The IAATO Online Assessment for the 2022–23 season opens on **Wednesday July 13, 2022.**

The Online Assessment is one of the tools IAATO uses to show the Treaty Parties their Officers, Crew, Field Staff, Observers, and Office staff are qualified, continually training, and learning the most up to date information regarding rules and procedures for operating in and around the Antarctic.

The Online Assessment is also a resource to assess knowledge of, and become familiar with, the Field Operations Manual (FOM), and where assessment takers can find the answers for Antarctic Treaty and IAATO related questions.

At IAATO2021, members voted that all IAATO Field Staff are required to successfully complete the appropriate IAATO Online Assessment annually.

Additionally, at IAATO2022 members voted that Captains and senior officers are required to take the Online Assessment as well.

The below personnel as a minimum must take an IAATO Online Assessment each season:

- ALL Field Staff
- Captain
- Staff Captain (where applicable)
- Officers in charge of a navigational watch
- Environmental Officer (where applicable)
- Chief Engineer
- Lead Hotel Officer/Manager
- Helicopter pilot (where applicable)
- Submersible pilot (where applicable)
- Shoreside management engaged, or responsible with IAATO operations and or planning

For more information on who qualifies as Field Staff, please see the Field Staff Experience document in the FOM in Section 01- General Information.
Important Note:
Operators are in charge of creating accounts for their Field Staff to access the IAATO Website and of communicating the process of registering for and completing the assessment.

This Operational update will provide useful general information about the Online Assessment platform and tools to support your staff. A set of instructions on creating accounts for your Field Staff for the IAATO Website can be found at the end of the document.

1. Online Assessment Platform

The Online Assessment is mandatory for all field staff traveling to Antarctica. The South Georgia Government (GSGSSI) also requires the IAATO Online Assessment for field staff visiting South Georgia. (NOTE: Permit holders are also required to take the Permit Holder Briefing and Assessment- additional information can be found in the FOM in Section 13- South Georgia.)

Returning Field Staff can continue to access the Online Assessment platform using the same personal logins as previous seasons. New users will need to create their own accounts. NOTE: The assessment platform login is different from the website logins, and are created by the user themselves. As New users will need to create their account on the Assessment website, it is important that Operators communicate which ‘Group’ they should sign up for and which assessment they need to take.
The following table shows the ‘Group’ users will need to select when creating an account and which assessments are included in the group to help Operators relay this information to staff.

<table>
<thead>
<tr>
<th>Group</th>
<th>Assessments</th>
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</thead>
<tbody>
<tr>
<td>Expedition Leaders</td>
<td>Ross Sea for ELs and Guides, Peninsula for Expeditions Guides, Peninsula and SG for Expedition Guides, Peninsula and SG for Expedition Leaders, Peninsula for Expedition Leaders</td>
</tr>
<tr>
<td>Field Staff and Guides</td>
<td>Ross Sea for ELs and Guides, Peninsula for Expeditions Guides, Peninsula and SG for Expedition Guides, Peninsula and SG for Expedition Leaders, Peninsula for Expedition Leaders</td>
</tr>
<tr>
<td>Deep Field Staff</td>
<td>Deep Field Ops for Expedition Staff</td>
</tr>
<tr>
<td>Ship Officers and Crew</td>
<td>Vessel Ops for Officers and Crew</td>
</tr>
<tr>
<td>Cruise Only Operations (no landings)</td>
<td>Cruise Only (No Landings)</td>
</tr>
<tr>
<td>Home Office Staff</td>
<td>Vessel Ops for Home Office Staff, Vessel Ops for Officers and Crew</td>
</tr>
</tbody>
</table>

The assessment platform has been reset to erase all previous season assessments.

If you have any questions regarding the Online Assessment platform, please contact survey_test@iaato.org.

2. **IAATO Helpful Hints for the Online Assessment**

   The IAATO Helpful Hints for taking the Online Assessment has been updated for the 2022-23 season. The Helpful Hints are a great resource for staff (especially new staff) to better prepare them for taking the Online Assessment.

   Operators should send this document to their staff as it outlines how to access and use the IAATO Website, FOM, and Online Assessment.
3. **The FOM Sync App**
In addition to accessing the Field Operations Manual on the IAATO Website, Field Staff can also download the FOM Sync App v4 to their computer. A benefit to using the FOM Sync App is the Search function. Users can search by both the Title of a document as well as by the contents within each document. Once downloaded, the FOM Sync App can also be accessed without internet connection.

Instructions on downloading the FOM Sync App and download links for Mac and Windows computers can be found in the [Field Staff section of the IAATO website](#).

Remind returning Field Staff to ‘Sync’ their FOM Sync App for the latest documents and app updates.

4. **Creating/Disabling Field Staff Accounts on the IAATO Website**
The below instructions outline how to create and disable accounts for Field Staff users.

**A. Creating Accounts**
There are two ways to create accounts for Field Staff:
- Individual Users
- Bulk Upload

**Individual Users:**
1. Log into the [IAATO database](#).
2. On the Dashboard, navigate into the ‘Company Management’ section.

3. There are five tabs at the top of the page. Select the tab that says ‘User Management’.
4. This page will show a list of your current staff members associated with your company. You can filter through your staff based on their role and status of their account.

5. You can add a new user by selecting ‘Add New User’ in the top left corner.

6. Select the role type of the account; this will set base permissions for the user. For Field Staff, select “Operator Field Staff”.

7. Once you select the user’s role, you will need to fill in their information including, First and Last name, email and username. **Note:** Please use the email address as the username.

8. The Operator Field Staff role will automatically grant the user access to the Field Staff section of the IAATO website, but additional permissions are available and can be selected by checking the appropriate box. These permissions include:
i. Company Management (Company Contacts, User Management, Vessel, Incident and Crisis Contacts)
ii. Ship Scheduler (Expedition Data, Live Ship Scheduler, Calendar)
iii. Seasonal Requirements (Preliminary Estimates, PVR, EOS reports)
iv. Website Access- Member’s Only

<table>
<thead>
<tr>
<th>Primary Role</th>
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<tbody>
<tr>
<td>[ ] Operator Company Admin</td>
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<tr>
<td>[x] Operator Field Staff</td>
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<table>
<thead>
<tr>
<th>Other Permissions</th>
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</thead>
<tbody>
<tr>
<td>[ ] Company Management</td>
</tr>
<tr>
<td>[ ] Seasonal Requirements</td>
</tr>
<tr>
<td>[ ] Ship Scheduler</td>
</tr>
<tr>
<td>[x] Website Access Members Only</td>
</tr>
</tbody>
</table>

9. After reviewing that all the information has been entered correctly, select ‘Add User’.

**NOTE:** A standard activation email will be sent to the new user to activate their account. **This email does not provide any additional information about accessing the Field Staff section of the website or the Online Assessment.**

**Bulk Upload:**
1. Log into the IAA TO Database using your Operator Admin account. (This may be the admin account where the username contains the three-letter member code followed by _admin, e.g., XYZ_admin)
2. From your Dashboard, select the ‘Company Management’ section.

3. Go to the fourth tab at the top of the page, ‘User Management’.

4. On the User Management landing page, click the button “Download Master Field Staff Upload Document” to download the bulk upload spreadsheet.
5. Fill out the bulk upload spreadsheet with all Field Staff Users. All fields must be completed for each user to ensure upload into the database. **Note:** The Username field can be left blank. This field will automatically populate as the email address upon upload.

6. Once all users have been added to the spreadsheet, on the User management landing page, click ‘Add New User’.

7. Under the first set of check boxes that show the different roles, select ‘Operator Field Staff’.
8. Below is the Bulk upload section. Choose your completed bulk upload spreadsheet and ‘Upload Bulk User Set’.

9. If there are any errors within the spreadsheet, it will fail to upload. A red box with a list of errors will appear below the upload section.

Some common errors that might appear include:

   a. If any fields in the spreadsheet were left blank. For example, a Member or job title was not selected for the user.
   b. The user is already in the system with that username/email address. This could be because the user is working for another Operator and has already been entered. If this is the error message, please contact the Field staff user, and have them log in using existing credentials.
      i. If you receive this message, please delete the entire row from the spreadsheet before saving and reuploading.

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Add Field Staff Users in Bulk

Attach File*

Upload field staff users in bulk by attaching a completed 'Master Field Staff Upload document' spreadsheet.

Choose File  no file selected

⚠️ There were one or more errors with the uploaded file. Please correct the outlined errors and upload again.

- Invalid or missing field(s) on row 3. Invalid field(s) are: 'First Name'.
- Row 4, an account is already registered using that username(email). Please have this user log in using existing credentials.
- Invalid or missing field(s) on row 5. Invalid field(s) are: 'Member'.
- Row 6, an account is already registered using that username(email). Please have this user log in using existing credentials.
10. If there are no errors within the spreadsheet, accounts for all users will be created and emails will be sent out to those users. This email is to activate their new account and set up a password.

11. If you would like to add additional permissions to a user’s accounts, you will need to do this once the bulk upload has been completed. See point 8 under ‘Individual User’ instructions for additional information.

NOTE: If you need additional assistance adding users by individual basis or bulk upload, please email Erin (edelaney@iaato.org).

B. Disabling User Accounts

1. Log into the IAATO Database using your Company Admin Account.

2. Navigate to the Company Management Section.

3. In Company Management, go to the fourth tab, User Management.
4. Select an active Field Staff user. You will be brought to their Account information page.

5. Scroll to the bottom of their account page. At the bottom will be a checkbox that says ‘Account Enabled’.

6. Uncheck the ‘Account Enabled’ box, and click ‘Update Account Details’.

If you have any questions, please email Erin Delaney (edelaney@iaato.org).