

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

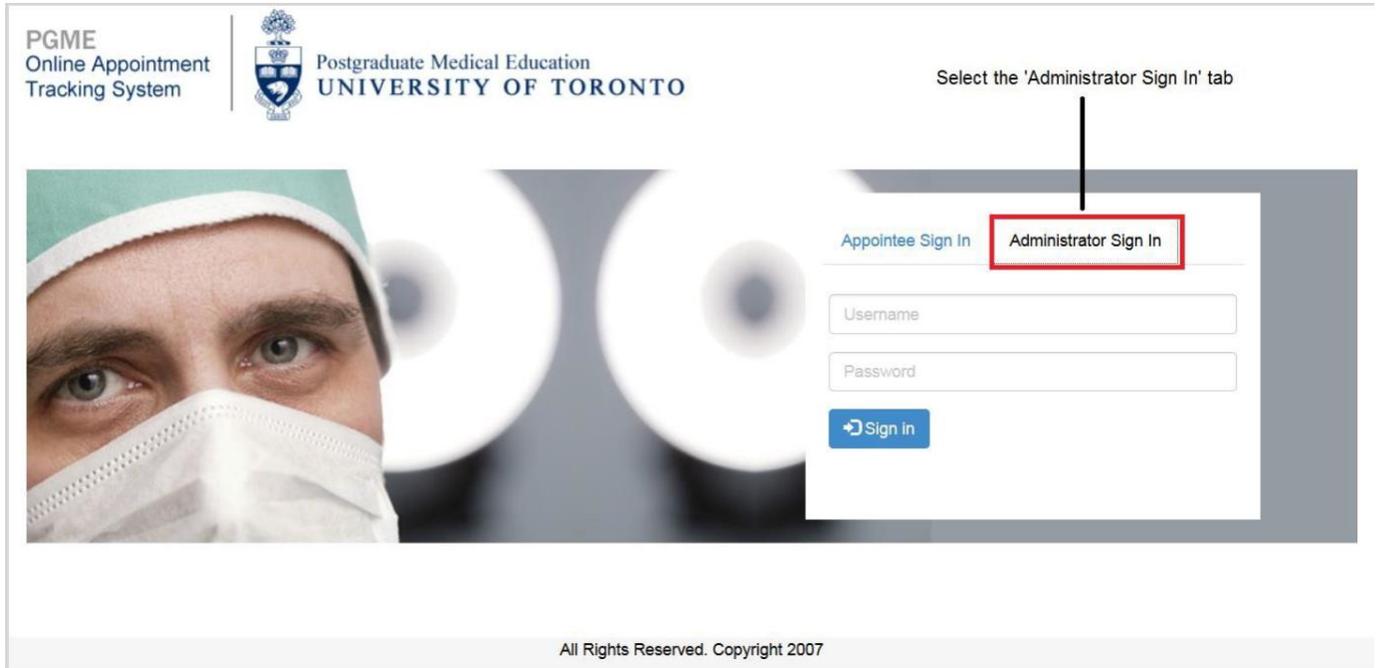
- Reject any of the documents uploaded (if necessary)
- Review and approve the appointment package

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'.

PGME
Online Appointment
Tracking System

Postgraduate Medical Education
UNIVERSITY OF TORONTO

Signed in as:
Nathan Harrison
Sign off

Department of Surgery Orthopaedic Surgery

New Activity Panel

Administrative Tools

Hi Nathan Harrison!
Your last visit was: 2015-03-30 16:11:35

New Activity Panel

Search Text:

| Last Name | First Name | Email | Department | Fellowship Title | Division | Start Date | End Date | Status |
|-----------|------------|-----------------------------|------------|------------------|---------------------|-------------|-------------|------------------|
| Harrison | Nathan | nathan.harrison@utoronto.ca | Surgery | Fellowship | Orthopaedic Surgery | Mar-19-2019 | Jul-18-2020 | Approved By PGME |

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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.

Department of Surgery Orthopaedic Surgery

New Activity Panel Administrative Tools

Administrative Tools

Create Account List Archived Records Reports Email Alerts Additional Stakeholder

Applicant First Name*

Applicant Last Name*

Fellowship Title

Date of Birth* Day Month Year

Applicant Email*

Applicant Status* Please Select One

Primary Hospital/Site* No Hospital/Site Selected

Appointment Start* Day Month Year

Appointment End* Day Month Year

Additional Stakeholder* No additional stakeholder

Supervisor Firstname*

Supervisor Lastname*

Supervisor Email*

Assistant Firstname

Assistant Lastname

Assistant Email

Required Documents
 Curriculum Vitae
 Medical School Diploma
 Specialty Certification
 Proof of Funding
 Visa Fee
 Job Offer
 Proof of Citizenship Document
 Goals & Objectives
 Appointment Letter

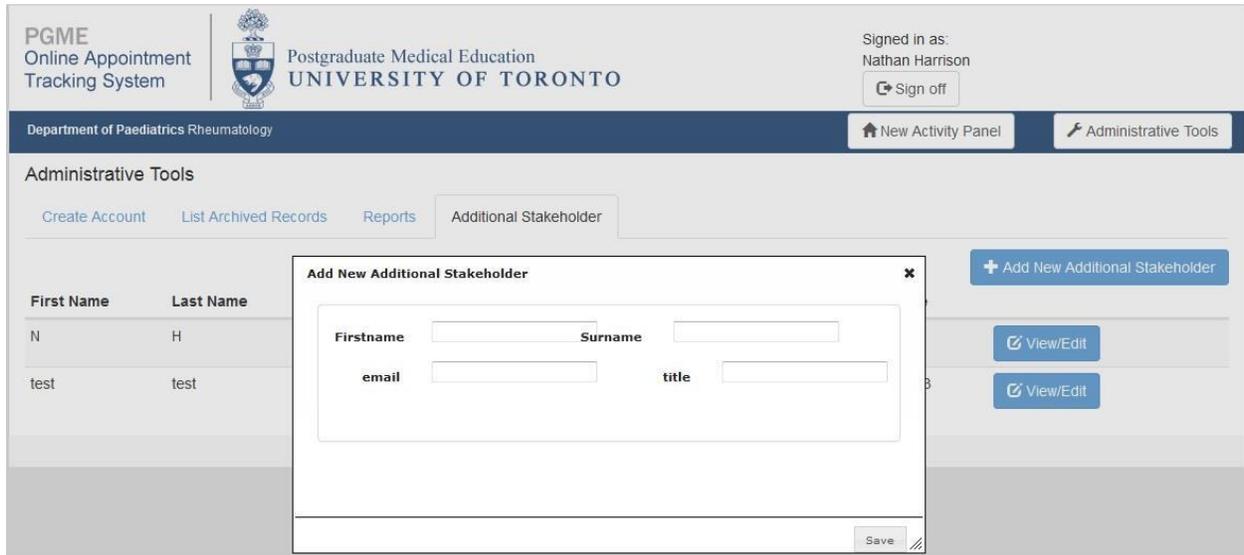
Additional Required Document(s)

Name* Description

Please note, you must create an [Additional Stakeholder](#) prior to selecting one from the drop-down menu.

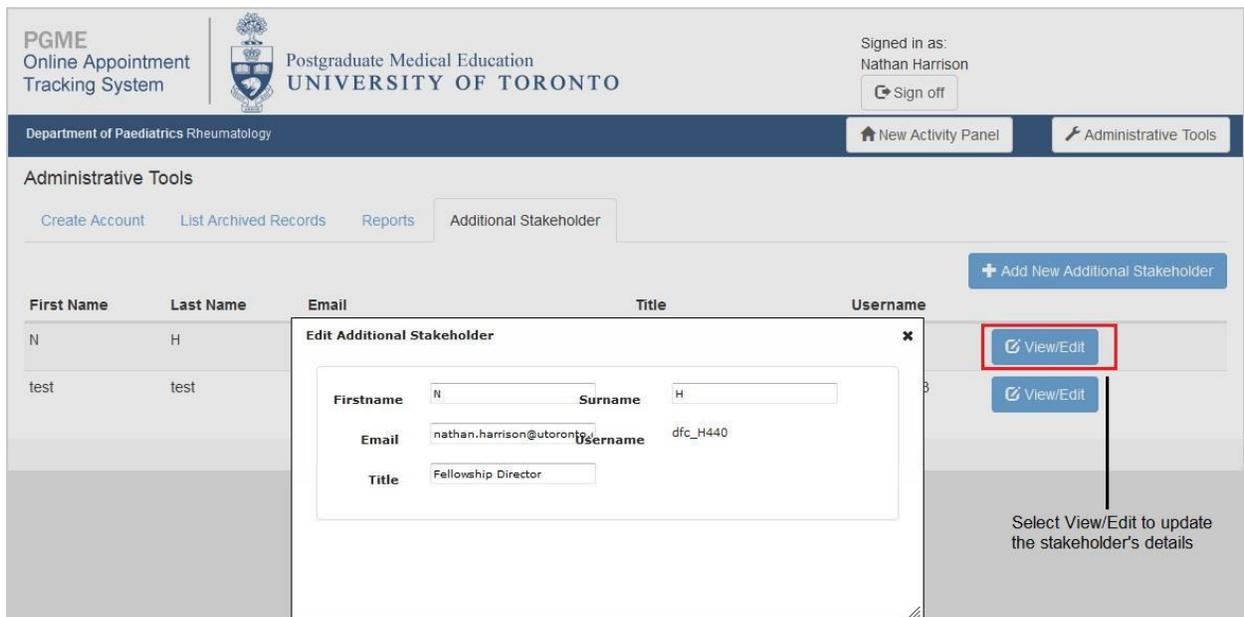
4) Creating an Additional Stakeholder

Creating an Additional Stakeholder allows you to keep 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.

The screenshot shows the PGME Online Appointment Tracking System interface. The user is signed in as Nathan Harrison. The interface includes a navigation bar with 'Department of Surgery Orthopaedic Surgery', 'New Activity Panel', and 'Administrative Tools'. The 'Administrative Tools' section is active, showing options for 'Create Account', 'List Archived Records', 'Reports', 'Email Alerts', and 'Additional Stakeholder'. A search form is present with a search text field containing 'account id/firstname/lastname/division' and a status dropdown set to 'All Statuses'. Below the search form is a table of records:

| Last Name | First Name | Email | Department | Fellowship Title | Division | Start Date | End Date | Status |
|-----------|------------|-----------------------------|------------|------------------|---------------------|-------------|-------------|------------------|
| Harrison | Nathan | nathan.harrison@utoronto.ca | Surgery | Fellowship | Orthopaedic Surgery | Mar-19-2019 | Jul-18-2020 | Approved By PGME |

The footer of the interface states 'All Rights Reserved. Copyright 2007'.

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.

The screenshot shows the PGME Online Appointment Tracking System interface. The user is signed in as Nathan Harrison. The interface includes a navigation bar with 'Department of Surgery Orthopaedic Surgery', 'New Activity Panel', and 'Administrative Tools'. The 'New Activity Panel' is active, showing a greeting: 'Hi Nathan Harrison! Your last visit was: 2015-03-30 16:11:35'. Below the greeting is a search form with a search text field containing 'account id/firstname/lastname/division' and a status dropdown set to 'All Statuses'. Below the search form is a table of records:

| Last Name | First Name | Email | Department | Fellowship Title | Division | Start Date | End Date | Status |
|-----------|------------|-----------------------------|------------|------------------|---------------------|-------------|-------------|------------------|
| Harrison | Nathan | nathan.harrison@utoronto.ca | Surgery | Fellowship | Orthopaedic Surgery | Mar-19-2019 | Jul-18-2020 | Approved By PGME |

A 'View Profile' button is visible next to the record. The footer of the interface states 'All Rights Reserved. Copyright 2007'.

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:

View Profile **Step 1**

| | | |
|--------|----------|--|
| Test 1 | received | OPEN |
| Test2 | received | OPEN |
| Test3 | received | OPEN |

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

View Profile

| | | |
|--|---|-----------------------|
| Test 1 | received | CLOSE |
| STATUS | | |
| <div style="border: 1px solid red; padding: 2px; display: inline-block;">Browse... No file selected.</div> Step 2 | <p>Date Received: 2015-03-25 13:22:38</p> <p>Division Approval: Pending</p> <p>Department Approval: Approved</p> | |
| Test2 | received | OPEN |

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

View Profile

| | | |
|---|---|-----------------------|
| Test 1 | received | CLOSE |
| STATUS | | |
| <p>View File</p> <div style="border: 1px solid red; padding: 2px; display: inline-block;">Browse... No file selected.</div> Step 3 | <p>Date Received: 2015-03-25 13:22:38</p> <p>Division Approval: Pending</p> <p>Department Approval: Approved</p> | |
| Test2 | received | OPEN |

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.

Proof of Funding
not yet received
CLOSE

Waive Document

Waive Document Reason:

No file chosen
 Please note the upload file size limit is: 25 mb
 The accepted file types are the following:
 gif|jpg|png|doc|docx|pdf|txt|jpeg

STATUS

Division Approval: Pending

Department Approval:

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.

View Profile
✕

Personal Details

| | | |
|--|---|---|
| <p>Account</p> <p>Account nathan</p> <p>Id</p> <p>Date Created 2015-03-25 11:29:36</p> <p>Last Login 2015-03-25 13:38:33</p> | <p>Trainee</p> <p>First Name <input type="text" value="Nathan"/></p> <p>Last Name <input type="text" value="Harrison"/></p> <p>Gender <input checked="" type="radio"/> Male <input type="radio"/> Female</p> <p>Birthdate <input type="text" value="Jan"/> <input type="text" value="01"/> <input type="text" value="1984"/></p> <p>Citizenship <input type="text" value="Canada"/></p> <p>Country of Residence <input type="text" value="Canada"/></p> <p>Telephone <input type="text" value="416 978-3650"/> <input type="text" value="416 978-3650"/></p> <p>Email <input type="text" value="nathan.harrison@utoronto.ca"/></p> <p>Address <input type="text" value="500 University Avenue"/> <input type="text" value="Toronto"/> <input type="text" value="M5G 1V7"/></p> | <p>Appointment</p> <p>Fellowship Title <input type="text" value="Fellowship"/></p> <p>Division <input type="text" value="Orthopaedic Surgery"/></p> <p>Primary Hospital/Site <input type="text" value="Sunnybrook Health Sciences Center"/></p> <p>Appointment Start Date <input type="text" value="Mar"/> <input type="text" value="19"/> <input type="text" value="2019"/></p> <p>Appointment End Date <input type="text" value="Jul"/> <input type="text" value="18"/> <input type="text" value="2020"/></p> <p>Additional Stakeholder Name <input type="text" value="Test"/></p> <p>Additional Stakeholder Email <input type="text" value="test@test.com"/></p> <p>Supervisor Name <input type="text" value="Nathan"/> <input type="text" value="Harrison"/></p> <p>Supervisor Email <input type="text" value="nathan.harrison@utoronto.ca"/></p> <p>Supervisor Assistant <input type="text" value="Nathan"/> <input type="text" value="Harrison"/></p> <p>Supervisor Assistant Email <input type="text" value="nathan.harrison@utoronto.ca"/></p> |
|--|---|---|

Send the trainee a new 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

Applicant

Supervisor

Assistant

Division

Nathan Harrison

Department

Nathan Harrison

PGME

Pgme Admin

Jessica Filion

Nathan Harrison

Nathan Harrison

Toni Jarvis

John Kerr

Hira Mirza

Loreta Muharuma

Test PGME admin

Message

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 |

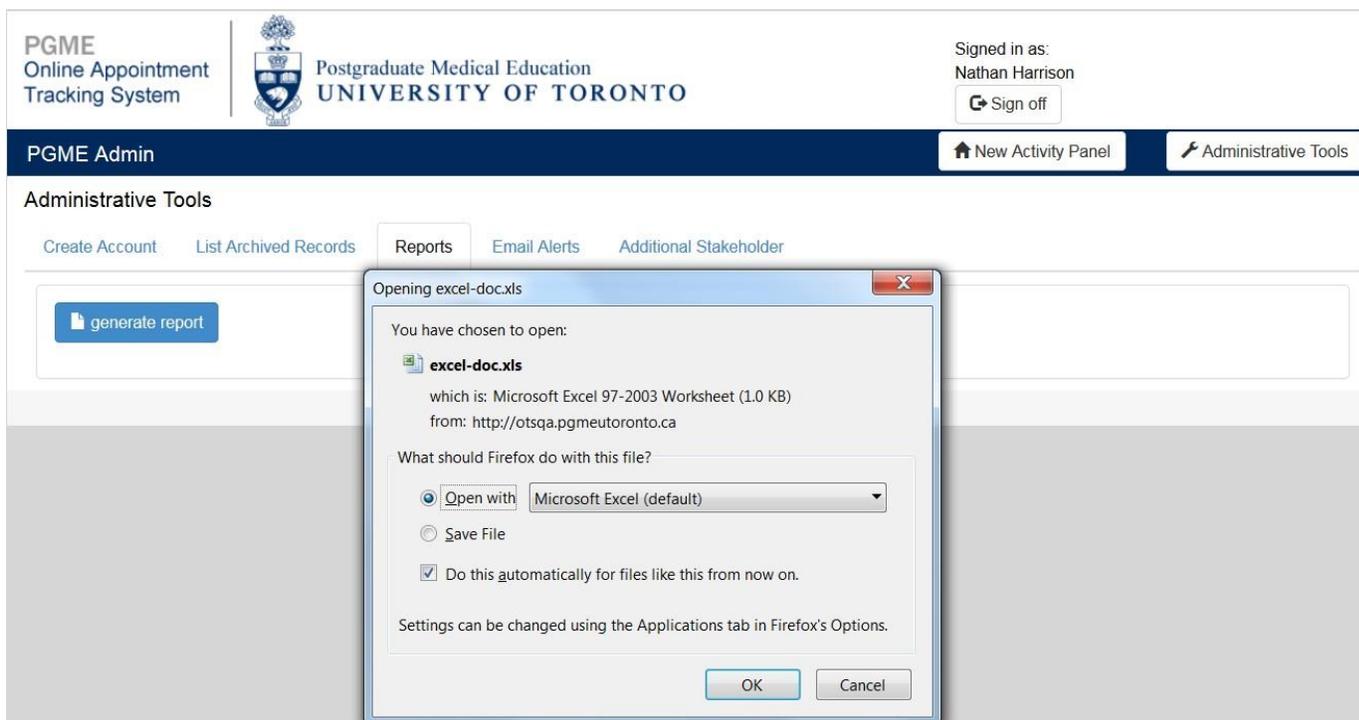
7) Setting the Email Alert Frequency

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.

The screenshot displays the PGME Online Appointment Tracking System interface. At the top left, the logo for PGME (Postgraduate Medical Education) is shown, along with the University of Toronto crest and name. The user is signed in as Nathan Harrison, with a 'Sign off' button. The navigation bar includes 'Department of Surgery', 'New Activity Panel', and 'Administrative Tools'. The 'Administrative Tools' section is active, with sub-tabs for 'Create Account', 'List Archived Records', 'Reports', 'Email Alerts', and 'Additional Stakeholder'. The 'Email Alerts' tab is selected, showing the 'Auto Emailer' settings. A dropdown menu is open, listing various frequency options: 'Do not set emailer', 'Daily', 'Weekly', 'Bi-Weekly', 'Monthly', and 'Once every three weeks' through 'Once every ten weeks'. The 'Weekly' option is currently selected. A 'Save Setting' button is located to the right of the dropdown. Below the dropdown, the current status is shown as 'Emails sent every: Currently not set' and 'Last date email sent: No record of last emails'. The footer of the page includes the text 'Rights Reserved. Copyright 2007'.

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.

| Required Documents | | | |
|---|----------|--|------|
| Generate ZIP Package Of Uploaded Required Documents | | | |
| Curriculum Vitae | received | | OPEN |
| Medical School Diploma | received | | OPEN |
| Medical School Transcript | received | | OPEN |

9) Contacting PGME for additional questions or concerns

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

Amy Widdifield
Information Management Specialist

Post Graduate Medical Education
Faculty of Medicine, University of Toronto
Room 590, 500 University Ave.
Toronto ON M5G 1V7

t: 416-978-3991

f: 416-978-7144

e: amy.widdifield@utoronto.ca