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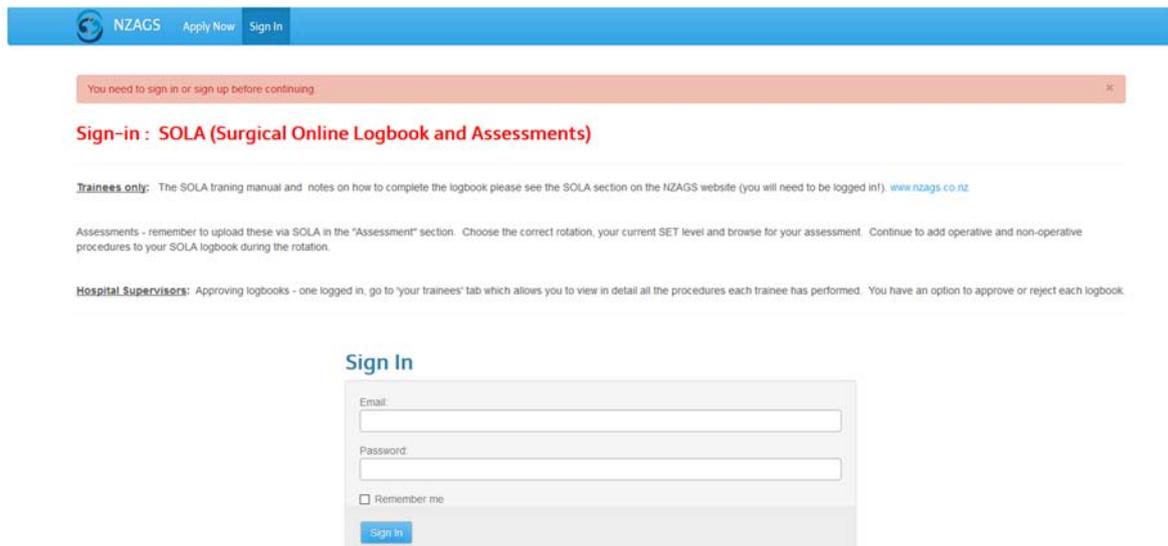
Users who forget their password can request a new password independently of the administrator.

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:-
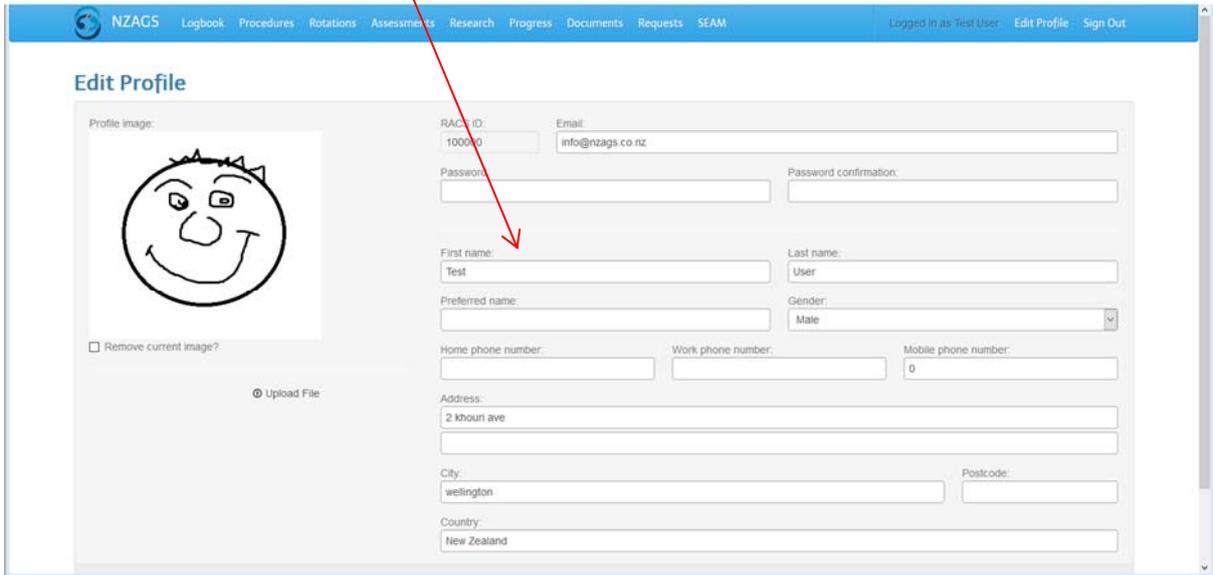
Navigation

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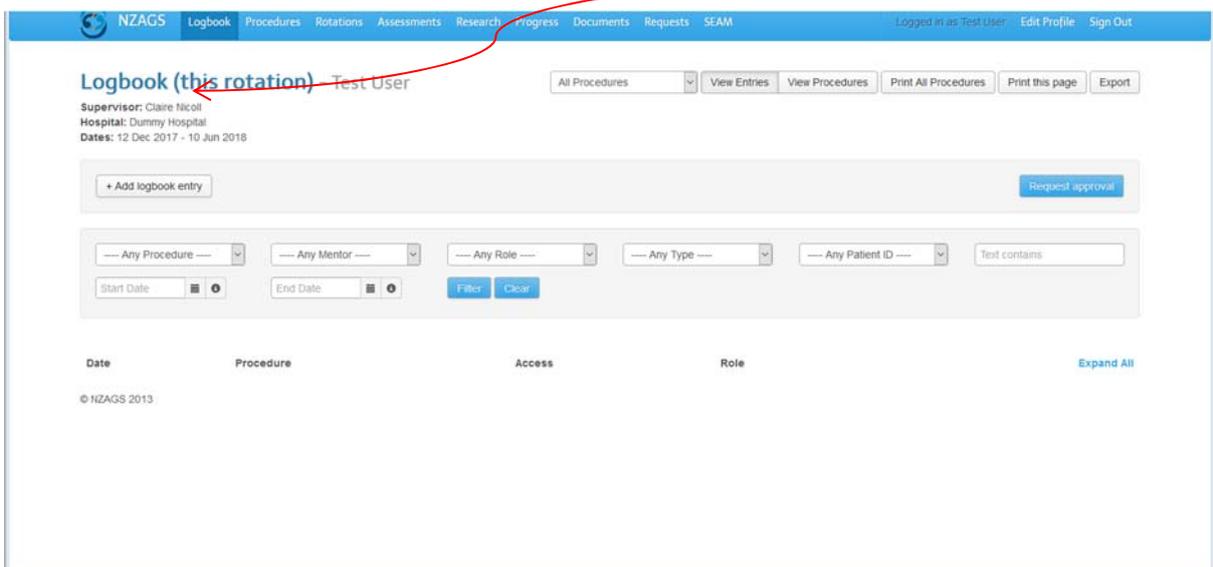
In summary the 9 tabs have the following functionality and permissions:-

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

- View other training documents, e.g. official letters
- Uploading documents by trainee
- Editing permissions: Trainees can <u>add only</u>, 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. Please refer to Appendix 1 for information on what and how to record your operative procedures.

Entering data

The SOLA logbook allows efficient record entry.

The logbook entry tab provides the following template:-
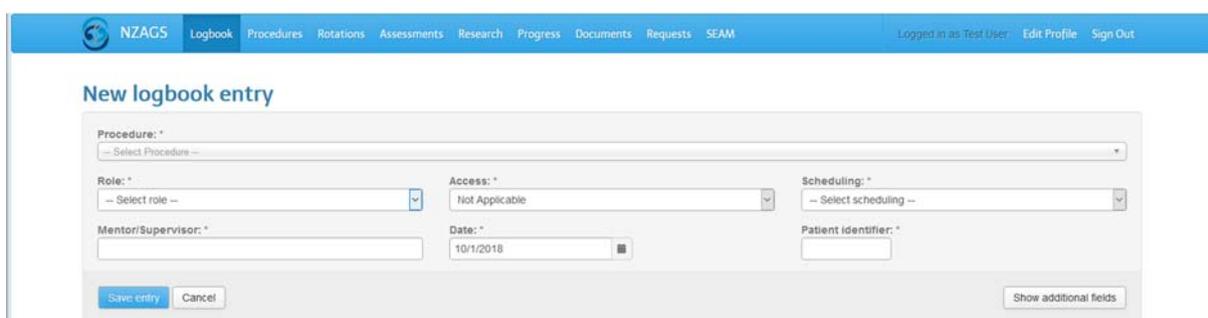
The minimum dataset for each entry is just 6 fields for operative procedures. Non-operative case can also be logged but this is no longer mandatory. Should the user wish to collect additional data, the "Show additional fields" button provides some options and free text boxes. There is the ability to 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 endoscopy entry template:-

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

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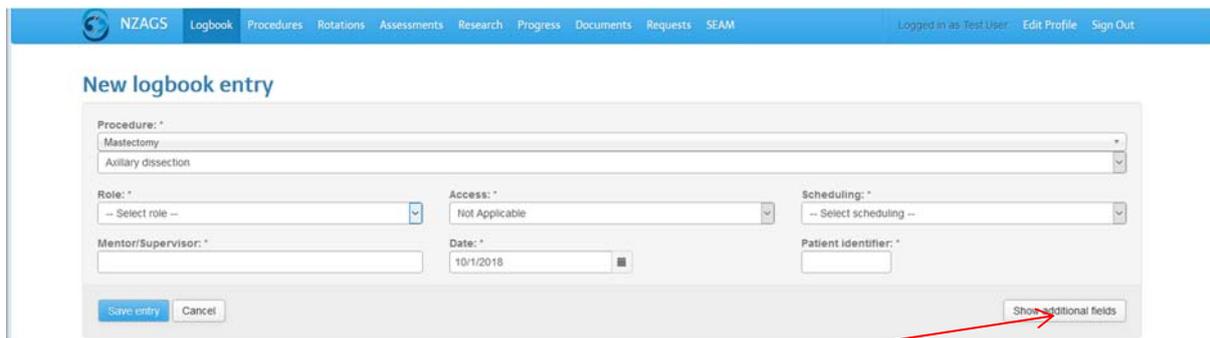
Need to record more information? Simply select "Show additional fields". There are a number of predetermined fields, none of which are currently mandatory. There are free text fields for complications (which can auto populate for consistency) and comments. You can edit records at any time until they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

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.

Request approval

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.

- 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.

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.

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.

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.

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.

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.

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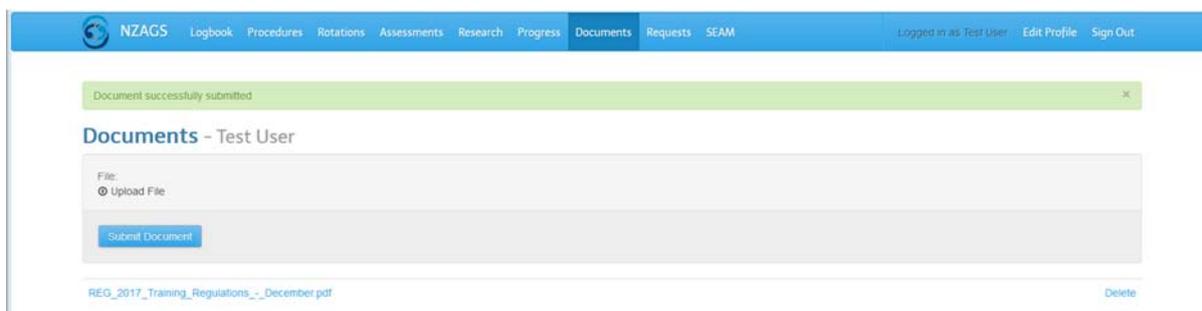
 Administrators will use file naming conventions so documents are easily identifiable from their title. You can add your own documents e.g. course certificates to this tab. Please note you do not have permission to delete administrator-uploaded documents, but you can delete anything you upload.

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.
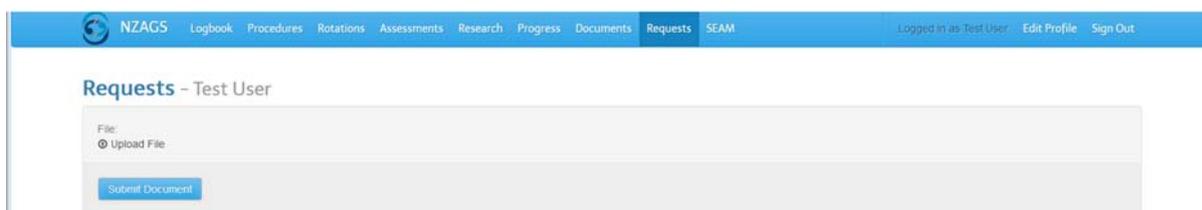
9. SEAM tab

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
Appendix 1 added	18/12/2018
Reviewed	1/12/2019

Guide to completing the logbook

1 December 2018

1. Purpose of the logbook

The main reasons for providing a logbook are listed below:-

- To provide exposure data for type and level of responsibility achieved for surgical procedures completed during each training term
- To provide an indication of the primary operator rate for the trainee during each training term
- To provide a running total of all procedure numbers, including major procedures, endoscopy and colonoscopy procedures to comply with the minimum number of these procedures for the purpose of application to sit the Fellowship Exam and to gain Fellowship at the end of training
- Provide procedural data for the accreditation process for post within each hospital so each post can be accessed for volume, appropriate trainee delegation and case mix
- Providing a record of surgical procedures undertaken during training for prospective Fellowship/employment situations

2. Minimum standards

Trainees are expected to complete the following:-

Per term		
• 100 Major procedures		
• Primary operator rate as follows:-		
SET level	Term	Primary operator rate (% of all majors)
2	1	20
	2	25
3	1	30
	2	40
4	1	50
	2	50
5	1	60
	2	60

By completion SET training
• 800 Major procedures
• 100 Upper GI endoscopies
• 50 colonoscopies

3. Accurate completion of logbook

It is very important that trainees record all procedures they have participated in to ensure accurate recording.

Trainees should continue to add all procedures completed, even when they have exceeded the minimum of 100 majors in any given term. Other than giving a true picture of the training opportunities of any given post, trainees should be mindful that circumstances outside of their

control may compromise their ability to complete 100 majors in any given term, full recording mitigates against the consequences of not completing the minimum number for the duration of training.

Procedures can only be entered on SOLA against the current term. Retrospective additions of logbook entries is not permitted once the logbook has been submitted to the supervisor for approval at the end of each term.

Accurate and complete recording is especially important when the accreditation of the training post may be at stake. Training posts not able to provide a minimum of 100 major procedures per term may lose their accreditation status. It should be noted that the data used to consider this criteria is taken from trainee logbooks.

4. Is it Major or Minor?

Most logbook procedures in SOLA are pre-determined as major or minor. It is not feasible for the logbook to list every procedure which would be considered very unusual situations. In these cases trainees, should use the "other" categories and select whether the procedure should be deemed major or minor. Generally speaking a major procedure would be one lasting longer than 45 minutes due to the complexity. The SOLA logbook allows for recording of more complex surgery such as Whipples procedure as two or more major operations. This allows trainees to record different levels of responsibility for each component procedure.

Here some examples of how some procedures should be recorded in SOLA:-

Procedure(s)	Logbook entry
Right hemicolectomy and open cholesystectomy at same time in 1 patient	"Right Hemicolectomy" AND "cholescystectomy" – 2 majors
Formation of end colostomy completed as part of Hartman's procedure	"Hartmans procedure" – 1 major
Mild adhesiolysis during gastrectomy	"Gastrectomy" – 1 major
Adhesiolysis taking greater than 45 mins to complete + small bowel resection	"Adhesiolysis" AND " Small Bowel Resection" – 2 majors
Laparotomy + procedure e.g. Liver Resection	"Liver resection" ("Laparotomy" would only be recorded where no other surgery ensues)

Trainees are strongly advised to record minor procedures for completeness of their logbook. Minor procedures are no less relevant to the training experience. Recording minor procedures, especially where these are less common procedures, provide a more balanced view of the trainee operative experience overall. Where logbook data is considered as part of a review of the accreditation status of a training post, the balance between minor and major procedures gives inspectors a clearer picture of the availability and delegation of procedures to trainees.

5. What's my role?

For each procedure entered into SOLA the trainee must enter their role in that procedure. The options are:-

a. Surgeon mentor scrubbed
b. Surgeon mentor in theatre
c. Surgeon mentor available
d. Assisting surgeon mentor
e. Assisting registrar

Selecting roles a-c above for any Major procedure automatically registers that procedure has been completed by the trainee as the primary operator.

Trainees should only select options a-c where they have completed half or more of the operative procedure. Some examples of how to code role are given below:-

Scenario	Logbook entry
High anterior resection – trainee completes colonic mobilisation and divides vessels. Surgeon mentor mobilises tumour, divides meso-rectum and rectum. Trainee then completes anastomosis	Record as "Surgeon Mentor Scrubbed"
Laparoscopic right hemicolectomy – trainee assists supervisor during dissection, vessel division and resection. Trainee fires the stapler and puts reinforcing sutures in anastomosis	Record as "Assisting Surgeon Mentor"
Trainee is first assistant in scenario 1	Record as "Surgeon Mentor Scrubbed"
Trainee is second assistant in scenario 1	Record as "Assisting Surgeon Mentor"
2nd assistant to major procedure with poor view of operative field (e.g. holding retractor)	Procedure not recorded as a Major

It is acknowledged by the New Zealand Board in General Surgery that the logbook cannot take into account the extra time and effort required for some complex procedures, or instances where more straightforward procedures hit snags and require more time and differing techniques. On the whole these will be balanced over the course of training by some procedures taking less time than the norm.

For assistance with recording procedures, please contact Helen Glasgow at the NZAGS office.