation" to add explanations of your role, effort, etc. or any other information you wish to be included in your Annual Report for Department Head review.
- Use "Supplementary Material" to include information that does not have its own specific place for entry, e.g., peer evaluations, commendation for service, etc.

Step 1: Access Your Account: Go to works.umn.edu and log in with your University of Minnesota username and password.

Step 2: Enter Required Information: The following screens require entry/review for the completion of your Annual Activity Report (note specific instructions in the boxes). Activities not listed as required are considered optional reporting items.

A note about the CV Import Tool:
If you are familiar with the CV Import Tool and want to request access, please email worksadm@umn.edu.

For more information and training resources, see https://support.watermarkinsights.com/hc/en-us/articles/5197035849499-CV-Imports.

- **Future Enhancement**: The vendor is working to improve the tool, potentially using A.I. to more efficiently add data from the CV into Works and reduce faculty effort. This new feature may be available for the 2026 reporting year.

A note on course contribution and number of hours:
A Faculty Workload Measurement Tool has been pilot tested during Fall 2025 and is expected to be used with Pharmacy departments in early 2026 (MLS and OT will continue to use the workload measurement process previously used within these departments). This tool is intended to support fair recognition of faculty effort and promote enhanced communications between faculty and department heads to address individual faculty workload and equity across faculty at the College.

Annual Reporting

Narrative, Goals, and Supplementary Material Upload

- Required
- Expectations for Goals and Narratives: Department Heads have requested that for each of the narrative sections on this page, faculty share three items:
    - Share the goals outlined in the previous year's report for this reporting year.
    - Report progress on those goals.
    - Outline goals for the 2025 calendar year.
- Supplementary material: Upload your updated CV plus any other relevant information that does not have a defined place for entry, e.g., peer evaluations, commendation for service, etc.

Leaves and Sabbaticals

- Required, if applicable

Scholarship/Research/Creative Activities

Note on Reporting DEIA Principles into Scholarship/Research – to encourage and support recognition of efforts to incorporate DEIA principles and frameworks into scholarly activities, examples of these types of initiatives are available from the Office of Community, Advocacy, Resilience and Empowerment (CARE).

Note on adding authors on presentations and abstracts/posters: The sheet that documents presentations and posters (items that cannot be imported like journal articles) requests the names and roles for all authors/presenters. It is recognized that this can be a time consuming process. While the University prefers that all authors be listed, if a faculty member is not using the WORKS-generated CV, you may choose to only list yourself as an author, as well as a first author if someone other than yourself served as first author.

Publications and Other Intellectual Contributions

- Required, if applicable
- Imported publications are often incomplete. Use the "edit" function to add missing items.
- Faculty are encouraged to import their publications directly from PubMed or another citation manager, or by linking their ORCID account.
- See Guides & Training for details about importing publications:

Presentations

- Required, if applicable
- You need to fill in relevant fields when you click on each presentation.

Creative and Artistic Practice, Performances, and Exhibits

- Required, if applicable

Grants, Sponsored Research, and Contracts

- Required (pre-populated)
- See Guides and Training for information on imported and manually added grants, sponsored research and contracts

Other Grants, Contracts, Gifts, or Earnings

- Manual entry

- Required if grants are not processed by SPA or received at another institution (non-UMN) or from a previous institution
- See Guides and Training for information on imported and manually added grants, sponsored research and contracts

Collaboration and Research/Creative Activity Currently in Progress

- Required, if applicable
- Research in progress that is not funded, published, or otherwise not captured in the earlier screens
- It is desirable for faculty to document collaborations and partnerships as reports from Works will then assist with awareness and relationship development across the College. Include a brief description of the focus for the partnership.

Biographical Sketch

- Optional

Patents and Intellectual Property

- Required, if applicable

Scholarly Reviews of/Commentaries on My Work

- Optional

Teaching

In the 2024 annual activities reporting, this section underwent numerous updates to enhance how teaching activities are reported, particularly related to MNspire. **Several new links to sheets were added to support clarity and efficiency in reporting.** The following is a brief overview.

- *College of Pharmacy: WTL & PSD Leadership, Instruction & Instructional Development*: Use this link ONLY for MNspire-related activities. This sheet includes inputs for student ratings of teaching, Block leadership roles, instructional contributions, and activities related to assessments, student feedback, evaluation and quality improvement.
- *College of Pharmacy: 3C Leadership, Instruction & Instructional Development*: This link is intended for faculty providing instructional effort for PHAR 6514 - Conversations on Critical Challenges in Pharmacy (3C).
- *College of Pharmacy: Non-MNspire: All Electives and Required OT, MLS, and Pharmacy CI-1 Courses*: This links to the previously available reporting sheet for teaching activities. Instruction in CI-1 (legacy Pharmacy curriculum), all pharmacy electives and all teaching within the OT and MLS programs is reported here.
- *College of Pharmacy: Graduate Education Leadership, Instruction & Instructional Development*: This is a new sheet that should be used to report instructional activities associated with graduate education (MS and PhD programs)
- *College of Pharmacy: Experiential Teaching*: Previously available sheet. Pharmacy experiential education only.
- *College of Pharmacy: Experiential Teaching - Course Coordination*: Previously available sheet. Pharmacy experiential education only.

Note on Reporting DEIA Principles into Teaching – to encourage and support faculty in sharing efforts supporting inclusive teaching practices and contributions to student learning DEIA,

teaching-related examples are available from the Office of Community, Advocacy, Resilience and Empowerment (CARE).

Reporting of Teaching Activities – Sheet-Specific Details

College of Pharmacy: WTL & PSD Leadership, Instruction & Instructional Development

- Required, if applicable
- Select year, Block #s and associated course numbers from drop down lists
- *****Note for 2025 reporting***** The Works sheet does not reflect the change to one course number for Blocks 1 and 3. *Block leaders and instructors should report contributions to Phar 6515 and Phar 6535 by selecting Phar 6511 and 6531, respectively.*
- "Add New" to add a new entry each time (do not "Duplicate")
- Under **WTL/PSD Leadership**, select the formal leadership roles assigned for the selected Block and course number.
- Select Instructor role for the Course number (Module) selected. Please consider definitions of "Block Instructor" and "Session Instructor."
- Faculty are encouraged to describe design and development activities, in addition to direct teaching contributions.
- The **Assessments, Feedback, Evaluation and Quality Improvement** provides an opportunity for faculty to share activities distinct from direct instruction that have contributed to overall delivery of the course and its improvement over time.

College of Pharmacy: 3C Leadership, Instruction & Instructional Development

- *This sheet has sections related to the 3C Course Director, 3C Sections Leads and individual instructors that have contributed to a 3C section.*
- *Instruction and instructional design effort is reported separately than effort associated with providing individualized student feedback, support and quality improvement associated with repeated offerings.*

College of Pharmacy: Non-MNspire: All Electives and Required OT, MLS, and Pharmacy CI-1 Courses

- Required, if applicable
- To avoid the need to re-enter courses previously included in an activity report, use the "**Duplicate**" function.
    - Select a previous course via the checkbox that should be included in the current Annual Report. Only one course can be selected at a time for the Duplicate function to work.
    - In the upper left section of this page, a "Duplicate" button is available. Once clicked, you will enter the course info form.
    - Update year and other required and optional information for the course
- Course roles and definitions:
    - Classroom Lecture/Discussion– lecturing and/or running a discussion
    - Online Instruction – primary instructional role is associated with asynchronous instructional strategies
    - Lab – used for Skills Lab instructors
    - Seminar – for instructional roles in professional programs titled "seminar"
    - Other
- Teaching Evaluations
    - Submission of Student Ratings of Teaching (SRTs) is required for 2024 courses.
- Faculty are encouraged to provide descriptions of instructional design/development activities as well as initiatives that provide individual student evaluation, support and course quality improvement over repeated offerings.

College of Pharmacy: Graduate Education Leadership, Instruction & Instructional Development

- Report instructional activities associated with graduate education (MS and PhD programs)
- Similar to professional education reporting, faculty are encouraged to provide descriptions of instructional design/development activities as well as initiatives that provide individual student evaluation, support and course quality improvement over repeated offerings.
- Graduate student advising is not included in this section. This is reported in the "Advising" section of Works (subsection - Advising-Post Doc, Resident, and Trainee Supervision/Mentorship)

College of Pharmacy: Experiential Teaching

- Required, if applicable
- Use Jan 1, 2023 as a start date and Dec 31, 2023 as the end date.
- If you participate in multiple rotations do a separate entry for each (i.e. "add new item")

College of Pharmacy: Experiential Teaching - Course Coordination

- Required, if applicable

Scheduled Teaching (Imported Data)

- **DO NOT USE this section**

Other Instructional Activity (Guest Lectures, Clinical Teaching, etc.)

- Required, if applicable
- Use for teaching that does not fit elsewhere (i,e. workshops, non-traditional courses, teaching other professions in a classroom).
- For post doc, resident, and trainee supervision, enter items under *Advising-Post Doc, Resident, and Trainee Supervision/Mentorship*
- If you have evaluation data for teaching activities with pharmacy resident or medical resident learners, include those experiences in this section.

Curriculum Development

- Optional
- This section should be used for non course-specific contributions to curricular design or development (Pharmacy, OT or MLS). Course specific design, development and quality improvement should be shared via links to forms where course-related teaching is reported.

Advising

Doctoral and Postdoctoral Placement

- Optional

My Advisees

- Required, if applicable
- Addresses MS and PhD advising. Prepopulated from PeopleSoft. If there is an error, see DGS or AD Graduate programs
- Use the "edit" function to add relevant missing information, e.g. title of project, summary of advisory activities, number of hours.

- For committee advising, review your committee advising records and enter either a Preliminary Committee Meeting Date or Final Committee Meeting Date.

Other Student Advising (e.g. UROP, Student Supervision, and Student Mentorship/Career Advising)

- Required
- List each student working under your direction in a research setting, students in directed study, volunteer, UROP, or Melendy programs, or graduate students completing lab rotations should be included
- Do not include Early or Advanced Practice Experience students - they should be entered in "College of Pharmacy: Experiential Teaching"
- Do not include graduate advising students - they are captured in the "Academic Advising" section -

Post Doc, Resident, and Trainee Supervision/Mentorship

- Required, if applicable

Clinical Activities (Pharmacy Only)

- All required, as applicable
- Clinical Productivity/Professional Practice
- Quality Improvement Projects
- Clinical Trials and Registries
- Service at Clinical Sites

For the first item (Clinical Productivity/Professional Practice), complete all relevant fields to the best of your ability, even if they are not marked required.

- Practice Site Name; Description of Activities/Services
  - It is acceptable to copy the information in these fields from previous years. If there have been any changes, update the copied/pasted information accordingly.
- Objectives of this practice partnership
  - Please document the specific objectives of your practice site partnership.
- Direct Care
  - Please provide the number of direct visits you have seen this year, or an estimate thereof. Use actual numbers if available. If actual numbers are not available, track these metrics for a sample period (i.e. one week or one month) and then extrapolate from that to estimate the numbers for an entire year. If you have had any direct care visits this year, please provide a number in this field, and do not leave this field blank.
  - It's OK to leave the Claims Submitted and Patient Revenue Collected fields blank, if they do not apply to your practice and/or you do not have access to this information.
- Indirect Care
  - Provide actual numbers if available, or if not, provide an estimate based on a measured sample period, as you did in the Direct Care field. If you have provided any indirect patient care this year, please provide a number in this field, and do not leave this field blank.
- FTE in practice / FTE compensation
  - Please fill these fields with a percentage (##%). This should reflect actual/estimated percent FTE you spend in practice (i.e. 2 x 8 hour days would

be 40% FTE), and the percent FTE compensation from the site per your clinical contract, where applicable.
- Clinical Goals (for Peer Review)
    - These are for use in the PFPG peer review. If applicable, you can copy your clinical Annual Goals from the main Annual Reporting section.

- Start Date and End Date for reporting should be January 1st through December 31 of the year reported.

Service

- All required, as applicable
- University/Department
- Discipline/Profession/Interdisciplinary Areas
- Public/External/Community, Legislative hearing/testimony (local, state, federal) may be included here, or in Extension, Outreach, and External Engagement.
    - It is desirable for faculty to document collaborations and partnerships as reports from Works will then assist with awareness and relationship development across the College. Include a brief description of the focus for the partnership.
- Mentoring/Career Advising
    - Enter colleagues you have mentored. Do not enter mentoring/advising of students, postdocs, or other trainees

Extension, Outreach, and External Engagement

- All required, as applicable
- International Engagement Summary
- Outreach and Community/Public/Private Partnerships Summary
    - It is desirable for faculty to document collaborations and partnerships as reports from Works will then assist with awareness and relationship development across the College. Include a brief description of the focus for the partnership.
    - **NOTE** - Faculty are highly encouraged to enter community engagement initiatives in the UMN Office of Public Engagement Footprint, a database and map that outlines the University's service, outreach and community engagement across Minnesota and beyond.
- Consulting and Professional Consultations
- Media Appearances and Interviews
- Legislative hearing/testimony (local, state, federal) may be included here or in Service.

Contact Information, Recognition, and Web Profile

- Personal and Contact Information Required
- Honors and Recognition Required, if applicable
- Biography and Expertise (Web Profile) Optional

Education and Appointments

- All required
- Education

- Graduate/Post-Professional Training (Practicums, Residencies, Fellowships, and Visiting Engagements)
- Current Position and Employment History
- Administrative Appointments
- Licensures and Certifications
- Professional Memberships
- Professional Development
    - Mentoring received: For your primary mentors, select “Mentorship” from the “Activity Type” drop-down and include the name of your mentor, the number of hours spent, and key career development items

Step 3: Enter Additional, Optional Activities and Accomplishments: Faculty accomplishments are many and varied. Screens exist in Works to capture the full range of faculty activities, and you are encouraged to explore. **Detailed data-entry, importing, and reporting guides can be found here.**

Step 4: Run Your Annual Activity Report: Once you have completed entering your activities (or at any point during the process to view progress), you can run a report. Click on *Rapid Reports.* Select the specific report (in this case, select: “Annual Activity Report, Health Sciences”), the dates, and the file format. Click on *Run Report.* Save a copy of your report for your records and forward a copy to your department head if requested.

Notes:

1. Faculty hired July 1, 2017 or later are required to use Works for the generation of their CV for Promotion and Tenure.
2. Additional guides and training can be found at http://works.umn.edu/guides-and-training