

# SOLA User Manual

## for Supervisors

### Technical considerations

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

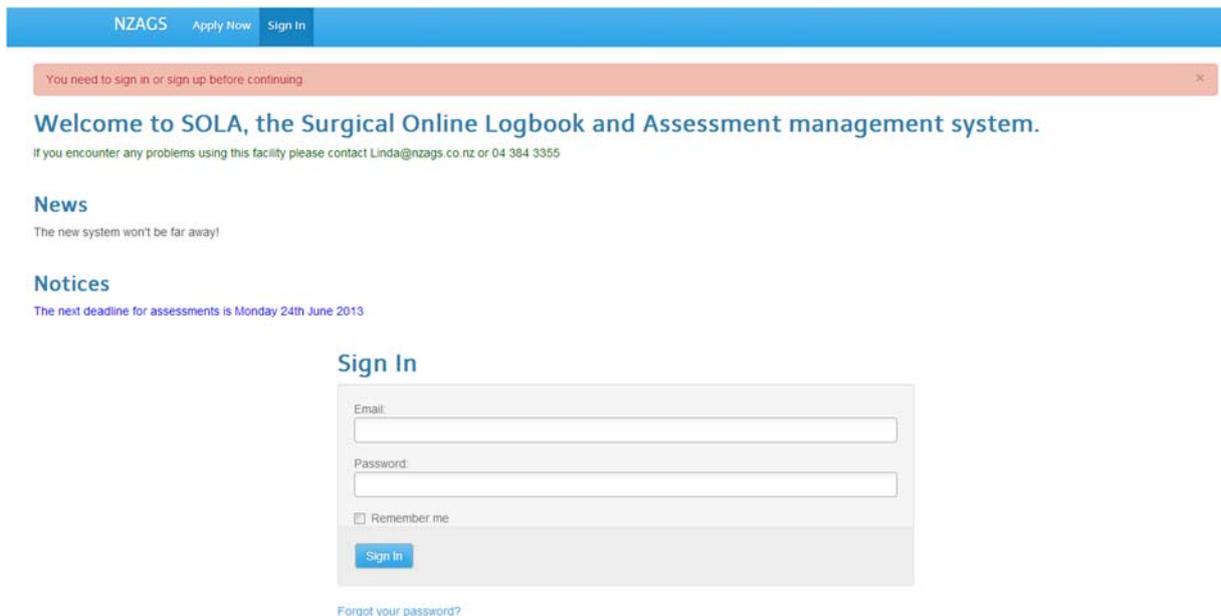
SOLA has been designed from the start to work effectively on hand held devices – the display is responsive and is maximised to the device used for access with current hand held technologies.

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 (where n is the most recent version, e.g. Internet Explorer 8 and above).

### Logging in

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

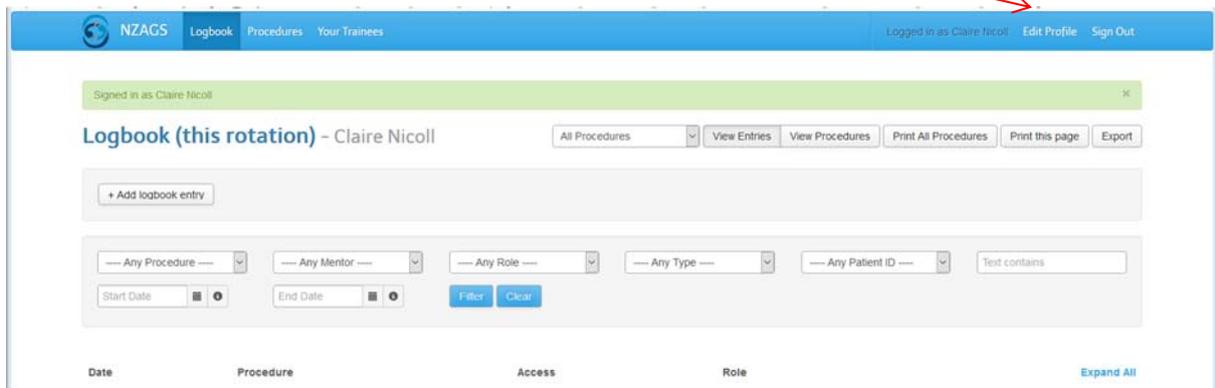


The screenshot shows the SOLA login interface. At the top, there is a blue navigation bar with 'NZAGS', 'Apply Now', and 'Sign In' links. Below this is a red error message: 'You need to sign in or sign up before continuing'. The main heading reads 'Welcome to SOLA, the Surgical Online Logbook and Assessment management system.' followed by contact information: 'If you encounter any problems using this facility please contact Linda@nzags.co.nz or 04 384 3355'. There are sections for 'News' (with the text 'The new system won't be far away!') and 'Notices' (with the text 'The next deadline for assessments is Monday 24th June 2013'). The 'Sign In' section contains a form with 'Email' and 'Password' input fields, a 'Remember me' checkbox, and a 'Sign In' button. A 'Forgot your password?' link is located below the form.

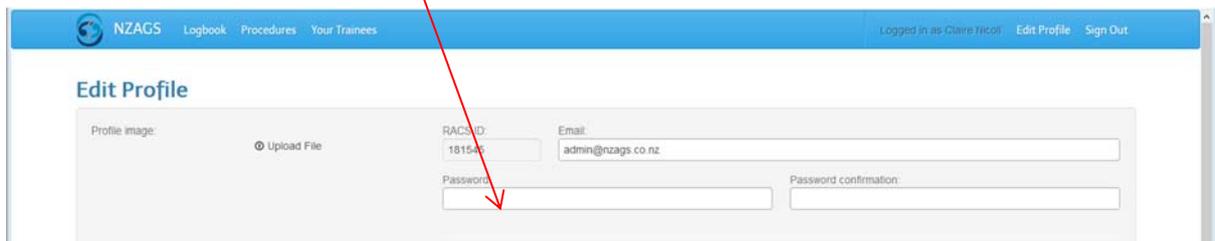
Users who forget their password can request a new password independently of the administrator.

## Your profile

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

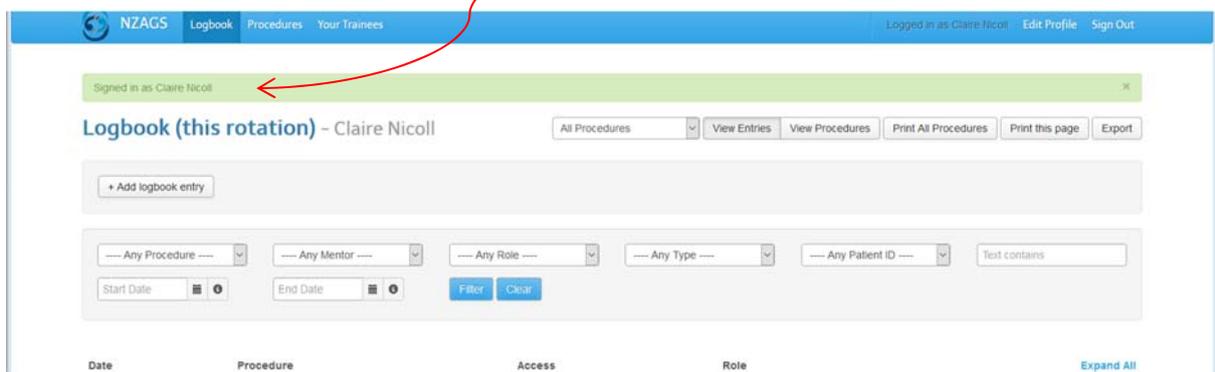


## Changing your password:-



## Navigation

There are 3 tabs on the SOLA menu. The grey bar below the menu shows you where you are within each tab. The default tab is the logbook view:-



In summary the 3 tabs have the following functionality and permissions:-

### Logbook

- This is for your use
- Enter/edit/delete/expand/collapse procedures and cases

- Editing permissions: owner **only**
- Viewing permissions: owner, administrator

## Procedures

- View individual procedures (if you used SOLA yourself as a trainee)
- View summary of procedure and category totals
- Viewing permissions: owner, administrator

## Your trainees

- View logbook entries, procedures and progress
- Notification of logbooks for approval
- Approval/rejection of logbooks

**As a supervisor, you will be primarily concerned with the “Your trainees” tab.**

## Your Trainees

You can only view the following for your **current** and **past** trainees.

- the current logbook using the “Logbook entries” tab
- the total procedures using the “Procedures” tab
- the trainee’s progress using the “Progress” tab
- keep track of logbook approvals



## Approving logbooks

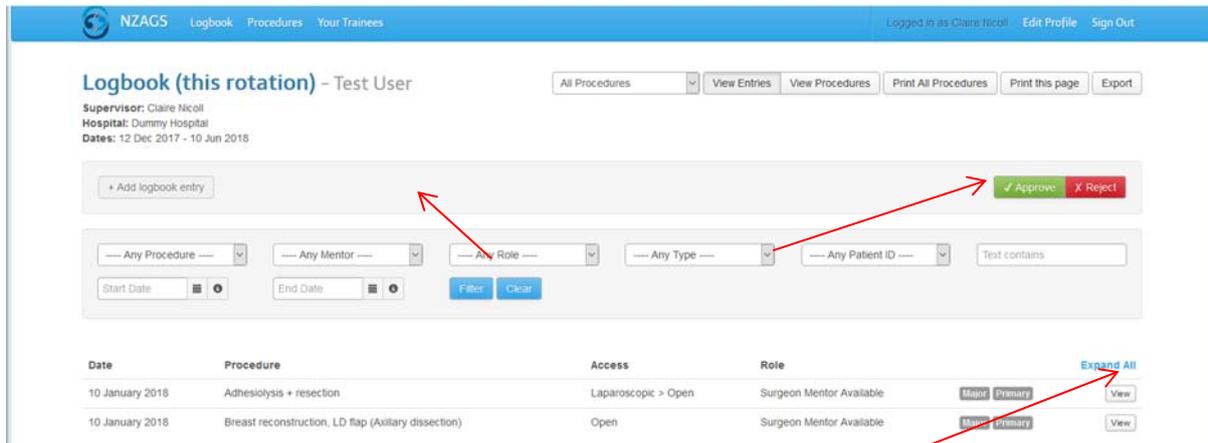
You will be notified by email when you have logbooks to review. **The email contains a link to SOLA to aid the process.**

**Please be aware that, depending on your spam filter, the email may be routed to your junk mail.**

You have 7 days to approve the logbook, before the trainee will be notified that no response has been received.

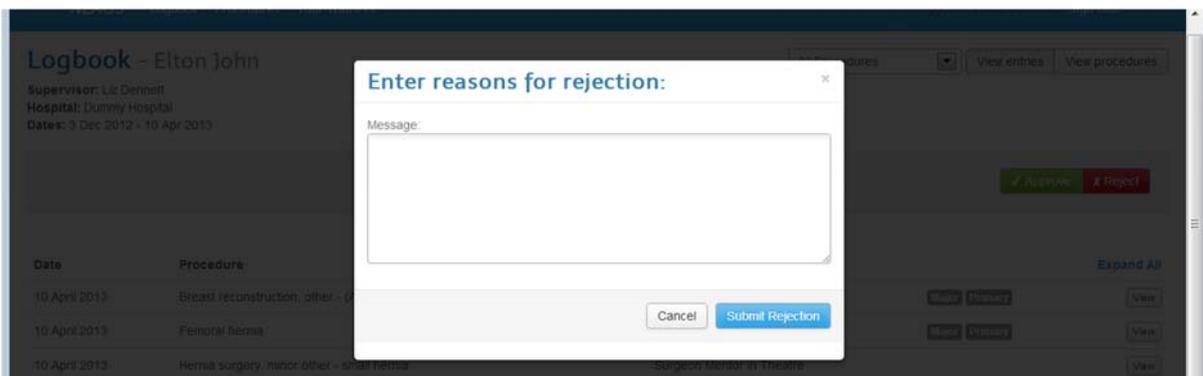
Your trainees will submit their logbooks for approval at the end of the rotation. You can identify which logbooks have been submitted from the “Your Trainees” tab on the top menu:-

The logbooks for approval will appear here. Click on logbook entries pertaining to the trainee to review.



Supervisors can expand the view to include all information provided using the “expand all” function.

Supervisors can approve or reject with comments. A comments box is provided for both instances:-



**Trainees** have been asked to take note of the following when requesting approval, **as supervisor please note the text in blue:-**

- **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. *Please note as a supervisor you will still get the alert email, but the logbook will not appear in the list for approval once “Withdraw approval request” has been lodged.*
- 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. *As supervisor, you will be notified if you have not approved/rejected a logbook within the time period. If for any reason you are unable to complete online approval, the administrator will elicit your approval by alternate means and process the logbook on your behalf.*
- 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.**

## Progress

The Progress tab for any of your trainees gives you the following view of overall trainee progress against training requirements which turn green once completed:-

You can expand the view of all the rotations your trainees have done to date:-

The screenshot shows the NZAGS portal interface. The user is logged in as Claire Nicoll. The page displays the progress for a trainee named 'Test User'. The 'Rotations' section is expanded, showing a table of rotation dates, hospitals, and specialities. Below the table is a summary of logbook entries for Major, Primary Operator, and Endoscopies.

| Component                          | Completed                | Required                   |
|------------------------------------|--------------------------|----------------------------|
| Rotations <a href="#">collapse</a> | 10                       | 10                         |
| <b>Rotation Date</b>               | <b>Rotation Hospital</b> | <b>Rotation Speciality</b> |
| 12 Dec 2017 - 10 Jun 2018          | Dummy Hospital           | General Surgery            |
| 12 Jun 2017 - 10 Dec 2017          | INTERRUPTED              | Other -                    |
| 12 Dec 2016 - 06 Jun 2017          | Dummy Hospital           | Colorectal                 |
| 13 Jun 2016 - 11 Dec 2016          | INTERRUPTED              | Colorectal                 |
| 07 Jun 2015 - 12 Dec 2015          | Dummy Hospital           | Colorectal                 |
| 09 Jun 2014 - 08 Dec 2014          | Dummy Hospital           | Colorectal                 |
| 09 Dec 2013 - 08 Jun 2014          | Dummy Hospital           | Colorectal                 |
| <b>All Logbook Entries</b>         |                          |                            |
| Major                              | 11                       | 800                        |
| Primary Operator                   | 14                       | 200                        |
| Endoscopies                        | 2                        | 100                        |

NZAGS Logbook Procedures Your Trainees Logged in as Claire Ficol Edit Profile Sign Out

Trainee - Test User Print this page

Status: Active  
SET level: 1  
Max end date: 25 Feb 2014

| Component                               | Completed            | Required |
|---|----------------------|----------|
| Rotations <a href="#">expand</a>        | 1.0                  | 10       |
| <b>All Logbook Entries</b>              |                      |          |
| Major                                   | 11                   | 800      |
| Primary Operator                        | 14                   | 200      |
| Endoscopies                             | 2                    | 100      |
| Colonoscopies                           | 3                    | 50       |
| <b>Assessments</b>                      |                      |          |
| Mini-CEX                                | 1                    | 2        |
| DOPs                                    |                      | 2        |
| <b>Other Training Components</b>        |                      |          |
| 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      |
| <b>Completed Modules</b>                |                      |          |
| Acute Abdomen                           |                      | Yes      |
| Anatomy                                 |                      | Yes      |
| Haematology                             |                      | Yes      |
| Operating Theatre                       |                      | Yes      |
| Nutrition                               |                      | No       |
| Post Operative Care                     |                      | No       |
| Critical Care/Trauma                    |                      | No       |
| Pre-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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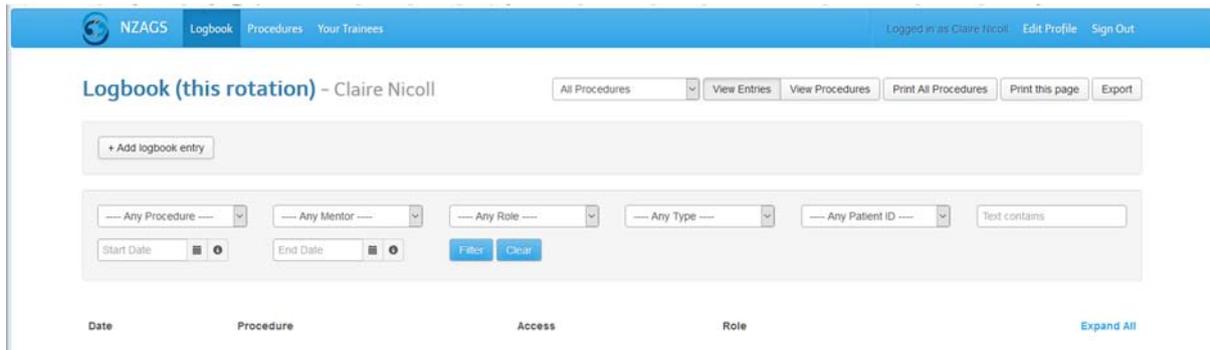
Please note that the running totals included here includes any **unapproved** procedures from the current logbook. In the event that a trainee has an approved RPL for procedures, the administrator can amend these totals with authority from the Board.

Approvals for sitting exams or gaining Fellowship are dated.

You can check how your trainees are doing on SEAM.

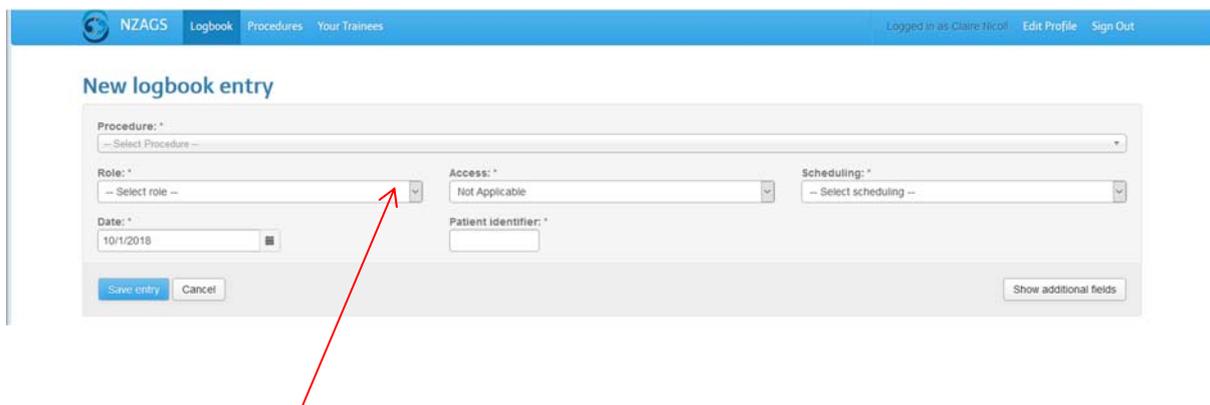
## Your Logbook tab

This tab is for entering data into the current 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.



## Entering data

The logbook entry tab provides the following template:-



The “role” field has 2 options – “responsible clinician” and “supervising trainee”.

The minimum dataset for each entry is just 6 fields for operative procedures and 3 for non-operative cases. 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.

**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. ***Trainees have been advised to use this option for unusual cases where they are sure there are no other suitable procedure names.***

### Specific procedure rules

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 'Procedure' dropdown menu is set to 'Mastectomy', and 'Auxiliary dissection' is listed below it. A red arrow points to this dropdown menu. Other fields include 'Role' (set to '-- Select role --'), 'Access' (set to 'Not Applicable'), 'Scheduling' (set to '-- Select scheduling --'), 'Date' (set to '10/1/2018'), and 'Patient identifier' (empty). There are 'Save entry' and 'Cancel' buttons at the bottom left, and a 'Show additional fields' button at the bottom right.

**Colonoscopy and Endoscopy** cases generate entry forms to comply with the requirements of the New Zealand Conjoint Committee for Recognition in Gastrointestinal Endoscopy. (***Note in the Trainee’s logbook, 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 for a Colonoscopy procedure. The 'Procedure' dropdown is set to 'Colonoscopy +/- biopsies'. Other fields include 'Role' (set to '-- Select role --'), 'Scheduling' (set to '-- Select scheduling --'), 'Sedation by' (set to '-- Select option --'), 'Intact colon' (radio buttons for 'yes' and 'no'), 'Scope passed to' (set to '-- Select option --'), 'Completed unassisted' (radio buttons for 'yes' and 'no'), 'Insertion time' (input field with 'mins' unit), 'Total anus to anus time' (input field with 'mins' unit), 'Date' (set to '10/1/2018'), 'Patient gender' (radio buttons for 'Male' and 'Female'), and 'Patient date of birth' (input field with 'dd/mm/yyyy' format). There are 'Save entry' and 'Cancel' buttons at the bottom left, and a 'Show additional fields' button at the bottom right.

The endoscopy entry template:-

The screenshot shows the 'New logbook entry' form in the NZAGS system. The form is titled 'New logbook entry' and is located under the 'Logbook' tab. The form contains several fields for data entry:

- Procedure:** A dropdown menu with 'Endoscopy, diagnostic other' selected and a text input field below it labeled 'Please specify'.
- Role:** A dropdown menu with 'Select role'.
- Completion status:** A dropdown menu with 'Select completion status'.
- Date:** A date input field showing '10/1/2018'.
- Patient gender:** Radio buttons for 'Male' and 'Female'.
- Patient date of birth:** A date input field with the format 'ddmm/yyyy'.
- Scheduling:** A dropdown menu with 'Select scheduling'.
- Sedation by:** A dropdown menu with 'Select sedation by'.
- Unassisted therapeutic procedure:** A dropdown menu with 'Select procedure'.
- Patient identifier:** A text input field.

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

**Role:** For trainees only 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, laparoscopies 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!

## Additional Fields

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. Trainees cannot edit procedures after you have approved their logbook except they can add outcomes, complications and comments. See following screen shot:-

New logbook entry

Procedure: \*  
Abdominal wall reconstruction

Role: \*  
Supervising Trainee

Access: \*  
Not Applicable

Scheduling: \*  
Acute

Date: \*  
7/4/2014

Patient Identifier: \*  
mnb8765

Patient gender:  
 Male  Female

Patient date of birth:  
dd/mm/yyyy

Patient ASA score:  
[ ]

Admission date:  
dd/mm/yyyy

First surgery date:  
dd/mm/yyyy

Discharge date:  
dd/mm/yyyy

Outcome:  
- Select outcome -

Return to theatre expected:  
 yes  no

Readmitted:  
 yes  no

Complications:  
[ ]

Comments:  
[ ]

Save entry Cancel Hide additional fields

## 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 Your Trainees Logged in as Claire Nicoll Edit Profile Sign Out

Entry saved

Logbook (this rotation) - Claire Nicoll All Procedures View Entries View Procedures Print All Procedures Print this page Export

+ Add logbook entry

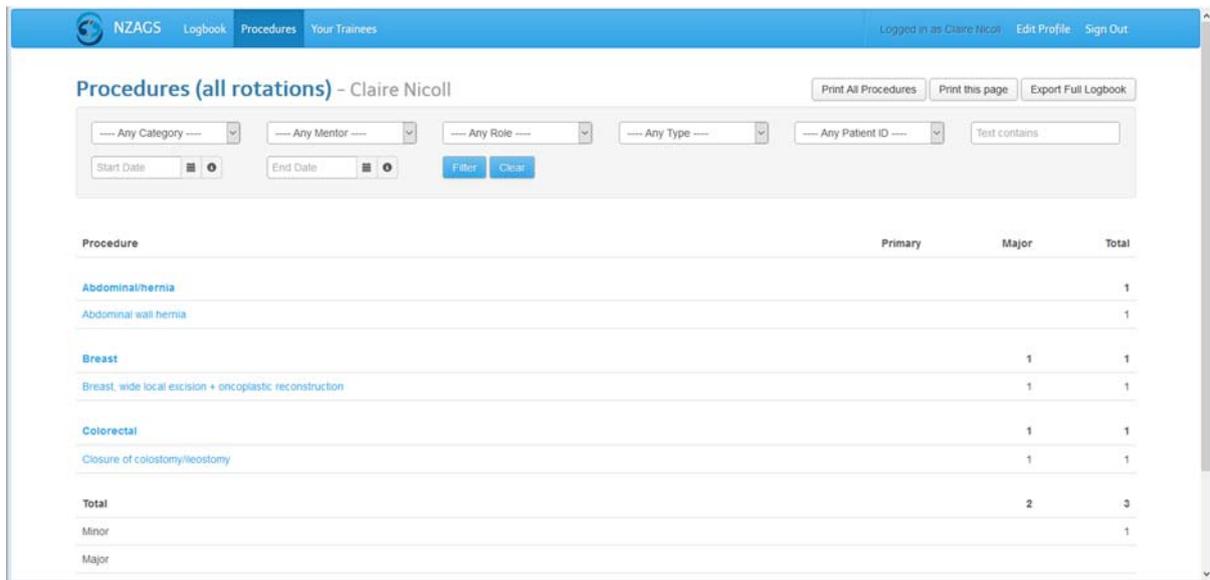
Any Procedure Any Mentor Any Role Any Type Any Patient ID Text contains

Start Date End Date Filter Clear

| Date            | Procedure  | Access         | Role                  | Expand All        |
|-----------------|--|----------------|-----------------------|-------------------|
| 10 January 2018 | Abdominal wall hernia  | Not Applicable | Responsible Clinician | Edit Delete       |
| 10 January 2018 | Breast, wide local excision + oncoplastic reconstruction (Axillary dissection) | Open           | Responsible Clinician | Major Edit Delete |
| 10 January 2018 | Closure of colostomy/ileostomy   | Laparoscopic   | Responsible Clinician | Major Edit Delete |

## Procedures tab

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



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.

### Printing/exporting your logbook

Use the “print” or “export” button on either the “logbook” tab or the “procedures” tab. Only procedures and/or categories where there are entries will appear.

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

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

| Version control |           |
|-----------------|-----------|
| Updated         | 7/4/2014  |
| Updated         | 2/12/2014 |
| Updated         | 10/1/2018 |
| Updated         | 1/12/2019 |