

Faculty Steps for Annual and CPE Reviews

- Go to DM and click on Workflow in your Menu Bar (it might be under Dropdown Tab "More");
- Click on Tasks;
- See your dossier in your "inbox";
- Click on the title;
- Fill out the faculty step screen;
- Click on the pdf icon to make sure the report is as you like it;
- Make any changes in DM;
- Click "refresh report";
- Check the dossier again to see if your changes (if any) came in;
- When you are ready, click on the button on the upper right hand of the page to route your review to the next step
- If you run a report to check on things, use 9/01/2020-12/31/2020 (this is to catch any date issues in publications, etc)