SOAR Permissions overview

www.appraisal.nes.scot.nhs.uk

This document details the available user roles on SOAR, and the different access each role has pertaining to user details.

There are two distinct accesses on SOAR, one for doctors (post CCT) who require to access SOAR for their Appraisal purposes, and the other for Doctors in Training (Trainees), who are asked to use SOAR to record their Self Declarations on Health, Probity, Complaints/Critical Incidents and Work History. Access to both setups is restricted by user roles. For example, a Primary Care Appraiser will not be able to access any Trainee details; similarly a Trainee will not be able to access a Secondary Care Appraisee's appraisal documents.

For details on the overall processes for both, please visit SOAR and review the user guidance available.

Contents:

VERSION CONTROL TABLE			
Version Number	Purpose/Change	Author	Date
1.0	Created	William Liu	14/11/2013

APPRAISEE Details on SOAR	PC/SC Admins		PC/SC Appraisal Leads		PC/SC Appraisal co-ordinators		PC/SC Appraisers		PC/SC Appraisees		Responsible Officers		System Admin	
	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
User profile (contact details, GMC number etc)	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓
> User login password	✗	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✗	✗	✓
> User security questions	✗	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✗	✗	✓
Uploaded files in "My Documents"	✗	✗	✗	✗	✗	✗	✓	✓	✗	✗	✗	✗	✓ [3]	✓ [3]
Draft Forms 1, 2 and 3 (inc linked files)	✗	✗	✗	✗	✗	✗	✓	✓	✗	✗	✗	✗	✓ [3]	✓ [3]
Appraisal History (overview)	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a
> Appraisal Interview Details	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓
>> Submitted Forms 1-3 in Interview Details	✗	✗	✗	✗	✗	✗	✓	n/a	✓	n/a	✗	✗	✓ [3]	✓ [3]
>> Form 4 (summary discussion)	✓ [1]	✗	✓	✗	✓	✗	✓	✓	✓	✗	✓	✗	✓ [3]	✓ [3]
Revalidation details	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a
Revalidation dashboard > Ability to make Revalidation Recommendation	✓ [2]	✓ [2]	✓ [2]	✓ [2]	✗	✗	✗	✗	✗	✗	✓	✓	✗	✗

	PC/SC Admins	PC/SC Appraisal Leads	PC/SC Appraisal co-ordinators	PC/SC Appraisers	PC/SC Appraisees	Responsible Officers	System Admin
Access notes:	*Only able to access those in their OWN HEALTH BOARD, and OWN SECTOR (Primary or Secondary Care) - not others*	*Only able to access those in their OWN HEALTH BOARD, and OWN SECTOR (Primary or Secondary Care) - not others*	*Only able to access those Appraisees ALLOCATED to them, not others*	*Only able to access those Appraisees ALLOCATED to them, not others*	*Only able to access OWN details/records, not other users*	*Only able to access those in their OWN HEALTH BOARD, not others*	✓₃
User notes:	*Primary and Secondary Care Administrative support teams, working in the local Health Boards*	*Local Appraisal Advisers (LAAs) in Primary Care, and Lead Appraisers in Secondary Care, working in local Health Boards*	*Associate Medical Directors, Clinical Directors, Line Managers etc - those who need to be informed of their doctors' appraisal progress but not involved with the actual process*	*Medical Appraisers*	*All doctors who require an appraisal*	*Medical Director*	*Medical Appraisal team working in NES*

✓₁ Local Health Board Admins can view sign off dates, but NOT the contents of Form 4

✓₂ ONLY IF recognised by GMC as Nominated RO Proxy

✓₃ Although SysAdmins have viewing access to restricted Appraisee details, this is ONLY accessed for troubleshooting purposes at users' request

✓ Has access

✗ No Access

TRAINEE Details on SOAR *	Trainee Admins		Post Graduate Deans		Training Programme Directors		Educational Supervisors		Trainees		Responsible Officer		System Admin	
	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
User profile (contact details, GMC number etc)	✓	✓ [1]	✓	✗	✓	✗	✓	✗	✓	✗	✓	✗	✓	✗
> User login password	✗	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✗	✗	✓
> User security questions	✗	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✗	✗	✓
Declarations (Health, Probity, Complaints, Work History)	✓	✗	✓	✓ [2]	✓	✓ [2]	✓	✓	✓	✓	✓	✗	✓	✓ [3]
ARCP outcomes	✓	✓ [1]	✓	✗	✓	✗	✓	✗	✓	✗	✓	✗	✓	✗
Suggested outcome to support Revalidation	✗	✗	✓	✓	✓	✓	✗	✗	✗	✗	✓	✓	✗	✗
Revalidation details	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a	✓	n/a
Revalidation dashboard > Ability to make Revalidation Recommendation	✗	✗	✓	✓	✗	✗	✗	✗	✗	✗	✓	✓	✗	✗
Access notes:	*Only able to access Trainee details, not others*		*Only able to access Trainee details, not others*		*Only able to access those Trainees IN TPD's PROGRAMME, not others*		*Only able to access those Trainees ALLOCATED to them, not others*		*Only able to access OWN details/records, not other users*		*Only able to access Trainee details, not others*		✓ [3]	
User notes:	*Administrative support teams, working in Deaneries*										*NES Medical Director*		*Medical Appraisal team working in NES*	

* ALL Trainee data on SOAR is imported from Turas, the NES internal management system for Trainees. It is NOT possible to change or edit a Trainee's details on SOAR, it needs to be amended on Turas by the regional Deanery Admin teams, which will trigger overnight import processes to SOAR.

✓₁ Local Deanery Admins can access Turas to update Trainee records

✓₂ PG Deans and TPDs could sign off a Trainee's submitted declarations in the absence of Educational Supervisors

✓₃ Although SysAdmins have viewing access to restricted Trainee declarations, this is ONLY accessed for troubleshooting at user's request

✓ Has access

✗ No Access