

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.

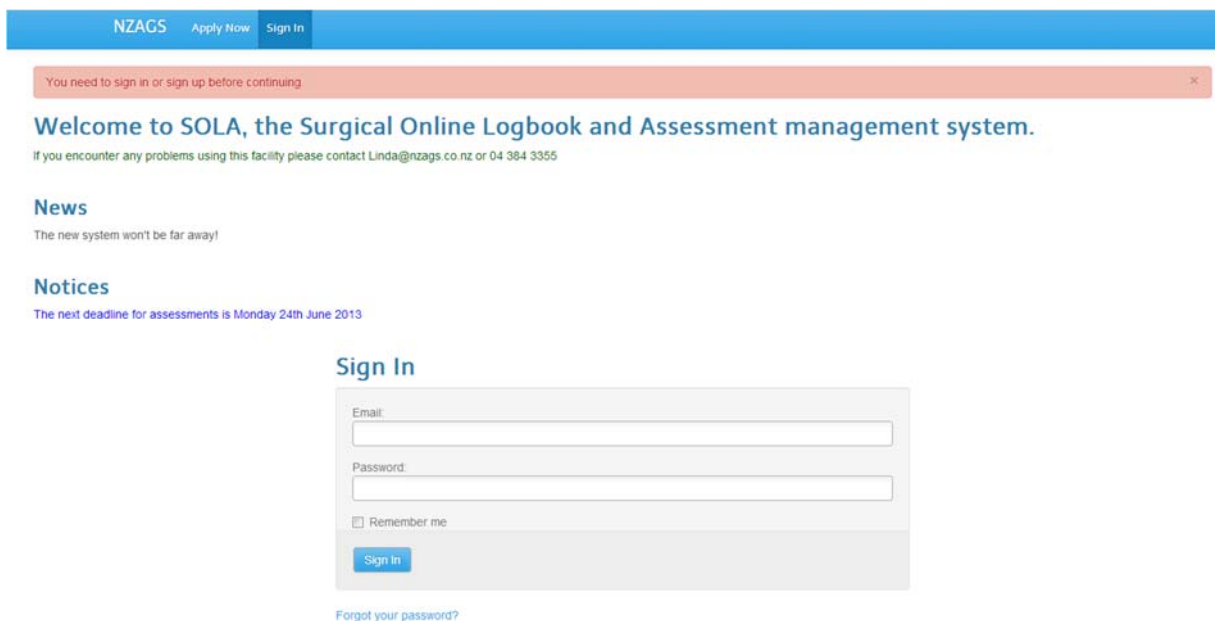
SOLA has been designed from the start to work effectively on hand held devices – the display is responsive and is maximised to the device used for access with current hand held technologies.

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 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.

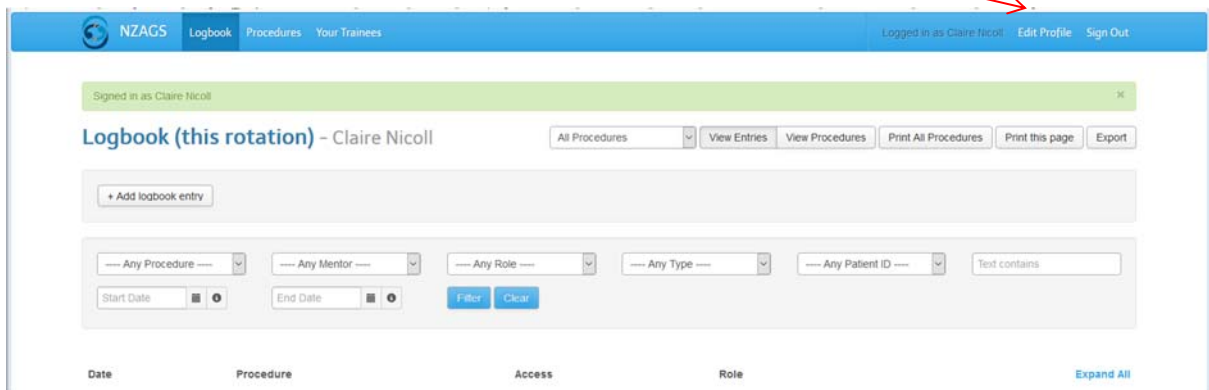


The screenshot shows the SOLA login interface. At the top, there is a blue navigation bar with 'NZAGS', 'Apply Now', and 'Sign In' links. Below this is a red error message: 'You need to sign in or sign up before continuing'. The main heading reads 'Welcome to SOLA, the Surgical Online Logbook and Assessment 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 fields for 'Email' and 'Password', a 'Remember me' checkbox, and a 'Sign In' button. A 'Forgot your password?' link is located below the form.

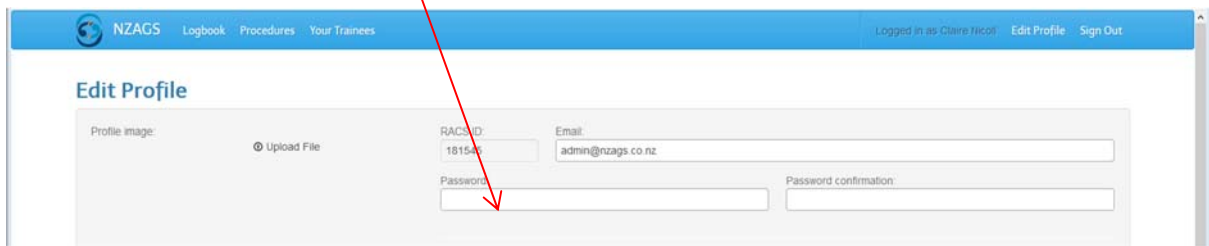
Users who forget their password can request a new password independently of the administrator.

Your profile

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

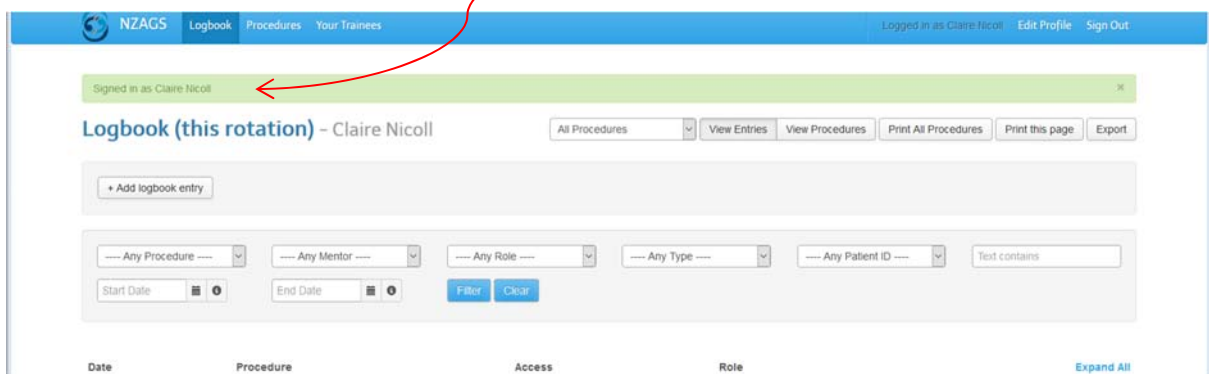


Changing your password:-



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

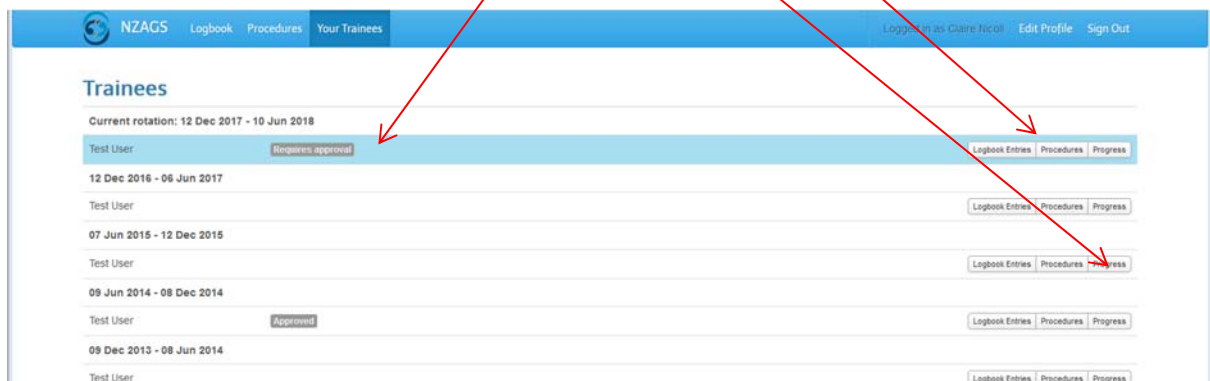
- View logbook entries, procedures and progress
- Notification of logbooks for approval
- Approval/rejection of logbooks

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

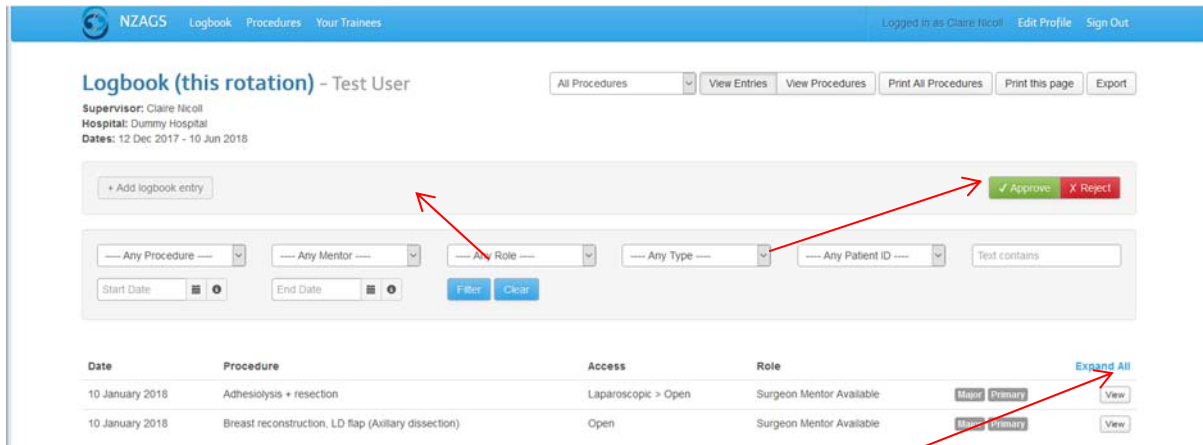
You will be notified by email when you have logbooks to review. **The email contains a link to SOLA to aid the process.**

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.

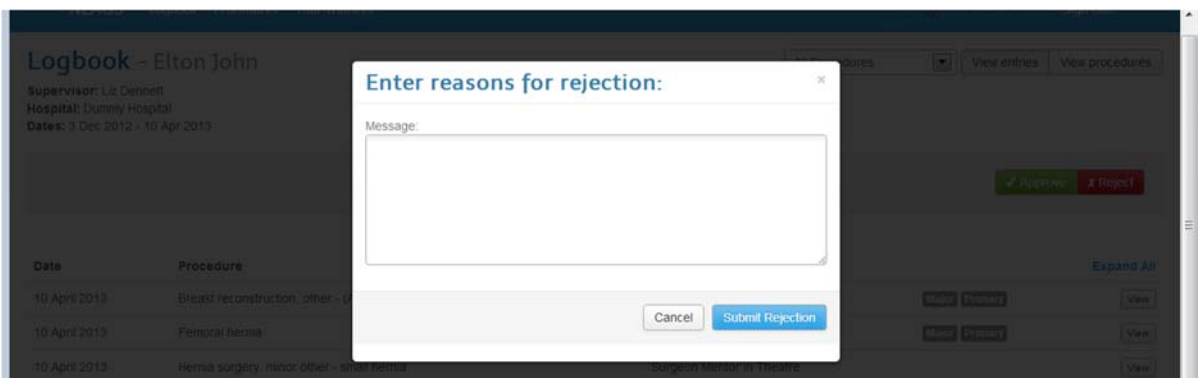
Your trainees will submit their logbooks for approval at the end of the rotation. You can identify which logbooks have been submitted from the “Your Trainees” tab on the top menu:-

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 specialties. Below the table is a summary of logbook entries for Major, Primary Operator, and Endoscopies.

Component	Completed	Required
Rotations collapse	1.0	10
Rotation Date	Rotation Hospital	Rotation Speciality
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
All Logbook Entries		
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 expand	1.0	10
All Logbook Entries		
Major	11	800
Primary Operator	14	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
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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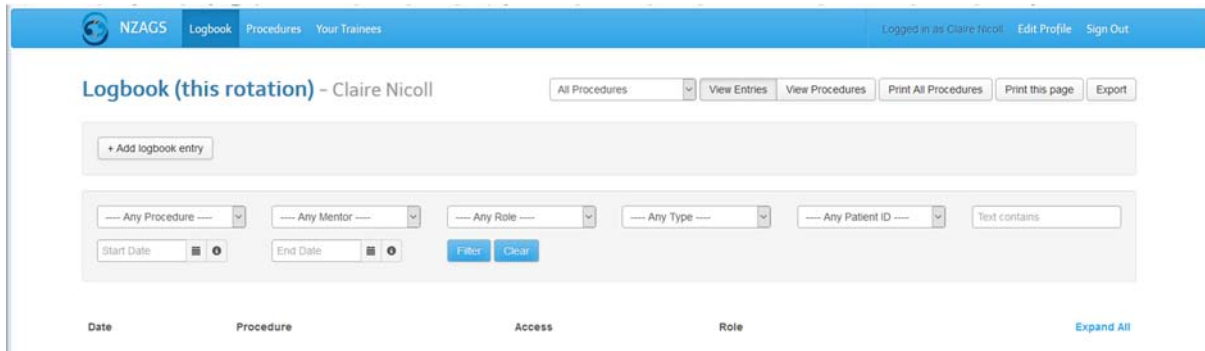
Please note that the running totals included here includes any **unapproved** procedures from the current logbook. In the event that a trainee has an approved RPL for procedures, the administrator can amend these totals with authority from the Board.

Approvals for sitting exams or gaining Fellowship are dated.

You can check how your trainees are doing on SEAM.

Your Logbook tab

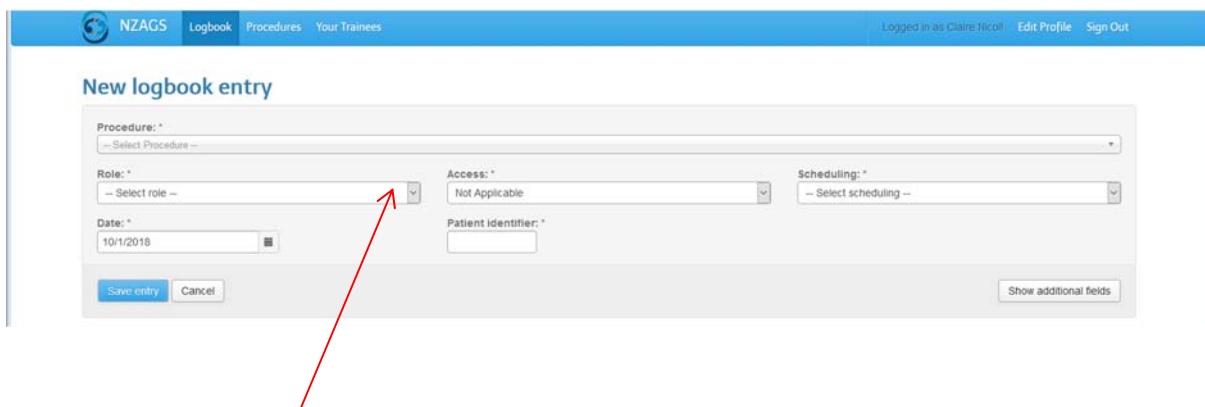
This tab is for entering data into the current logbook. You can toggle between viewing your entries and the running totals of all your procedures using the tabs on the right. The procedures tab is for reviewing each entry.



The screenshot shows the 'Logbook (this rotation) - Claire Nicoll' interface. At the top, there are navigation tabs for 'Logbook', 'Procedures', and 'Your Trainees'. The user is logged in as 'Claire Nicoll'. Below the navigation, there are several buttons: 'View Entries', 'View Procedures', 'Print All Procedures', 'Print this page', and 'Export'. A '+ Add logbook entry' button is also present. Below these are several filter dropdowns: 'Any Procedure', 'Any Mentor', 'Any Role', 'Any Type', and 'Any Patient ID'. There are also date pickers for 'Start Date' and 'End Date', and a 'Text contains' search box. At the bottom, a table header is visible with columns for 'Date', 'Procedure', 'Access', and 'Role', along with an 'Expand All' button.

Entering data

The logbook entry tab provides the following template:-



The screenshot shows the 'New logbook entry' form. It contains several mandatory fields marked with an asterisk: 'Procedure', 'Role', 'Date', 'Access', 'Scheduling', and 'Patient identifier'. The 'Role' field is highlighted with a red arrow. Below the form are 'Save entry' and 'Cancel' buttons, and a 'Show additional fields' button.

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.

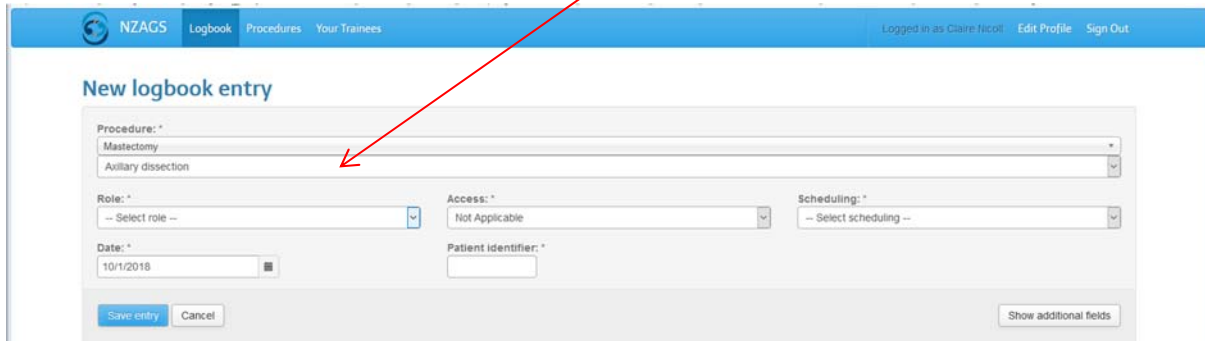
Each procedure/case automatically assigns the entry to the appropriate of the category - (Major/Minor/Colonoscopy/Endoscopy/Non-operative) and provides a total on the "Procedures" tab.

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

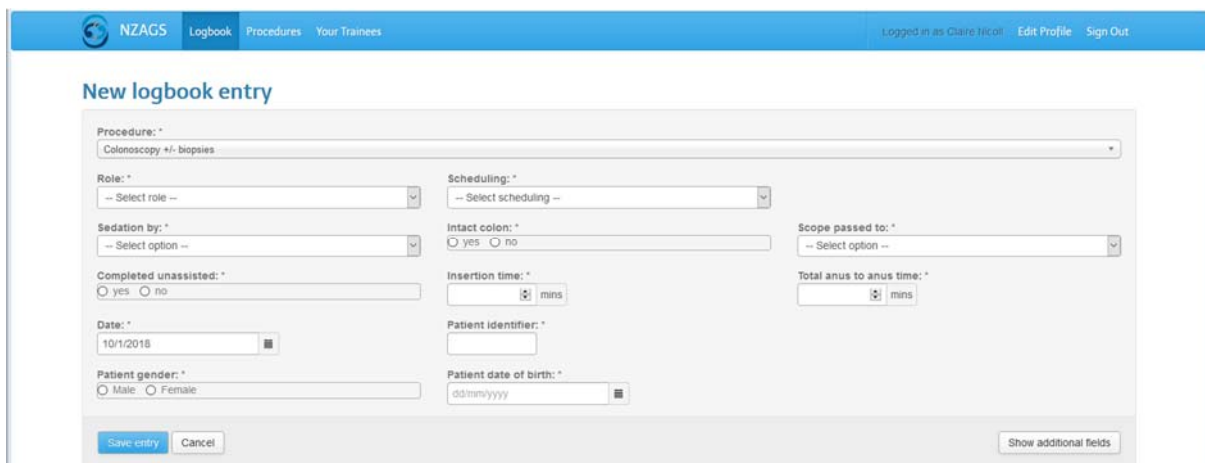
For **breast** surgery there are additional fields to complete for the associated lymph node procedures.



The screenshot shows the 'New logbook entry' form in the NZAGS system. The 'Procedure' dropdown menu is open, showing 'Mastectomy' and 'Axillary dissection'. A red arrow points to the 'Axillary dissection' option. Other fields include 'Role' (dropdown), 'Access' (dropdown, set to 'Not Applicable'), 'Scheduling' (dropdown), 'Date' (calendar, set to 10/1/2018), and 'Patient identifier' (text input). There are 'Save entry', 'Cancel', and 'Show additional fields' buttons at the bottom.

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 menu is set to 'Colonoscopy +/- biopsies'. Other fields include 'Role' (dropdown), 'Scheduling' (dropdown), 'Sedation by' (dropdown), 'Intact colon' (radio buttons, 'yes' selected), 'Scope passed to' (dropdown), 'Completed unassisted' (radio buttons, 'yes' selected), 'Insertion time' (time input, 'mins'), 'Total anus to anus time' (time input, 'mins'), 'Date' (calendar, set to 10/1/2018), 'Patient gender' (radio buttons, 'Male' selected), 'Patient identifier' (text input), and 'Patient date of birth' (calendar, 'dd/mm/yyyy'). 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 form is titled 'New logbook entry' and is located in the 'Logbook' section. The user is logged in as 'Clare Nicol'. The form contains several fields: 'Procedure' (a dropdown menu with 'Endoscopy, diagnostic other' selected), 'Role' (a dropdown menu with 'Select role' selected), 'Completion status' (a dropdown menu with 'Select completion status' selected), 'Date' (a date picker showing '10/1/2018'), 'Patient gender' (radio buttons for 'Male' and 'Female'), 'Patient date of birth' (a date picker showing 'ddmm/yyyy'), 'Scheduling' (a dropdown menu with 'Select scheduling' selected), 'Sedation by' (a dropdown menu with 'Select sedation by' selected), 'Unassisted therapeutic procedure' (a dropdown menu with 'Select procedure' selected), and 'Patient identifier' (a text input field). At the bottom of the form, there are 'Save entry' and 'Cancel' buttons, and a 'Show additional fields' button.

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:-

The screenshot shows a 'New logbook entry' form with the following fields and values:

- Procedure: Abdominal wall reconstruction
- Role: Supervising Trainee
- Access: Not Applicable
- Scheduling: Acute
- Date: 7/4/2014
- Patient identifier: mnb8765
- Patient gender: Male
- Patient date of birth: dd/mm/yyyy
- Admission date: dd/mm/yyyy
- First surgery date: dd/mm/yyyy
- Discharge date: dd/mm/yyyy
- Outcome: - Select outcome -
- Return to theatre expected: yes
- Readmitted: yes

Buttons at the bottom: 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

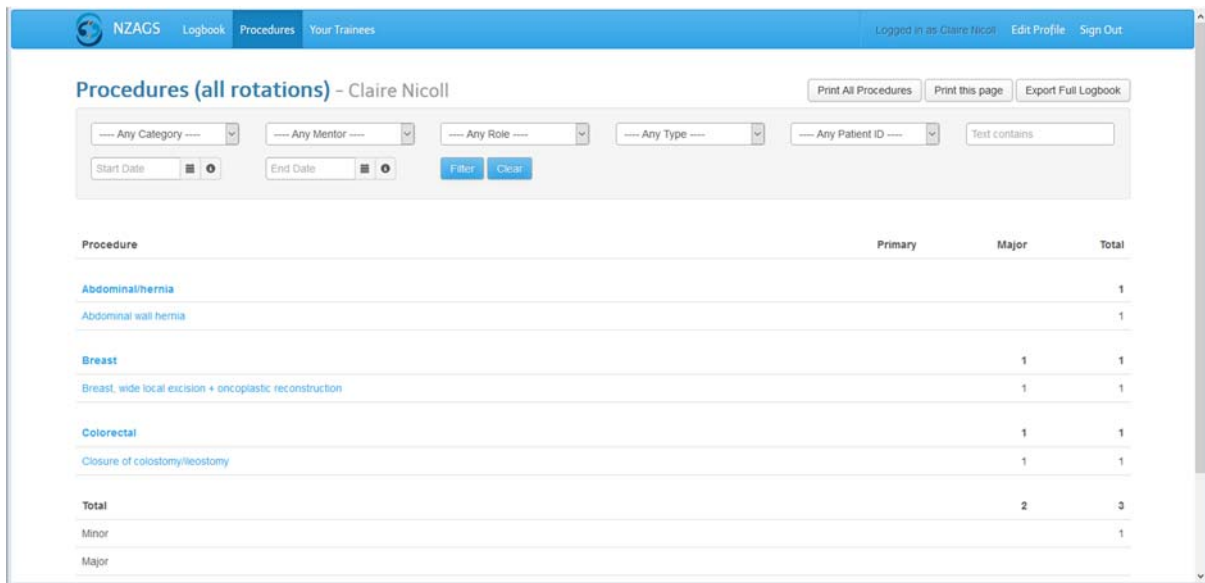
From the logbook tab you can use “Edit”, “Delete” and “Expand all” which displays all the completed fields (blank fields are not displayed). Use the “Collapse” all button for the summary view.

The screenshot shows the NZAGS Logbook interface with the following table of entries:

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