



SOLA

User Manual for Trainees

Technical considerations

SOLA is web- based trainee management system with integrated logbook which records trainee progress through the SET training programme.

SOLA has been designed from the start to work effectively on hand held devices – the display is responsive and is maximised to the device used for access with current hand held technologies.

SOLA is compatible with all commonly used internet browsers. Please be aware that if the device you are using is running older versions of browser, as sometimes happens within some DHBs, some of the functionality may be compromised. As a rule of thumb, browsers version n-2 and beyond should work efficiently.

Logging in

The link for SOLA is <https://portal.nzags.co.nz> or through the SOLA tab on the www.nzags.co.nz website.

Trainees and supervisors will be set up within the system using their usual email address as the username and a system-generated password which can be reset by the user.

NZAGS Apply Now Sign In

You need to sign in or sign up before continuing

Sign-in : SOLA (Surgical Online Logbook and Assessments)

Trainees only: The SOLA training manual and notes on how to complete the logbook please see the SOLA section on the NZAGS website (you will need to be logged in). www.nzags.co.nz

Assessments - remember to upload these via SOLA in the "Assessment" section. Choose the correct rotation, your current SET level and browse for your assessment. Continue to add operative and non-operative procedures to your SOLA logbook during the rotation.

Hospital Supervisors: Approving logbooks - one logged in, go to 'your trainees' tab which allows you to view in detail all the procedures each trainee has performed. You have an option to approve or reject each logbook.

Sign In

Email:

Password:

☐ Remember me

Users who forget their password can request a new password independently of the administrator.

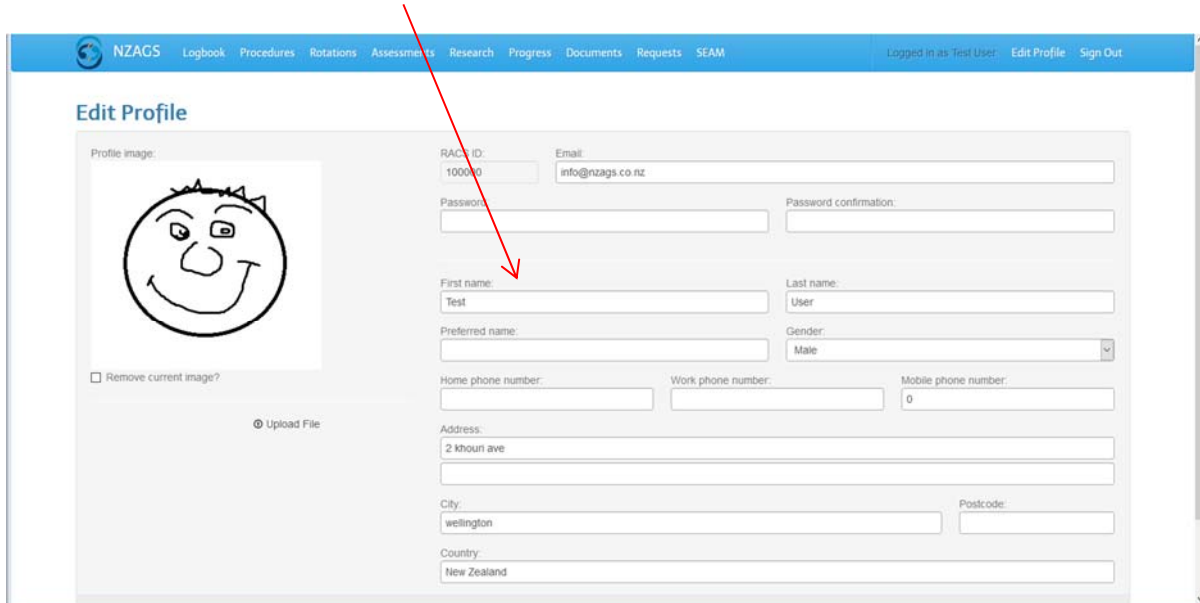
Edit profile and change password

You can edit your contact details and your password by selecting “Edit profile” from the top menu:-



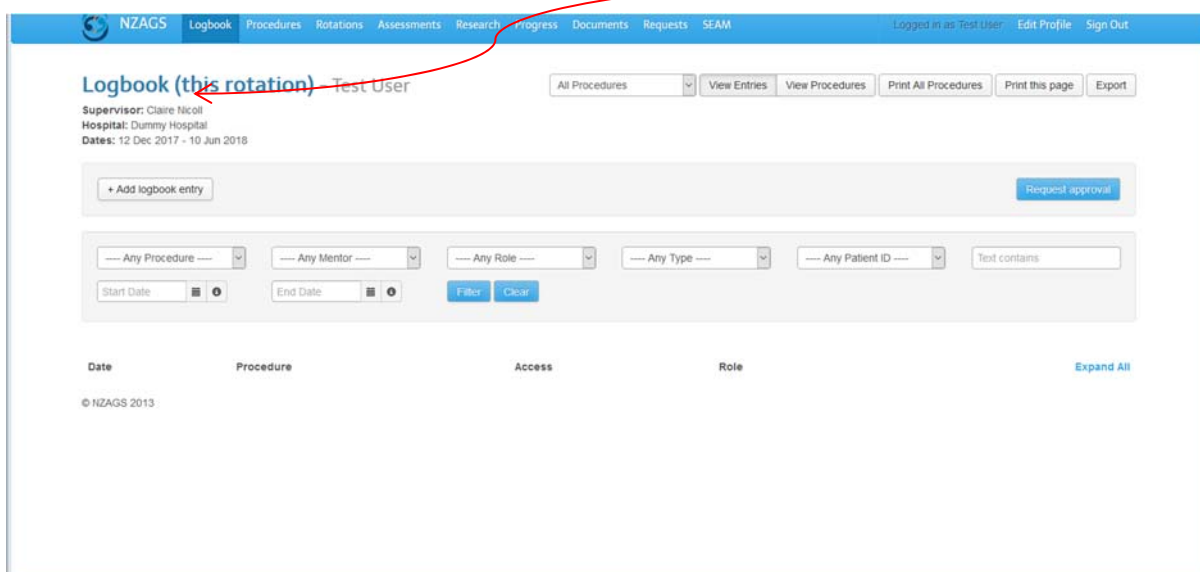
Please ensure contact details are kept up to date and that there is always a current mobile number and street address entered. Please do not remove your photo image!

Changing your password:-



Navigation

There are 9 tabs on the SOLA menu. The grey bar below the menu shows you where you are within each tab. The default tab (if you are in a rotation) is the logbook view:-



In summary the 9 tabs have the following functionality and permissions:-

Logbook (default tab)

- Enter/edit/delete/expand/collapse procedures and cases for current rotation
- Request logbook approval
- Editing permissions: owner trainee **only**
- Viewing permissions: owner trainee, trainee hospital supervisor, administrator

Procedures

- View individual procedures from all rotations, **including current rotation**
- View summary of procedure and category totals
- Editing permissions: “outcome”, “complications” and “comments” fields only
- Viewing permissions: owner trainee, hospital supervisor, administrator

Rotations

- View all current and completed rotations
- You can view the logbooks associated with these rotations using the “Logbook Entries” next to any given rotation
- Editing permissions: administrator only
- Viewing permissions: owner trainee, administrator, Supervisor (through your progress page)

Assessments

- Upload supervisor approved assessments
- View assessments
- Editing permissions: owner trainee, administrator (grading only)
- Viewing permissions: owner trainee, administrator, (**not** hospital supervisor)

Research

- Submit Research Prior Approval, Progress, Approval and supporting documents for NZ Training Committee to review
- Editing permissions: owner trainee, administrator (to annotate progress)
- Viewing permissions: owner trainee, administrator, (**not** hospital supervisor)

Progress

- View progress against all SET training requirements, including skills course, exams, SEAM, research etc.
- View logbook totals
- Editing permissions: administrator only, with Board authority –NB some fields update automatically
- Viewing Permissions: owner trainee, supervisor, administrator

Documents

- View other training documents, e.g. official letters
- Uploading documents by trainee
- Editing permissions: Trainees can add only, administrator can add and delete
- Viewing permissions: owner trainee, administrator, (**not** hospital supervisor)

Requests

- Upload trainee requests – N.B any request to do with research should be uploaded on that tab
- Using this function automatically sends an email to the Training Manager for action

SEAM

- Direct link to SEAM modules

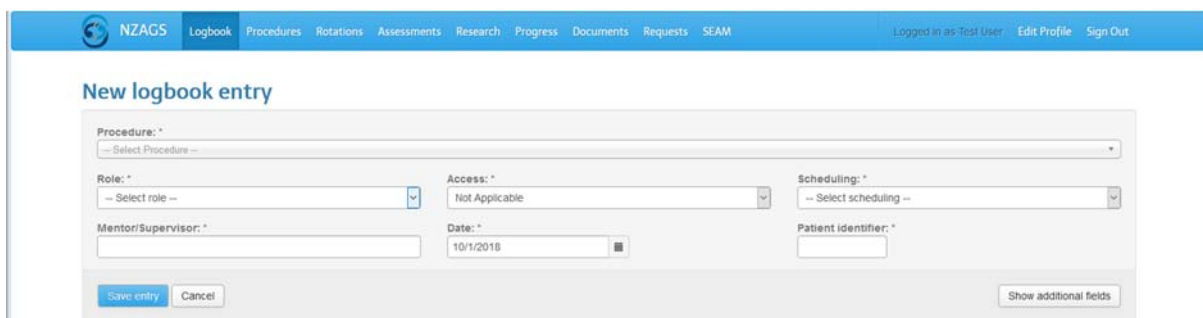
1. Logbook tab

This tab is for entering data into the current rotation logbook. You can toggle between viewing your entries and the running totals of all your procedures using the tabs on the right. The procedures tab is for reviewing each entry. It is through this tab that logbooks are sent to supervisors for approval. Procedures nested in logbooks which have been approved do not appear under this tab, only within the “Procedures” tab.

Entering data

The SOLA logbook allows efficient record entry.

The logbook entry tab provides the following template:-



The minimum dataset for each entry is just 6 fields for operative procedures. Non-operative case can also be logged but this is no longer mandatory. Should the user wish to collect additional data, the “Show additional fields” button provides some options and free text boxes. There is the ability to collect more information for each case on a voluntary basis. The 6 mandatory fields are:-

Procedure: Select procedures from drop down list or commence typing procedure name.

Each procedure/case automatically assigns the entry to the appropriate of the category - (Major/Minor/Colonoscopy/Endoscopy/Non-operative) and provides a total on the “Procedures”

tab. The totals for each category will automatically update on the “progress” page once approved by the supervisor.

Can't find the procedure you are looking for?

For all procedures/cases with the term “other” in the title, the user will be asked to complete more information. **Only use this option for unusual cases where you are sure there are no other suitable procedure names.** The “other” sections will be monitored to identify potential gaps in the operative procedure list, so it is important these headings are only used accurately to reflect the unusual and emerging surgeries.

Specific procedure rules

Colonoscopy and Endoscopy cases generate entry forms to comply with the requirements of the New Zealand Conjoint Committee for Recognition in Gastrointestinal Endoscopy. Trainees will be able to select these categories to print off for individual approval by the appropriate supervisor.

The **colonoscopy entry template**:-

The screenshot shows the 'New logbook entry' form in the NZAGS system. The 'Procedure' dropdown is set to 'Colonoscopic dilatation'. The form includes fields for Role, Sedation by, Completed unassisted, Mentor/Supervisor, Patient gender, Scheduling, Intact colon, Insertion time, Date, Patient date of birth, Scope passed to, Total anus to anus time, and Patient identifier. There are 'Save entry', 'Cancel', and 'Show additional fields' buttons at the bottom.

The **endoscopy entry template**:-

The screenshot shows the 'New logbook entry' form in the NZAGS system. The 'Procedure' dropdown is set to 'Endoscopy, diagnostic other'. The form includes fields for Role, Completion status, Mentor/Supervisor, Patient gender, Scheduling, Sedation by, Unassisted therapeutic procedure, Date, Patient date of birth, and Patient identifier. There are 'Save entry', 'Cancel', and 'Show additional fields' buttons at the bottom.

For **breast** surgery there are additional fields to complete for the associated lymph node procedures.

The screenshot shows the 'New logbook entry' form in the NZAGS system. The form is titled 'New logbook entry' and has a blue header bar with the NZAGS logo and navigation links: Logbook, Procedures, Rotations, Assessments, Research, Progress, Documents, Requests, and SEAM. The user is logged in as 'Test User' and can edit their profile or sign out. The form fields are as follows:

- Procedure:** A dropdown menu with 'Mastectomy' and 'Axillary dissection' options.
- Role:** A dropdown menu with '-- Select role --'.
- Access:** A dropdown menu with 'Not Applicable'.
- Scheduling:** A dropdown menu with '-- Select scheduling --'.
- Mentor/Supervisor:** A text input field.
- Date:** A date picker showing '10/1/2018'.
- Patient Identifier:** A text input field.

At the bottom of the form, there are three buttons: 'Save entry', 'Cancel', and 'Show additional fields'.

Mandatory fields

Role: Each procedure entered has rules built in to calculate whether the case counts as a “Primary Operator” procedure. (This field does not display for non-operative cases)

Access: Chose from Open/Laparoscopic/Open>Laparoscopic/Not applicable. (This field does not display for non-operative cases, colonoscopies or endoscopies).

An inbuilt rule in ensures that for inguinal and femoral hernias completed by laparoscope or laparoscope>open count as major rather than minor procedures.

Scheduling: To record if the surgery was acute or elective. (This field does not display for non-operative cases).

Date: Defaults to that day. Selection of alternative dates is through calendar provided or typing in to required format.

Patient identifier: Enter the patient NHI in standard format of seven alphanumeric characters. This field can auto populate so take care!

Mentor/supervisor (NB for that case): This is to record the mentor/supervisor for **that** procedure/case. The rotation each trainee is assigned to automatically maps to the hospital supervisor for logbook approval. This field can auto populate for faster data entry.

Additional Fields

The screenshot shows the 'New logbook entry' form in the NZAGS system. The form is titled 'New logbook entry' and has a blue header bar with the NZAGS logo and navigation tabs: Logbook, Procedures, Rotations, Assessments, Research, Progress, Documents, Requests, and SEAM. The user is logged in as 'Test User' and can click 'Edit Profile' or 'Sign Out'. The form contains several fields: 'Procedure:' with a dropdown menu showing 'Mastectomy' and 'Auxiliary dissection'; 'Role:' with a dropdown menu showing '-- Select role --'; 'Access:' with a dropdown menu showing 'Not Applicable'; 'Scheduling:' with a dropdown menu showing '-- Select scheduling --'; 'Mentor/Supervisor:' with a text input field; 'Date:' with a date picker showing '10/1/2018'; and 'Patient identifier:' with a text input field. At the bottom left are 'Save entry' and 'Cancel' buttons. At the bottom right is a 'Show additional fields' button, which is highlighted by a red arrow.

Need to record more information? Simply select “Show additional fields”. There are a number of predetermined fields, none of which are currently mandatory. There are free text fields for complications (which can auto populate for consistency) and comments. You can edit records at any time until they have been approved by the supervisor. See following screen shot:-

The screenshot shows the 'New logbook entry' form in the NZAGS system, expanded to show additional fields. The form is titled 'New logbook entry' and has a blue header bar with the NZAGS logo and navigation tabs: Logbook, Procedures, Rotations, Assessments, Research, Progress, Documents, Requests, and SEAM. The user is logged in as 'Test User' and can click 'Edit Profile' or 'Sign Out'. The form contains several fields: 'Procedure:' with a dropdown menu showing 'Mastectomy' and 'Auxiliary dissection'; 'Role:' with a dropdown menu showing '-- Select role --'; 'Access:' with a dropdown menu showing 'Not Applicable'; 'Scheduling:' with a dropdown menu showing '-- Select scheduling --'; 'Mentor/Supervisor:' with a text input field; 'Date:' with a date picker showing '10/1/2018'; 'Patient identifier:' with a text input field; 'Patient gender:' with radio buttons for 'Male' and 'Female'; 'Patient date of birth:' with a date picker showing 'dd/mm/yyyy'; 'Patient ASA score:' with a dropdown menu showing '1'; 'Admission date:' with a date picker showing 'dd/mm/yyyy'; 'First surgery date:' with a date picker showing 'dd/mm/yyyy'; 'Discharge date:' with a date picker showing 'dd/mm/yyyy'; 'Outcome:' with a dropdown menu showing '-- Select outcome --'; 'Return to theatre expected:' with radio buttons for 'yes' and 'no'; 'Readmitted:' with radio buttons for 'yes' and 'no'; 'Complications:' with a text input field; and 'Comments:' with a text input field.

Saving entries

Once you have entered the record, use the “Save entry” button. If mandatory fields have been left blank, the record will not save until rectified.

Editing/deleting/expanding

From the logbook tab you can use “Edit”, “Delete” and “Expand all” which displays all the completed fields (blank fields are not displayed). Use the “Collapse” all button for the summary view.

NZAGS Logbook Procedures Rotations Assessments Research Progress Documents Requests SEAM Logged in as Test User Edit Profile Sign Out

Procedures (all rotations) - Test User Breast

Print All Procedures Print this page Export

Any Procedure Any Mentor Any Role Any Type Any Patient ID Text contains

Start Date End Date Filter Clear

Date	Procedure	Access	Role	
7 November 2017	Microdochectomy (Sentinel node biopsy)	Laparoscopic	Surgeon Mentor in Theatre	Edit Delete
Mentor/Supervisor:	mike smith	Scheduling:	Acute	Patient identifier: abc1234
Readmitted:	No			
31 October 2017	Breast abscess procedure (Axillary dissection)	Laparoscopic > Open	Surgeon Mentor Scrubbed	Edit Delete
Mentor/Supervisor:	j smith	Scheduling:	Acute	Patient identifier: mnb7654
Readmitted:	No			
19 January 2017	Mastectomy (Sentinel node biopsy)	Open	Surgeon Mentor Scrubbed	Edit Delete
Mentor/Supervisor:	cn	Scheduling:	Acute	Patient identifier: abc1236
Readmitted:	No			
19 January 2017	Breast reconstruction, LD flap (Sentinel node biopsy with axillary dissection)	Open	Surgeon Mentor Scrubbed	Edit Delete
Mentor/Supervisor:	cn	Scheduling:	Acute	Patient identifier: abc1237
Readmitted:	No			
19 January 2017	Breast reconstruction, TRAM flap (Axillary dissection)	Not Applicable	Surgeon Mentor Scrubbed	Edit Delete
Mentor/Supervisor:	cn	Scheduling:	Acute	Patient identifier: abc1238
Readmitted:	No			

Request approval

NZAGS Logbook Procedures Rotations Assessments Research Progress Documents Requests SEAM Logged in as Test User Edit Profile Sign Out

Entry saved

Logbook (this rotation) - Test User All Procedures View Entries View Procedures Print All Procedures Print this page Export

Supervisor: Claire Nicoll
Hospital: Dummy Hospital
Dates: 12 Dec 2017 - 10 Jun 2018

+ Add logbook entry [Request approval](#)

Any Procedure Any Mentor Any Role Any Type Any Patient ID Text contains

Start Date End Date Filter Clear

Date	Procedure	Access	Role	
10 January 2018	Adhesiolysis + resection	Laparoscopic > Open	Surgeon Mentor Available	Edit Delete
10 January 2018	Breast reconstruction, LD flap (Axillary dissection)	Open	Surgeon Mentor Available	Edit Delete

At the end of the rotation (**and only then**) trainees will be required to submit the current logbook to the supervisor for that hospital. The following applies:-

- **Only select the “Request approval” button once you have entered all the mandatory data for procedures/cases pertinent to that rotation.** Using this button sends an email request to your supervisor.
- If you accidentally submit the logbook before then you can select the “Withdraw approval request”. However, this does not alert your supervisor via email, but it will unlock the logbook for you to add or edit entries.

NZAGS Logbook Procedures Rotations Assessments Research Progress Documents Requests SEAM Logged in as Test User Edit Profile Sign Out

Your logbook has been submitted to Claire Nicoll for approval.

Logbook (this rotation) - Test User All Procedures View Entries View Procedures Print All Procedures Print this page Export

Supervisor: Claire Nicoll
Hospital: Dummy Hospital
Dates: 12 Dec 2017 - 10 Jun 2018

+ Add logbook entry Approval requested on 10 January 2018 [Withdraw approval request](#)

- If the user is going to be absent at the end of the rotation, the logbook can be submitted up to two weeks before the end of the rotation as per the General Surgery regulations.
- If the logbook is not approved or rejected within 7 days you will be advised by email to follow up with your supervisor. After the 2 week deadline has passed, the administrator will follow up with the supervisor.
- A supervisor can reject a logbook and request changes, the trainee will then have the opportunity to edit the records accordingly and resubmit.
- Once the logbook has been approved, the records are locked and no further editing can occur except the the following fields:-
 - Outcome
 - Complications
 - Comments

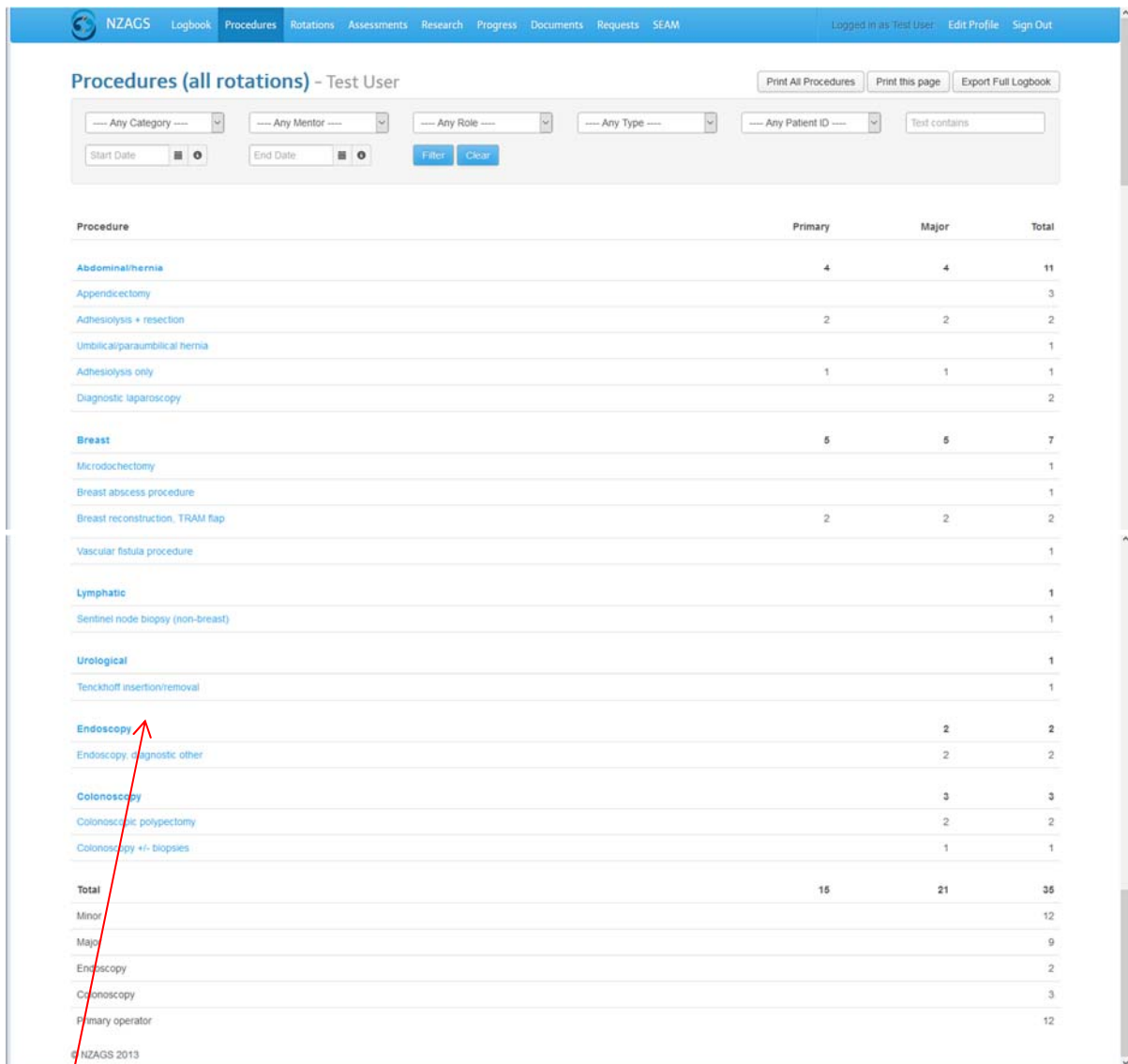
Logbook database

Please note the following regarding the data entered:-

- As each record is saved, the running totals on both the “Procedures” and “Progress” tabs update. This is not dependent on approval status, so you can print out unapproved procedures at any time.
- Each record calculates whether the procedure counts as a “Primary Operator” procedure automatically dependent on role.
- Please note that procedures denoted as “Major” completed in SET 1 do not contribute to the total “Majors” as per the regulations. Note, only the number of SET 1 majors is set back to zero – any major procedures completed as a SET 1 trainee are still in the system for reference. The same applies for any procedures completed during interruption.
- When a trainee has procedures approved as part of a “Request for Prior Learning” that have not been entered directly into SOLA, these will be added manually to the “Progress” tab running total, but will not appear on the “Procedures” or “Logbook” tabs.

2. Procedures tab

Use this tab for the summary view of all logbook procedures.



Procedures (all rotations) - Test User

Print All Procedures | Print this page | Export Full Logbook

Any Category | Any Mentor | Any Role | Any Type | Any Patient ID | Text contains

Start Date | End Date | Filter | Clear

Procedure	Primary	Major	Total
Abdominal/hernia	4	4	11
Appendectomy			3
Adhesiolysis + resection	2	2	2
Umbilical/paraumbilical hernia			1
Adhesiolysis only	1	1	1
Diagnostic laparoscopy			2
Breast	5	5	7
Microdochectomy			1
Breast abscess procedure			1
Breast reconstruction, TRAM flap	2	2	2
Vascular fistula procedure			1
Lymphatic			1
Sentinel node biopsy (non-breast)			1
Urological			1
Tenckhoff insertion/removal			1
Endoscopy		2	2
Endoscopy, diagnostic other		2	2
Colonoscopy		3	3
Colonoscopic polypectomy		2	2
Colonoscopy +/- biopsies		1	1
Total	15	21	35
Minor			12
Major			9
Endoscopy			2
Colonoscopy			3
Primary operator			12

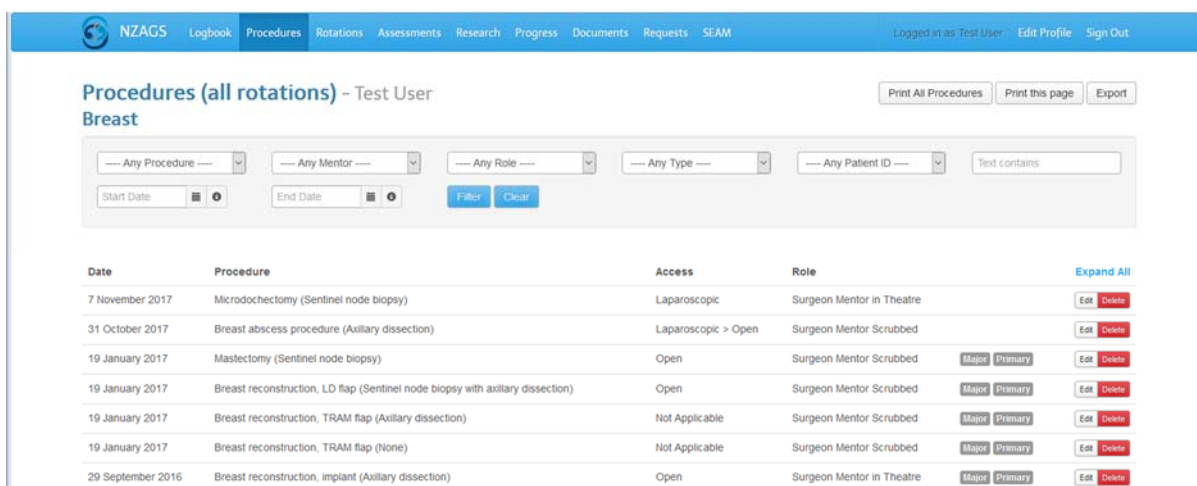
© NZAGS 2013

The running totals appear next to the appropriate category group, and summary group at the end of the screen.

You can drill down each category or procedure as they are all hyperlinked, by clicking on the term of interest.

You can view all procedures by category type by selecting from the "All Procedures" tab.

For example – if you select “Breast” you will see all current logbook entries for this category.

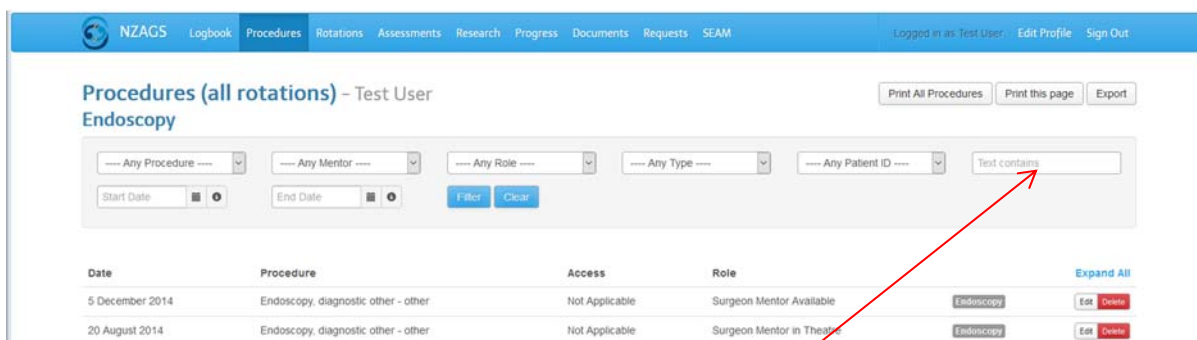


Date	Procedure	Access	Role	Expand All
7 November 2017	Microdochectomy (Sentinel node biopsy)	Laparoscopic	Surgeon Mentor in Theatre	Edit Delete
31 October 2017	Breast abscess procedure (Axillary dissection)	Laparoscopic > Open	Surgeon Mentor Scrubbed	Edit Delete
19 January 2017	Mastectomy (Sentinel node biopsy)	Open	Surgeon Mentor Scrubbed	Major Primary Edit Delete
19 January 2017	Breast reconstruction, LD flap (Sentinel node biopsy with axillary dissection)	Open	Surgeon Mentor Scrubbed	Major Primary Edit Delete
19 January 2017	Breast reconstruction, TRAM flap (Axillary dissection)	Not Applicable	Surgeon Mentor Scrubbed	Major Primary Edit Delete
19 January 2017	Breast reconstruction, TRAM flap (None)	Not Applicable	Surgeon Mentor Scrubbed	Major Primary Edit Delete
29 September 2016	Breast reconstruction, implant (Axillary dissection)	Open	Surgeon Mentor in Theatre	Major Primary Edit Delete

Printing/filtering/exporting your logbook

Use the “Print” or “Export” button on either the “logbook” tab. Note in the “Procedures” view the “Export Full Logbook” button will export all completed fields for all the procedures in SOLA. With the “print” options, only procedures and/or categories where there are entries will appear, i.e. null fields will not be printed.

By selecting a category, you can also print out groupings – for example all endoscopies.



Date	Procedure	Access	Role	Expand All
5 December 2014	Endoscopy, diagnostic other - other	Not Applicable	Surgeon Mentor Available	Endoscopy Edit Delete
20 August 2014	Endoscopy, diagnostic other - other	Not Applicable	Surgeon Mentor in Theatre	Endoscopy Edit Delete

There are a number of filters available in both the “Logbook” and “Procedures” views. For example, you can select a patient ID should you wish to update the case with outcomes or complications.

You can also do free text searches using “Text contains” where you have added more information, for example under complications. Please note that this filter only works for the “comments”, “complications” and “please specify” fields.

3. Rotations tab

This tab summarises the trainee rotations, with current rotation at the top, previous rotations in reverse order to the first rotation. You can view the relevant logbook entries for that rotation from this tab which is a much neater way than using the filter option in the “procedures” view.

4. Assessments tab

This tab is for the uploading of supervisor approved, scanned assessments. The “grade” of the assessment is recorded by the administrator and all assessments uploaded into SOLA are available through this tab for viewing by the trainee.

Select the rotation and the assessment type from the drop down list, then browse to upload file.

Submitted At	Rotation	SET Level	Assessment	File Attached	Grade
Mon, 01 Dec 2014 10:25 +1300	Dummy Hospital (09 Jun 2014 - 08 Dec 2014)	1	Mini-CEX	tori_o_miniCEX.pdf	This assessment has not yet been reviewed

Previously uploaded assessments appear here with the grade once completed by administrator. Supervisors do not have read or write access to this page.

5. Research tab

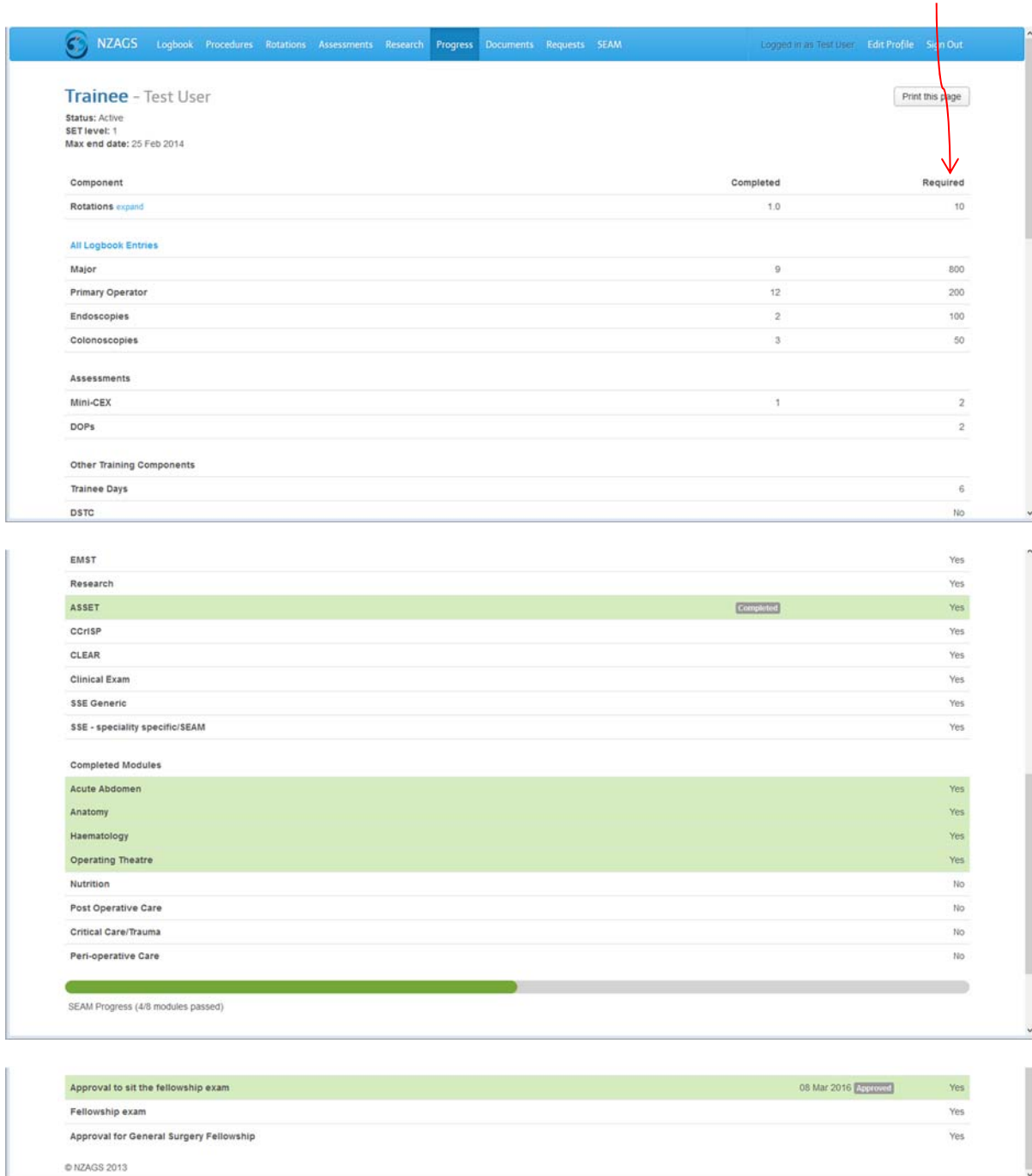
This tab allows you to upload your research documents for approval and works just like the assessments tab.

Submitted	SET Level	File Attached	File Type	Notes	Status	Date
Tue, 31 Oct 2017 10:40:00 +1300	1	Pacific_Surgeon_Fund_announcement.pdf	Prior Approval Form		Declined	31 Oct 2017

Once uploaded, the administrator will be notified automatically and schedule your documents to be discussed at the next Training Committee meeting. The administrator will add notes to your records so you can track progress. The outcome of the Training Committee will be recorded for each submission.

6. Progress tab

This tab shows your progress against your requirements for completing SET –once the requirement is achieved it will display as green. It is specific for each trainee – e.g., if you entered training at SET 2 the number of rotations required would be 8.



Trainee - Test User
 Status: Active
 SET level: 1
 Max end date: 25 Feb 2014

Print this page

Component	Completed	Required
Rotations expand	1.0	10
All Logbook Entries		
Major	9	800
Primary Operator	12	200
Endoscopies	2	100
Colonoscopies	3	50
Assessments		
Mini-CEX	1	2
DOPs		2
Other Training Components		
Trainee Days		6
DSTC		No
EMST		Yes
Research		Yes
ASSET	Completed	Yes
CCRISP		Yes
CLEAR		Yes
Clinical Exam		Yes
SSE Generic		Yes
SSE - speciality specific/SEAM		Yes
Completed Modules		
Acute Abdomen		Yes
Anatomy		Yes
Haematology		Yes
Operating Theatre		Yes
Nutrition		No
Post Operative Care		No
Critical Care/Trauma		No
Peri-operative Care		No
SEAM Progress (4/8 modules passed)		
Approval to sit the fellowship exam	08 Mar 2016	Approved Yes
Fellowship exam		Yes
Approval for General Surgery Fellowship		Yes

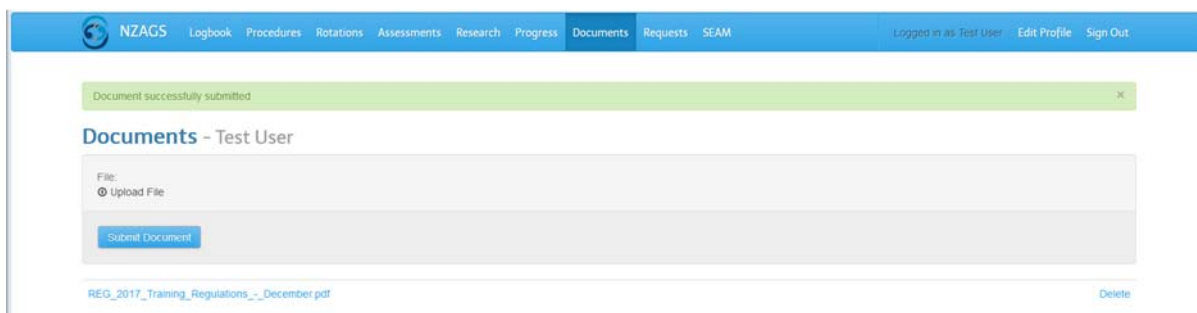
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Please note that the running totals on the progress page includes any unapproved procedures from your current logbook. In the event that a trainee has an approved RPL for procedures, the administrator can amend these totals with authority from the Board on this page.

Approvals for sitting exams or gaining Fellowship will be dated.

7. Documents tab

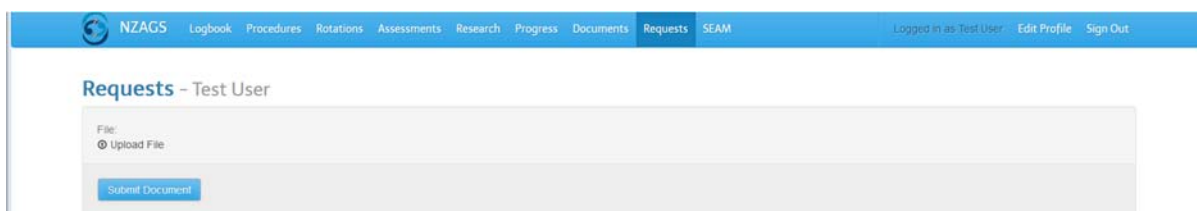
All documentation other than assessments and research documentation will be available here. This includes official letters from the Board, historical digitalised records (logbooks completed before SOLA was implemented) and any correspondence/requests from trainees to the Board, e.g. requests for interruption.



Administrators will use file naming conventions so documents are easily identifiable from their title. You can add your own documents e.g. course certificates to this tab. Please note you do not have permission to delete administrator-uploaded documents, but you can delete anything you upload.

8. Requests tab

Please use this tab to upload any trainee request for the Training Committee to consider e.g. leave and RPL requests. Please use the “Research tab” for anything to do with research.



9. SEAM tab

This tab has been added for the convenience of those doing SEAM – it links directly to the SEAM login page.

You can check your progress with SEAM on the **Progress tab** which records the modules you have passed.

Help or suggestions?

For any problems or suggestions for improvements, please contact Helen Glasgow or Claire Nicoll in the NZAGS office via email or 04 3843355.

Version control	
Updated	7/4/2014
Updated	2/12/2014
Updated	10/1/2018
Updated	20/9/2018