

## OTA TRAINEE USER INSTRUCTIONS

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## INTRODUCTION

This user guide has been created to explain how the Online Training Application works in relation to the OTA program. The guide is comprised of sections covering all aspects of the application for both Provisional and Advanced Trainees, including Progress Summary Bar, ITA submission, SR requests and Interrupted Training.

Throughout the guide, particular attention is directed to areas of data entry that require careful consideration to avoid unnecessary phone calls or emails to the College. These areas are clearly marked with a warning symbol:



Please ensure that you have a full understanding of these important sections prior to logging in and entering data.

For an explanation of terms used in these instructions, please see the [Glossary](#) on the last page.

## OTA PROGRAM OVERVIEW

In-Training Assessments (ITAs) are completed on-line through the OTA program, unless you are undertaking a pre-approved training post outside Australia and New Zealand. In such circumstances, the paper version of the ITA (form GT-11) is to be used. This form may be downloaded from the College website.

It is expected that you will find the program very straightforward. However, if you do have any difficulties, please review this user guide for instructions, or if the matter is urgent, contact the College for further assistance.

## HOW TO ACCESS OTA

To go straight to the program, log on to [www.acem.org.au/ota](http://www.acem.org.au/ota). You will need to enter your usual member log-in details. Alternatively, you can go to the ACEM website and log in there as a member. Click on the Trainees Home and there will be a link from the home page and from the Navigation bar – 'OTA'.

The ITA Inbox Navigation Bar will lead you through the various stages of the ITA process. Time frames apply to completion of each part of the OTA process. For more information on this please refer to the following section entitled [ITA Overview](#).



## ITA OVERVIEW

**This section probably contains the most important information for trainees regarding due by dates. Please read carefully:**

### TIMEFRAMES

You must enter your term details ***within the first four weeks*** of your term start-date. This four-week period includes any leave taken at the commencement of a term. If you attempt to complete these details more than four weeks after the term start-date, you will be locked out and will need to contact the College.

For example; if your term dates are from 1/5/09 – 31/7/09, you have until 28/5/09 to enter and save your term details. You can also enter future term details in advance if you know what they are. Simply repeat the process as outlined in the steps below for creating an ED or a non-ED term.

### SUBMISSION OF ITA

The whole of the term assessment process – that is, completion of the ITA by all relevant parties and its submission to the College – must be ***finalised within eight weeks*** of the end date of the term to which the ITA relates. If your ITA is not completed within this eight week period, it will automatically become “expired” and you will not be able to complete the ITA.

The earliest date that you may submit your ITA for assessment is 2 weeks prior to your term end date. The exception to this rule is if you have a period of leave which ends on the same date as your term. In this instance, you may submit your ITA from 2 weeks prior to the first date of your leave.

To ensure that you meet the eight week deadline, you should allow for the possibility of delays in the assessment process (eg. availability of DEMENT/supervisor, annual leave etc). We highly recommend that you begin the assessment process within the last two weeks of your term.

### EMAIL REMINDERS

You may receive a number of email reminders throughout the OTA program, which are triggered if you have not created an ITA term or if submission of your ITA has not been received by a certain date. Please pay attention to these as many will contain dates which are relevant to your personal training year.

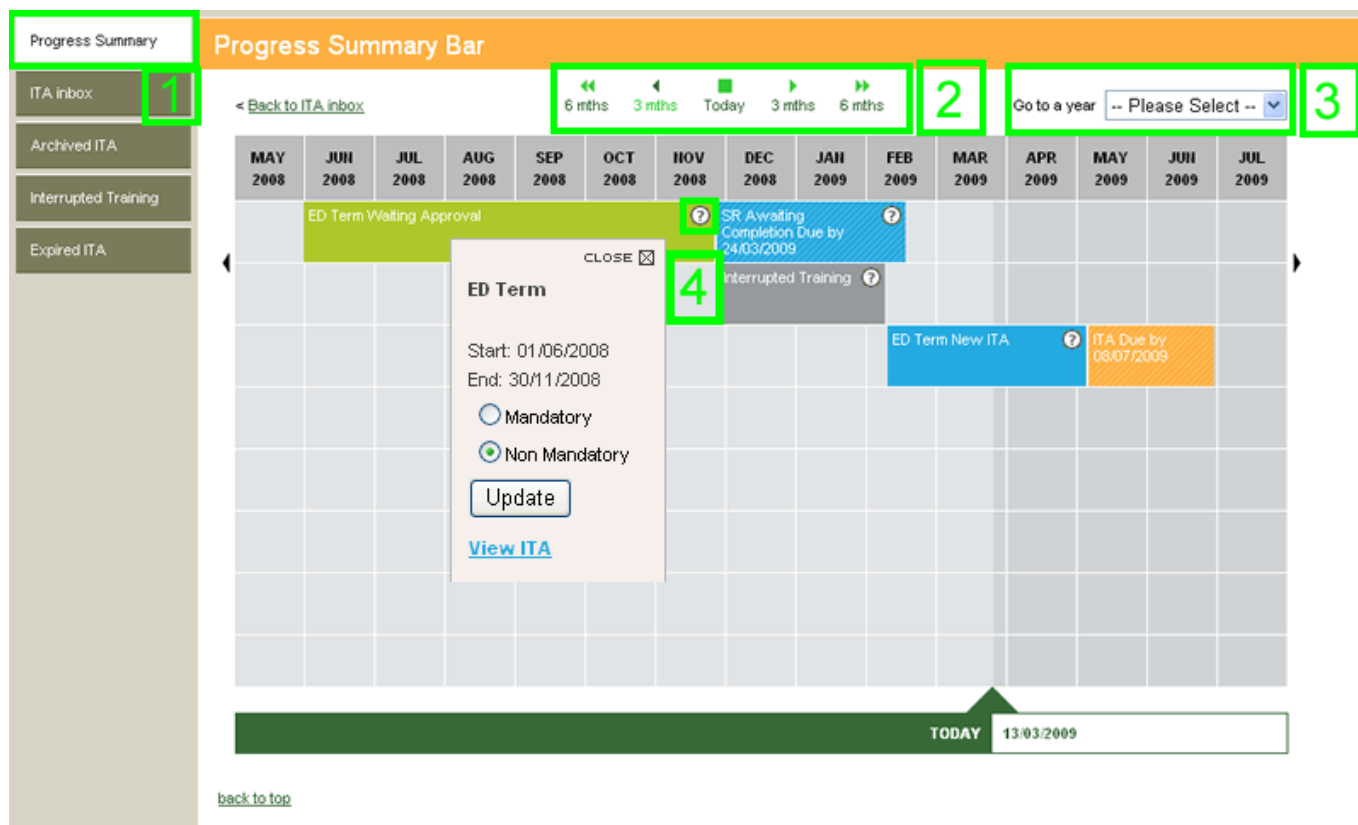
## PROGRESS SUMMARY BAR

The Progress Summary Bar is designed to provide at-a-glance information so you can see where you are within the overall program at any given time. **NOTE** – it is NOT reflective of the amount of training with which you may be formally accredited.

Each ITA, SR and period of Interrupted Training shown is colour-coded to reflect the current status;

- **blue** for a newly created term or SR request
- **orange** for an ITA / SR yet to be submitted
- **green** for an ITA/ SR completed and /or approved
- **red** for an expired ITA / SR
- **grey** for a period of Interrupted Training.

Refer to figure 1 below.



**Figure 1**

The Progress Summary Bar (PSB) screen is accessible via the top link in the left hand navigation panel (1). To scroll through the years, there are a number of controls at the top of the screen (2) which allow you to scroll backwards and forwards in 3 or 6 month blocks. In addition, you can also navigate directly to a particular year (3).

It is also possible to access each ITA and SR screen by clicking on the ? symbol. A small pop-up will appear (4) which provides basic information about the ITA or SR status. In the case of an ED term for Provisional Trainees; you may select this term as part of your 6 months mandatory ED training. You may also directly view and potentially edit the ITA by clicking on the ‘View ITA’ link. This link will take you directly to the term details screen of the ITA.

## ENTER TERM DETAILS

### ED TERM

1. Click on the “Create a new ED ITA” link in the left hand navigation (1)
2. The first screen shows your term details for your hospital, DEMENT and term dates.
3. Signify the nature of the ED – whether “adult/mixed” or “paediatric”. (2)
4. Select your hospital from the dropdown list; the DEMENT field will be automatically filled from this choice.
5. Select your working hours whether full time or a part time or part time mix.
6. If you select part time hours, a further field will appear (3) with a choice of hours ranging from 20 – 39 for all regions.

At this point we recommend that you save your term details (4). You may progress through the next screens but having the basic term information saved will be very useful if you should be called away from your computer for any reason.


The screenshot shows the 'Create a new ED ITA' form. On the left is a navigation menu with 'Create a new ED ITA' highlighted (1). The main form area is titled 'Term details' and contains the following fields:

- Trainee Name: First User
- Membership No: 04514
- ED or non ED: ED
- Adult/Paediatric: Radio buttons for 'Adult Mixed' (2) and 'Paediatric'.
- Hospital/Institution: Dropdown menu with '- Please select -'.
- DEMT: Dropdown menu with '- Please select -'.
- Period: Date range input fields with a note: 'Note that you can manually type in your dates (use dd/mm/yyyy format)'.
- Full time/Part time: Radio buttons for 'Full Time' and 'Part Time or mix' (selected).
- Hours per week: Dropdown menu with '- please select -' (3).

At the bottom of the form are buttons: 'Previous', 'Next', 'Delete', and 'Save progress' (4).

Figure 2

## NON ED TERM

1. Click on the “Create a new non-ED ITA” link in the left hand navigation (1)
2. The first screen shows your term details for your chosen discipline, hospital, Supervisor, DEMENT and term dates.
3. Select your discipline from the dropdown list.
  - a. If you select “ICU”, “medicine” or “surgery” a further field will appear and provide a drop-down list from which you select the relevant subspecialty (2).
  - b. If you select one of the other listed disciplines, a “Click to Proceed” button may appear (3). Click this button to read important information relevant to the discipline you have selected. You will not be able to proceed until you do this
4. Select your hospital from the dropdown list; the DEMENT field will be automatically filled from this choice.
5. If your hospital does not appear on the list, select “other” and type the name of the hospital in the new field that appears.  
NB: The DEMENT field has now changed to Deputy Censor and is pre-filled with the name of the Deputy Censor for your state.
6. Select your supervisor from the dropdown list or if he/she does not appear on this list, select create new and a new screen will pop up (4). You will need to have your supervisor’s name, email address and mobile phone number to hand.
7.  It is imperative that all the supervisor details fields are filled in **100% correctly**. This is particularly relevant for the email address, which you should confirm with your supervisor before entering your term details. An error here will result in your supervisor not receiving his login details and therefore not having access to the OTA program to complete your assessment in due course. Please also be aware that until your term details are saved, the email containing your supervisor’s login details will not be issued.
8. Enter your term dates and working hours as for ED term steps 4 & 5

At this point we recommend that you save your term details. You may progress through the next screens but having the basic term information saved will be very useful if you should be called away from your computer for any reason

Progress Summary

ITA inbox

Create a new ED ITA

**Create new non-ED ITA** 1

Edit existing ITA

ITA awaiting DEMT / Supervisor assessment

ITA awaiting joint assessment

Awaiting DEMT validation

ITA awaiting ACEM credentialing

Archived ITA

Expired ITA

Interrupted Training

### Create new non-ED ITA

#### Term details

Trainee Name	First User
Membership No	04514
ED or non ED	non ED
Non ED discipline	ICU 2
<input type="button" value="Click to close"/> Select if post is accredited by CICM for either basic or advanced training.	
Non ED Specialty	Paediatric
<input type="button" value="Click to proceed"/> 3	
Hospital/Institution	Z1 - DO NOT USE
Supervisor	- Please select - Start typing the supervisor first name to bring up options.
DEMT	- Please select -
Period	<input type="text"/> - <input type="text"/> Note that you can manually type in your dates (use dd/yy)
Full time/Part time	<input checked="" type="radio"/> Full Time <input type="radio"/> Part Time or mix

[back to top](#)

#### Create Supervisor

Only choose "create new supervisor" if you are positive there is no existing record in DEA

First name:

Last name:

Email address:

Mobile phone:

Hospital: - Please select -

Note: When clicking on 'Create' below, the supervisor will automatically be emailed login details.

Figure 3

**ENTERING A VARIATION IN WORKING HOURS / LEAVE / CONCURRENT TERMS**

After you have entered your basic term details, click next and you will be taken to a new screen which enables you to enter a variation to your working hours and / or any leave that takes place during your term dates. This screen also shows you the full time equivalent calculation or FTE of your term duration (5).

<b>Progress Summary</b> ITA inbox Create new ED ITA Create new non-ED ITA Edit existing ITA ITA awaiting DEMT / Supervisor assessment ITA awaiting joint assessment Awaiting DEMT validation ITA awaiting ACEM credentialing Archived ITA Interrupted Training Expired ITA	<table border="1"> <tr> <td>Trainee name</td> <td>Jane Bloggs</td> <td>DEMT</td> <td>John Smith</td> </tr> <tr> <td>Membership no.</td> <td>04514</td> <td>Full time / Part time</td> <td>FT</td> </tr> <tr> <td>ED or Non ED</td> <td>ED</td> <td>Period</td> <td>01/01/2009 - 16/03/2009</td> </tr> <tr> <td>Hospital/Institution</td> <td>SAMPLE HOSPITAL</td> <td></td> <td></td> </tr> </table>	Trainee name	Jane Bloggs	DEMT	John Smith	Membership no.	04514	Full time / Part time	FT	ED or Non ED	ED	Period	01/01/2009 - 16/03/2009	Hospital/Institution	SAMPLE HOSPITAL		
	Trainee name	Jane Bloggs	DEMT	John Smith													
	Membership no.	04514	Full time / Part time	FT													
	ED or Non ED	ED	Period	01/01/2009 - 16/03/2009													
	Hospital/Institution	SAMPLE HOSPITAL															
	Submitted by Trainee																
	Submitted by DEMT																
	Submitted Jointly																
	Due by	11/05/2009															
	Working Hours	<table border="1"> <tr> <th>From</th> <th>To</th> <th>Days</th> <th>Hours per week</th> <th></th> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>-- please select --</td> <td><input type="button" value="delete"/> <b>2</b></td> </tr> </table> <p>Did you work a variety of hours during this term? If so <a href="#">please enter the details here</a> <b>1</b></p>	From	To	Days	Hours per week		<input type="text"/>	<input type="text"/>	<input type="text"/>	-- please select --	<input type="button" value="delete"/> <b>2</b>					
From	To	Days	Hours per week														
<input type="text"/>	<input type="text"/>	<input type="text"/>	-- please select --	<input type="button" value="delete"/> <b>2</b>													
Leave	<table border="1"> <tr> <th>From</th> <th>To</th> <th>Days</th> <th>Type of Leave</th> <th></th> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>-- please select --</td> <td><input type="button" value="delete"/> <b>4</b></td> </tr> </table> <p>If you took 1 or more days leave during this term <a href="#">please enter the details here</a> <b>3</b>                  (Note that leave entered will not affect the term duration).</p>	From	To	Days	Type of Leave		<input type="text"/>	<input type="text"/>	<input type="text"/>	-- please select --	<input type="button" value="delete"/> <b>4</b>						
From	To	Days	Type of Leave														
<input type="text"/>	<input type="text"/>	<input type="text"/>	-- please select --	<input type="button" value="delete"/> <b>4</b>													
<p><b>Full time equivalent (FTE) = 2.44 months</b> (excluding any leave taken, which may reduce the amount of accreditable training time) <b>5</b></p>																	
<p> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Delete"/> <input type="button" value="Save progress"/> </p> <p><a href="#">back to top</a></p>																	

**Figure 4**

**ENTER VARIATION TO WORKING HOURS**

If you worked the same hours every week for the duration of your term, you do not need to enter anything here. However, if there was a variation in the hours worked for one or more periods of your term, this is where you record the details:

1. Click on the link to add a variation to your working hours (1)
2. A new set of fields will appear for you to complete (2). If you don't want to keep this record for whatever reason, click on delete.
3. If you need to record more than one variation, click on the link (1) and repeat
4. These fields will only be saved when you select "Next" or "Save Progress"

### **ENTERING LEAVE**

If you do not have any leave to record during your term, you do not need to enter anything here. However, if you have one or more periods of leave to enter, this is where you record the details:

1. Click on the link to enter leave details (3).
2. A new set of fields will appear for you to complete (4). If you don't want to keep this record for whatever reason, click on delete
3. If you need to record more than one period of leave, click on the link (3) and repeat
4. These fields will only be saved when you select "Next" or "Save Progress"

### ***A note about leave:***

If your period of leave is extended or unusual, you may be required to enter a period of Interrupted Training instead. Please refer to the [Interrupted Training](#) section further on.

### **CONCURRENT TERMS**

If you are working more than one part-time term at a time, you will be able to record them in the program. Please bear in mind that the application will only allow you to enter a minimum of 20 hours per week and a maximum of 40 hours per week. Therefore, if you create one part time term with 25 hours per week, you will not be able to enter any other terms for same time period.

Effectively you may only enter 2 x concurrent terms of 20 hours per week for each term.

## THE ITA ASSESSMENT PROCESS

The assessment process is split into several sections, all of which must be completed by the ITA due by date.

**Figure 5**

Progress Summary	
ITA inbox	
Create new ED ITA	
Create new non-ED ITA	
Edit existing ITA	
ITA awaiting DEMT / Supervisor assessment	1
ITA awaiting joint assessment	2
Awaiting DEMT validation	3
ITA awaiting ACEM credentialling	4
Archived ITA	5
Interrupted Training	
Expired ITA	6

**STAGE 1 - ENTERING SELF ASSESSMENT DETAILS & TRAINEE FEEDBACK FORM**

**Self Assessment**  
 You can access an existing ITA via the ITA Inbox or Progress Summary Bar. Click on “Next” and you will be taken to the assessment screen to commence your self-assessment.

The assessment itself is fairly straightforward. You are required to provide an assessment in respect of each parameter, leave optional comments at the end. If you fail to provide an assessment in respect of any parameter, you will be prompted to complete it before you are able to submit the ITA.

Once all parameters are completed, click on “Save and go to Feedback Form”

*Note that you will not be able to submit your ITA until your feedback form has been completed and submitted.*

**Trainee Feedback Form**  
 The feedback form requires a score for each question. Should you grade a question at ‘4’ or less, you will also be prompted to provide a mandatory comment. For all scores at ‘5’ or over, comments are optional.

Once all questions are completed click on ‘Submit Feedback Form’. You will be prompted to confirm this submission and informed that the feedback form can not be amended after it is submitted.

Once form has been submitted, click on “Complete and Notify DEMT” ( (or supervisor, for a non-ED term). **You will be prompted to confirm this action.** If this confirmation is omitted, the ITA will NOT progress to the next stage.

Once it has been submitted, an automatic email is generated to your DEMT or supervisor (as appropriate) advising that the ITA is awaiting their assessment. In addition, your ITA will move into the section of the ITA Inbox entitled (appropriately) “ITA awaiting DEMT / Supervisor assessment” (1). Whilst it is in this section, it can only be viewed, and is not editable.

### STAGE 2 - ASSESSMENT BY DEMT / SUPERVISOR

Your DEMT or supervisor will have received an email notifying them that an assessment awaits their completion. When the DEMT or supervisor logs in to complete their assessment, your own version of the assessment is not visible to them at that stage.

Once the DEMT or supervisor completes the assessment, an email is generated to advise you of the completion and requesting that you contact them to arrange the joint assessment. The ITA then moves into the section of your ITA Inbox entitled “ITA awaiting joint assessment” (2). Whilst it is in this section, it can only be edited when you and your DEMT / Supervisor log in together at the same computer.

### STAGE 3 – JOINT ASSESSMENT BY TRAINEE & DEMT / SUPERVISOR

**You must log-on first** and click on “Complete”

Once this is done, the DEMT/supervisor will be prompted to log on also. The assessments of both you and the DEMT/supervisor will show on the screen. You cannot change your assessment at this stage but, following

discussion, the DEMENT/supervisor may change his/her assessment. It is mandatory for the DEMENT/supervisor to provide comments at the foot of the ITA.

You then click on “Complete & Submit ITA”. **You will be prompted to confirm this action.** If this confirmation is omitted, the ITA will NOT progress to the next stage.

**ED terms:** Upon submission of the joint assessment, the ITA is sent to the College. You will receive a reference number and are prompted to print the assessment. The ITA then moves into the section of your ITA Inbox entitled “ITA awaiting ACEM credentialling” (4).

**Non-ED terms:** Upon submission of the joint assessment, an email is automatically generated to your DEMENT, requesting them to validate the term. The ITA then moves into the section of your ITA Inbox entitled “Awaiting DEMENT validation” (3).

#### **STAGE 4 – VALIDATION BY A DEMENT (NON ED TERMS ONLY)**

A non-ED term requires an extra validation stage by your DEMENT to confirm the completion of the assessment and to acknowledge its appropriateness for accreditation or otherwise. Upon validation by the DEMENT, the ITA is sent to the College. You will receive a reference number and are prompted to print the assessment. The ITA then moves into the section of your ITA Inbox entitled “ITA awaiting ACEM credentialling” (4).

**NB:** If you are working at a hospital which has an accredited ED, your DEMENT will be the DEMENT for that hospital. If you are working in a hospital which does not have an accredited ED, your DEMENT will be your Deputy Regional Censor.

#### **STAGE 5 - CREDENTIALLING OF TRAINING**

An ITA that has been submitted to ACEM will be held here until credentialling reviewed, which is the final step in the process.

Once your ITA has been credentialed, it will move into the section of your ITA Inbox entitled “Archived ITA” (5). This section keeps a record of all ITAs submitted to the College, whether approved or not.

#### **EXPIRED ITA**

Any ITA that has not been completed within the required time frame will automatically move to the “Expired ITA” section (6). The rules relating to submission of an ITA within eight (8) weeks of completion of the term will be enforced and no ITA in this section can be completed. If this occurs you should contact the College.

## INTERRUPTED TRAINING

The OTA program requires all trainees to enter back-to-back data throughout training until election to fellowship occurs. Where there are periods of time in respect of which no term details have been entered, email reminders will be issued to prompt you to enter your terms regularly.

In order to satisfy the requirements of the application and of your training program, there may be occasions where you will need to enter a period of Interrupted Training rather than an accreditable term. In such circumstances, the same rules apply as for the entering of term details – details of periods of interrupted training must be entered within **four weeks** of commencing that interruption of training.

If you are interrupting training for a period of 6 calendar months or more, you will need to obtain prior approval from the Board of Censors (use form GT-60, available on the website) and will need to contact the College for this interruption to be recorded.

There are a number of reasons for this such as:

- Maternity leave
- Extended non annual leave
- Your current post is not accreditable
- Your term does not meet minimum term requirements



Please note that all periods of interrupted training will reduce the period of time in which you must complete your provisional or advanced training. For provisional trainees, this rule also applies to the 12 month period in which your mandatory ED training must be completed.

To access the Interrupted Training section, navigate to ITA Home and select Interrupted Training in the left hand navigation panel. The screen will display a list of any previously entered periods of interrupted training, if applicable, which can be edited. To create a new period of interrupted training, select “Create Interrupted Training” (1).

Progress Summary	<b>Create Interrupted Training</b>	
ITA Inbox	Please note that if the duration of interrupted training exceeds 6 months, prior approval from the Board of Censors is required. Please contact ACEM for further information.	
Archived ITA		
Interrupted Training		
<b>Create Interrupted Training</b> (1)	Trainee Name	First User
Edit Interrupted Training	Membership No	04514
Expired ITA	Period	<input type="text"/> - <input type="text"/> <small>Note that you can manually type in your dates (use dd/mm/yyyy format)</small>
	Reason	-- please select -- (2)
	Comments	<input type="text"/>
		<input type="button" value="Create"/>
	<a href="#">back to top</a>	

Figure 6



Enter your start and end dates. You will not be able to overlap a period of interrupted training with a pre-existing term or enter a period of interrupted training which backdates more than 4 weeks from the current date. The OTA program will monitor this and will prompt you to enter different dates for your interrupted training period if this should occur. In addition, you will not be able to enter consecutive periods of interrupted training; either an ED or non-ED term must be entered after a period of interrupted training.

Select a reason for the interrupted training period from the dropdown menu (2). If you select "Other" you will need to enter an explanation in the blank field provided; and in all cases you will need to enter comments on your interrupted training period.

Click on create to save your interrupted training period. If you wish to make a change or delete this entry, return to the Interrupted Training page and review your record. Click on edit and update or delete as required.

All Interrupted Training periods will also be shown in the Progress Summary Bar – please refer to **Figure 1** in the [Progress Summary Bar](#) section for further information.

**STRUCTURED REFERENCES – OVERVIEW & TIMEFRAMES**

Structured References are only required for Provisional Trainees, and may be based only on provisional training terms. They are submitted in the following circumstances:

- After the six months **mandatory ED training** has been completed;
- After a three-month period of **extended ED training** has been completed (required where the SRs based on the six months of mandatory ED training have expired);
- If the first mandatory submission of SRs have not been approved and you are required to complete an additional six months of specified ED provisional training.



The ITA for the term on which your Structured References will be based **MUST** be at least at the “Awaiting ACEM Credentialing” stage **BEFORE** you will be able to an SR Request for that term.

The references must be completed and submitted to ACEM within **12 weeks** of the end date of the relevant ED term. You will be required to submit a request to your DEMA and two Fellows of the College.

**SUBMIT SR REQUEST**

To submit a SR request, go to SR Home on the top navigation bar and select “Submit SR Request” (1) from the left hand navigation panel. The screen will display the hospital at which you completed your ED training (2). If you completed two blocks of six months in a 12 month period at different hospitals, both will be shown and you will have the option to select either.

**Figure 7**

Your term(s) will be listed and automatically selected from your choice of hospital (3). If you have completed more than six months ED training at the same hospital and have multiple terms to select from, these will be shown here and you will have option to select any or all that apply.

Your DEMA will be automatically selected for you (4), based on the ED term(s) completed. The Fellows are chosen from a dropdown menu.



Please select your FACEM referees carefully – you will not be able to correct the request if you select the wrong one!

Once you have confirmed your SR request, an email will be sent to each of your referees informing them of their requirements to complete their assessment by the due date.

**ARCHIVED SR REQUESTS**

After you have submitted your SR request to your three referees, the ‘Archived SR Requests’ (1) section is updated.

Submit SR request
Awaiting completion

Archived SR requests

1

**SAMPLE HOSPITAL**

Submitted by Trainee	17/03/2009 05:07 PM
Due by	23/06/2009
Term	01/10/2008 - 31/03/2009

TYPE	NAME	EMAIL	STATUS	SUBMITTED
DEMT	Johm Smith	<a href="mailto:marvin@flashfx.com.au">marvin@flashfx.com.au</a>	Awaiting Completion	
FACEM	Andy Bolle	<a href="mailto:ota_admin@flashfx.com.au">ota_admin@flashfx.com.au</a>	Awaiting Completion	
FACEM	Marie Pedroz		Awaiting Completion	

[back to top](#)

**Figure 8**

The screen will show the date and time of your SR request submission (2) as well as the due by date (3). The status (4) of the Structured Reference will be updated as soon as each referee submits their assessment.

In addition, the SR status will be shown in the Progress Summary Bar – please refer to **Figure 1** in the [Progress Summary Bar](#) section for further information.