TURAS - PROGRAMME DIRECTOR GUIDE

Last updated 31/07/2015

Contents

1   Introduction

Turas is the Training Management system for the Scotland Deanery. Turas is an online system designed for maintaining information on NHS Scotland Medical and Dental Trainees, Trainers, Programmes, Educational Providers and Study Leave.

Definition: "Turas from the Scottish Gaelic for Journey or Visit"

This guide is specific to the programme director functions with-in Turas and the management of programmes, trainees and study leave.

Field labels and drop-down lists used throughout Turas, where available, is terminology as defined by the regulator for medical trainees and trainers the General Medical Council (GMC) and for dental trainees and trainers the General Dental Council (GDC) with information on specialties, location provided by the Information Statistics Division (ISD).

1.1   Purpose of the User Guide

External access developed for Programme Directors to will allow them to view their programme, trainees in that programme and trainer supervising trainees in the programme, study leave transactions and to authorise study leave.

1.2   Accessing Turas

Programme Directors (PD) will Log into Turas via a link sent to them via email, this should be saved in your Favourites.

From the 'Log In' page, PDs can retrieve their password by clicking on the 'Forgotten your Password?' link. PDs will need to enter their email address and the user will be sent an email containing the link to reset your password.

Also from the 'Log In' page user can also receive technical support and help by clicking the "Contact the helpdesk". **Note:** this is for technical queries and support only.
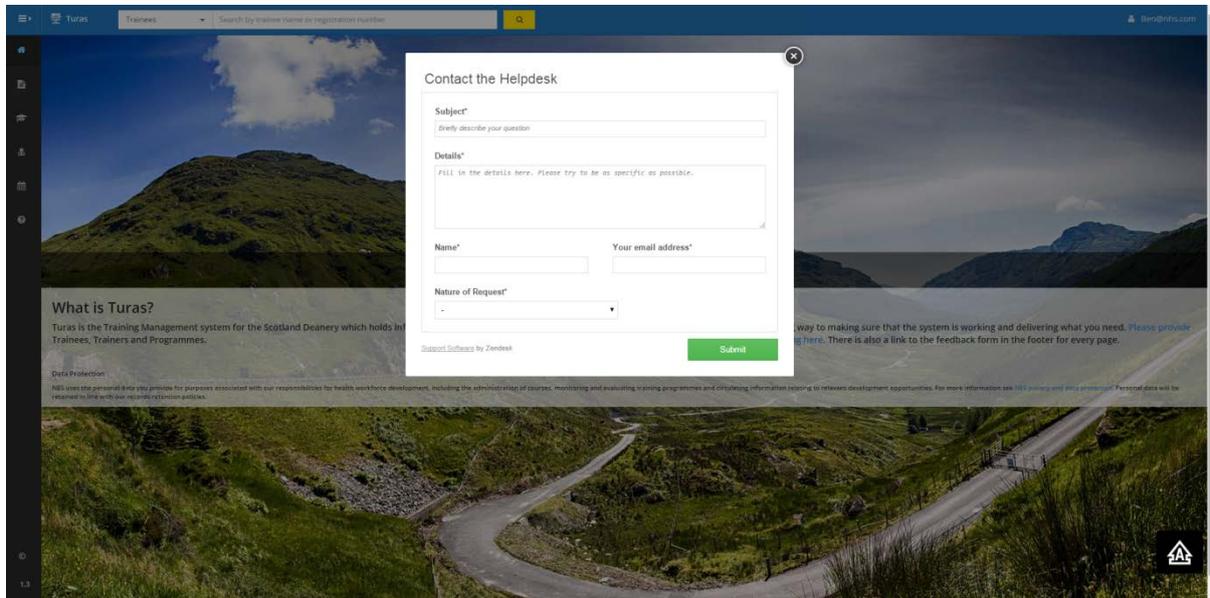

The Helpdesk is for the user to raise any technical faults. After clicking on the Helpdesk icon, the user can enter

- Subject
- Details
- Name
- Email address
- Nature of Request – Select from a drop down list
    - -
    - I cannot log into Turas
    - I have identified a functional defect in Turas
   - I have identified a data defect in Turas

Users can give feedback on the system and the form can be accessed at the bottom of any of the pages in Turas. Feedback could include future requirement and features as well as additional reporting requirements. This form should also be used if you notice any data that is incorrect.
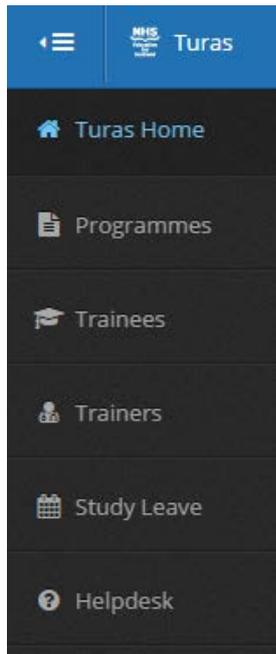
1.3   Home Page

The home page, expanded view allows the user to view the icon and names on the left hand-side of the page, the user as required can collapse this (see below).
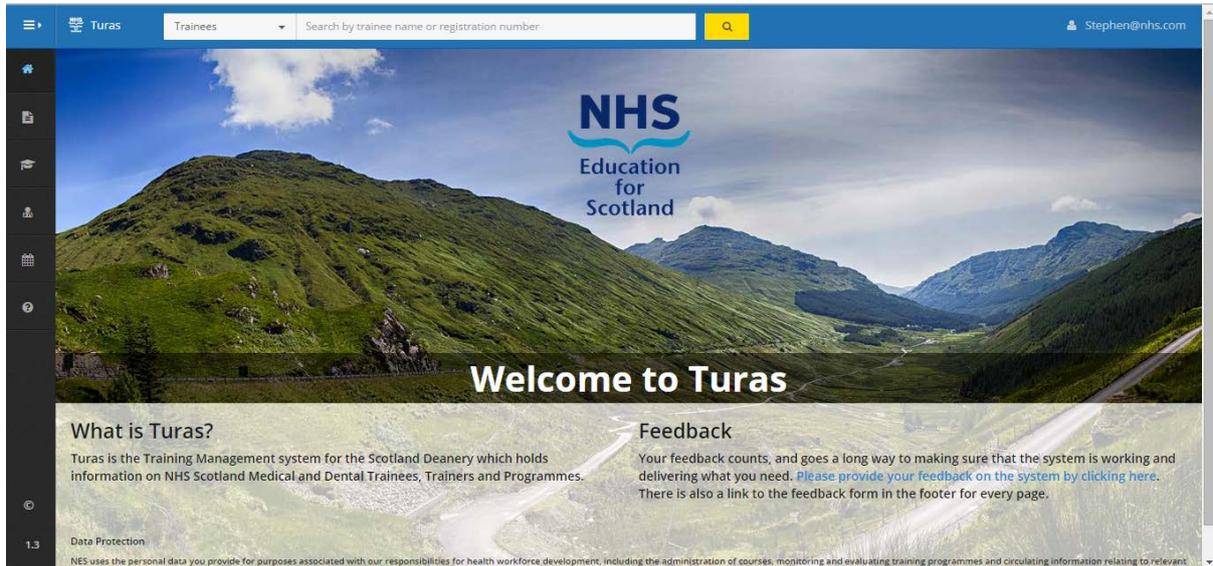

Click to collapse or expand the sidebar
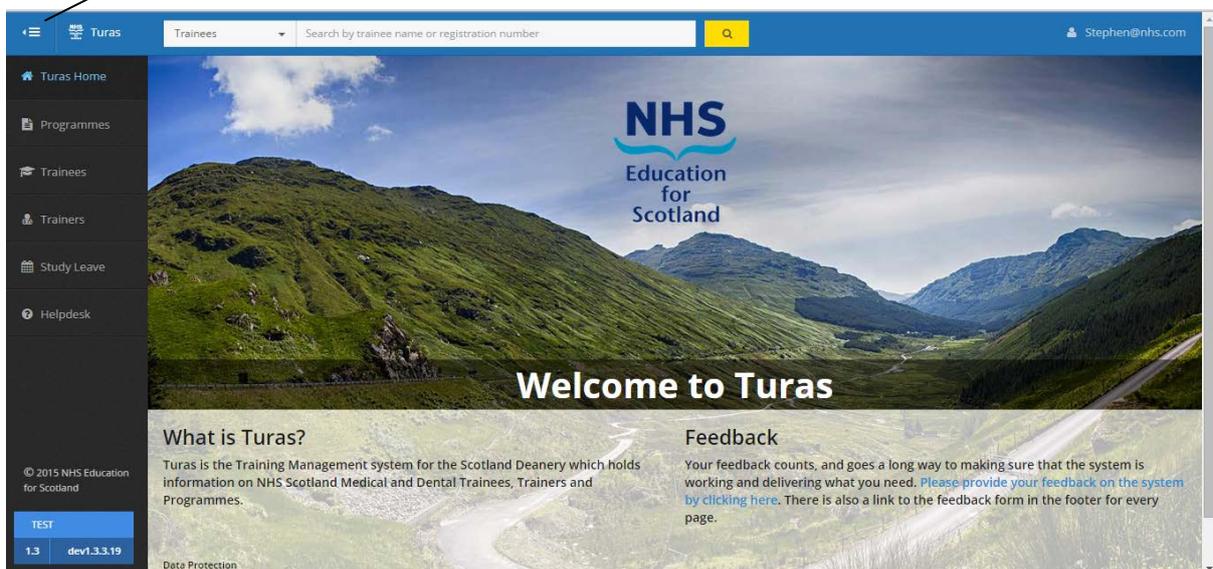
Programme Directors can click and search on the following.

1.4   Change Password

Users have the option to change password by clicking on their email in the top right hand corner of the screen and selecting change password. Passwords must be six characters or more, have at least one non-letter or digit characters, at least one digit, at least one lowercase (a-z) and at least leave one uppercase (A-Z).
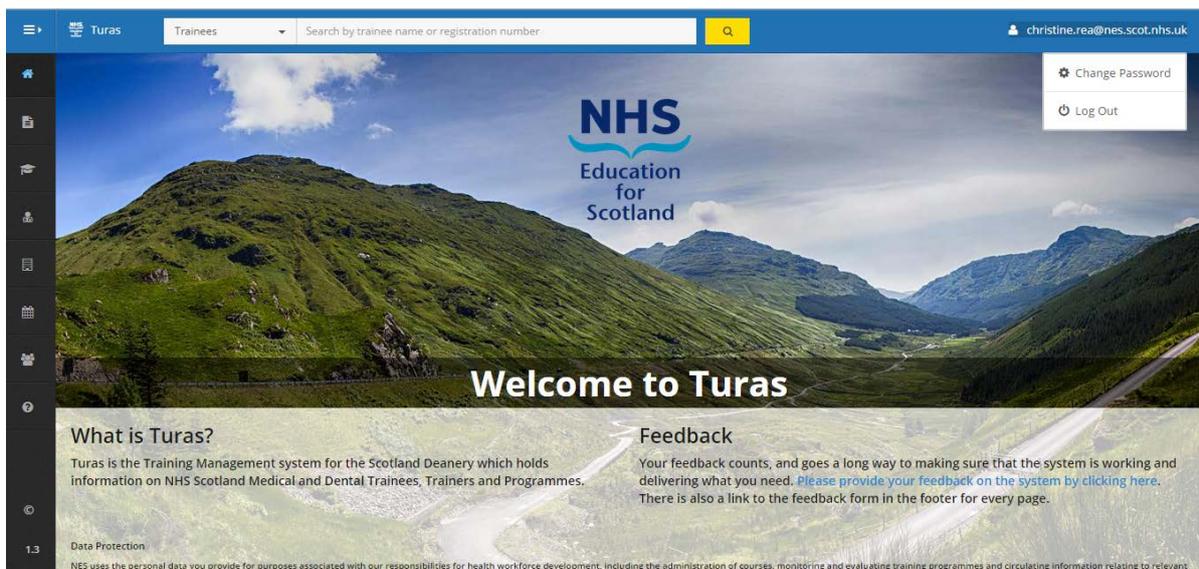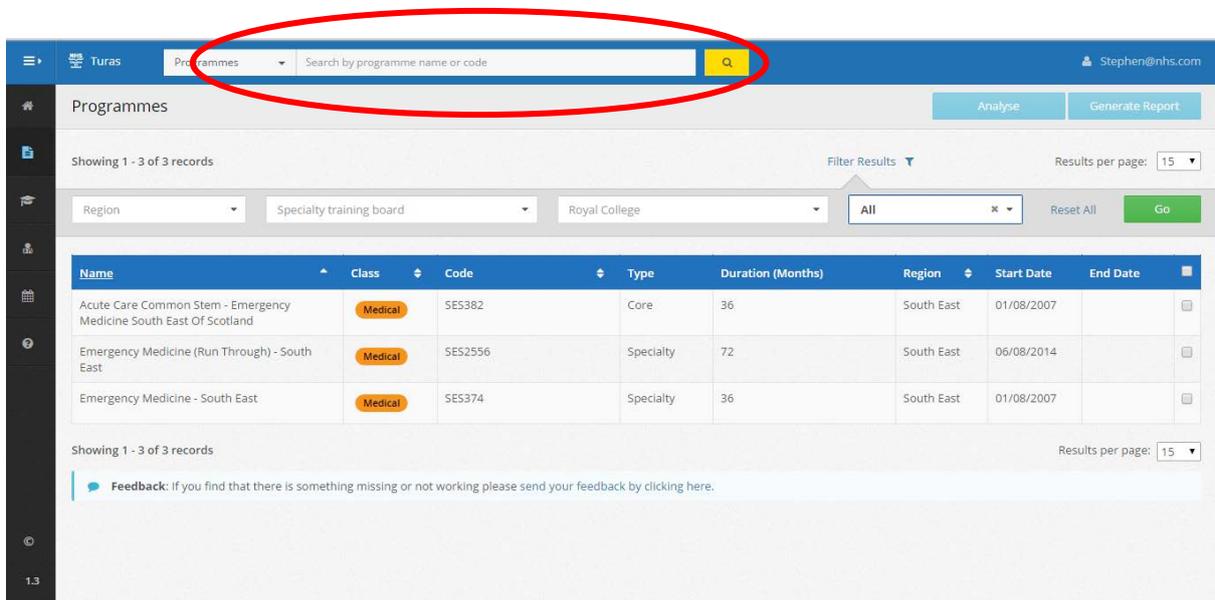
1.5   Links to Other Systems

There is a nightly download from Turas to SOAR (Scottish Online Appraisal Resource), for information on Trainees and Trainers. SOAR is applicable to medical trainees and trainers only.

1.6   Search Function

As a Programme Director, you have access to the programme or programmes you manage and the trainees linked to them. You can search on any of the icons (Programme, Trainee, Trainer, Study Leave). Select the icon you wish to search on, and you can start the search by typing in the search box below and pressing return.
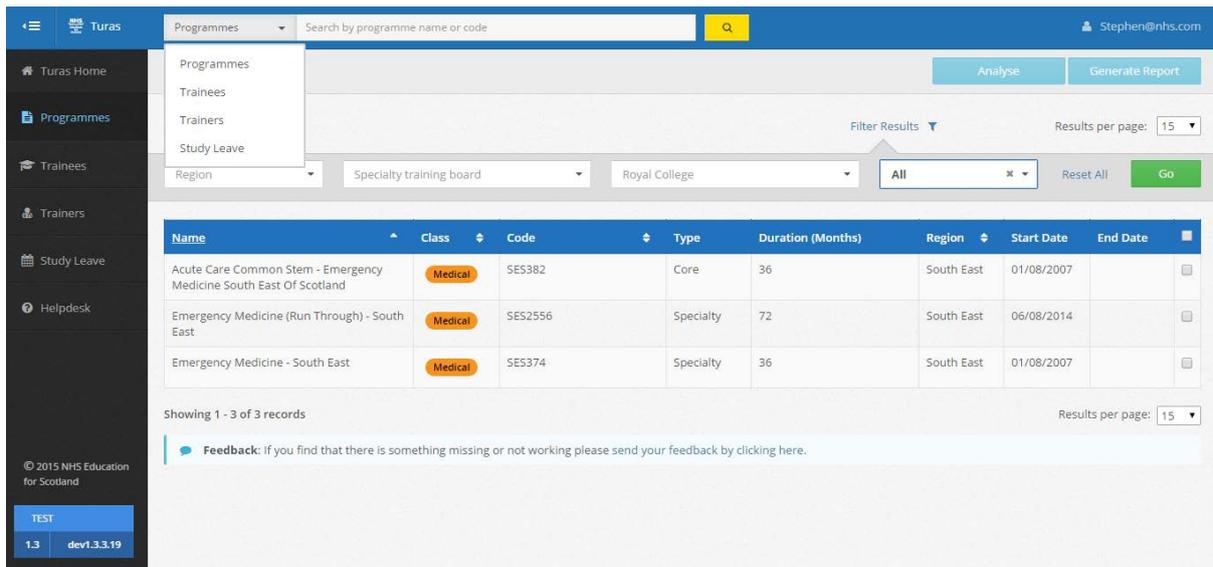

Throughout the system, users can search in any of the areas by selecting the icon or by clicking the down arrow on the search box (see below) and selecting from the list.

1.7   Additional Functionality

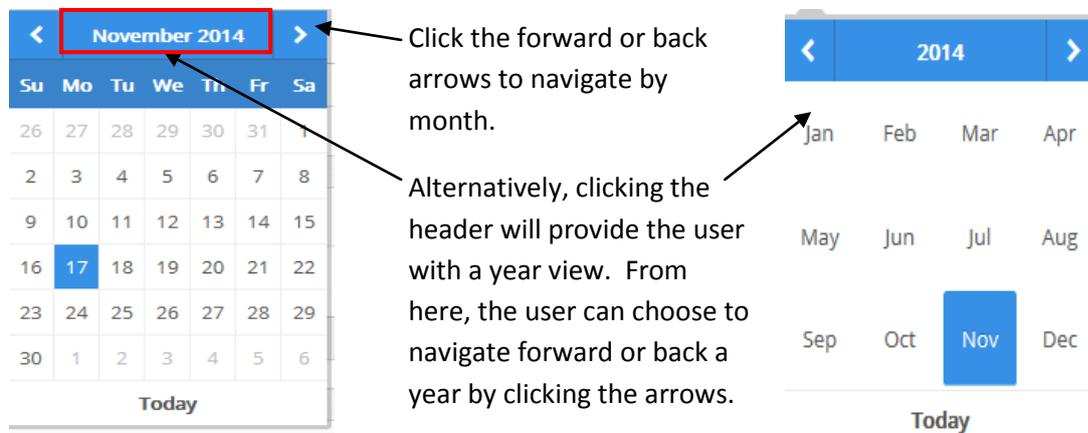The names of the user who created or modified any of the items on a page are displayed at the bottom of the page in the format 'Created by', 'Modified by'.
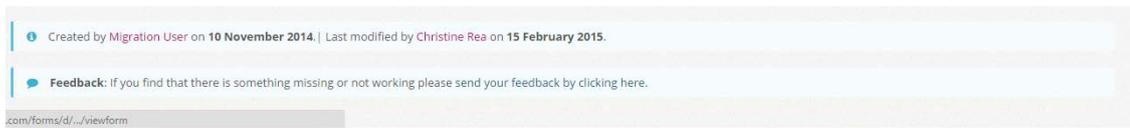
- The pages are paginated so the user can move between pages to view all
- The User can cut and paste any of the lists to excel
- From the trainee page, the user can email the trainee by clicking on the trainees email
- All Education Providers are linked to Parent Education Providers in the back end of the system and are populated on reports

1.8   Calendar

The Calendar has functions to make the date & year selection easy for the user:

Click the forward or back arrows to navigate by month.

Alternatively, clicking the header will provide the user with a year view. From here, the user can choose to navigate forward or back a year by clicking the arrows.
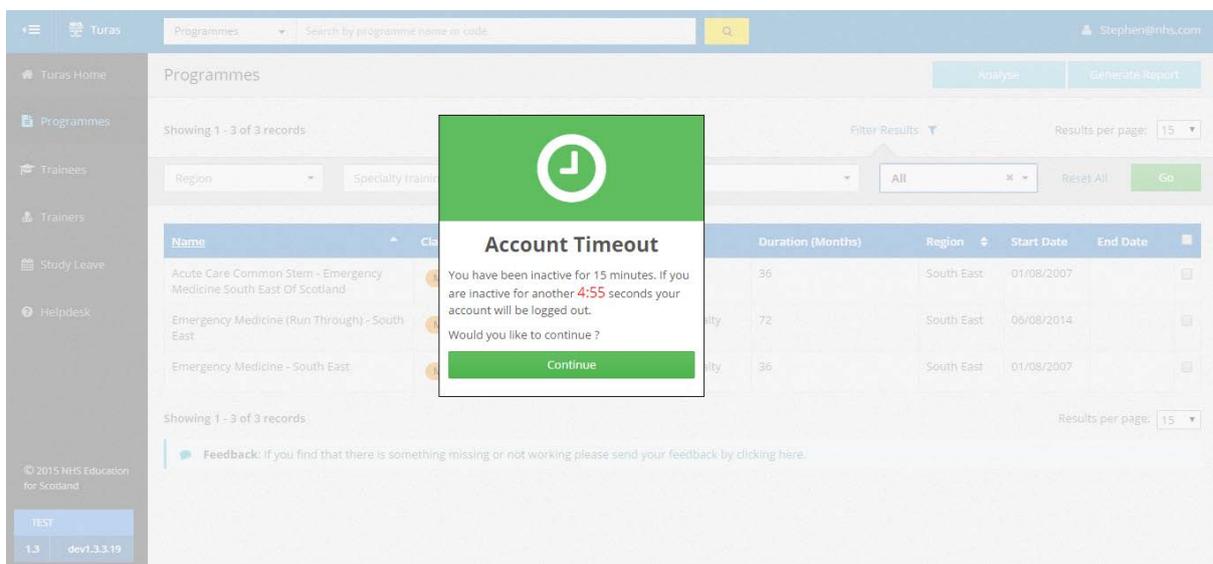
The user can also select a year by clicking on the header again to see all years in the current decade.

The Calendar has a Date and Year feature. Double arrow buttons to allow the user to flick forward by years rather than months.

1.9   Time out

If your account is inactive for 15 minutes, you will be timed out. The user will be given a warning with the option to proceed.

2 Training Programme

All Medical Training Programmes listed in Turas are approved by the GMC. The list of programmes and approved training locations for each specialty programme can be viewed on GMC Connect.

GMC Connect is the system from managing the secure transfer of data both into and out of the GMC and can only accessed with a login name and password.

The GMC define a programme as:

"A programme is a formal alignment or rotation of posts which together comprise a programme of training in a given specialty or subspecialty. A programme may either deliver the totality of the curriculum through linked stages in an entirety to CCT, or the programme may deliver different component elements of the approved curriculum (e.g. where an approved curriculum distinguishes an early 'core' element such as core medical training and then a later specialty-specific element to complete the training to CCT, there will be two programmes approved)".

GMC website assessed 17/11/2014 (http://www.gmc-uk.org/education/programme_approval.asp)

For Dental Programmes, NES is involved in education and training for dentists throughout their career from Undergraduate to CPD. NES co-ordinates vocational and foundation training and for specialty training co-ordinates the number of training places available in Scotland.

2.1 Filtering and Sorting Results (Programme)

The programme results can be filtered, the user can select by Region, Specialty Training Board, Royal College or Class or a combination of these. As well as being able to filter on results, users will be able to sort (ascending or descending) by Name (Programme), Class, Code, Type, Region.
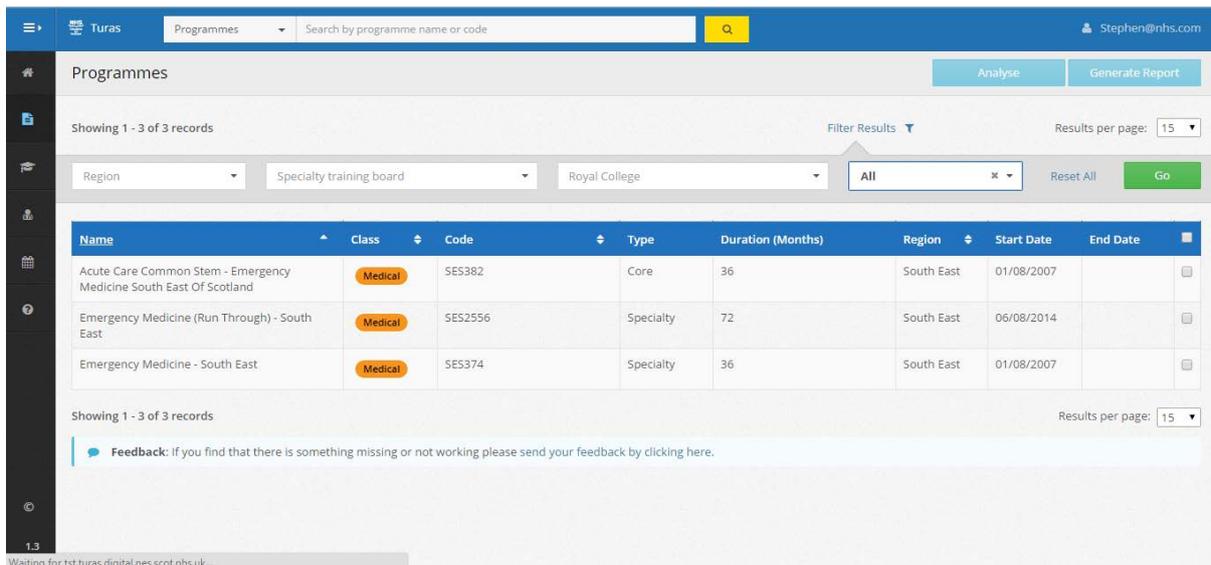
2.2   Programme View

Once you have selected your programme the following is displayed.   You can choose to view Trainees as at today's date or at a point in the past or the future by entering, an 'As at' date by either using the calendar to select the date or by entering a date in the following format dd/mm/yyyy and selecting Go.
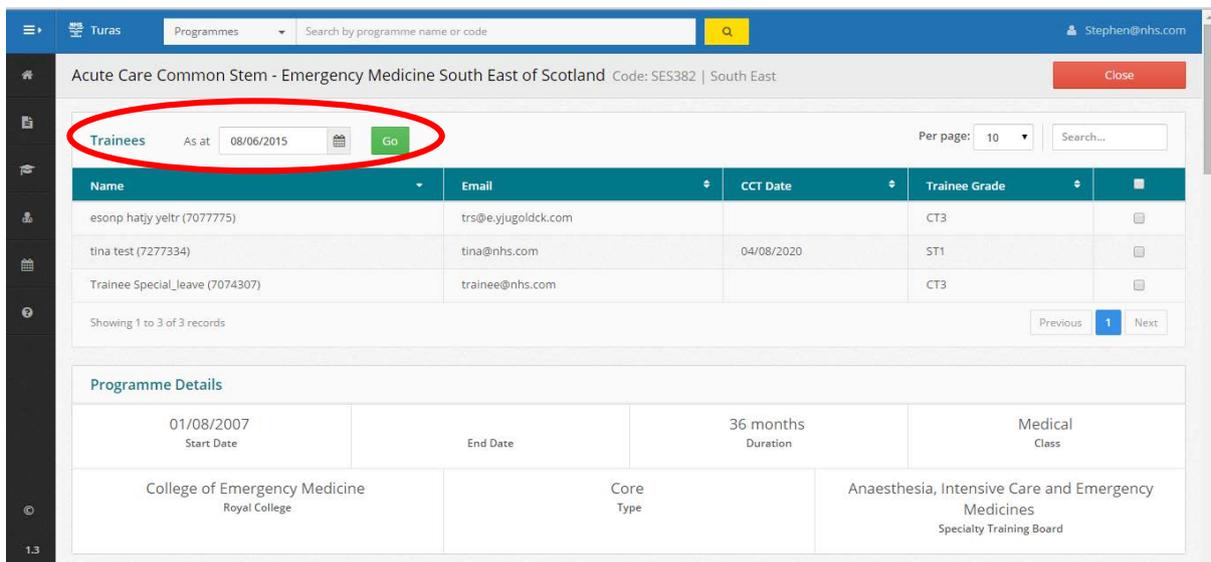
As PD you have the option to increase the number of trainees displayed, the default is 10 but this can be increased to 25, 50, 100, 200, 300, 400, 500.
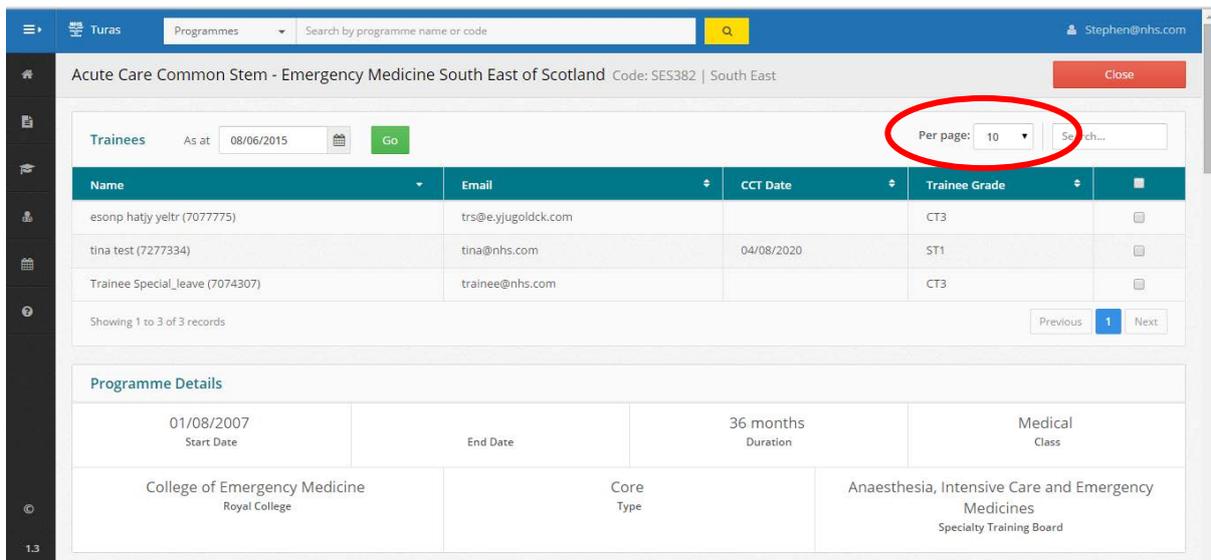
PDs can also search on aspects of the trainee (Name, Email, CCT date Trainee Grade) to reduce the list displayed.
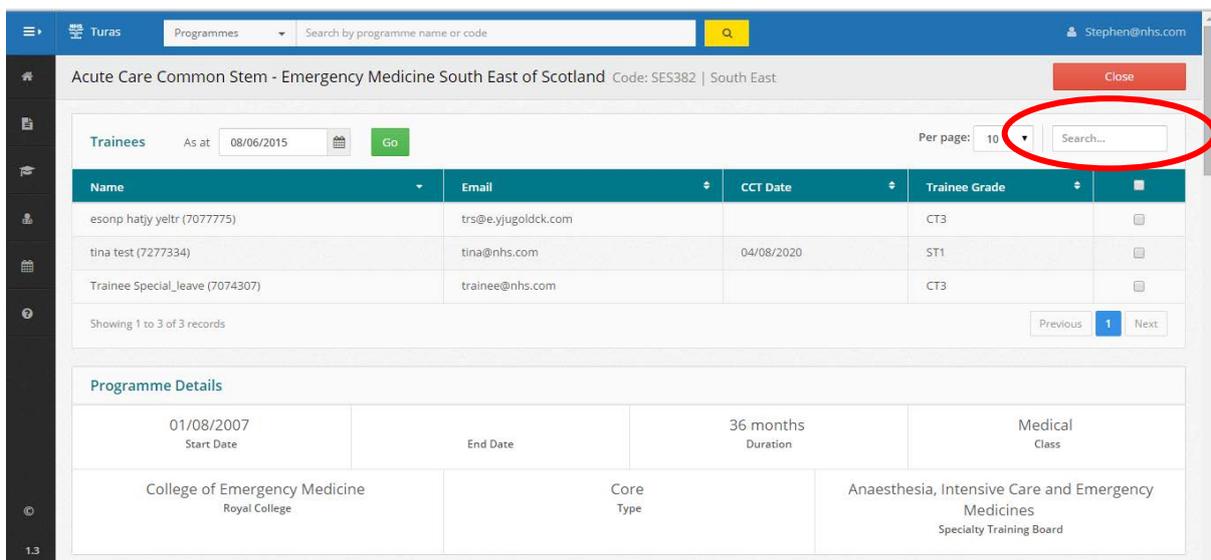
The programme details show a number of aspects, which include to the date the programme commenced with the GMC, duration of the programme, type of programme, which can be Foundation, Core or Speciality and the assigned Royal College and NES STB (Specialty Training Board).

As a you scroll through the programme the header which showing the GMC programme name, GMC code and region which manages the programme remains static.
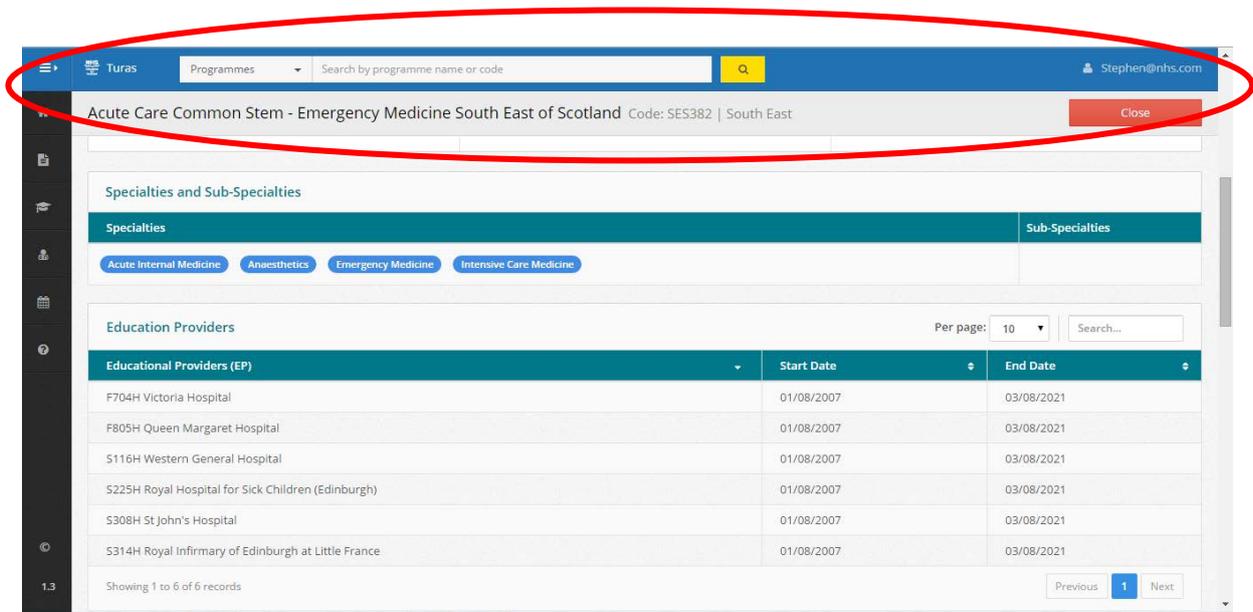
Above shows the programme specialties and training locations as approved by the General Medical Council.

Note: the listed specialties and locations can be used as approved training posts for trainees. If additional locations are required as these will need to be approved through the GMC and the appropriate forms completed. http://www.gmc-uk.org/education/27031.asp

For Dental programme, the locality of training posts and their specialties are managed by NES and the Scottish Government.
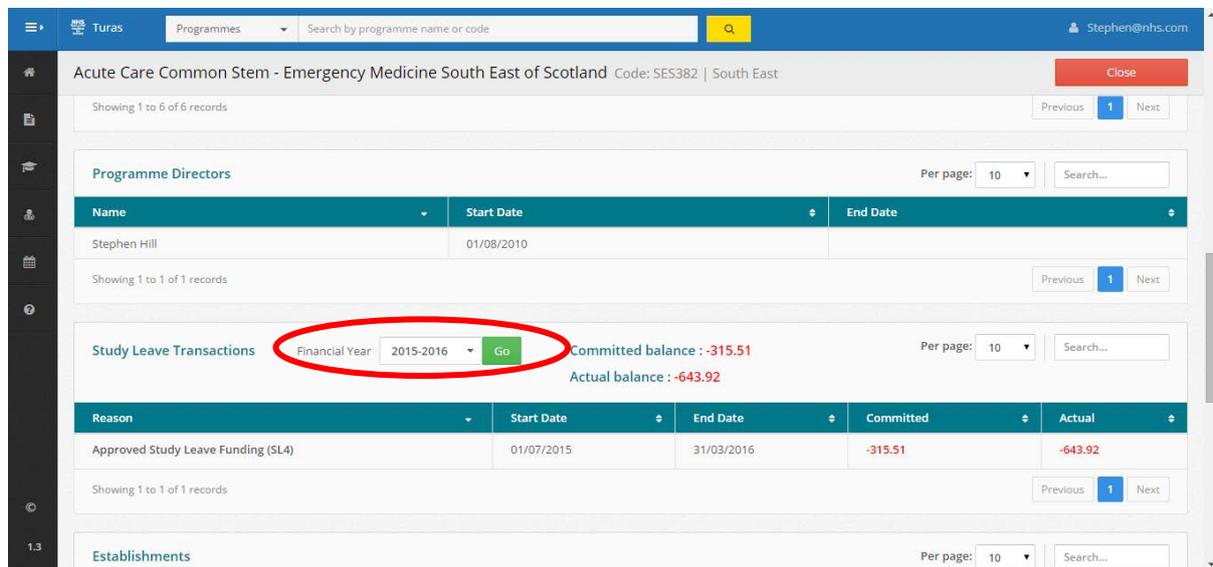
Above the programme director start and end date and the list of study leave transactions per financial year.

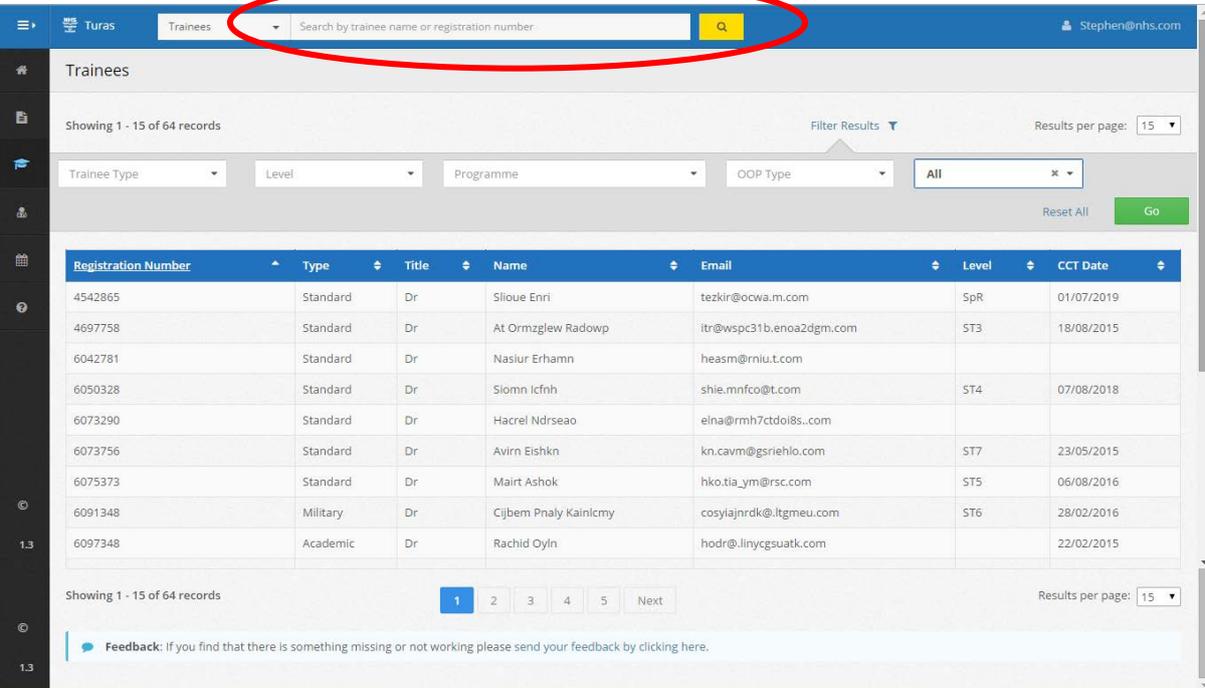Above shows the Establishment (funding) for the programme, this is update on an annual basis, April of each year.

Note: there may be adjustments made to the establishment at the start of the training year, dependent upon annual recruitment numbers.

3 Trainee Management

Trainee Management, is the management of trainees through their training programme(s), supporting the administration of the processes as defined by the GMC, College/Faculties and the Purple Guide (Foundation) and the Gold Guide (Specialty) and the Dental Gold Guide.

3.1 Trainee Search

User can search for Trainees who are attached to the programme or programmes you manage by trainee name or registration number.
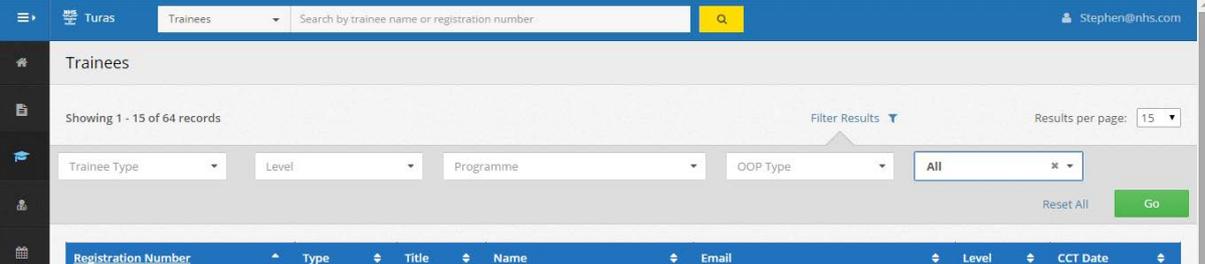

## 3.2 Filtering and Sorting Results (Trainee)

The trainee results can be filtered, the user can select by Trainee Type, Level, Programme, OOP Type, All or a combination of these. Then selecting Go.

As well as being able to filter on results, users will be able to sort (ascending or descending) by Registration Number, Type, Title, Name, Email, Level, CCT Date.

The results per page can be changed by the user to either, 15, 25, 50, 100, 200, 300, 400 or 500. The default is set at 15 lines per page. If the user does not wish to change the results per page then they can move through the results 15 lines at a time and select next at the bottom of the page.
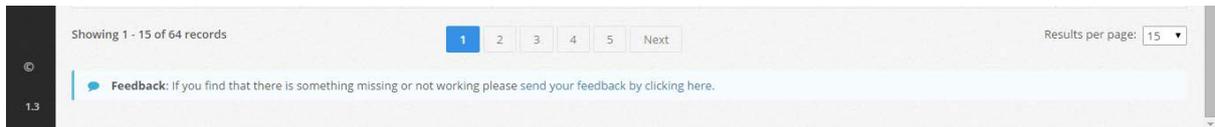

3.3   Trainee View (Timeline)

The Trainee Timeline below, reflects the Trainee's time in Post. It displays the location, period (Start and End Dates) and specialty in a pop-up. There is one line displayed for each Programme or Type of OOP that a trainee has a post in. This includes a pop up which will display the data items captured when the type of training was applied for.

Note: Trainee's are assumed as working full-time , unless a trainee has LTFT record. LTFT will only show on the Trainee timeline when they have been approved by both the Dean and the NHS Board.

Each type of Out of Programme is clearly reflected using a different colour. All Out of Programmes have their own timeline and are displayed regardless of status (Pending, Approved, Partly Approved) but not when the application is Not Approved but these can still be viewed on the trainees record.

The pop-up can be 'Pinned' so that it remains open, this allows users to scroll up and down the page. To un-pin, simply click the 'x' within the pop-up.
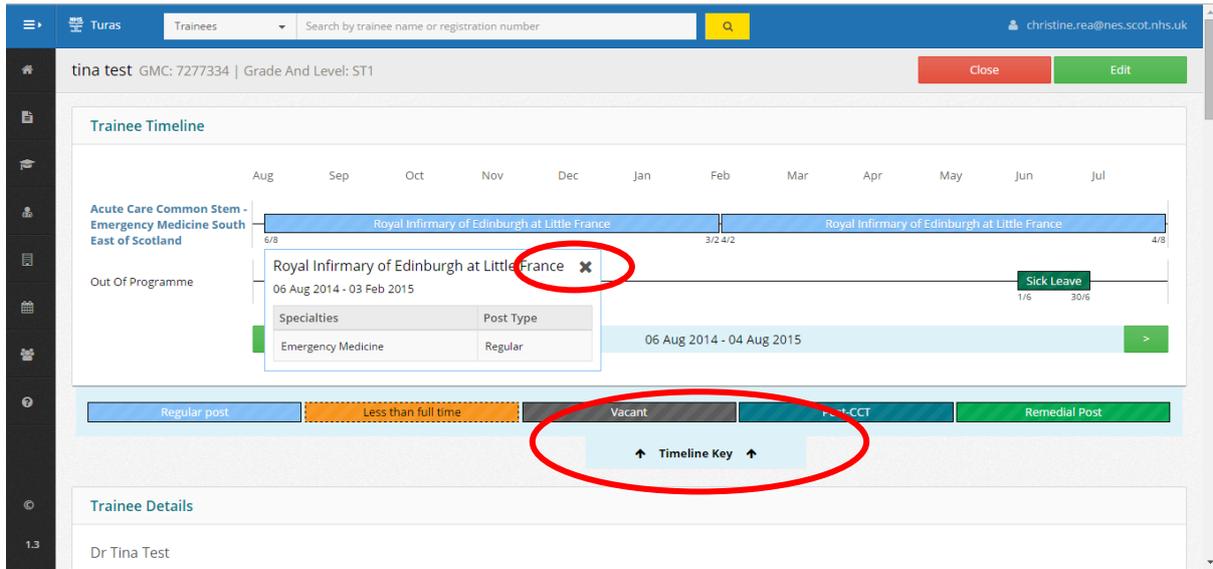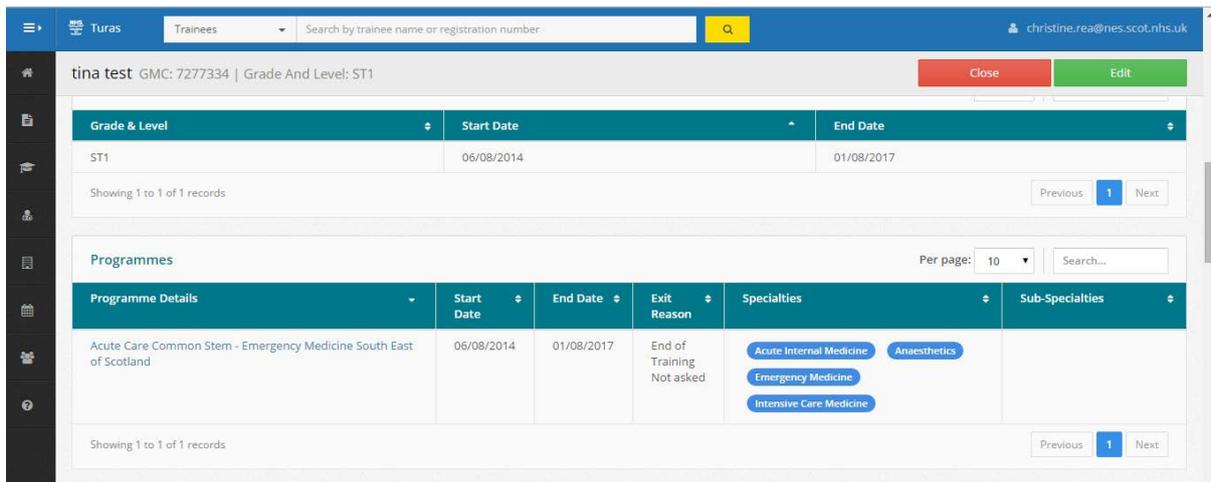
The Timeline Key can be open (revealed) and closed as required by the user by selecting the arrows.

As PD you are able to view a trainees personal record, which shows their contact information, training number and CCT date as well as their GMC registration details.
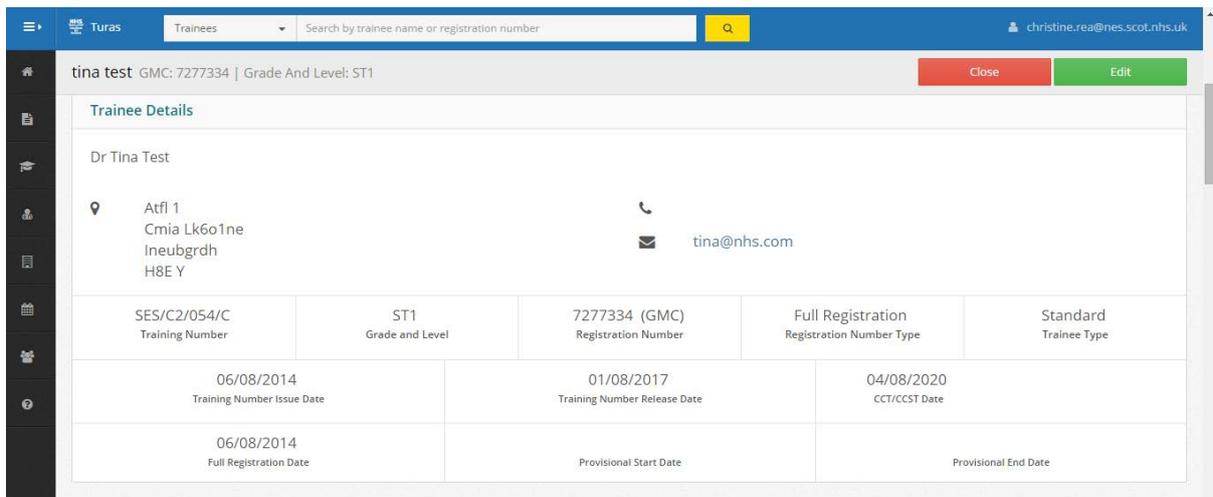
Below shows the trainees grades, and programmes they are attached too with start and end dates.

The trainee record also shows the posts (rotation) the trainee has completed or will complete. Each post includes programme, location (educational provider) start and end date post type (regular, post CCT or remedial) as well as the post speciality and if the post is being covered by a LAT.
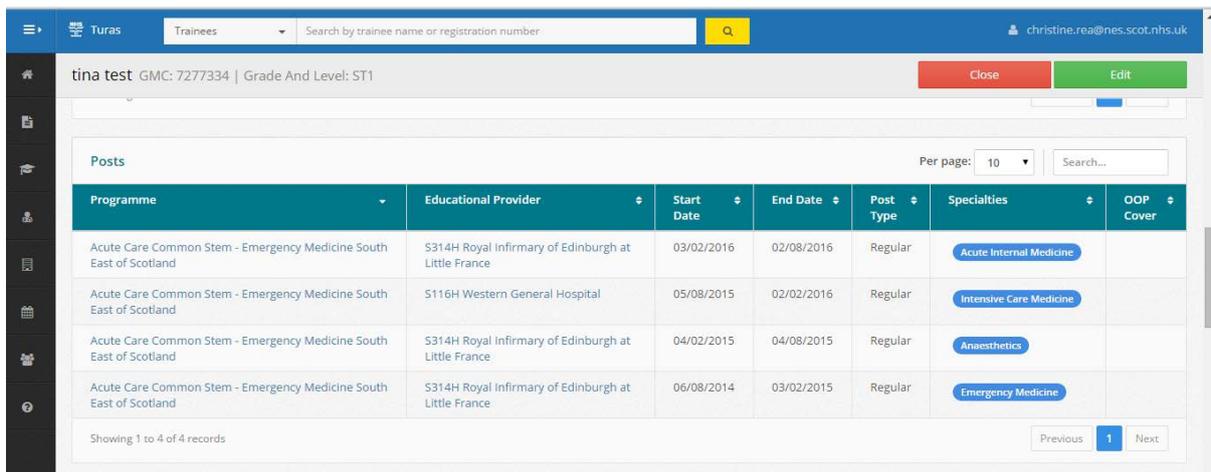
As PD you can also see ARCP Outcomes, both Less Than Full Time and Out of Programme Applications as well as Trainers assigned to the trainee.

Both Educational Supervisors and Clinical Supervisors information should be provided on a regular basis, so that Deanery teams can add these to the trainees with from and to dates, this information is required for each trainee and is shared with SOAR on a nightly basis.

Trainees Immigration Status is also recorded and PDs should be aware of this when is comes to rotation planning and allocation. NES is the Tier 2 sponsor, UKFPO is the sponsor for Tier 4 and the Health Board/Royal College is the sponsor for Tier 5 trainees.

Note: regarding reporting of trainees who hold a Visa to the UK Border Agency therefore all trainee post allocations should be up-to-date.

If a PD notes that the information recorded is not correct they should contact their programme administrator to get the details amended and updated this includes the recording of any type of leave including sick leave.

PDs should also be aware that this information is accessed by Deanery staff (NES), Trainees, Health Board (HR and Finance departments) as well as the DME offices.

The GMC Position Statement (November 2012) provides clear guidance to Deaneries, Medical Royal College/Faculties and postgraduate trainees on the management of absences from training and their affect on a trainee's CCT date or programme end date.

Foundation trainees are covered by a separate statement provided in the Foundation Programme Reference Guide.

4 Trainer (Medical)

Definition of a Trainer in the context of GMC approval "A trainer is an appropriately trained and experience doctor who has responsibility for the education and training of medical student and/or postgraduate medical trainee which takes place in the clinical environment.

The term **trainer** incorporates the roles of clinical and educational supervisor but is not limited to these alone. **It also includes all doctors with formally recognised roles in delivering undergraduate and postgraduate medical education locally in the clinical environment**, such as clinical teacher, clinical tutors, clinical lecturers, GP trainer, college tutors, specialty tutors, regional adviser, heads of schools, foundation programme directors, specialty (including GP) programme directors, directors of medical education. The trainee is most often a consultant or general practitioner, but can also be a specialty doctor or senior trainee. GMC website accessed 17/11/2014 (http://www.gmc-uk.org/14___Progress_report_on_the_Approval_of_Trainers___Annex_D.pdf_41341075.pdf).

The management of dental core and specialty training, including responsibility for quality management, rests with the postgraduate dental dean who is accountable through NES to Scottish Government.   The day-to-day management of training is carried out by NES appointed core training advisers and specialty training programme directors. This includes responsibility for study leave management.

Dental core and specialty training takes place in different environments including general and dental hospitals and Public Dental Service (PDS) clinics. The term trainer incorporates the roles of core training adviser, specialty training programme director, PDS adviser, educational supervisor and clinical supervisor.

Turas relies on information from the core training advisers and specialty training programme directors to populate the trainer information.

4.1 Background

From July 2014, Trainers (whether as role Educational Supervisor or Clinical Supervisor) have to be recognised by the GMC before they can be assigned to a Trainee. These arrangements relate to the following four categories:

- named educational supervisors in postgraduate training
- named clinical supervisors in postgraduate training
- lead co-ordinators of undergraduate training at each local education provider

- doctors responsible for overseeing students' educational progress for each medical school.

It is the responsibility of local educational providers such as hospital and general practices to show how they identify, train and appraise trainers in each of the categories, the Educational Organiser (EOs) i.e. NES will use this information to report to the GMC.

Turas relies on information provided by the local DME's office and medical schools to populate, the trainer information. All trainers in the four specific roles will be fully recognised by the GMC by 31st July 2016.

4.2 Filter and Sort on Trainers

Within the Trainers search, the user can sort (ascending or descending) by (Registration Number, Type, Title, Name, or Education Provider. Alternatively, users can select Filters. There are options to Filter from the drop-downs on Role, Education Provider, Training Type and selecting Go.

The results per page can be changed by the user to either, 15, 25, 50, 100, 200, 300, 400 or 500. The default is set at 15 lines per page. If the user does not wish to change the results per page then they can move through the results 15 lines at a time and select next at the bottom of the page.
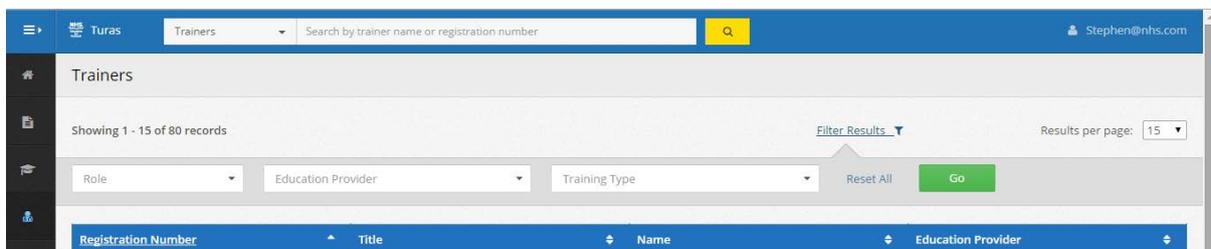
The Trainer page shows details of the contact information including work address and email address as well as the Trainers approved Role or Roles and any Trainees they are linked too.

5 Study Leave

You will receive an email from the system, which says the following:

Dear XXXXXXX PD Please note that there is a study leave application awaiting your approval. Click the following link to access the application and take the appropriate action New Application

Log onto Turas and click the Study leave icon and you will see the following details, which will show you any applications, which require your approval as well as other applications you have approved.

Prior to sign off users can search and sort on the Trainee to see the number of days, activities, dates of leave already submitted and/or taken.

Click on Pending Approval, you will be taken to the trainees page which shows you their current grade and post, specialty and location.

The Study Leave Application section it will, show details of the leave applied for including start and end dates.
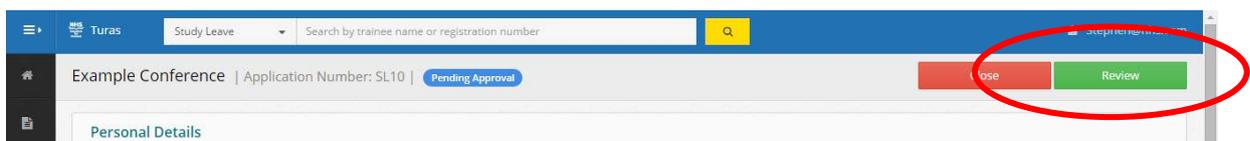
Note: note trainees cannot apply for retrospective study leave.
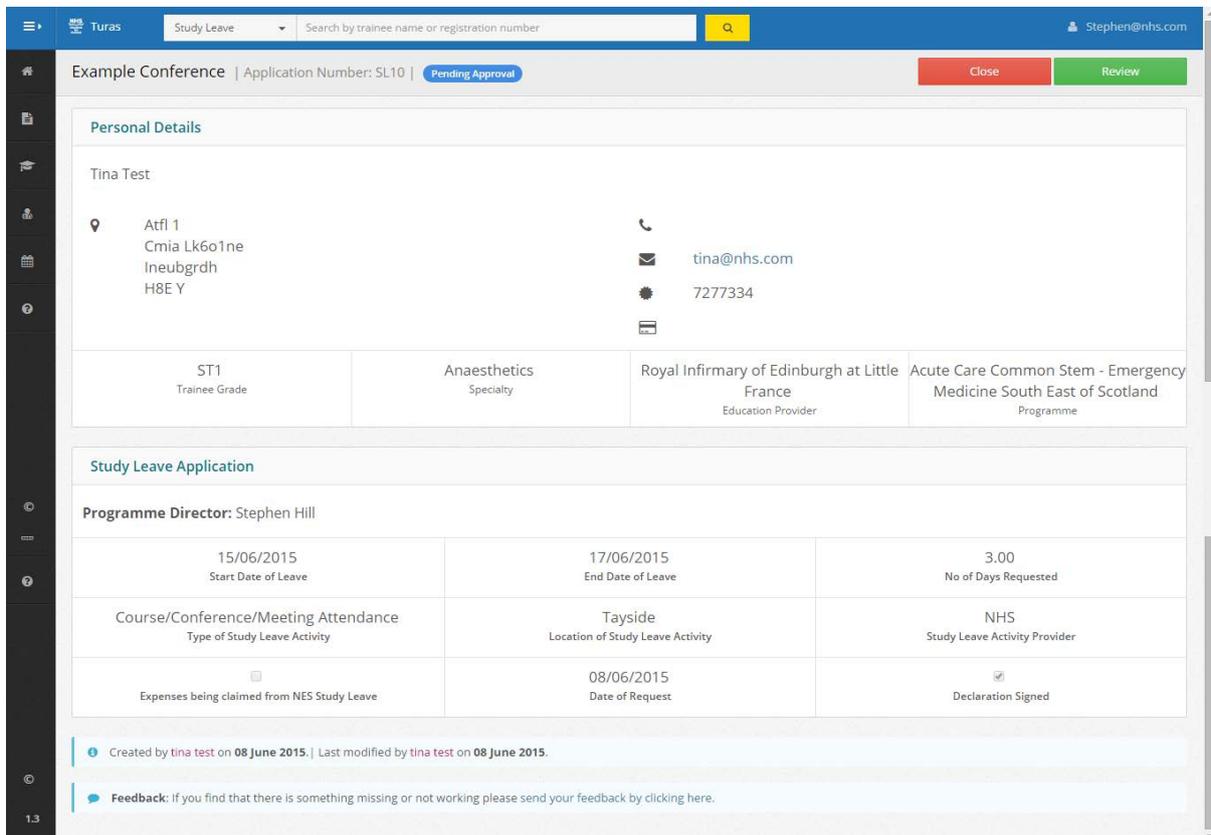


Click Review at the top of the page

You will then be presented with the decision screen. As PD you will be offered 3 options:

- Approved with funding
- Approved without funding
- Not approved

Dependent upon the option selected you will be asked to complete further decisions

- Approved with funding – as PD you will need to complete the amounts approved
- Approved without funding – you will be presented with a further drop-down list
- Not Approved – you will be asked to give the reason the request was not approved from a drop-down list

Once you have completed the appropriate Approval Outcome you will then need to click the declaration to say you have read the NES Study Leave Policy
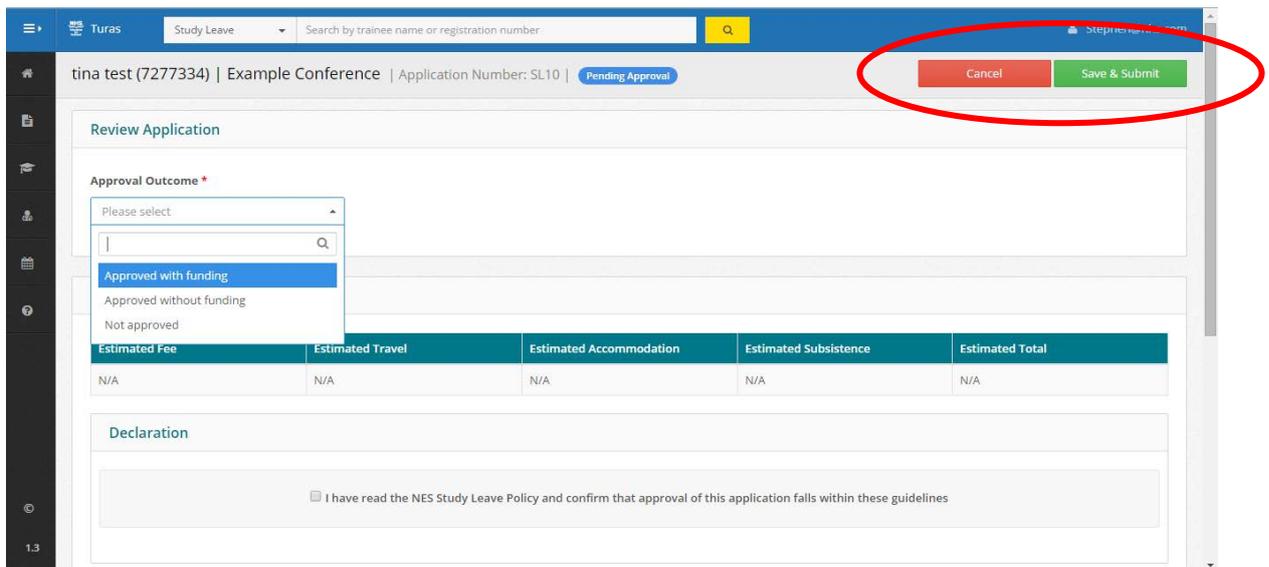
Then click Save & Submit or Cancel.

You will be returned to the trainee page, the status of the application has changed at the top of the trainees page.
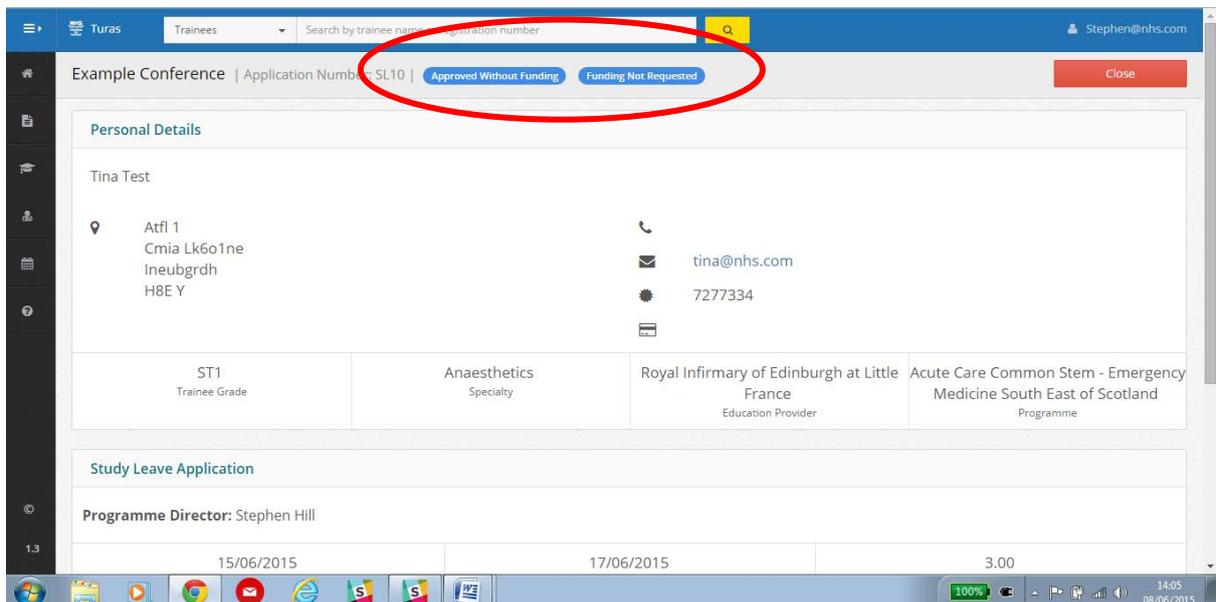
Click Close

You are returned to the Study Leave index page where you will see the application in the list.

Once you have made your recommendation the trainee will be automatically emailed with the following dependent upon you the approval you have given.

- Approved with Funding

  We are pleased to inform you that your study leave application, ID No, has been approved by your Programme Director for the total of £

  Please click on the following link in order to access the expenses claim form.

- Approved without Funding (no funding requested)

  We are pleased to inform you that your study leave application, ID No, has been approved by your Programme Director.

  As no funding was requested no further action is required in respect of this.

- Approved without funding (funding requested)

  Please note that your study leave application, ID No, has been approved without funding by your Programme Director, with the reason (reason selected from sub-list).

  If you wish to appeal against this decision please note that the appeals process is detailed in the operational guide for study leave which is available at www.nes.scot.nhs.uk

- Not Approved

    Please note that your study leave application, ID No, has not been approved by your Programme Director, with the reason (reason selected from sub-list).

    If you wish to appeal against this decision please note that the appeals process is detailed in the operational guide for study leave which is available at www.nes.scot.nhs.uk

Trainees can also withdraw/cancel a Study Leave Application and these will be shown on the study leave page.

5.1 Study Leave Transactions

As Study Leave Applications with funding are approved, the estimated costs are deducted from the committed Study Leave balance.

The Study Leave Transactions section in the programme page is updated on a regular basis by the Deanery Study Leave Team as trainees submit expense claims.
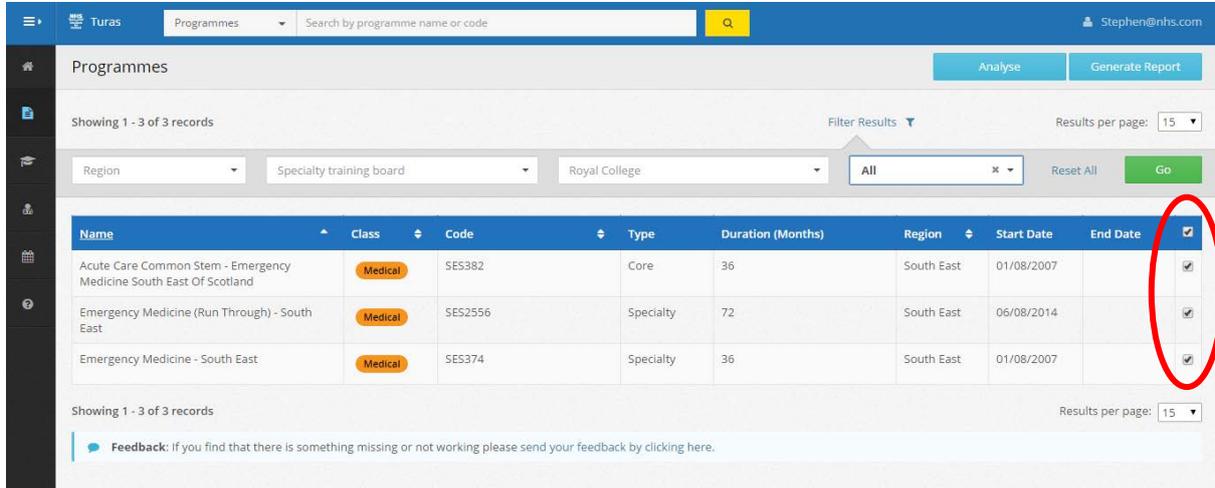
Only once the trainee has submitted their expense claims is the amount deducted against the actual budget.

6   Reports

The reports in Turas will be selected and run from the programme search page. The Generate Report facility will only be opened once a programme(s) have been selected.
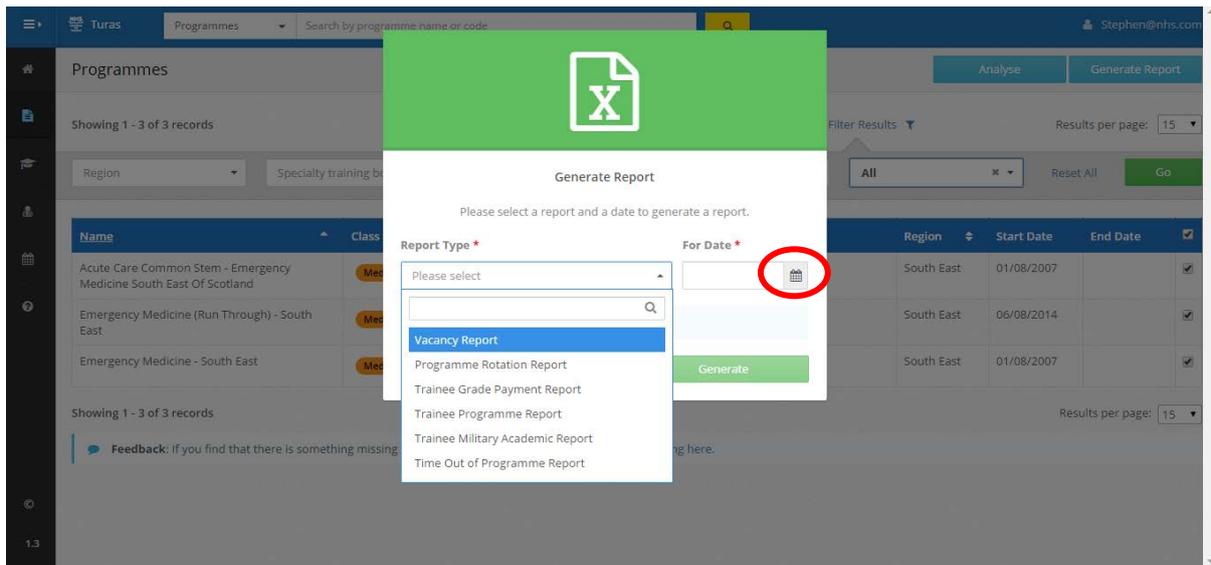

Once programme or programmes have been selected

Click Generate Report button at the top of the page
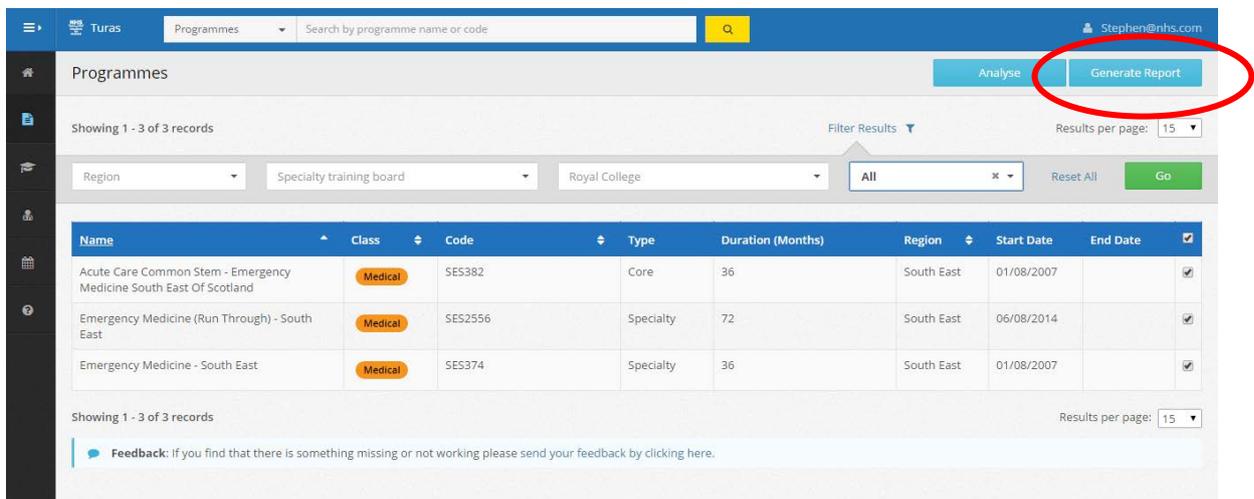
You will be presented with the Generate Report screen

Select the report you run from the drop-down list

Enter date from the calendar option or enter date format dd/mm/yyyy

Click Generate or Cancel

All reports are generated and are accessed in Excel

The user can Open or Save the report

Reports Descriptors

- Vacancy Report – This report show the WTE funding/vacancies available within a programme at a specified date
- Programme Rotation Report – This report shows programmes, trainee, post at a specified date
- Training Grade Payment Report – This report shows the WTE payable by programme at a specified date
- Trainee Programme Report – This report shows all trainees in a programme and their post at a specific date
- Trainee Military Academic Report – This report shows trainee in a programme who are Military or Academic type at a specific date
- Time Out of Programme Report – This report shows a summary of time out of programme at a specific date
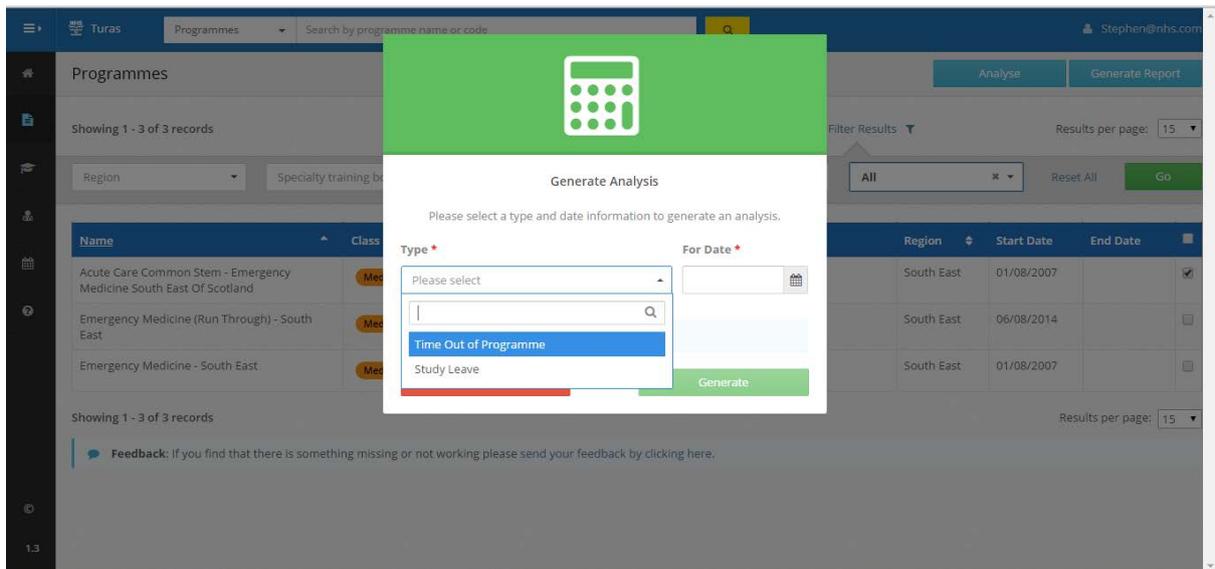
7   Analyse

Users can also use the Analyse Option from the Programme page
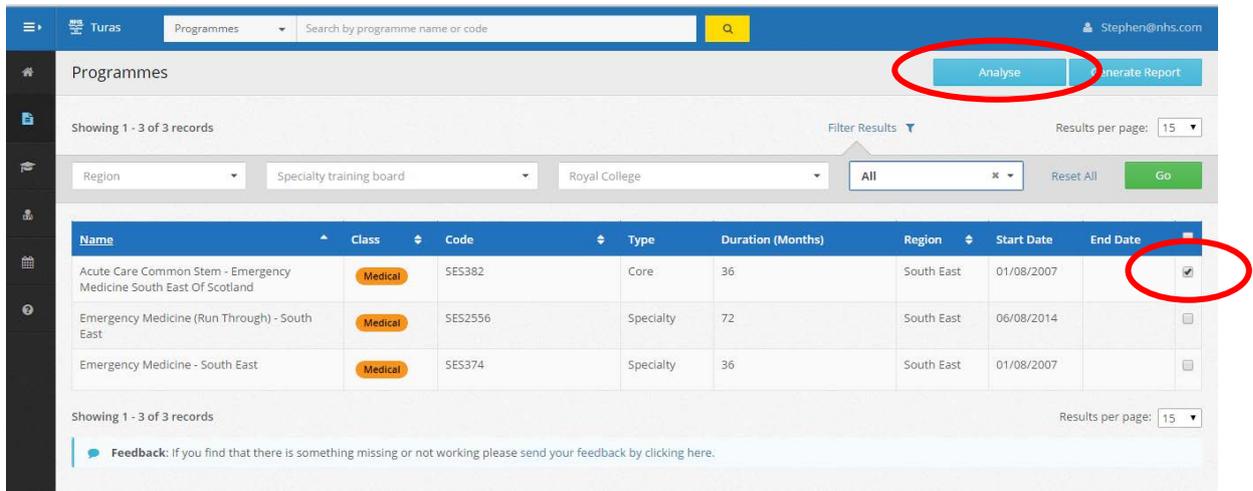
Select the programme

Select Analyse

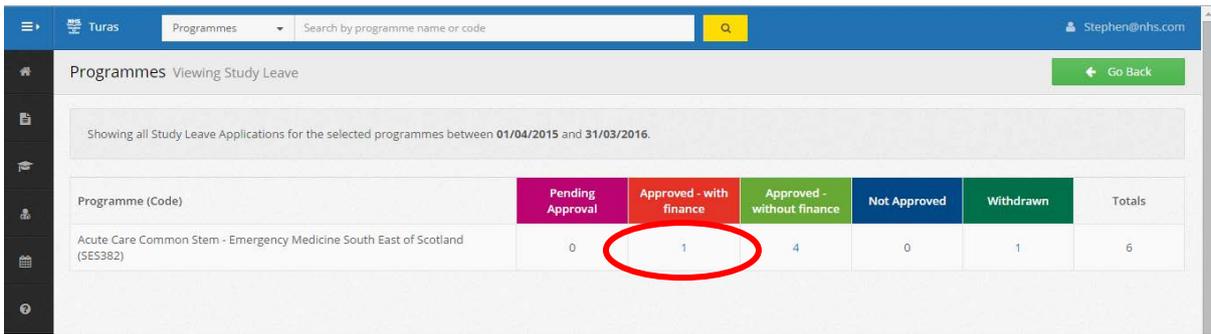You will be presented with the generate Analyse screen

Selection Type

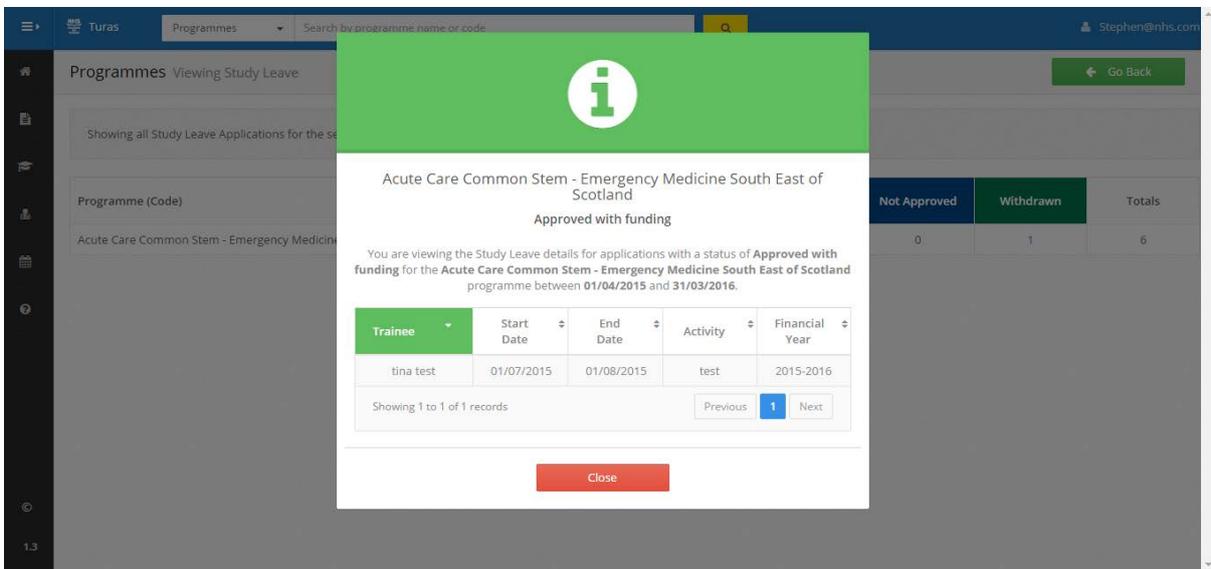- Time Out of Programme
- Study Leave

Enter date from the calendar option or enter date format dd/mm/yyyy

Click Generate or Cancel

- Analyse options are for view on screen only

- Click on the number under one of the statuses options
- User see the details of the option selected and the trainee name

- Click Close to return to Analyse view
- Click Go Back to return to Programme index page