



Training Tracking System User Guide

User Management – Scheduling - Assessment

(Program Director)



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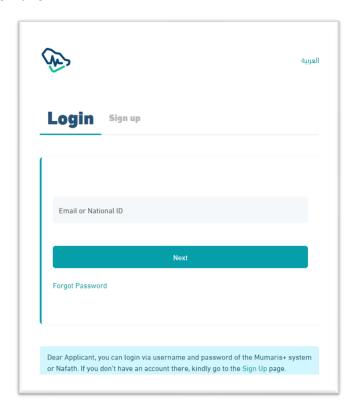
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### 1-Log In

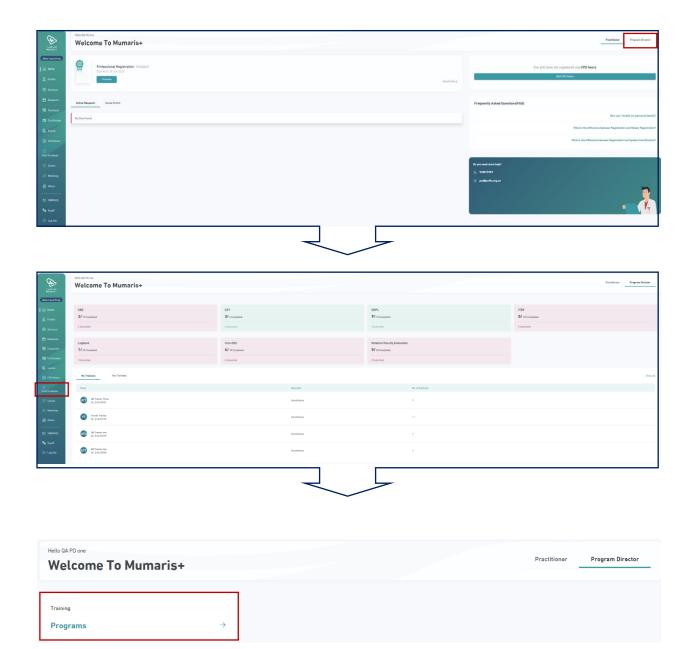
- Use your SCFHS network account and password to log in.
- Access the login page (<u>Here</u>)



### 2- Home Page/ Program Profile

- After logging in, you'll land on the home page.
- Select the 'Program Director' view in the top-right corner for your profile overview.
- Click the 'Post Graduate' button on the left sidebar.
- Click on the Training 'Programs' to access the Program Director Profile & Functions.
- 'Program Profile' tab Provides an overview of the program and its details.







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### 3-User Management

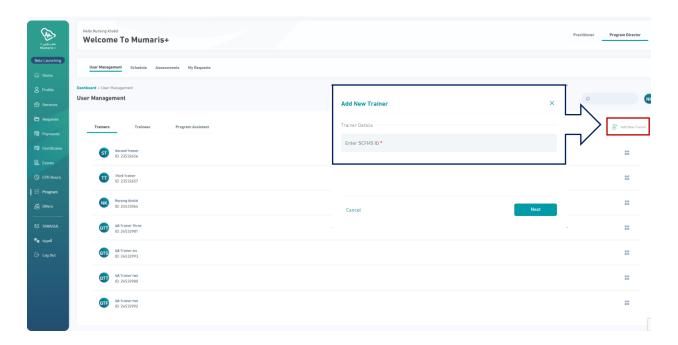
• The User Management page has three sections: Trainer, Trainee, and Program Assistant. Each section lists active users, showing their name, ID, and additional details accessible via the square icon on the right. A search function is available in the upper-right corner.



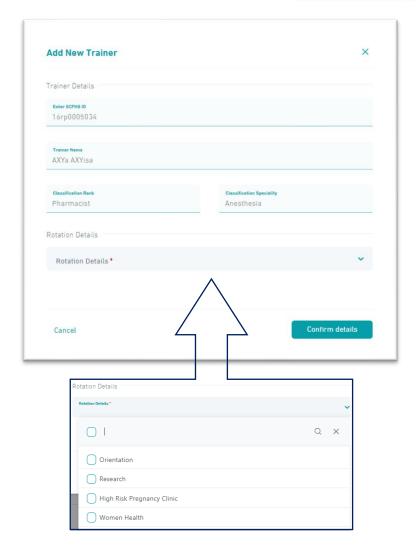


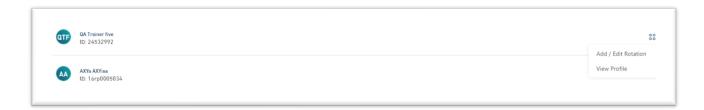
#### 3.1. Trainer

- View a list of all trainers.
- To assign a trainer, enter their Mumaris+ ID.
- The system retrieves their name, specialty, and rank automatically.
- Select the rotations they will oversee
- Then click "Confirm Details" to add them to the Trainers list.
- Edit trainer profiles using the square icon.





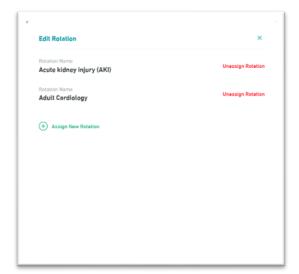


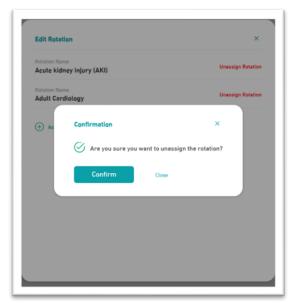




#### **Unassign Trainer:**

- To delete a trainer, you must first unassign all rotations associated with them.
- Once all rotations are unassigned, the trainer will be removed from your training list.
- Similarly, the unassigned rotations will no longer appear in the trainer's list.

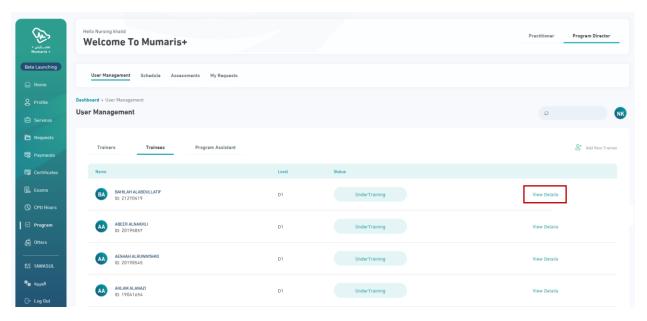


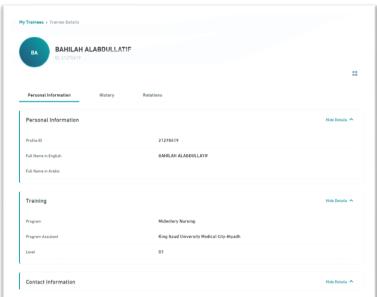




#### 3.2. Trainee

- View all trainees, including their name, level, and training status.
- You can view details via the 'View Details' button, which leads to the trainee's profile, including personal information, contact details, and assessment history.

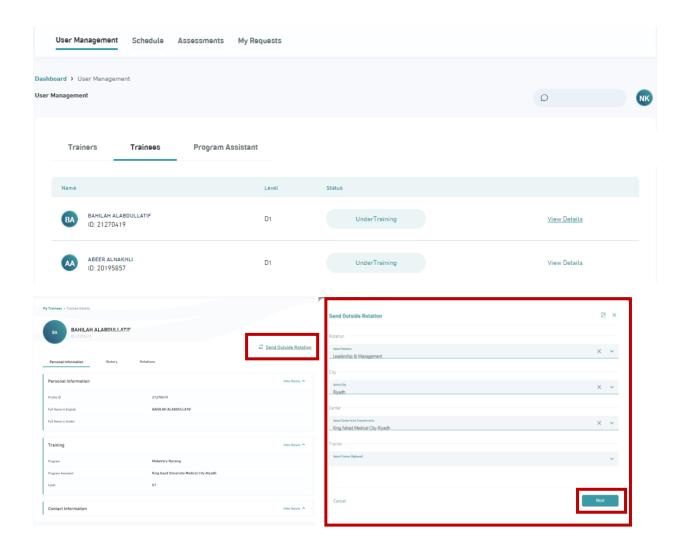






#### **Assign Outside Rotation**

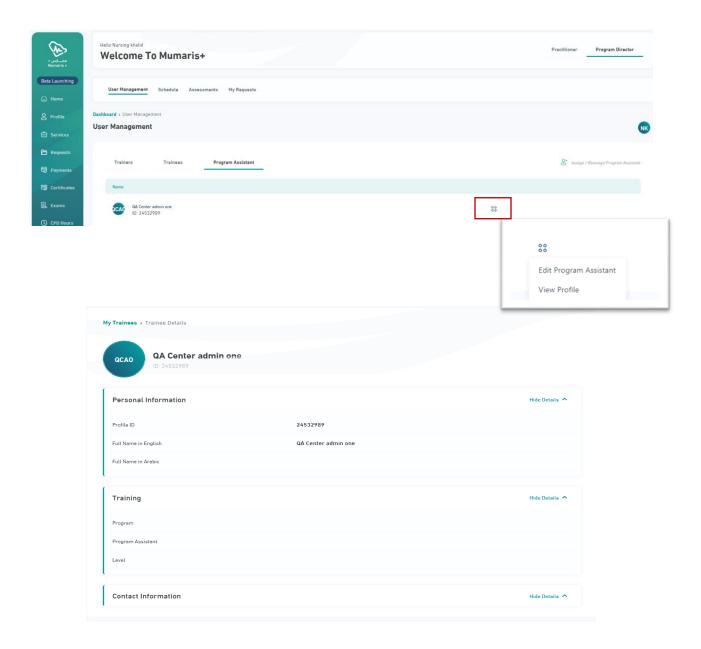
- To assign trainees to an outside rotation, go to the 'User Management' page.
- Click 'View Details' on the trainee's page.
- This opens the trainee's personal information page.
- Click 'Send Outside Rotation' on the top-right corner.
- Fill the required info and click 'Next'





#### 3.3. Program Assistant:

- View all Program Assistants.
- To assign one, click 'Assign / Reassign Program Assistant' and enter their Mumaris+ ID.
- The assigned assistant will appear on the list and will have administrative privileges.
- Edit Program Assistant details and view their profiles as needed.

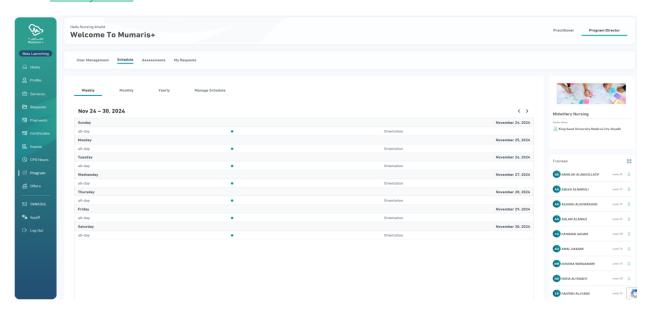




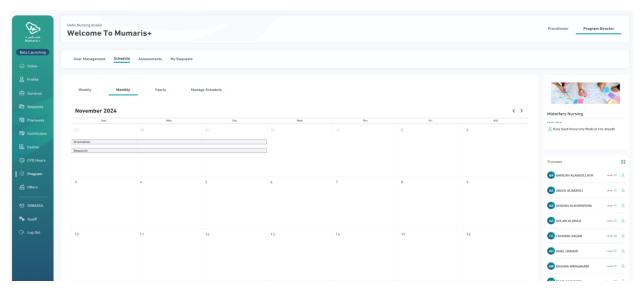
### 4- Schedule Views:

- The user can view and search the schedule in three different formats: Weekly, Monthly, and Yearly, by navigating through the top bar.
- Additionally, the user can view details of each rotation scheduled for the year in various formats.
- Block details are displayed when clicking on any rotation in the schedule.

#### Weekly View:



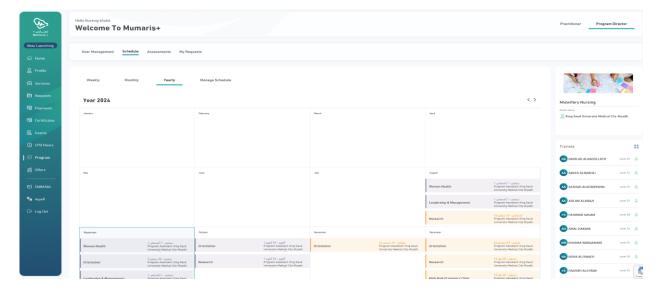
#### Monthly View:

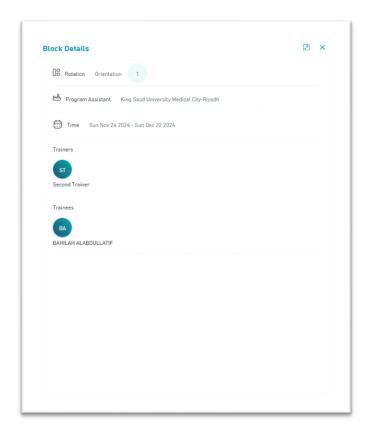




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### Yearly View:









### 5- Manage Schedule:

#### 5.1. Schedule Block:

To start scheduling, click on the Schedule Block option and select the start date for the new block. After choosing a date, click Next. The end date will be automatically determined based on predefined program durations (four, five, or six weeks).

**Note:** The system calculates the end date based on the specified block duration. Once the end date is reached, the block cannot be edited, but users will still have access to view the rotation details.

- Users cannot schedule a rotation that has the same start date as a previous rotation or if there are any conflicts or duplications.
- After selecting the start date, the Program Director (PD) should:
  - Choose a rotation type.
  - Assign a **Senior Trainer** for the rotation. The system will automatically list all trainers associated with that rotation.
  - Users can select or deselect any trainer not required for that rotation.
  - Use the "Trainee Level" search bar to filter trainees as needed.
  - Click **Next** to proceed.

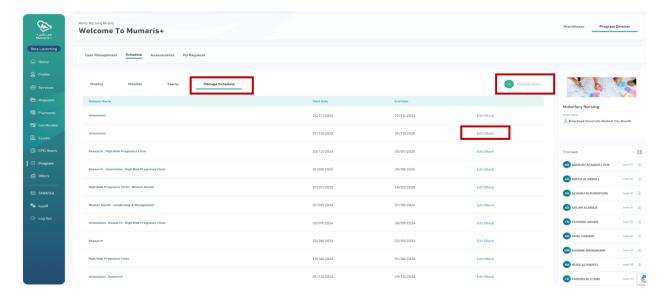
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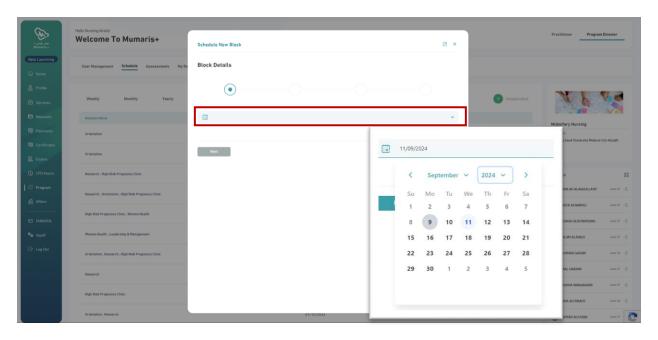
- ✓ The Senior Trainer is responsible for submitting the final evaluation to the PD.

  They have access to all assessments completed by other trainers and can either incorporate the assessments into their own or create a new evaluation before submitting it to the PD.
- ✓ Trainers selected in the checklist can complete assessments; however, their
  evaluations must first be reviewed and approved by the Senior Trainer.
- ✓ The selected trainers will receive an **ITER assessment** at the end of the block.
- ✓ Providing details for trainee entries is flexible; you can add information for one or multiple trainees at a time.

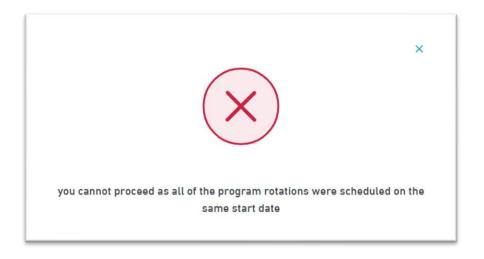


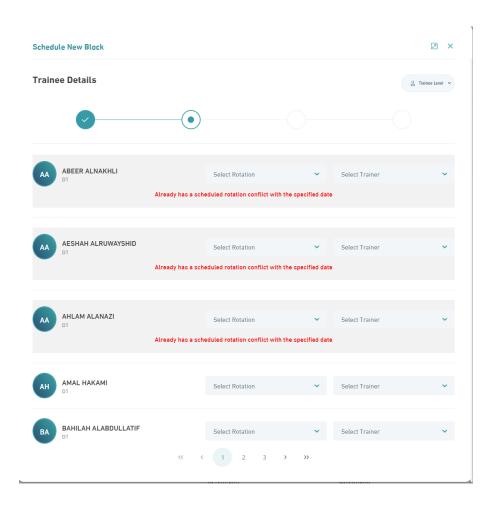
- Review the details on the Summary Details page, which includes rotation, assigned Program Assistant, timing, and involved trainees/trainers.
- Click Finish to confirm.
- A notification will be sent to all assigned users, and the finalized schedule will be available in the Yearly View.



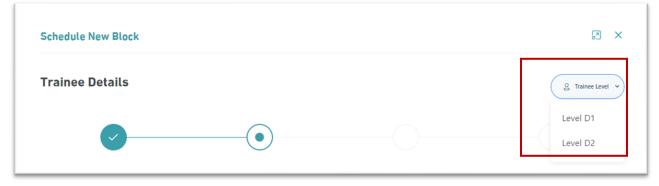


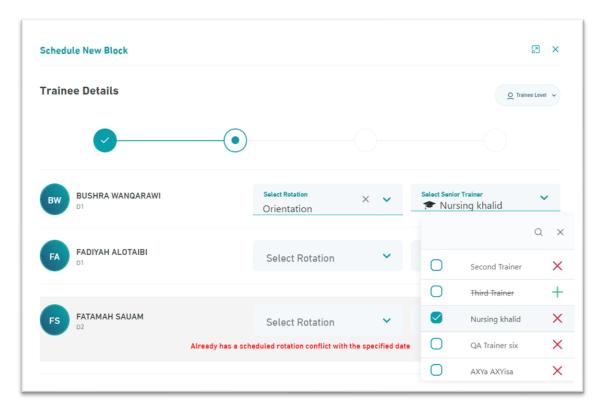




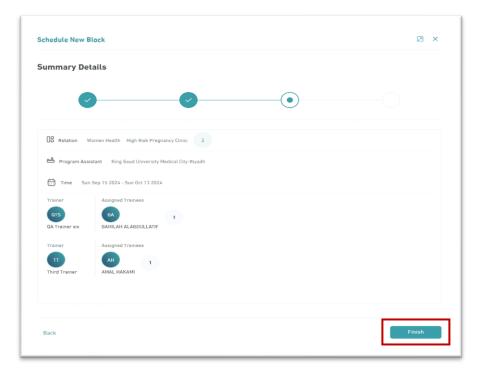


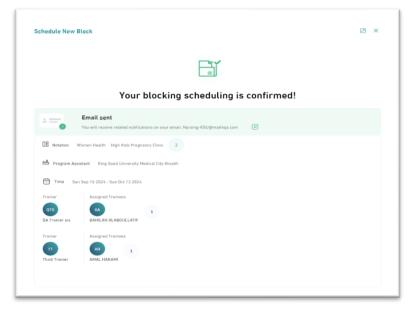








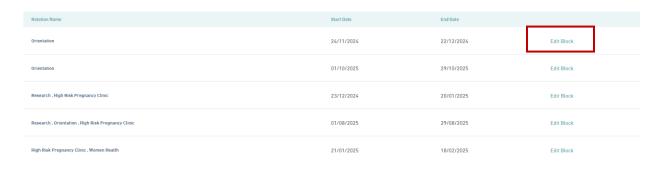


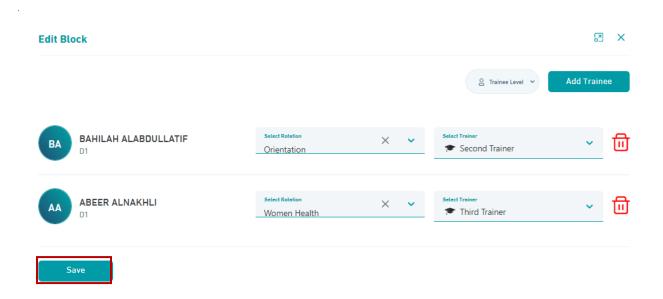




#### 5.1. Edit Block:

- To modify an existing block, navigate to the Manage Schedule page.
- Select the specific block you wish to edit, then click the Edit Block button. This action will return you to the previous view where you initially set up the block.
- In this view, you can:
  - Update the rotations or trainers assigned to the block.
  - Modify the details of current trainees or add new trainees as needed.
- Once you have made the necessary changes, click Save to confirm.
- After saving, the updated information will be reflected in the profiles of all relevant users and in their schedules.



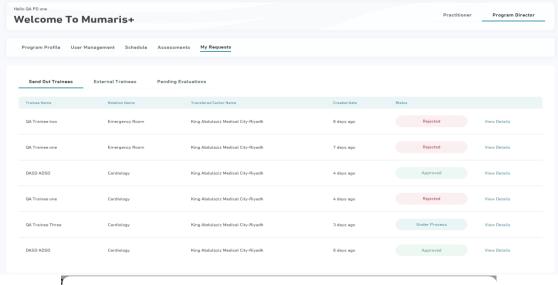


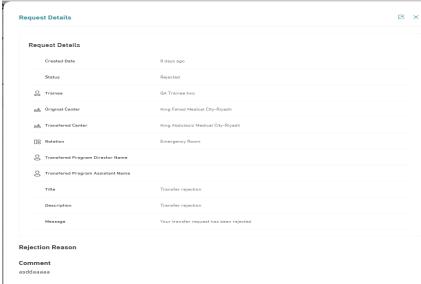


### 6- My Requests:

#### 6.1. Send Out Trainees Progress

- To track the status of the trainees who have been sent outside rotations, click 'My Requests'
- Next click 'Send Out Trainees'
- More information can be accessed through the 'View Details' button.



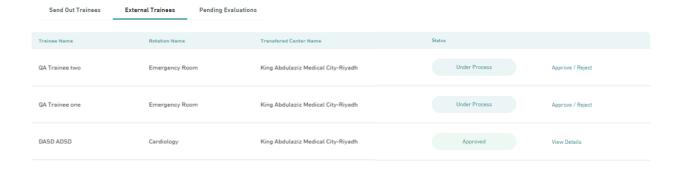


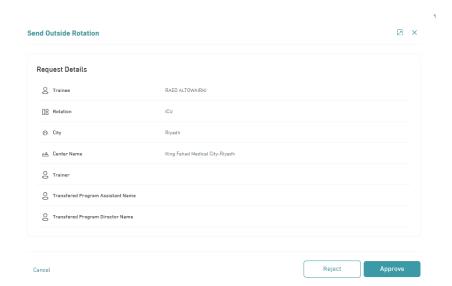


#### **6.2. External Trainees Request:**

#### **Approve:**

- To accept external trainees, click 'My Requests'
- Then 'External Trainees'
- Click the 'Approve/Reject' button
- A popup message will appear when clicking 'Approve'

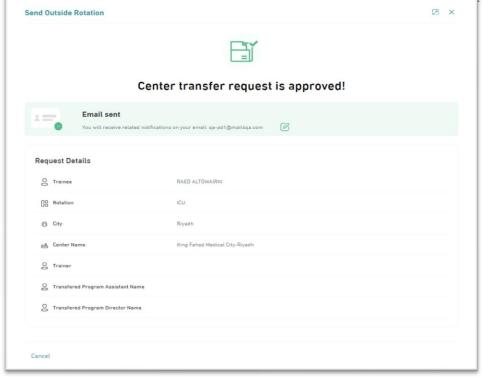






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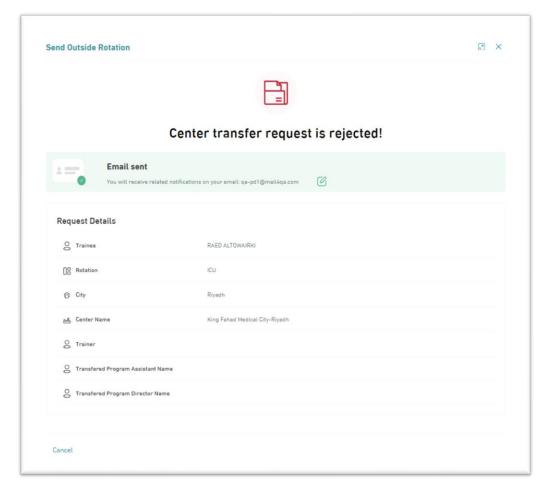


#### Reject:

- To accept external trainees, click 'My Requests'
- Then 'External Trainees'
- Click the 'Approve/Reject' button
- When clicking 'Reject' you must fill out the 'Reason for Rejection'







### 7- Assessments:

#### 7.1. ITER Assessment

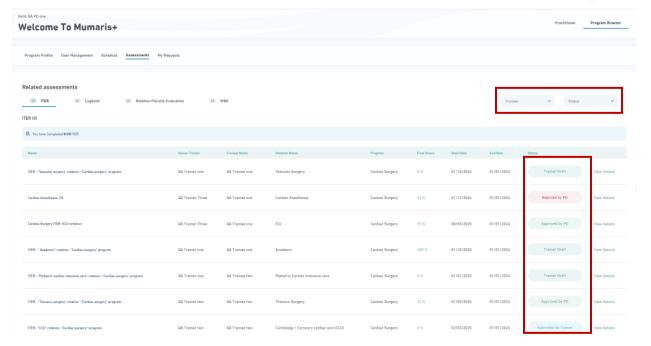
- The ITER (In-Training Evaluation Report) assessment is automatically sent to the selected trainers after the block end date.
- ITER is sent to the selected group of trainers.
- The assessment form reflects the program and rotation.

**Trainers:** The ITER is sent to the trainers once the block ends.

• **PD:** The PD can view a list of assessments and filter by trainee or status.



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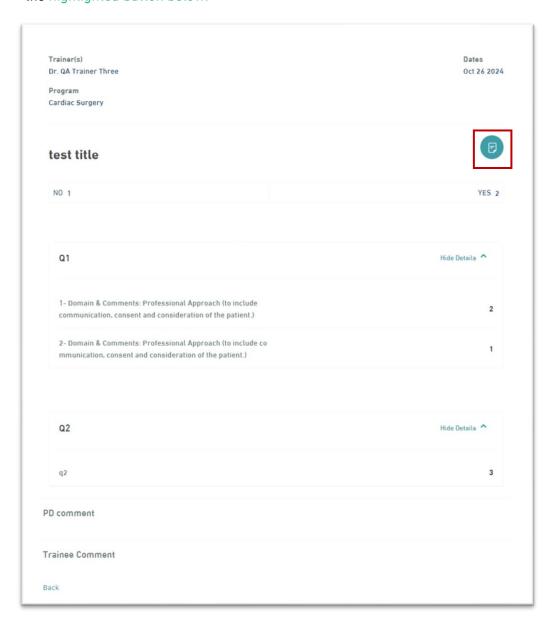
#### **Statuses include:**

- o Trainer Draft: The trainer has started the evaluation but has not submitted it yet.
- Submitted by Trainer: Ready for evaluation.
- Approved by PD: Past evaluations that have been approved.
- o **Rejected by PD:** Past evaluations that have been Rejected.
- Request Review: Trainee requests a second assessment.
- The information displayed includes the assessment name, senior trainer, trainee name, rotation name, program, score, and the start and end dates. For more detailed information or to take action, click the 'View Details' button.

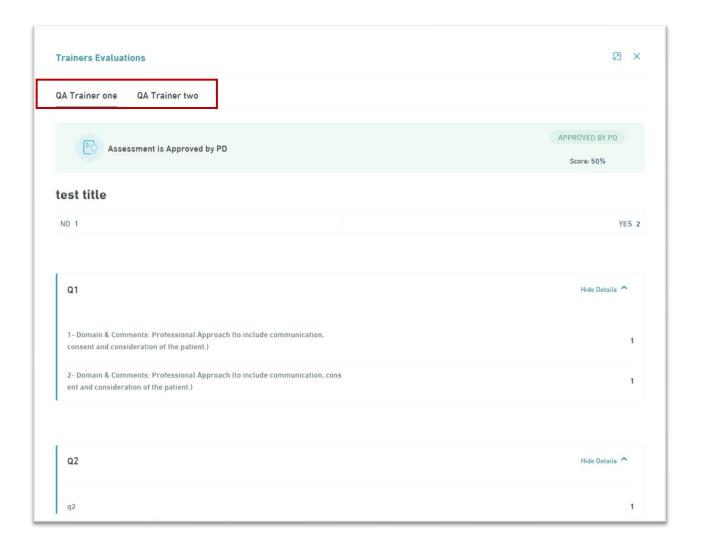




 The PD can view the trainers' evaluations and easily navigate through them by clicking the highlighted button below.





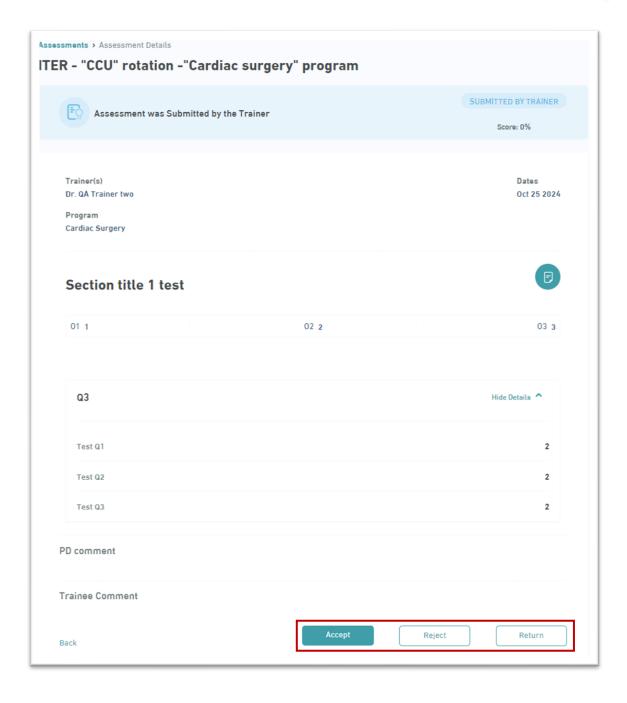


#### Note:

- ✓ The Senior Trainer is selected during the scheduling process.
- ✓ The selected trainers will receive an ITER assessment at the end of the block.
- ✓ The Senior Trainer is responsible for submitting the final evaluation to the PD.

  They have access to all assessments completed by other trainers and can either incorporate the assessments into their own or create a new evaluation before submitting it to the PD.
- ✓ Trainers selected in the checklist can complete assessments; however, their
  evaluations must first be reviewed by the Senior Trainer.



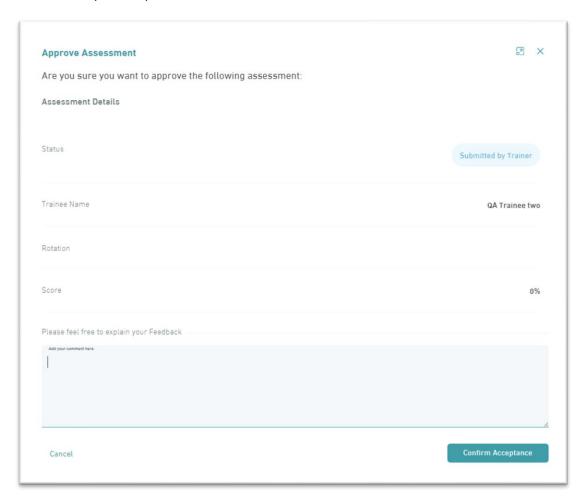




If the status of the evaluation is 'Submitted by Trainer' or 'Request Evaluation' the PD can review and select one of three actions:

#### 1. Accept:

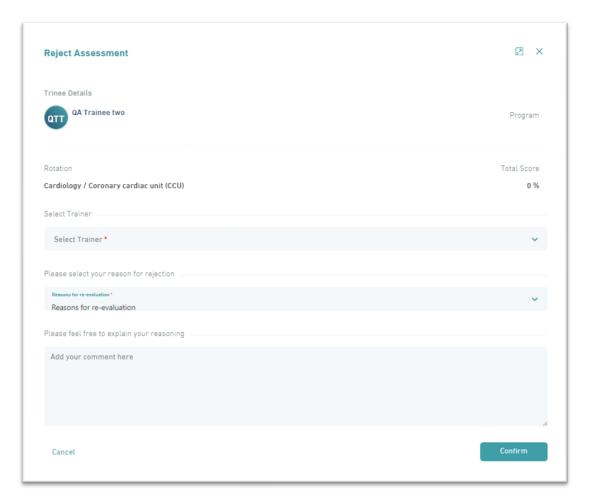
- o PD adds comments in the designated section, which will be visible to the trainer.
- PD clicks "Confirm Acceptance," and the evaluation goes to the trainee, who can accept or request another evaluation.





#### 2. Reject:

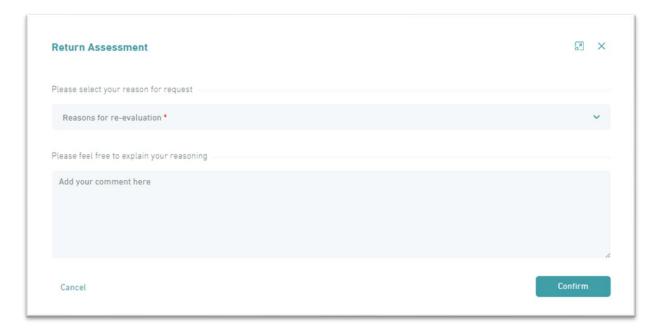
- o PD selects a new trainer and provides the reason for rejection then clicks 'Confirm'.
- o The evaluation is then sent to the new trainer.





#### 3. Return:

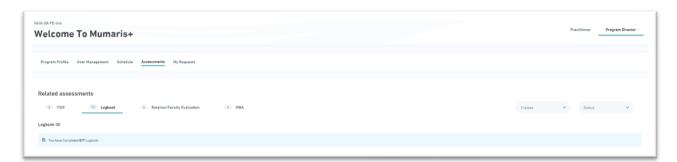
 PD adds the reason for the return, then clicks 'Confirm' and the evaluation is sent back to the same trainer for modifications.



#### 7.2. Logbook & WBA (Work-Based Assessment)

#### Logbook:

- Trainee: Submits the logbook anytime during the year.
- **Trainer:** Approves the logbook.
- **PD:** Can <u>view</u> the logbook and filter by trainee or status but cannot take any action.





#### **WBA (Work-Based Assessment):**

- WBAs vary depending on the program and requirements set by the SCFHS Admin.
- **PD:** Can <u>view</u> the WBA list and filter by trainee or status, but no direct action is required.



#### 7.3. Rotations & Faculty Evaluation

• This section provides a <u>view</u> of trainees' feedback on completed rotations and their trainers.





### FAQs:

What if the assigned Program Assistant does not have an SCFHS user ID?

Create an account and register through the Mumaris+ platform to generate an SCFHS ID.

Do I have to add all the user's information?

No, only the ID is required. The rest of the information will be retrieved from the Mumaris+ account.

Can I add a trainee through my account?

No, trainee entries are made by the SCFHS training department and the specific program.

Can I edit rotations after the end date has passed?

Once the end date is reached, the block cannot be edited. However, users can still view the details of the rotation.

Can I assign multiple trainers to a single block?

Yes, you can assign multiple trainers, with one designated as the Senior Trainer. The Senior Trainer is responsible for submitting the final evaluation to the Program Director (PD) and has access to all assessments from other trainers. They can choose to incorporate those assessments or create their own before sending it to the PD.

Can I add multiple trainees at one time?

Yes, you can enter details for one or multiple trainees simultaneously.



# Thank You