Online Appointment Tracking System (OATS)

Division/Department Admin User Reference Guide

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Online Appointment Tracking System: Access & Responsibilities

The Online Appointment Tracking System (OATS) is designed to centralize the management and approval of appointment documents for accepted Clinical or Research Fellowship (non-RCPSC) trainees only. The process begins after a trainee has accepted an offer from a fellowship program and ends when the PGME Office approves the appointment package (the appointment is then processed in POWER). The following list outlines each stakeholder's responsibilities in the process.

Division/Program Administrator

- Create the trainee's account
- **Optional**: Upload appointment documents on the trainees behalf (if the program administrator has these documents in their possession)
- Upload the offer letter and the goals & objectives document (for certain Departments, the Program Administrator also uploads the appointment letter)

Trainee

- Login and update personal information
- Upload required appointment documentation (CV, medical degree, specialty certificate, etc.)
- Provide updated personal information if required

Department Administrator

- Reject any of the documents uploaded (if necessary)
- Upload the appointment letter (for certain Departments, this is completed by the Division Administrator)
- Approve the appointment package

PGME Administrator

- Reject any of the documents uploaded (if necessary)
- Review and approve the appointment package

Additional Stakeholders (supervisor, supervisor assistant, additional stakeholder)

- Login and view trainee profile and status

1) Logging in to the System

The home page for the Online Appointment Tracking System is available at
http://oats.pgme.utoronto.ca and the home page should appear similar to the image below.
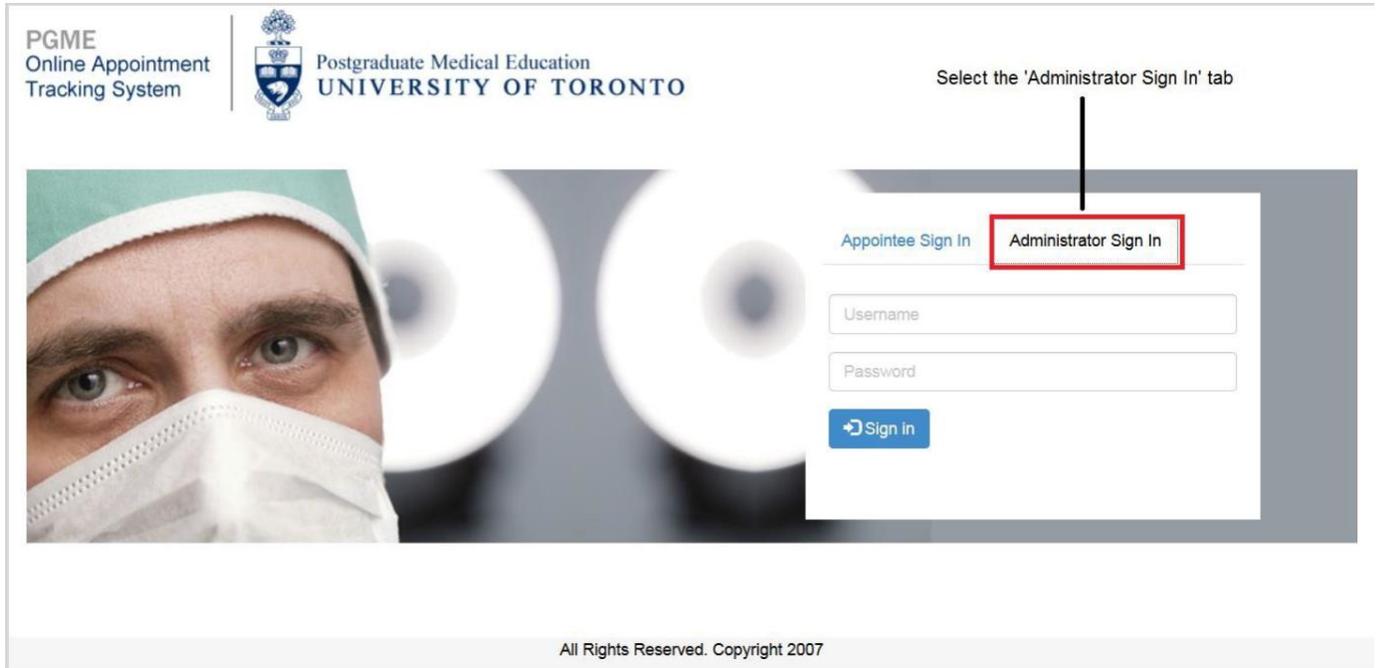
To login as a Division or Department administrator, go to the page shown above and select 'Administrator Sign In' tab and input your login credentials to access your account. Trainees must access the system by selecting the 'Appointee Sign In' tab and inputting their login credentials. If you have any trouble accessing your account or you have forgotten your password, please contact Amy Widdifield (amy.widdifield@utoronto.ca).

2) Main Dashboard: 'New Activity'

After logging in as a Division or Department Administrator you will find your main dashboard, also known as the 'New Activity Panel'. This page shows you a list of all of the trainee appointments in your program or department in various stages of the OATS process. From here you can access individual trainee records by selecting 'View Profile' or select the 'Administrative Tools' button to perform other actions.

Please note, only trainees who have logged into their accounts will appear in the 'New Activity Panel'. If a trainee is not displayed, search for them using the 'List Archived Records' function available in 'Administrative Tools'.

If the list of trainees in your 'New Activity Panel' is extensive, use the 'Search' function; enter the account id, first name, last name or division to find the trainee you are looking for. As noted above, only trainees who have uploaded their documents but are still in the process of being approved will be listed on this page. Trainees for which an account has just been created, or trainees who have been approved will only be accessible through the 'List Archived Records' page.

3) Creating a Trainee Account

From the 'New Activity Panel', select the 'Administrative Tools' button to go to the 'Create Account' page. To complete this page, all fields (except for 'Optional Documents') must be filled in. To add an additional document, click 'Add Required Document' and type in the name of the document and a description of what is to be uploaded (a maximum of 10 additional documents can be added). If you've added too many documents, simply click 'Remove Required Document' to remove the last added field.

Please note, you must create an 'Additional Stakeholder' prior to selecting one from the drop-down menu.

4) Creating an Additional Stakeholder

Creating an Additional Stakeholder allows you to keeps an extra contact in the loop with respect to the appointment, as the system will notify them of any events that occur throughout the process (ex: approval of the appointment). They will also be able to login to the system to view the trainee's record and any others to which they've been attached. An Additional Stakeholder can be anyone within your program/division other than the supervisor/supervisor's assistant, such as the fellowship director.
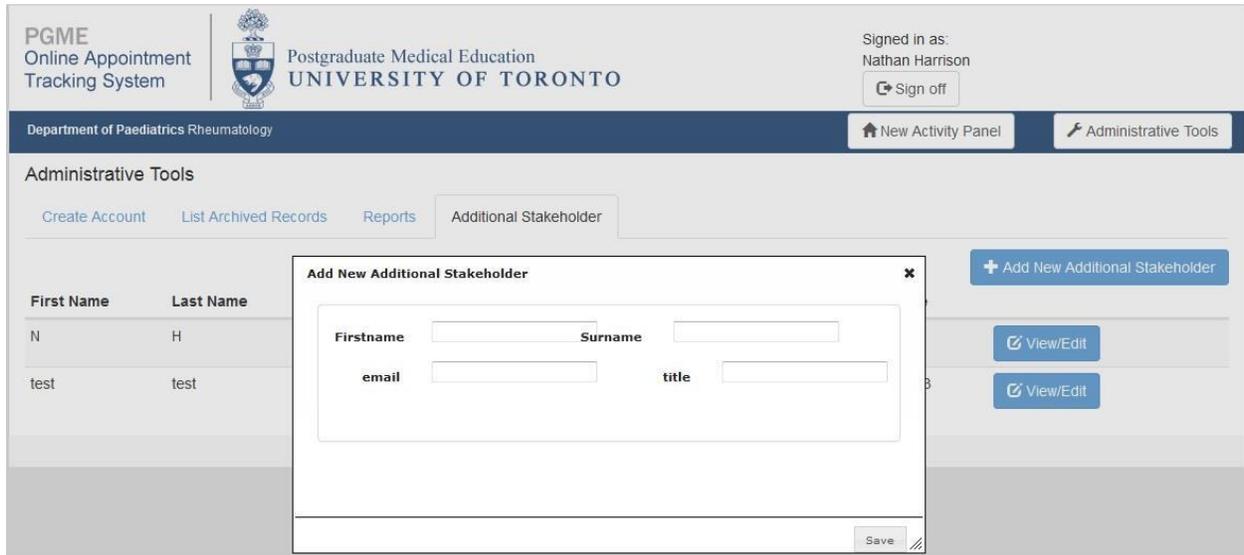
4a) Updating an existing Additional Stakeholder

If you need to update the details for a particular Additional Stakeholder, select 'View/Edit'.
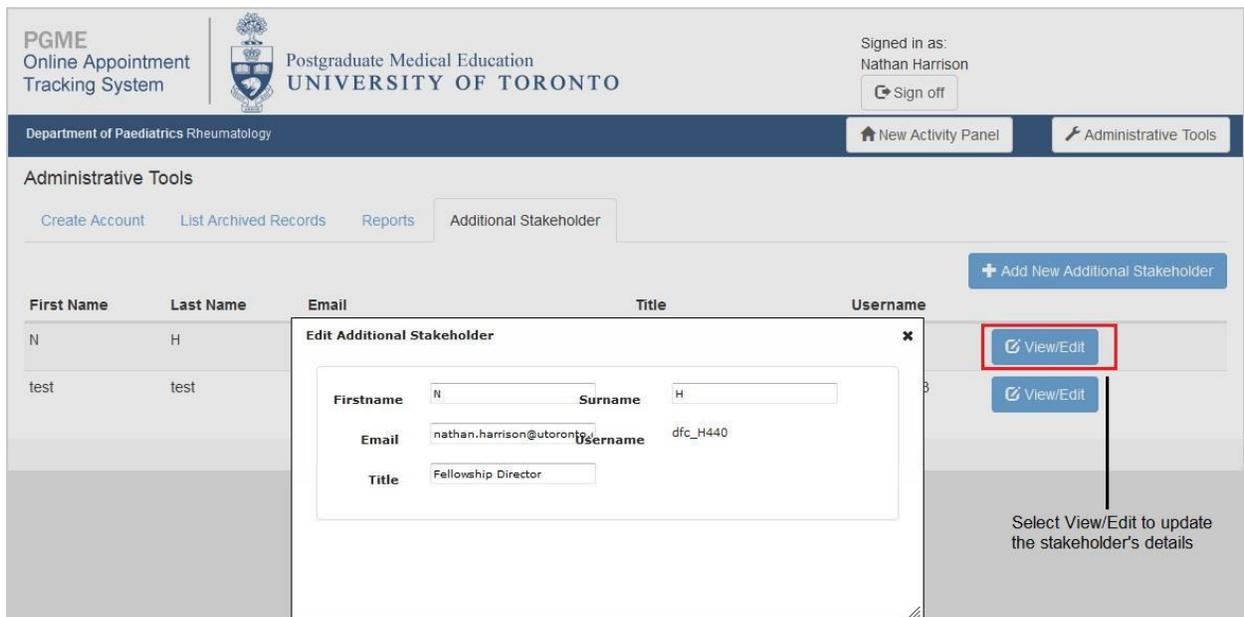
5) Accessing new and old records

Newly created trainee records and trainee records that have been approved will not appear in the 'New Activity Panel'. In order to access them, you must use the 'List Archived Records' function available in the 'Administrative Tools' section.

You can search for a record by status or by inputting the trainee's account id, first name, last name or division. After the trainee has uploaded all of their required documentation, their profile will appear on the 'New Activity Panel', as shown below.

6) Uploading Documents for a Trainee

After creating an account for a trainee, they will be automatically provided a pin and password. Trainees are then responsible for uploading the documents required for their appointment; however the Division/Program administrator can upload these documents on the trainee's behalf. Select 'View Profile' for a trainee (either through the 'New Activity Panel' or 'List Archived Records' page), and then scroll to the list of required documents and perform the following three steps:

1) Select 'Open' for the document you would like to upload:

2) Select 'Browse', to browse your desktop folders for the desired document:

3) Select 'Upload' to successfully upload the document to the profile:

6a) Uploading Goals & Objectives, the Offer Letter and the Appointment Letter

After the trainee's required documents have been uploaded, it is the responsibility of the Division/Program administrator to upload the goals & objectives document, the offer letter and (if required) the appointment letter.

6b) Waiving the Proof-of-funding document requirement

In certain situations, the funding amount and source are indicated in another document (e.g. the Offer Letter). You may use the 'Waive Document' function in this situation, as long as a valid reason is provided.

6c) Updating a Trainees Profile

To update a trainee's profile details on their behalf or send them a new login password, use the 'View Profile' function. All data fields in the trainee profile can be edited; be sure to click 'Save' to enable changes. Select 'Password Reset' to send a new password to a trainee if they have forgotten/lost their original password.

6d) Communicating with other Stakeholders

Should you need to communicate with other stakeholders directly in the system, there is an internal messaging system available within the trainee's profile called the 'Emailer'. Type a note into the 'Message' field, select the desired recipients and select 'Send Email'. This function will forward the message to the specified recipients' email inbox.

View Profile

Appointment Letter	received and accepted by PGME	OPEN

☐ Uploaded by Division Admin

Message From PGME

Accepted by the PGME office, appointment processing will now begin.

Emailer

Send Email(s) to:

Applicant	Division	PGME	Message
☐ Applicant	☐ Nathan Harrison	☐ Pgme Admin	
☐ Supervisor		☐ Jessica Filion	
☐ Assistant	**Department**	☐ Nathan Harrison	
	☐ Nathan Harrison	☐ Nathan Harrison	
		☐ Toni Jarvis	
		☐ John Kerr	
		☐ Hira Mirza	
		☐ Loreta Muharuma	
		☐ Test PGME admin	

◀ Send Email

Application History

| Changed On	Changed By	Action
2015-03-25 11:29:36	N_Harrison753	Account created by admin
2015-03-25 13:21:13	N_Harrison753	Admin uploaded: 76_item1_v1_CV_HnVgExB3.docx
2015-03-25 13:21:20	N_Harrison753	Admin uploaded: 76_item2_v1_MD_A9wQrJ34.docx
2015-03-25 13:21:47	N_Harrison753	Admin uploaded: 76_item4_v1_SPECCERT_fsCHtqDb.docx
2015-03-25 13:22:16	N_Harrison753	Admin uploaded: 76_item7_v1_FUNDING_4gX2JLRH.docx
2015-03-25 13:22:20	N_Harrison753	Admin uploaded: 76_item4_v2_SPECCERT_CjTUWgez.docx
2015-03-25 13:22:30	N_Harrison753	Admin uploaded: 76_item15_v1_CITIZENSHIPDOCUMENT_OfP5X9R6.docx
2015-03-25 13:22:38	N_Harrison753	Admin uploaded: 76_item21_v1__cSQjE39h.docx
2015-03-25 13:22:46	N_Harrison753	Admin uploaded: 76_item22_v1__YCFBHue3.docx

7) Setting the Email Alert Frequency

In the dashboard under 'Administrative Tools', there is an 'Email Alert's function available to you. This alert is an email message sent to the trainee that asks them to upload any outstanding documents to their appointment record. To set the frequency, select the desired interval between notification emails on the drop-down menu and then select 'Save Setting'. This setting will be applied to all incomplete appointment records within your Division/Program.

8) Downloading Reports

If you would like to download an appointment record report, you can do so through the 'Administrative Tools' section under 'Reports'. Select the 'Generate Report' function to see a pop-up window that allows you to 'Open' or 'Save' the file. This report is a raw data export of appointment record data, where each row is a different trainee and each column is a corresponding data field associated with that trainee.
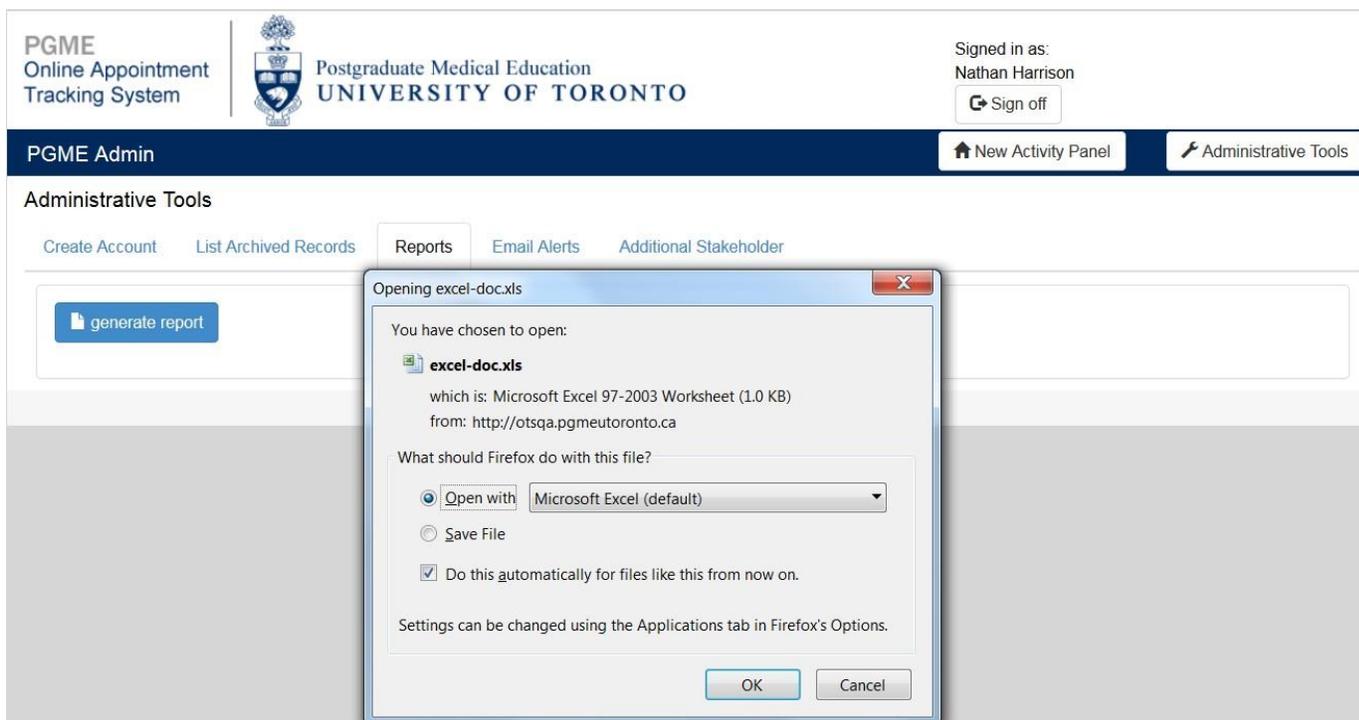
7a) Generating a Zip file of trainee documents

The report provides data on the text-fields of a trainee's profile only. To download the trainee's appointment package documents, select 'Generate Zip Package' through the trainee's profile.

9) Contacting PGME for additional questions or concerns

Should you have any further questions or concerns, please contact:

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