Initiate Declarations for Trainees on SOAR

This guide is intended for Trainee Deanery Admin teams

Last updated: William Liu – 27/01/2014

Background

Creating individual declarations for Trainees is relatively straightforward. Go to "Initiate Declarations" page, search for the Trainee via Surname, tick the box next to their name and click "Initiate" button at bottom of page – that's it. But what about creating new declarations for all trainees?
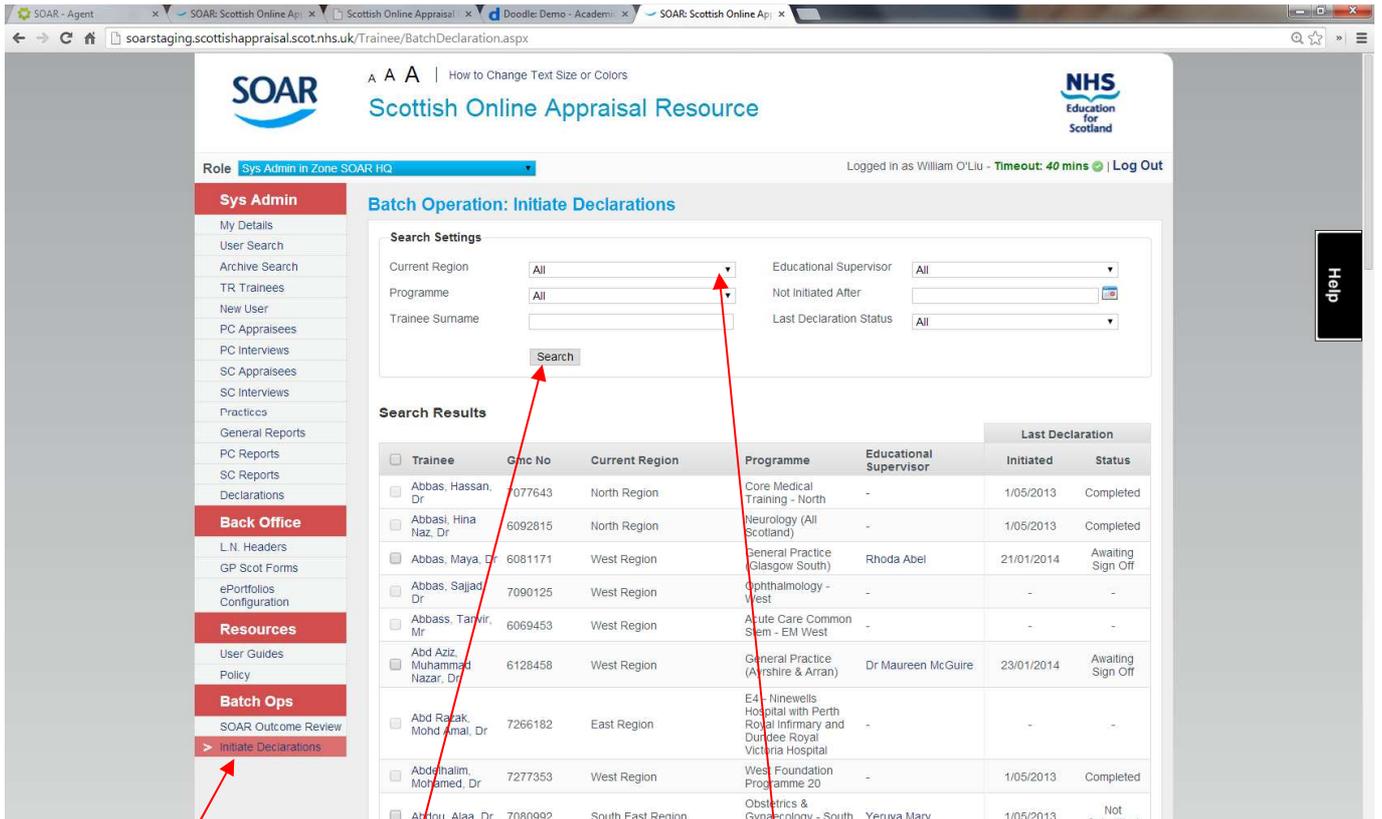
When we first introduced the self declarations last year, all "current" trainees were imported across from Pinnacle to SOAR, and all of them had a declaration created for them as part of the original import process. As we approach the second annual declarations, it is **not** yet possible to automatically create a new round of declarations (because we have not resolved the "current" vs. "recent" trainee import issues yet). To create the new round of declarations, it will need to be done manually.

We have made a number of additions to SOAR which will hopefully make this a more accurate process.
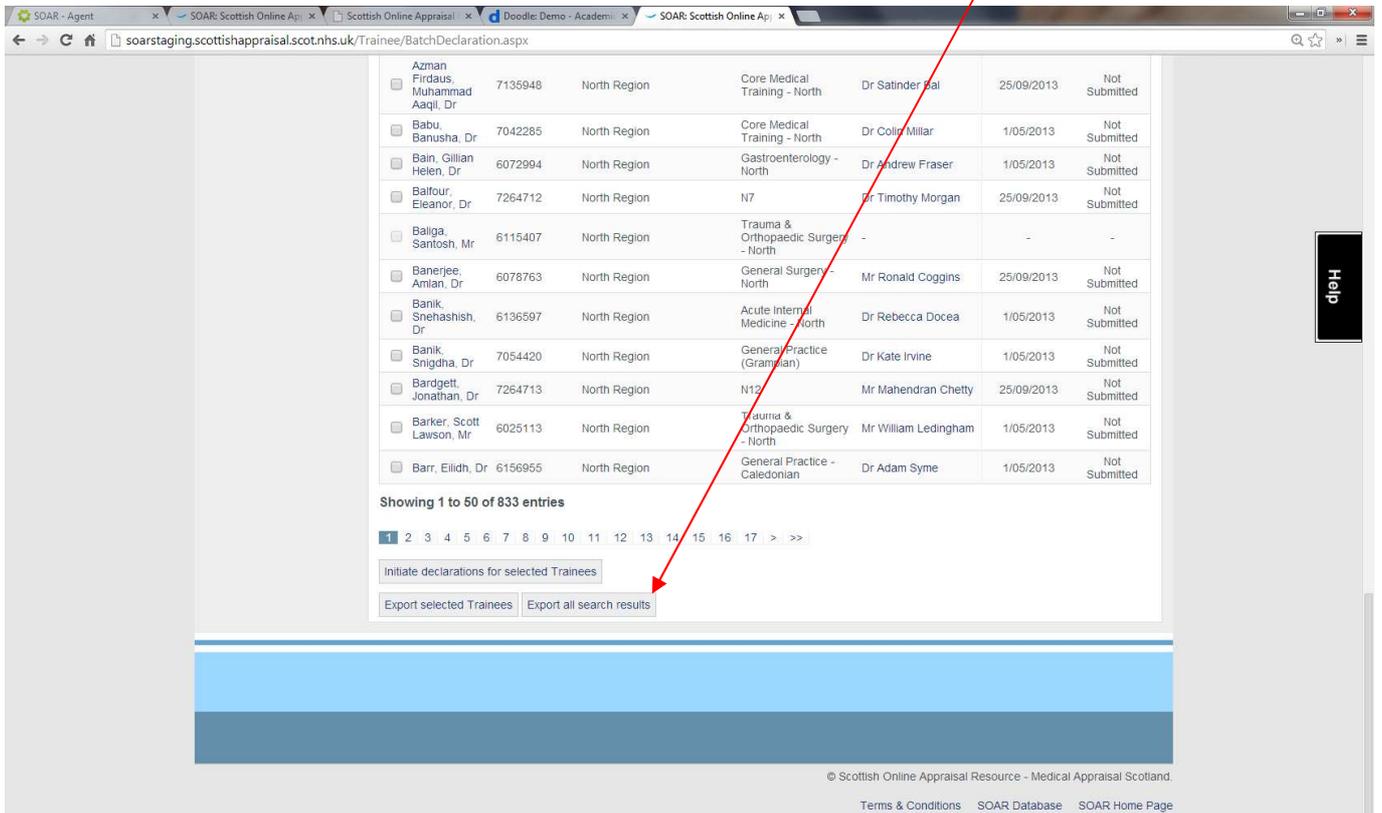
The steps required are:

1) Export list of Trainees on SOAR
2) Review from exported list who should not be included
3) **Select** everyone for inclusion in creating the new declarations
4) **De-select** those not appropriate (LEFT programme, CCT'ed etc)
5) Create declarations

1) Export Trainees to spreadsheet

Go to the "Initiate Declarations" page – there are various search settings available and you can now search for trainees not assigned to an Educational Supervisor. Set the "Current Region" to your region, and/or set the Programme if you wish – click Search.

When the results come up, scroll to the bottom of the page, and click the "Export all search results" button. This will export the searched results into a spreadsheet for review.

2)   Review exported spreadsheet

Review the exported spreadsheet and see who shouldn't be on this list.

Highlight those who shouldn't be there (CCT'ed, LEFT region etc).

When you have gone through this list, you can start the initiation process for new declarations.

3)   Select ALL for initiate declarations (but don't click the button!)

Back to the "Initiate Declarations" page (repeat the search if required, so you are on the same page as you were when exporting the spreadsheet). Tick the tickbox in the top left corner of the list to select all trainees – but don't click anything else yet! Once everyone is selected, we can begin de-selecting those identified in the spreadsheet.

4)   De-select from the list

Working from the spreadsheet, untick those selected to ensure declarations will not be created for them. Use the page system at bottom of pages to navigate to the next page and work your way through to the last page. Both the spreadsheet and the search results pages are in alphabetical order so both lists should line up.

(NB – Trainees who have no Educational Supervisor assigned will not be available for selection. You cannot create a declaration if there is no Ed Sup to sign it off!)

5)   Initiate declarations

Once you have a list of trainees that you have gone through and are ready to initiate/create the declarations for, scroll to the bottom of the page and click "Initiate declarations for selected Trainees" – **just click on this ONCE**. The page may take several seconds to load (especially if you have a large list) but once you have clicked on it, just let the system take its time to load – don't click on the button repeatedly!! It will generate duplicate declarations and then you will have to go in manually to delete them!

If you want to be safe and review your final list before clicking the Initiate button, use the "Export selected Trainees" button, which will generate a spreadsheet of those who have been ticked/selected on the list.

6)   Other info

Until we resolve the "current" vs. "recent" trainees issue, the above is a workaround for creating new rounds of declarations.

If you have trainees who are not appearing on the list but should be, check Pinnacle: there will be a reason why the record didn't get imported.

All Trainee data on SOAR is imported from Pinnacle. We cannot make changes/edits to these records (hence why the time consuming steps above). This is done to ensure all trainee data comes from one data source.