

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?

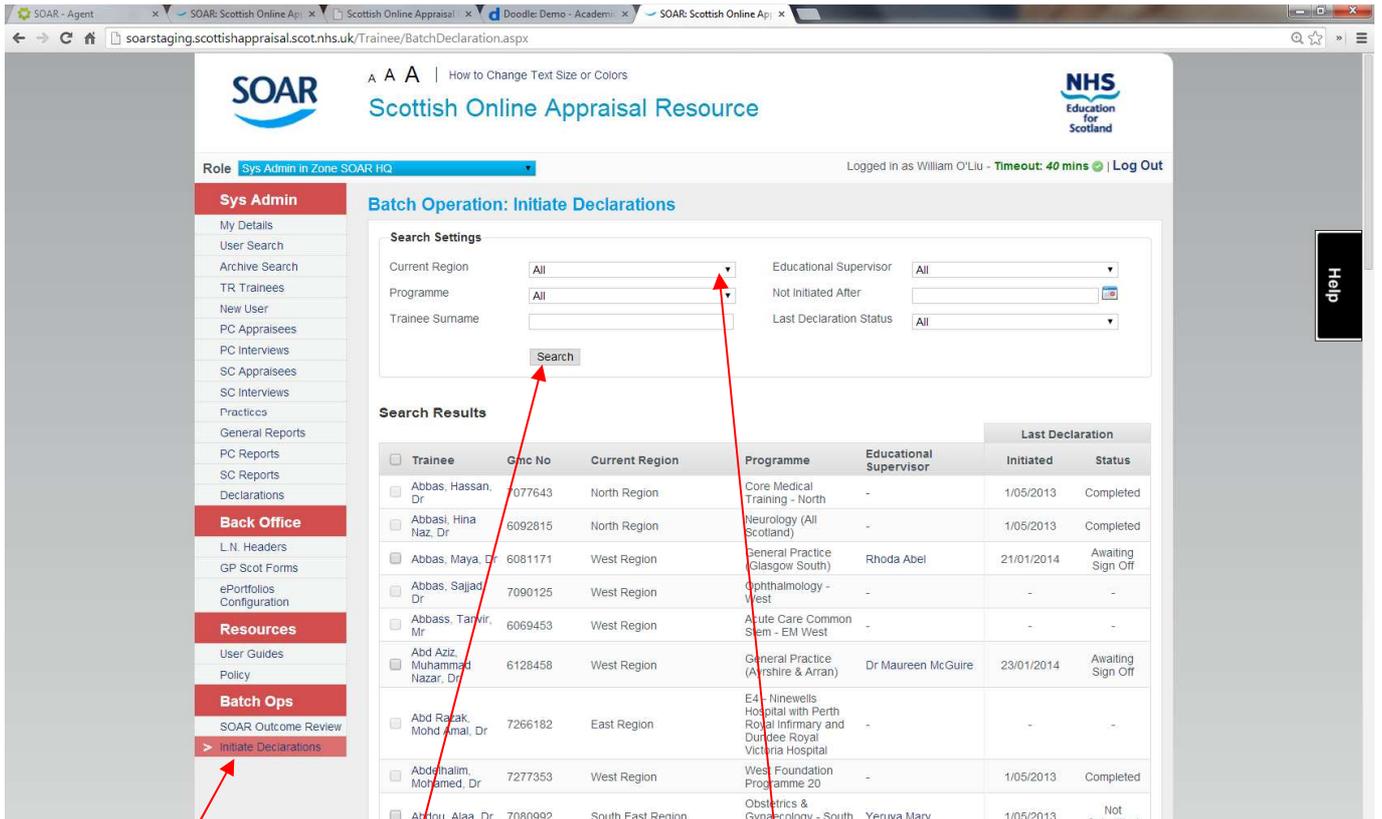
When we first introduced the self declarations last year, all “current” trainees were imported across from Pinnacle to SOAR, and all of them had a declaration created for them as part of the original import process. As we approach the second annual declarations, it is **not** yet possible to automatically 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:

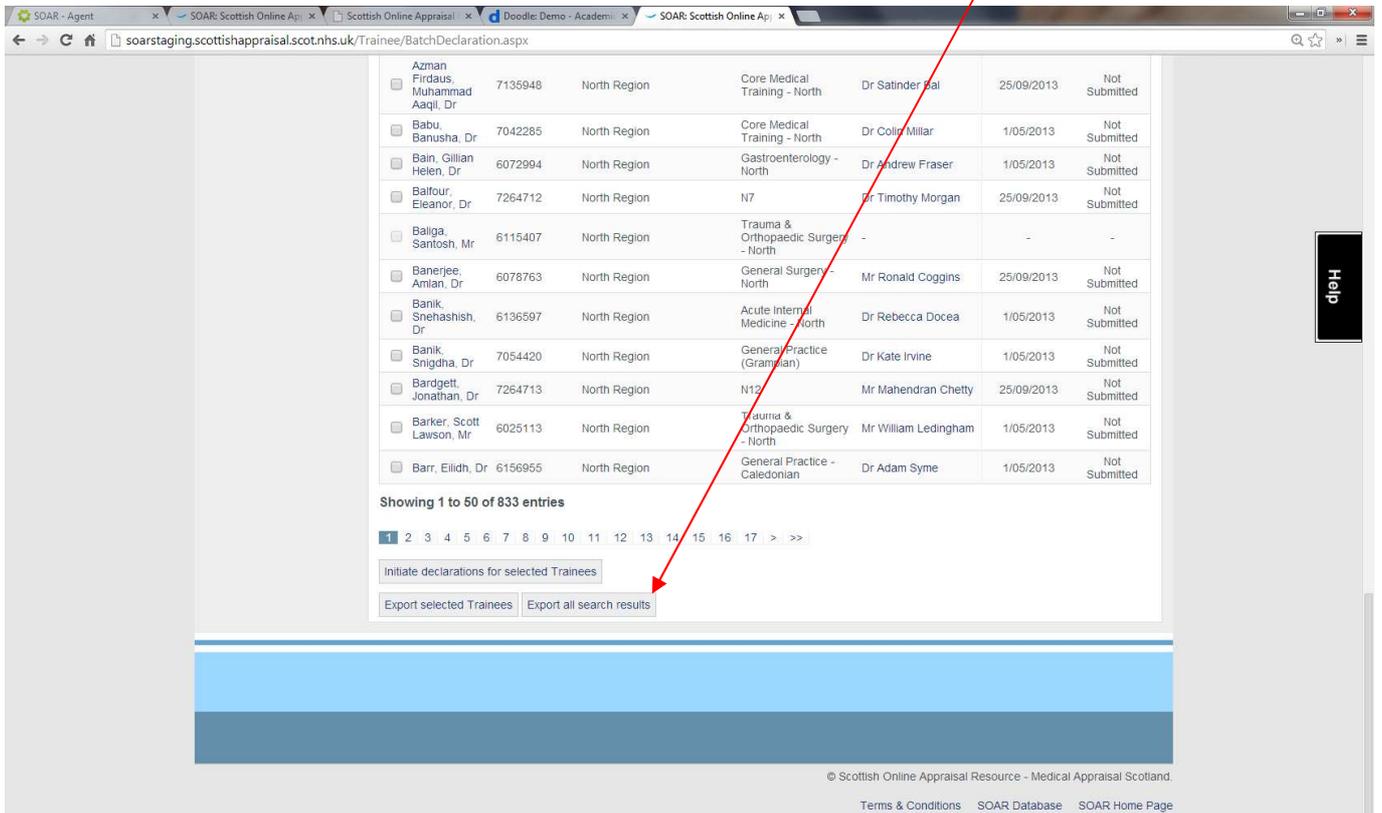
- 1) Export list of Trainees on SOAR
- 2) Review from exported list who should not be included
- 3) **Select** everyone for inclusion in creating the new declarations
- 4) **De-select** those not appropriate (LEFT programme, CCT’ed etc)
- 5) Create declarations

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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Declarations List Report													
2		27/01/2014 14:37												
3														
4	Trainee	Gmc No.	Current Region	Programme	Education Supervisor	Initiated (Date)	Status							
5	Abbas, Hassan, Dr		North Region	Core Medical Training - North	-	01/05/2013	Completed							
6	Abbas, Hina Naz, Dr		North Region	Neurology (All Scotland)	-	01/05/2013	Completed							
7	Ahimbola, Oluwaseun Oyenike, Dr		North Region	General Practice (Grampian)	Karen Barker	25/09/2013	Not Submitted							
8	Abou Alhous, Mohammed Hafez, Dr		North Region	Cardiology - North	Dr Deepak Garg	01/05/2013	Not Submitted							
9	Adams, Jennifer, Dr		North Region	Core Psychiatry Training - North	Dr Soma Sekhar Tadi	01/05/2013	Not Submitted							
10	Adeponle, Olanlesi, Dr		North Region	General Practice (Grampian)	Dr Stephen L Terwey	01/05/2013	Not Submitted							
11	Adeyemi, Adekunle Ajolayo, Dr		North Region	General Practice (Grampian)	Dr Peter Kiehlmann	01/05/2013	Not Submitted							
12	Adjeh, Anthony Edafe, Dr		North Region	General Practice - Caledonian	-	01/05/2013	Not Submitted							
13	Ahmad, Fayyaz, Dr		North Region	General Psychiatry - North	-	-	-							
14	Akbar, Saeed, Dr		North Region	N3	Dr David Gordon	25/09/2013	Not Submitted							
15	Akbar, Sarah, Dr		North Region	Paediatrics - North	Dr Sarah Hill	01/05/2013	Not Submitted							
16	Al Soufi, Reem Haja, Dr		North Region	Emergency Medicine - North	Dr Jeremy Richardson	01/05/2013	Not Submitted							
17	Alder, Sarah Louise, Dr		North Region	Geriatrics - North	Dr Roy Soiza	01/05/2013	Not Submitted							
18	Al-Hassani, Sarah, Dr		North Region	General Practice (Grampian)	Dr Yvonne Aiken	25/09/2013	Not Submitted							
19	Ali, Elham Kdiar, Dr		North Region	N6	Mr Marcin Szczepanski	-	-							
20	Ali, Isma Mariam, Dr		North Region	N4	-	-	-							
21	Ali, Masooma, Dr		North Region	Paediatrics - North	-	-	-							
22	Allen, Laurin, Dr		North Region	Anaesthesia - North	Dr Andrea Harvey	01/05/2013	Not Submitted							
23	AlMasri, Omar, Dr		North Region	N11	-	-	-							
24	Almeida, Natasha, Dr		North Region	Core Psychiatry Training - North	-	-	-							
25	Al-Moyeed, Baig, Dr		North Region	Neurology (All Scotland)	Mrs Margaret Macleod	01/05/2013	Not Submitted							
26	Aly, Omar, Dr		North Region	N12	Dr Callum Duncan	25/09/2013	Not Submitted							
27	Amin, Altager, Mr		North Region	General Surgery - North	Mr Ronald Coggins	01/05/2013	Not Submitted							
28	Anatolyeva, Mariya, Dr		North Region	Core Anaesthetics Training - North	Dr Ross Clarke	-	-							
29	Anderson, Jennifer Gabriella, Dr		North Region	General Practice (Grampian)	Dr Stephen L Terwey	-	-							
30	Anderson, Zoe, Dr		North Region	General Practice - Caledonian	Dr Allison Smith	-	-							
31	Andronowski, Piotr, Dr		North Region	N5	Dr Grant Cumming	25/09/2013	Not Submitted							
32	Anglim, Neil, Dr		North Region	Cardiology - North	Dr Andrew Hannah	01/05/2013	Not Submitted							
33	Angpalakhan, Shaemala, Miss		North Region	N9 Academic	-	-	-							
34	Anwar, Nur Aizsan, Dr		North Region	N11	-	-	-							
35	Arapova, Natalia, Dr		North Region	Anaesthesia - North	Dr Karen Cranfield	-	-							
36	Arnold, Karen, Dr		North Region	General Practice - Caledonian	Dr Claire B Robertson	-	-							
37	Arthur, Nicola, Dr		North Region	N8	-	-	-							
38	Atherton, Paul Timothy, Dr		North Region	General Practice - Caledonian	Dr Angus McKellar	01/05/2013	Not Submitted							
39	Atkinson, Rebecca, Dr		North Region	N8	Mr Fraser Gill	25/09/2013	Not Submitted							

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.

SOAR - Agent

SOAR: Scottish Online Appraisal Resource

Role: Sys Admin in Zone SOAR HQ

Logged in as William O'Lu - Timeout: 40 mins | Log Out

Batch Operation: Initiate Declarations

Search Settings

Current Region: North Region

Programme: All

Trainee Surname:

Educational Supervisor: All

Not Initiated After:

Last Declaration Status: All

Search

Search Results

<input checked="" type="checkbox"/>	Trainee	Gmc No	Current Region	Programme	Educational Supervisor	Initiated	Status
<input type="checkbox"/>	Abbas, Hassan, Dr	7077643	North Region	Core Medical Training - North	-	1/05/2013	Completed
<input type="checkbox"/>	Abbas, Hina Naz, Dr	6092815	North Region	Neurology (All Scotland)	-	1/05/2013	Completed
<input checked="" type="checkbox"/>	Ahimbola, Oluwaseun Oyenike, Dr	6162879	North Region	General Practice (Grampian)	Karen Barker	25/09/2013	Not Submitted
<input checked="" type="checkbox"/>	Abou Alhous, Mohammed Hafez, Dr	5204403	North Region	Cardiology - North	Dr Deepak Garg	1/05/2013	Not Submitted
<input checked="" type="checkbox"/>	Adams, Jennifer, Dr	7039045	North Region	Core Psychiatry Training - North	Dr Soma Sekhar Tadi	1/05/2013	Not Submitted
<input checked="" type="checkbox"/>	Adeponle, Olanlesi, Dr	7011310	North Region	General Practice (Grampian)	Dr Stephen L Terwey	1/05/2013	Not Submitted
<input checked="" type="checkbox"/>	Adeyemi, Adekunle Ajolayo, Dr	7047948	North Region	General Practice (Grampian)	Dr Peter Kiehlmann	1/05/2013	Not Submitted
<input type="checkbox"/>	Adjeh, Anthony Edafe, Dr	6116313	North Region	General Practice - Caledonian	-	1/05/2013	Not Submitted
<input type="checkbox"/>	Ahmad, Fayyaz, Dr	5199999	North Region	General Psychiatry - North	-	-	-

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!)

The screenshot shows a web browser window displaying the 'BatchDeclaration.aspx' page. The page contains a table of trainees with columns for Name, ID, Region, Specialty, Supervisor, Date, and Status. Several rows are checked, including those for Kashif, Jayakody, Jeunma, Jha, Jido, Johnston, Johnstone, and Jones. Below the table, there is a pagination system showing 'Showing 301 to 350 of 833 entries' and a set of navigation buttons. At the bottom of the page, there are three buttons: 'Initiate declarations for selected Trainees', 'Export selected Trainees', and 'Export all search results'. A red arrow points from the 'Initiate declarations for selected Trainees' button to the text 'De-select from the list' in the previous section.

Name	ID	Region	Specialty	Supervisor	Date	Status
Kashif, Dr						
Jayakody, J.A.R.K., Dr	6092696	North Region	General Psychiatry - North			
Jeunma, Esasa Ruth (yay), Dr	7039124	North Region	General Practice (Grampian)	Dr Jamie Cooper	1/05/2013	Not Submitted
Jha, Manoj Kumar, Dr	6093780	North Region	General Practice - Caledonian	Dr Jock Ramsay		
Jia, Xueli, Dr	7061016	North Region	N9 Academic			
Jido, Tahir Ado, Dr	5168321	North Region	Obstetrics & Gynaecology - North	Dr Subhayu Bandyopadhyay	1/05/2013	Not Submitted
Johnston, Agnes Louise, Dr	4509211	North Region	Child & Adolescent Psychiatry - North	Dr Philip Crockett	1/05/2013	Not Submitted
Johnstone, Lisa, Dr	7131911	North Region	N7	Dr Carol Robertson	25/09/2013	Not Submitted
Johnston, Elizabeth Jane, Dr	6145574	North Region	General Practice - Caledonian			
Jones, Gareth, Dr	3264455	North Region	N11			
Jones, Isabel, Dr	7254775	North Region	N8	Dr Charles Chithila	25/09/2013	Not Submitted
Jones, Jennifer Louise, Dr	7033127	North Region	Core Medical Training - North	Dr Michal Szygula	1/05/2013	Not Submitted

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.