

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.

PGME
Online Appointment
Tracking System

Postgraduate Medical Education
UNIVERSITY OF TORONTO

Select the 'Administrator Sign In' tab

Appointee Sign In Administrator Sign In

Username

Password

Sign In

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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 Judy Ha (judy.ha@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’.

The screenshot shows the 'New Activity Panel' interface. At the top, there is a header with the PGME logo, the University of Toronto crest, and the text 'Postgraduate Medical Education UNIVERSITY OF TORONTO'. On the right, it says 'Signed in as: Nathan Harrison' with a 'Sign off' button. Below the header, a dark blue bar contains 'Department of Surgery Orthopaedic Surgery' and two buttons: 'New Activity Panel' and 'Administrative Tools'. The main content area starts with a greeting 'Hi Nathan Harrison!' and 'Your last visit was: 2015-03-30 16:11:35'. Below this is the 'New Activity Panel' title. A search bar is present with the placeholder text 'Search Text: account id/firstname/lastname/division' and a 'Search' button. Below the search bar is a table with columns: Last Name, First Name, Email, Department, Fellowship Title, Division, Start Date, End Date, and Status. The table contains one row for Nathan Harrison, a Surgery Fellowship in Orthopaedic Surgery, approved by PGME. A 'View Profile' button is next to the row. At the bottom, a footer states 'All Rights Reserved. Copyright 2007'.

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

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) + Add Required Document - Remove Required Document

Name* Description

+ Create Account

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.

The screenshot shows the PGME Online Appointment Tracking System interface. The user is signed in as Nathan Harrison. The 'Administrative Tools' tab is selected, and the 'Additional Stakeholder' sub-tab is active. A modal titled 'Add New Additional Stakeholder' is open, displaying a form with fields for Firstname, Surname, email, and title. A 'Save' button is at the bottom right of the modal. In the background, a table lists existing stakeholders with columns for First Name, Last Name, Email, Title, and Username. A '+ Add New Additional Stakeholder' button is visible on the right.

First Name	Last Name	Email	Title	Username
N	H			
test	test			

4a) Updating an existing Additional Stakeholder

If you need to update the details for a particular Additional Stakeholder, select 'View/Edit'.

The screenshot shows the PGME Online Appointment Tracking System interface. The user is signed in as Nathan Harrison. The 'Administrative Tools' tab is selected, and the 'Additional Stakeholder' sub-tab is active. A modal titled 'Edit Additional Stakeholder' is open, displaying a form with fields for Firstname, Surname, Email, Title, and Username. The fields are pre-filled with the details of the stakeholder 'Nathan Harrison'. A 'View/Edit' button is highlighted with a red box. A callout arrow points to this button with the text: 'Select View/Edit to update the stakeholder's details'. In the background, a table lists existing stakeholders with columns for First Name, Last Name, Email, Title, and Username. A '+ Add New Additional Stakeholder' button is visible on the right.

First Name	Last Name	Email	Title	Username
N	H			
test	test			

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 header includes the PGME logo, the University of Toronto crest, and the text 'Postgraduate Medical Education UNIVERSITY OF TORONTO'. The user is signed in as Nathan Harrison, with a 'Sign off' button. The navigation bar shows 'Department of Surgery Orthopaedic Surgery' and buttons for 'New Activity Panel' and 'Administrative Tools'. The 'Administrative Tools' section is active, with tabs for 'Create Account', 'List Archived Records', 'Reports', 'Email Alerts', and 'Additional Stakeholder'. The 'List Archived Records' tab is selected, showing a search form with 'Search Text' (account id/firstname/lastname/division) and 'Status' (All Statuses). A 'Search' button is present. Below the search form is a table with columns: Last Name, First Name, Email, Department, Fellowship Title, Division, Start Date, End Date, and Status. The table contains one record for Nathan Harrison, a Fellowship in Orthopaedic Surgery, approved by PGME. A 'View Profile' button is next to the record. The footer states 'All Rights Reserved. Copyright 2007'.

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

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 header is the same as the previous screenshot. The navigation bar shows 'Department of Surgery Orthopaedic Surgery' and buttons for 'New Activity Panel' and 'Administrative Tools'. The 'New Activity Panel' is active, showing a greeting 'Hi Nathan Harrison!' and 'Your last visit was: 2015-03-30 16:11:35'. Below this is a search form with 'Search Text' (account id/firstname/lastname/division) and a 'Search' button. Below the search form is a table with columns: Last Name, First Name, Email, Department, Fellowship Title, Division, Start Date, End Date, and Status. The table contains one record for Nathan Harrison, a Fellowship in Orthopaedic Surgery, approved by PGME. A 'View Profile' button is next to the record. The footer states 'All Rights Reserved. Copyright 2007'.

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

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

Step 2

Test 1	received	CLOSE
--------	----------	-------

Browse...

No file selected.

Upload

STATUS

Date Received: 2015-03-25 13:22:38

Division Approval: Pending

Department Approval: Approved

Test2	received	OPEN
-------	----------	------

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

View Profile

Step 3

Test 1	received	CLOSE
--------	----------	-------

View File

Browse...

No file selected.

Upload

STATUS

Date Received: 2015-03-25 13:22:38

Division Approval: Pending

Department Approval: Approved

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:

See appointment letter for this information.

Save

Choose File
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

Upload

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

Account
Account nathan
Id

Date 2015-03-25
Created 11:29:36
Last 2015-03-25
Login 13:38:33

Trainee
First Name Nathan

Last Name Harrison
Gender ☒ Male ☐ Female
Birthdate Jan 01 1984
Citizenship Canada
Country of Residence Canada
Telephone 416 978-3650
416 978-3650
Email nathan.harrison@utoronto.ca
Address 500 University Avenue
Toronto
M5G 1V7

Appointment
Fellowship Title Fellowship
Division Orthopaedic Surgery
Primary Hospital/Site Sunnybrook Health Sciences Center
Appointment Start Date Mar 19 2019
Appointment End Date Jul 18 2020
Additional Stakeholder Name
Stakeholder
test@test.com
Additional Stakeholder Email
Supervisor Name
Nathan
Harrison
Supervisor Email
nathan.harrison@utoronto.ca
Supervisor Assistant
Nathan
Harrison
Supervisor Assistant Email
nathan.harrison@utoronto.ca

Save

Send the trainee a new password

Password Reset

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 Fillion
 ☐ 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.

PGME
Online Appointment
Tracking System

Postgraduate Medical Education
UNIVERSITY OF TORONTO

Signed in as:
Nathan Harrison
Sign off

Department of Surgery

New Activity Panel Administrative Tools

Administrative Tools

Create Account List Archived Records Reports **Email Alerts** Additional Stakeholder

Auto Emitter

Change auto emitter to sent reminder emails: Do not set emitter
Do not set emitter
Daily
Weekly
Bi-Weekly
Monthly
Once every three weeks
Once every four weeks
Once every five weeks
Once every six weeks
Once every seven weeks
Once every eight weeks
Once every nine weeks
Once every ten weeks

Save Setting

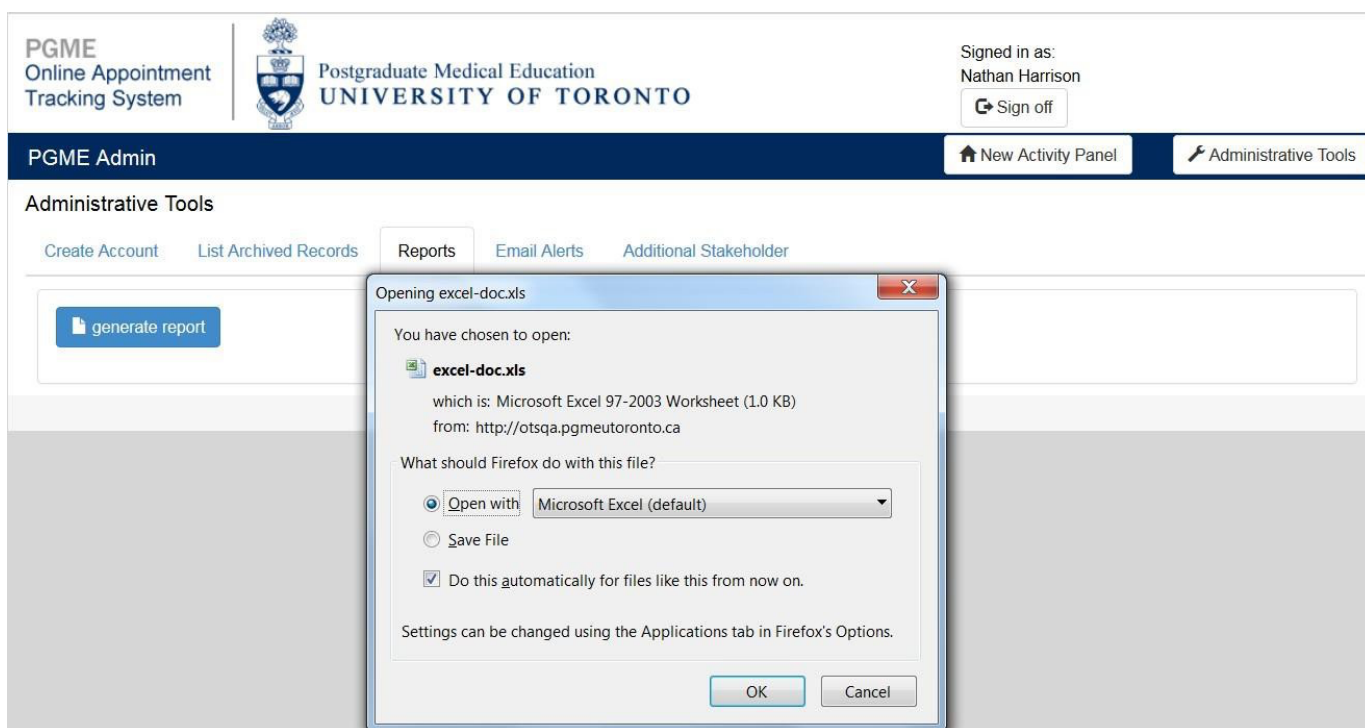
Emails sent every: Currently not set

Last date email sent: No record of last emails

Copyright 2007

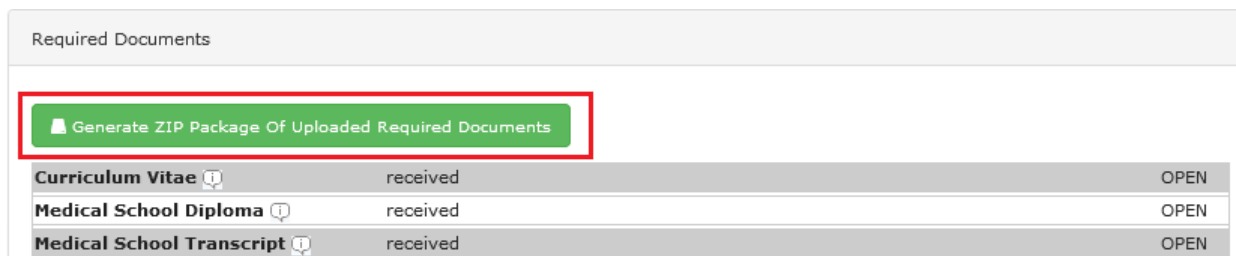
8) Downloading Reports

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.



9) Contacting PGME for additional questions or concerns

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

Judy Ha

Digital Platform Administrator

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Toronto ON M5G 1V7

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