

Clinical Learning Australia
Training Guide



QUICK REFERENCE GUIDE FOR
CLA ADMINISTRATORS

**CREATING TERMS AND MANAGING TERM
ALLOCATIONS**

This quick reference guide provides information on how to create term allocations in Clinical Learning Australia (CLA). This guide will explain the process to follow for allocating trainees to terms including linking term and clinical supervisors and how term allocations can be managed.

Table of Contents

| | | |
|----------|--|-----------|
| 1 | CREATING TERM ALLOCATIONS | 3 |
| 1.1 | WHERE TO CREATE TERM ALLOCATIONS | 3 |
| 1.2 | CREATING TERM ALLOCATIONS MANUALLY IN THE SYSTEM | 4 |
| 1.3 | IMPORTING TERM ALLOCATIONS IN BULK | 9 |
| 2 | MANAGING TERM ALLOCATIONS | 23 |
| 2.1 | WHERE TO MANAGE TERM ALLOCATIONS | 23 |
| 2.2 | MANUAL UPDATES | 24 |
| 2.3 | BULK UPDATES | 26 |
| 2.4 | MANAGING TERM ALLOCATIONS FOR SPECIFIC SCENARIOS | 27 |
| 3 | SUPPORT | 29 |

1 Creating term allocations

Medical Education Unit / Administrator users of CLA can create term allocations either manually (one by one) in the system or in bulk via the **single term** or **multi-term allocations import spreadsheet**.

The following steps are done once a cohort group, trainee user accounts and PGY Instance are created.

You do not need to enter term allocations for the full clinical year at once if you do not yet have this information to hand and can add/upload on an ongoing basis if needed.

1.1 Where to create term allocations

- Navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to add term allocations to.

| Organisation | Template | Group | Start Date | End Date | Created | Edited | Status |
|---|--|----------------------|------------|-------------|-------------------|-------------------|---------|
| ilio (DEMO ONLY) - Group 1 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 1 | 1 Jan 2024 | 31 Dec 2025 | 19 Jun 2024 14:13 | 28 Nov 2024 22:31 | Live |
| ilio (PGY1) 2024 UAT | Clinical Learning Australia (PGY1) (4 Terms) | AMC UAT Testing PGY1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:32 | 28 Nov 2024 22:20 | Live |
| ilio (PGY1) 2024 UAT - Group | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:49 | 24 Sep 2024 13:24 | Arch... |
| ilio (PGY1) 2024 UAT - Group | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 2 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:54 | 24 Oct 2024 14:32 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 3 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 3 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:59 | 5 Nov 2024 10:34 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 4 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 4 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:01 | 24 Oct 2024 14:33 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 5 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 5 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:02 | 24 Oct 2024 14:33 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 6 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 6 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:04 | 24 Oct 2024 14:33 | Live |

You will then be taken into that PGY Instance.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *
Clinical Learning Australia (PGY2) - Training Gro

Description

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) - Training Gro

Start Date
01/11/2024

End Date
01/11/2027

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

> PGY2 1 Nov 2024 1 Nov 2027

Cumulative Tallies

No cumulative tallies added

Add new cumulative tally

Outcome Statements

Version 2 - Prevocational Outcome Statements

Remove

Add new Outcome Statements

- Click on the PGY block to expand and display the terms.

- Click on the relevant **Term** to expand and display the **term allocations** table.

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors |
|-----------------------|------------|------------|--------------|---|---|
| Miranda Bailey (3...) | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - Paediatrics/Hos... | <input type="checkbox"/> |

Note: If any term allocations have been created previously, these will be visible in the table. If no term allocations have been created previously, the table will be empty.

1.2 Creating term allocations manually in the system

You can create term allocations manually (one by one) in the system or in bulk (see section 1.3 below).

To create term allocations manually:

- Navigate to the relevant term you wish to create term allocations for within the PGY Instance.
- Click on **Add allocation**.

- This will open the 'Create allocation' window.

Create allocation

Trainee *

Please select

Term

Please select

Start Date *

20/01/2025

End Date *

20/01/2025

Target Hours

0

Term Supervisors / Clinical Supervisors

Add a new user...

You have yet to assign any assessors/supervisors.

Close

Create

Add trainee

- Select a trainee from the drop-down list or start to type the trainee's name to find the trainee you want to add a term allocation for.

- **Note:** Only trainees that are assigned to the Group associated with this instance will be available to select from.

Assign term allocation

- In the 'Term' field, start to type the name of the term you wish to allocate this trainee to.
- **Note:** All accredited terms have already been created in the system. If the term you wish to allocate the trainee to is not available, please contact CLA Support.

Create allocation

Trainee *

Fergus Jackson - (holly.fowler+amcs11@myknowledgemap.com)

Term

goul

Goulburn Base Hospital - General Medicine
Goulburn Base Hospital - General Medicine (Canberra Region Medical Education Council)

Goulburn Base Hospital - General Surgery
Goulburn Base Hospital - General Surgery (Canberra Region Medical Education Council)

Goulburn Base Hospital - Obstetrics & Gynaecology
Goulburn Base Hospital - Obstetrics & Gynaecology (Canberra Region Medical Education Council)

Goulburn Base Hospital - Orthopaedic Surgery
Goulburn Base Hospital - Orthopaedic Surgery (Canberra Region Medical Education Council)

Close

Create

Add start and end dates for this term allocation

- Enter the term start and end date for this term allocation.
- **Note:** The start and end date of a term allocation for a particular trainee can be different to the overall term start and end dates. In this way, trainees could have different start and end dates for term allocations within a term. Trainees can also be put on split terms where required, meaning two allocations are given for a term.
- See 2.4 Managing term allocations for more information about setting up split/blended terms or split contracts.
- **Note:** Leave the Target Hours field blank – this is not relevant for CLA.

Link a trainee to a Term and Clinical Supervisor(s)

Next, you need to add the supervisor(s) to the trainee allocation and assign them a relationship of either Term Supervisor or Clinical Supervisor to link them to the trainee. This step gives the supervisor(s) access to the relevant trainee's ePortfolio and they can complete assessments for them for the duration of the term.

If the terms you are allocating trainees to have had supervisors pre-linked in the Term Descriptions, these will automatically populate in the term allocations once you click 'create' and you do not need to follow these steps unless you want to add additional supervisors.

- Start typing the name of the supervisor in the Term Supervisors / Clinical Supervisors field.
- Select the relevant user to add them to the term allocation.
- Select the Term Supervisor or Clinical Supervisor relationship for each supervisor added, noting that the default is Clinical Supervisor.
- **Note:** There can be only **one user with the Term Supervisor role per trainee** per term allocation but there can be **multiple Clinical Supervisors**. Both Term and Clinical Supervisors can complete mid and end of term assessments as well as EPAs. Individuals assigned as the Term Supervisors are able to complete an additional sign off form to confirm they have read and agree with the end of term assessment where this has been completed by a Clinical Supervisor if necessary.
- If you have multiple individuals that may act as the Term Supervisors for a trainee, it is recommended that you enter all supervisors as Clinical Supervisors and review who has completed the End of Term assessments through the Detailed Response Report to determine if additional review and approval is required

Create allocation

Trainee *
Fergus Jackson - (holly.fowler+amcs11@myknowledgemap.com) ▼

Term
Goulburn Base Hospital - General Medicine ▼





Start Date *
01/01/2025

End Date *
28/03/2025

Target Hours
0

Term Supervisors / Clinical Supervisors

Add a new user...

| | | |
|--|-----------------------|---|
|  Alana Prendigast tom+term2@myknowledgemap.com | Clinical Supervisor ▼ |  |
|  Joe Bloggs holly.fowler+termssupervisor1@myknowle | Term Supervisor ▼ |  |

Close Create

- **Note:** Supervisors must already be set up as users in CLA to be added to a term allocation. Please see the [Creating and managing users](#) quick reference guide. Supervisors can be added or removed from a term allocation at any time (see section below on managing term allocations).
- **DCTs as Supervisors:** Where your DCT/DPETs also have a supervisor role in relation to some terms, e.g. Relief, to be able to allocate these, they must have a Main Role in CLA of 'Supervisor (Term or Clinical)'. Change their role in Users to the Supervisor role and add them to your PGY cohort groups with the role of Director of Clinical Training. Please see the [Creating and managing users](#) and [Creating and managing groups](#) quick reference guides.
- Once you have completed all relevant fields, click **Create** to create the term allocation.
- The term allocation will then show in the term allocation table for the relevant term.

PGY1 1 Jan 2024 31 Dec 2024
Save changes

Start Date
01/01/2024
End Date
31/12/2024
Target Hours
0

Term 1 1 Jan 2024 28 Feb 2024 (8 forms)

Start Date
01/01/2024
End Date
28/02/2024
Target Hours
0
Grace Period (days)
7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters

Reference: e76f8f0e-a0b6-41f7-88a4-83f6e996279f
Import
Add allocation

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors | |
|-----------------|------------|------------|--------------|---------------------------------|---|--------------------------|
| Fergus Jacks... | 01/01/2025 | 28/03/2025 | 0 | Goulburn Base Hospital - Gen... | | <input type="checkbox"/> |
| | | | | | | |
| | | | | | | |
| | | | | | | |

- Repeat the above steps for each trainee and for each term allocation you wish to assign them to if creating allocations manually.

Release 2.0 – 02 June 2025

8

1.3 Importing term allocations in bulk

You can import term allocations for multiple trainees in bulk, either for each specific term one by one, or for multiple terms at once.

To import term allocations in bulk for a specific term, download and complete the **'allocations_import' spreadsheet** from within the Term you wish to create allocations for in the relevant PGY Instance.

To import term allocations for multiple terms at once, download and complete the **'allocations_import_bulk' spreadsheet** from above the PGY block in the PGY Instance.

The screenshot displays the 'Clinical Learning Australia (PGY2) - Training Group' interface. On the left, a 'Details' sidebar shows fields for Name, Description, Status (set to 'Live'), Template, and Group. The main 'Allocation' section contains a navigation tree with 'PGY2 1 Jan 2025 1 Jan 2026' and 'Term 1 1 Jan 2025 5 May 2025 (11 forms)'. Below the tree, there are input fields for Start Date, End Date, Target Hours, and Grace Period (days). A callout box points to the 'Import Allocations' button, stating 'Use to import multi-term allocations'. Another callout box points to the 'Import' button within the 'Term 1' section, stating 'Use to import single-term allocations'. At the bottom, there is a table with columns for Trainee, Start Date, End Date, Target Hours, and Term, along with a 'Term Supervisors / Clinical Supervisors' checkbox.

The key difference between the two methods is as follows:

Importing term allocations for multiple trainees at once: The multi-term allocation 'bulk' spreadsheet has a Reference column – here you put the reference code, which is a string of letters and numbers that uniquely identify each term in CLA, and this puts the trainee allocation into the correct term. To upload multiple terms, create trainee allocation rows using the reference codes for the specific terms that you want to upload trainee allocations to.

Importing terms one by one: To import allocations using the single term import spreadsheet, you need to prepare a separate spreadsheet for each term and upload these separately into each term.

Downloading the term allocations import spreadsheets:

- Navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to add term allocations for.

| Organisation | Template | Group | Start Date | End Date | Created | Edited | Status |
|---|--|----------------------|------------|-------------|-------------------|-------------------|-----------|
| lio (DEMO ONLY) - Group 1 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 1 | 1 Jan 2024 | 31 Dec 2025 | 19 Jun 2024 14:13 | 28 Nov 2024 22:31 | Live |
| lio (PGY1) 2024 UAT | Clinical Learning Australia (PGY1) (4 Terms) | AMC UAT Testing PGY1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:32 | 28 Nov 2024 22:20 | Live |
| lio (PGY1) 2024 UAT - Group | Australian Medical Council | amc-group 1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:49 | 24 Sep 2024 13:24 | Archiv... |
| lio (PGY1) 2024 UAT - Group | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 2 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:54 | 24 Oct 2024 14:32 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 3 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 3 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:59 | 5 Nov 2024 10:34 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 4 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 4 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:01 | 24 Oct 2024 14:33 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 5 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 5 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:02 | 24 Oct 2024 14:33 | Live |
| AMC National ePortfolio (PGY1) 2024 UAT - Group 6 | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 6 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:04 | 24 Oct 2024 14:33 | Live |

To download the multi-term allocations spreadsheet:

- Click the **Import allocations** button on the top right-hand side of the instance page, above the PGY section.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *
Clinical Learning Australia (PGY2) - Training Group

Description
[Text Area]

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) - Training Group (20 tr...

Start Date
01/01/2025

End Date
01/01/2026

Target Hours
0

Allocation

Navigate between the parts/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.

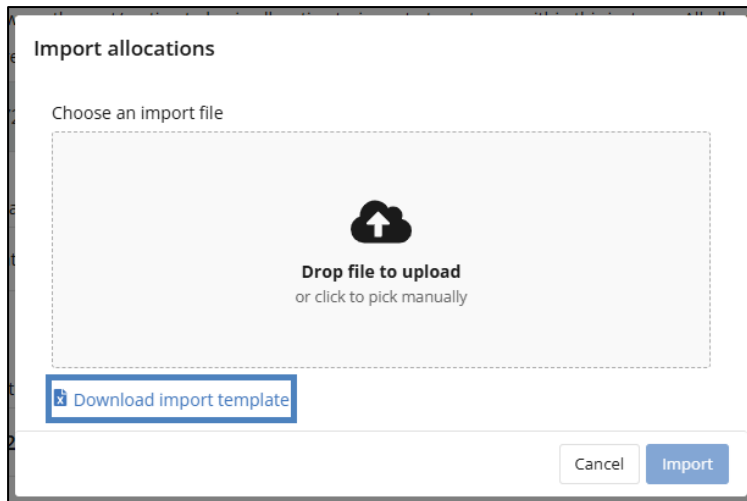
> PGY2 1 Jan 2025 1 Jan 2026

Cumulative Tallies (0)
No cumulative tallies added

Outcome Statements
Version 2 - Prevocational Outcome Statements


Import Allocations

- A pop-up box will appear with the option to **Download import template** – click on this.



Import allocations

Choose an import file



Drop file to upload
or click to pick manually

[Download import template](#)

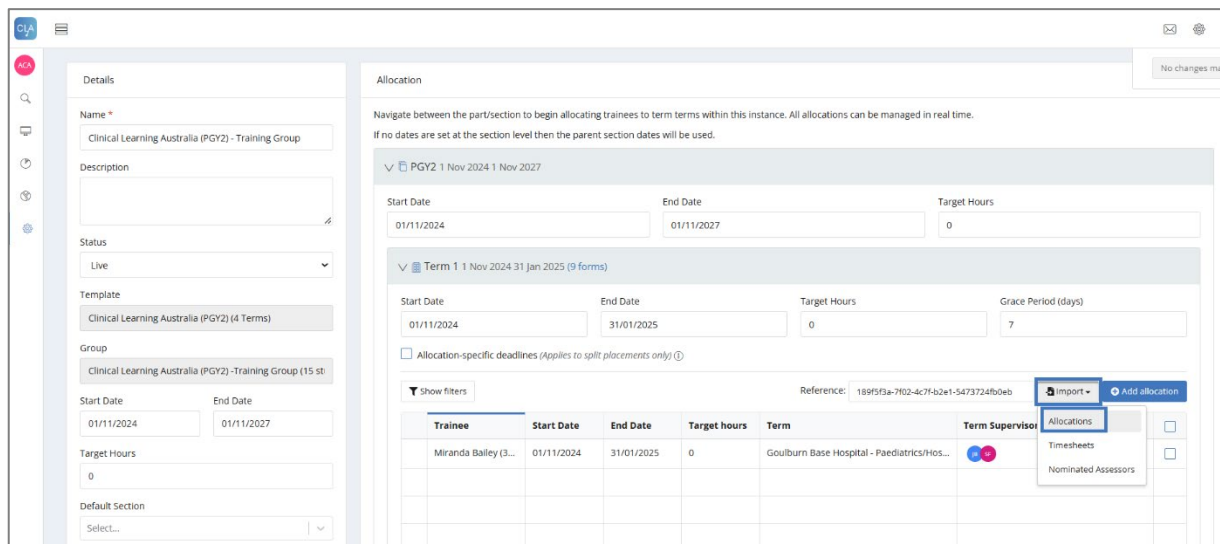
Cancel Import

- This will download the 'allocations_import_bulk' spreadsheet that you can use to enter term allocations for multiple terms for all trainees.
- Save this spreadsheet to your preferred location.

To download the single term allocation spreadsheet:

In this method, a separate spreadsheet will need to be completed and uploaded for each term.

- Expand the PGY block on the right half of the screen.
- Navigate to and expand the term you want to import allocations for.
- Click on **Import** and then **Allocations** button



The interface shows a sidebar with 'Details' and a main area with 'Allocation' and 'Term' sections. The 'Term' section for 'Term 1 1 Nov 2024 31 Jan 2025 (9 forms)' is expanded, showing a table with columns: Trainee, Start Date, End Date, Target hours, Term, and Term Supervisor. A dropdown menu is open for the 'Term Supervisor' column, showing options: Allocations, Timesheets, and Nominated Assessors. The 'Allocations' option is highlighted.

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisor |
|----------------------|------------|------------|--------------|---|-----------------|
| Miranda Bailey (3... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - Paediatrics/Hos... | [Avatar] |

- A pop-up box will appear with the option to **Download import template** – click on this.

Import allocations

Choose an import file

Drop file to upload
or click to pick manually

Download import template

Cancel Import

- This will download the 'allocations_import' spreadsheet that you can use to enter term allocations for all trainees for a single term.
- Save this spreadsheet to your preferred location.

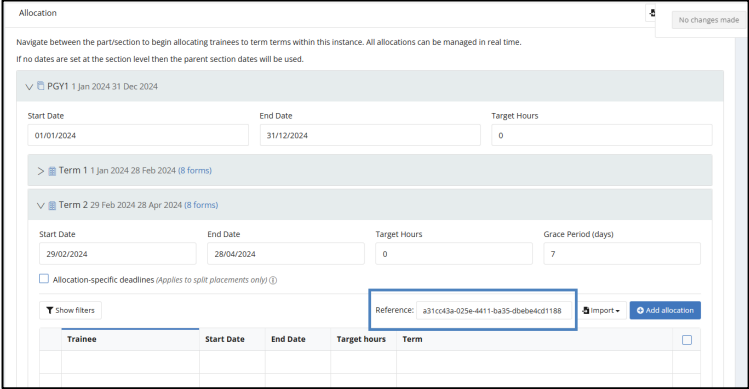
Completing the Term Allocations Spreadsheet

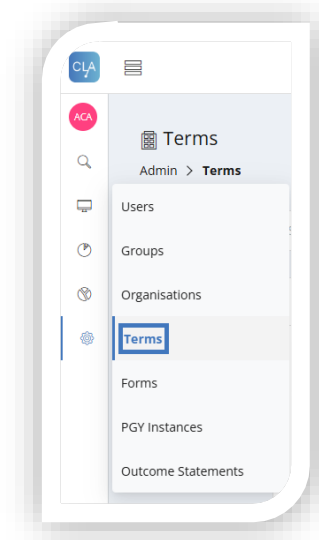
Complete the below fields in the spreadsheet, noting that the column A, Reference, is only included in the 'allocations_import_bulk' spreadsheet used to upload allocations for multiple terms.

| A | B | C | D | E |
|-----------|-----------|---------------------------------|-----------|---------|
| Reference | StudentId | Provider SystemId or Short Code | StartDate | EndDate |

| F | G | H | I | J |
|--------------|----------------|-----------------------|----------------|-----------------------|
| Target Hours | AssessorEmail1 | AssessorRelationship1 | AssessorEmail2 | AssessorRelationship2 |

| Column | Description | Field Type |
|-------------------|--|------------------|
| Reference* | <ul style="list-style-type: none"> • This Reference column is only relevant if you are completing the multi-term 'allocations_import_bulk' spreadsheet. • The Reference column is where you put the Term Reference code and this is how the system knows which term (Term1, Term 2, Term3, etc...) the allocation on that row belongs to. • This reference is a string of letters and numbers that is found within each of the term blocks of the PGY instance. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Reference: a31cc43a-025e-4411-ba35-dbebe4cd1188</p> </div> <ul style="list-style-type: none"> • Click on the PGY block at the top right of the PGY Instance window to reveal all the term blocks. | Mandatory |

| | | |
|--|---|------------------|
| | <ul style="list-style-type: none"> Click into each of the term blocks within the PGY Instance that you wish to add term allocations to. Within each block, you will see a string of letters and numbers under the 'reference' part of the term.  <ul style="list-style-type: none"> This is the reference that needs to go into this column of the spreadsheet. Note: The reference code will be different for every term and between PGY Instances. Reference codes are not reused in CLA. Caution: When entering reference codes into your spreadsheet, be careful to not enter the reference in the first row and drag this down in Excel as this will change the numbering of the code and will cause errors when you attempt to upload the file. Copy and paste this reference into each row. | |
| StudentID* | <ul style="list-style-type: none"> This is the Trainee's Ahpra number or email address associated with their account. You can find the Ahpra number and/or email by navigating the relevant user in the Users section of the administrator panel and searching for the relevant Trainee's user profile. | Mandatory |
| Provider SystemID or Short Code * | <ul style="list-style-type: none"> This ID links a Trainee to a specific term. The Term Name or System ID reference for a Term can be used in this field. Note that where you use the Term Name, it must be exactly as stored in CLA. If using the Term System ID, navigate to the 'cog' icon on the administrator side menu bar and click 'Terms'. Find the term that you want to link the trainee to. Below the heading of each term is a '<i>System ID</i>'. Copy the System ID reference and enter this into the '<i>Provider SystemID or Short Code</i>' column in the upload spreadsheet (see screen shot below). | Mandatory |

| | | |
|-----------------------|--|------------------|
| |  <p>Goulburn Base Hospital - General Surgery (Term) Managed by Cai</p> <p>System ID: GOU8457580</p> <ul style="list-style-type: none"> • Note: If you get a 'No provider found' error for a term when uploading using the term name, change this term identifier to the System ID. | |
| StartDate* | <ul style="list-style-type: none"> • This is the start date of the term. • For multi-term allocations, change the start and end dates for each term to reflect the start and end date for each specific trainee • Note: The start and end date of a term allocation for a particular trainee can be different to the overall term start and end date. In this way, trainees could have different start and end dates for term allocations within a Term. | Mandatory |
| EndDate* | <ul style="list-style-type: none"> • This is the end date of the term. | Mandatory |
| TargetHours | <ul style="list-style-type: none"> • This field isn't relevant for Clinical Learning Australia. Please leave blank or enter a 0. | Not used |
| AssessorEmail1 | <ul style="list-style-type: none"> • This is where Supervisors can be linked to trainees. • Enter the Supervisor's email address that is linked to their account in CLA. • Note: Supervisors must have been created as users in CLA before you can link them to trainees via the term allocations import process. If supervisors with matching emails do not exist in CLA at the time of importing, you will get an error message for each supervisor that does not already exist and you will need to resolve each error (i.e. find their email used in CLA or create an account if they don't exist) before being able to upload the spreadsheet. • Note: If you want to add more than one Supervisor during the allocation process, you can add additional columns at the end | Optional |

| | | | | | | |
|------------------------|--|----------|---|----------------|-----------------------|--|
| | <p>of the spreadsheet noting Assessor Email2/Relationship2 and so on depending how many you need to add for a Trainee (see example below). Please ensure you follow the same naming convention and order as below for any additional columns you add.</p> <table><tr><td>H</td><td>I</td></tr><tr><td>AssessorEmail2</td><td>AssessorRelationship2</td></tr></table> <p>* It is possible to link supervisors to Term Descriptions from May 2025. Where supervisors have been linked, you do not need to enter supervisors in the import spreadsheet – these supervisors will automatically populate in the individual trainee term allocations once imported.</p> | H | I | AssessorEmail2 | AssessorRelationship2 | |
| H | I | | | | | |
| AssessorEmail2 | AssessorRelationship2 | | | | | |
| Assessor Relationship1 | <ul style="list-style-type: none">Enter the Supervisor’s relationship to the Trainee – this should be Term Supervisor or Clinical Supervisor.If you want to assign a Term Supervisor relationship, enter Term Supervisor in the Assessor Relationship field. Leaving the Assessor Relationship blank will automatically assign them as a Clinical Supervisor.Note: A Trainee can only have one Term Supervisor linked to them per term. The Term Supervisor can be replaced at any point if requiredNote: A Trainee can have multiple Clinical Supervisors. Add additional columns for additional Clinical Supervisors as above. <p>Where Supervisors have been linked to a Term Description, the relationship as per the Term Description will automatically populate in the term allocation. This can be adjusted if a different supervisor is taking the Term Supervisor designation in relation to trainees.</p> | Optional | | | | |

Example of a completed multi-term allocation spreadsheet for Terms 1 – 4 for a single trainee.

| A | B | C | D | E | F | G | H |
|--------------------------------------|---|---------------------------------|------------|------------|--------------|----------------------|-----------------------|
| Reference | StudentId | Provider SystemId or Short Code | StartDate | EndDate | Target Hours | AssessorEmail1 | AssessorRelationship1 |
| 7d91bcae-fd19-486d-9bfe-7517ba374bdd | Term1 holly.fowler+testuser34@myknowledgemap.com | ACT6707192 | 5/02/2025 | 13/05/2025 | | assessor@example.com | Term Supervisor |
| 318ead71-f707-43c1-bfb8-232476762bcb | Term2 holly.fowler+testuser34@myknowledgemap.com | ACT9535097 | 14/05/2025 | 28/07/2025 | | | |
| 91c1b831-eb71-49d0-872e-8e1639722eb4 | Term3 holly.fowler+testuser34@myknowledgemap.com | ACT3476178 | 29/07/2025 | 27/10/2025 | | | |
| 52c3ec63-f5c5-4aa8-824d-f839abf6a6c9 | Term4 holly.fowler+testuser34@myknowledgemap.com | ACT4722321 | 28/10/2025 | 2/02/2026 | | | |

Reminder: The main difference in the multi-term spreadsheet is Column A ‘Reference’.

This reference is a string of letters and numbers. It is located within each term block (see below).

Allocation

Import Allocations

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Jan 2025 1 Jan 2026

Start Date: 01/01/2025, End Date: 01/01/2026, Target Hours: 0

Term 1 1 Jan 2025 5 May 2025 (11 forms)

Start Date: 01/01/2025, End Date: 05/05/2025, Target Hours: 0, Grace Period (days): 7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters

Reference: 189f53a-7f02-4c7f-b2e1-5473724fb0eb

Import Add allocation

| Trainee | Start Date | End Date | Target hours | Term Supervisors / Clinical Supervisors |
|---------|------------|----------|--------------|---|
|---------|------------|----------|--------------|---|

Ensure you highlight the full reference string, copy and paste into Column A of the multi-term spreadsheet.

Each term block has its own unique reference string.

Example of a completed single term allocation spreadsheet for three trainees for one term.

| | A | B | C | D | E | F | G | H | |
|---|----------------------|---|------------|------------|--------------|---------------------|-----------------------|----------------|--------|
| 1 | StudentId | Provider SystemId or Short Code | StartDate | EndDate | Target Hours | AssessorEmail1 | AssessorRelationship1 | AssessorEmail2 | Assess |
| 2 | trainee1@example.com | Wollongong Hospital - Endocrinology | 14/04/2025 | 29/06/2025 | 0.00 | Sample@assessor.com | Term Supervisor | | |
| 3 | MED123EXAMPLE | WAG8934280 | 14/04/2025 | 29/06/2025 | 0.00 | | | | |
| 4 | trainee3@example.com | Fiona Stanley Hospital - Acute Medical Unit | 14/04/2025 | 29/06/2025 | 0.00 | | | | |
| 5 | | | | | | | | | |

Uploading the Term Allocation Spreadsheet

- Once you have completed the term allocation spreadsheet, save it to your desktop or another local file location.
- Navigate back to the PGY Instance.

To upload the multi-term 'allocations import bulk' spreadsheet:

- Click on **Import allocations** located at the top right-hand side of the PGY Instance page.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *

Clinical Learning Australia (PGY2) - Training Group

Description

Status

Live

Template

Clinical Learning Australia (PGY2) (4 Terms)

Group

Clinical Learning Australia (PGY2) - Training Group (20 tr...

Start Date

01/01/2025

End Date

01/01/2026

Target Hours

0

Default Section

Select...

Allocation

Import Allocations

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Jan 2025 1 Jan 2026

Cumulative Tallies ⓘ

No cumulative tallies added

Add new cumulative tally

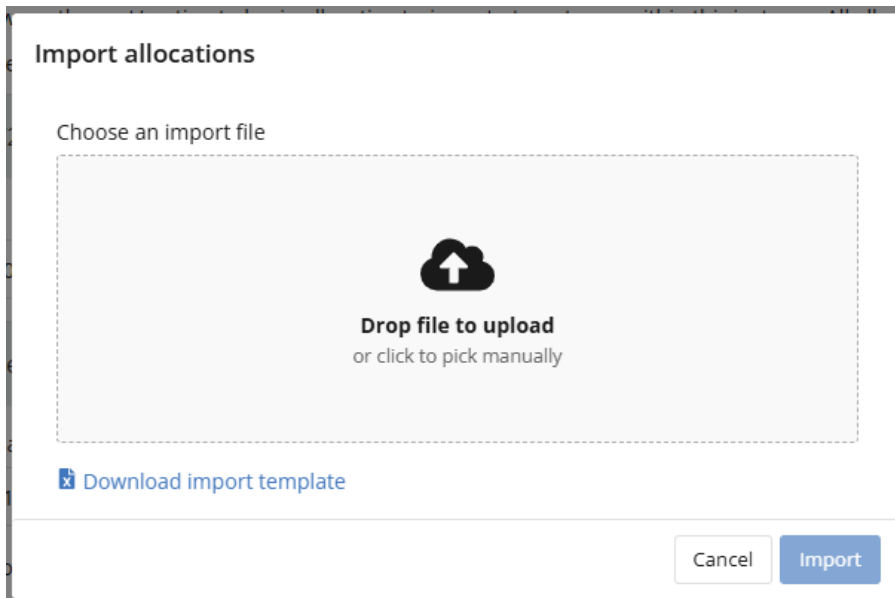
Outcome Statements

Version 2 - Prevocational Outcome Statements

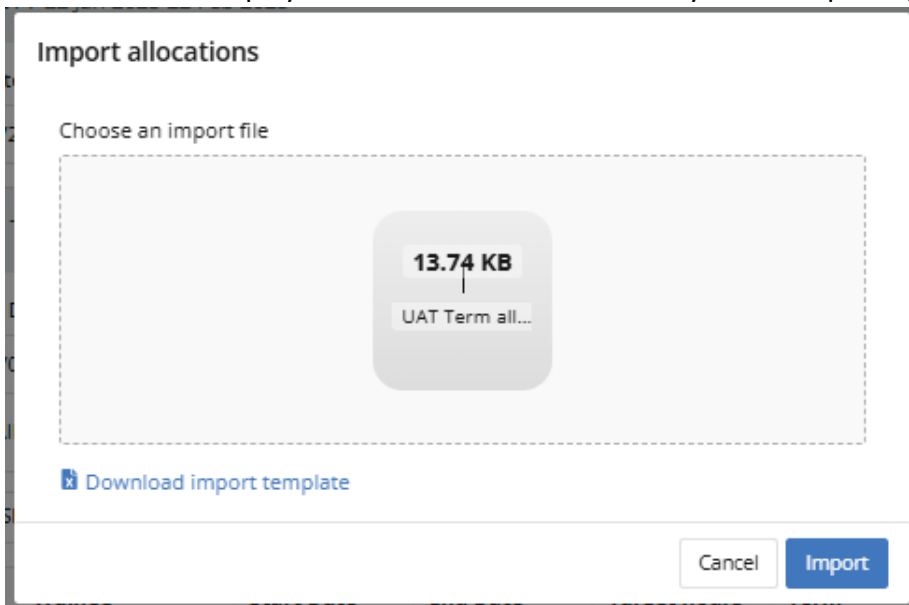
Remove

Add new Outcome Statements

- Click the **Drop file to upload** icon to select the file you created with the multi-term allocations and then **Upload** to upload the file.



- The screen will display the size and name of the file you are importing. Click **Import**.



- If there are no issues with the data, you will see a notification that the data has been successfully imported. Click **Done**.

Import allocations

Import results

Information: Successfully imported SILVIATEST01 to ACT Test Hospital - Intensive Care.

Information: Successfully imported SILVIATEST01 to ACT Test Hospital - Palliative Care.

Information: Successfully imported SILVIATEST01 to ACT Test Hospital - Medical Oncology.

Information: Successfully imported SILVIATEST01 to ACT Test Hospital - Emergency.

Done

- Once the file has been uploaded successfully, a message will appear and the term allocations will appear within each of the term allocation tables under each term block.

Allocation Import Allocations

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY1 8 Jan 2025 2 Feb 2026

Start Date

End Date

Target Hours

08/01/2025

02/02/2026

0

> Term 1 5 Feb 2025 13 May 2025 (11 forms)

Term 2 14 May 2025 28 Jul 2025 (11 forms)

Start Date

End Date

Target Hours

Grace Period (days)

14/05/2025

28/07/2025

0

7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Cancel

Reference: 318ead71-f707-43c1-bfb8-232476762bcb

Import

Add allocation

| Trainee | Start Date | End Date | Term | Term Supervisors / Clinical Supervisors | |
|-----------------|------------|------------|-------------------------------------|---|--|
| 34 | | | | | |
| Test Trainee 34 | 14/05/2025 | 28/07/2025 | ACT Test Hospital - Palliative Care | <div>LA</div> Leon Avery | |

To upload the single term 'allocations import' spreadsheet:

Release 2.0 – 02 June 2025

18

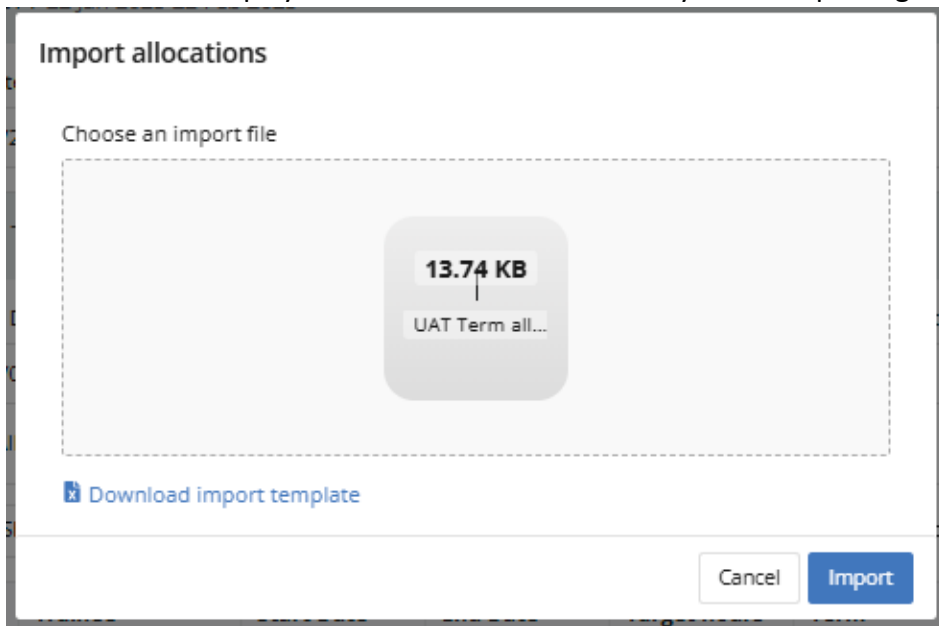
- Expand the Term section for the term you want to import allocations for.
- Above the term allocation table click **Import -> Allocations**.

The screenshot displays the 'Allocation' management interface. On the left, the 'Details' sidebar shows the training group 'Clinical Learning Australia (PGY2) - Training Group'. The main 'Allocation' section is set for 'PGY2 1 Nov 2024 1 Nov 2027'. Below this, the 'Term 1 1 Nov 2024 31 Jan 2025 (9 forms)' section is expanded, showing a table with columns: Trainee, Start Date, End Date, Target hours, Term, and Term Supervisor. A dropdown menu is open over the 'Import' button, showing options: 'Import', 'Add allocation', 'Allocations', 'Timesheets', and 'Nominated Assessors'.

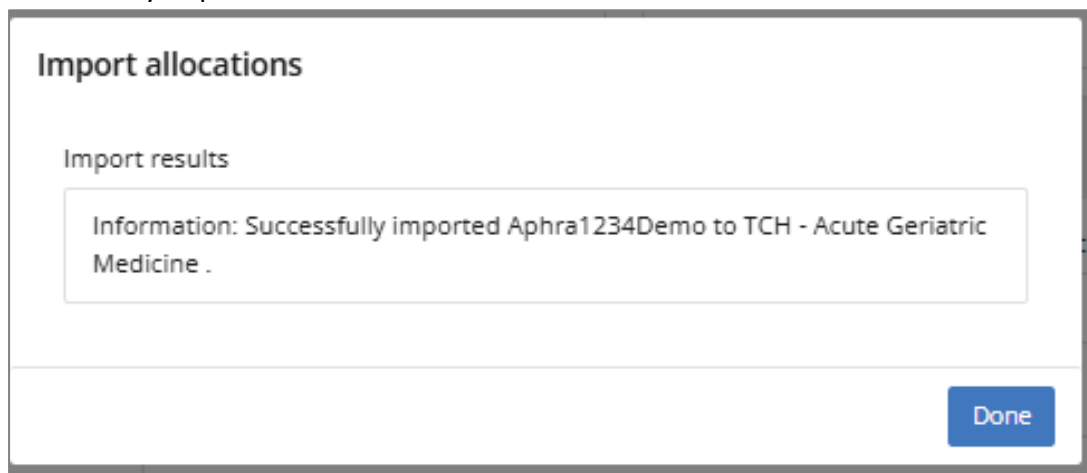
- Click on the **Drop file to upload** icon to select the file you created with the term allocations and then **Upload** to upload the file.

The 'Import allocations' dialog box prompts the user to 'Choose an import file'. It features a large dashed box with a cloud upload icon and the text 'Drop file to upload or click to pick manually'. At the bottom left is a link 'Download import template'. At the bottom right are 'Cancel' and 'Import' buttons.

- The screen will display the size and name of the file you are importing. Click **Import**.



- If there are no issues with the data, you will see a notification that the data has been successfully imported. Click **Done**.



- Once you file has been successfully uploaded, the relevant term allocations will be visible in the table within the single term.

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY1 22 Jan 2025 22 Feb 2025

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0

Term 1 22 Jan 2025 22 Feb 2025 (10 forms)

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0 Grace Period (days): 0

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters Reference: 318ef38e-85fd-4d70-8315-52dee02a9b6c Import Add allocation

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors | |
|----------------------|------------|------------|--------------|--------------------------------|---|--------------------------|
| Example Doctor (A... | 22/01/2025 | 22/02/2025 | 0 | TCH - Acute Geriatric Medicine | Demo Term Supervisor | <input type="checkbox"/> |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Previous Page 1 of 1 5 rows Next

Data validation

Regardless of whether you import the single or multi-term allocation spreadsheet, the data in your spreadsheet undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded these will be flagged on the screen for review and correction. Issues with data include:

- invalid Term Reference codes
- incorrect Ahpra number or email address for a Trainee
- invalid Term names or System IDs ('No provider found' error)
- a supervisor email does not exist in CLA yet ('Could not find user' error)
- multiple supervisors with the Term Supervisor role for a trainee allocation

Import allocations

Import results

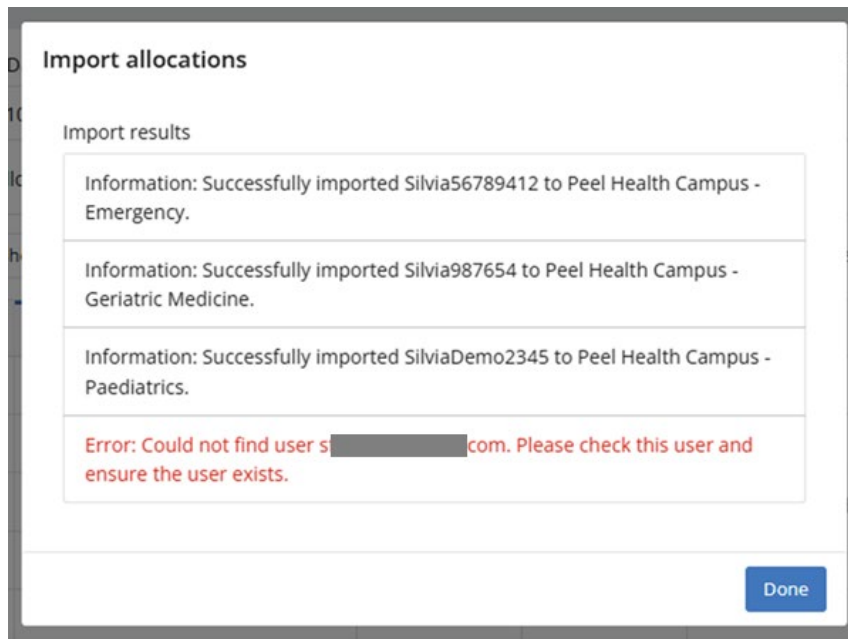
Error: Could not find user TESTAhpra123. Please check this user and ensure the user exists.

Error: Student Aphra1234Demo - No provider found for GBH89336223412.

Done

Review your term allocation import spreadsheet, make necessary corrections, save the latest version and try to upload again. Some errors will allow the import for other trainees to go ahead. For example, a **No provider found** error for one term/trainee will allow the rest of the import to proceed and allocations to be created.

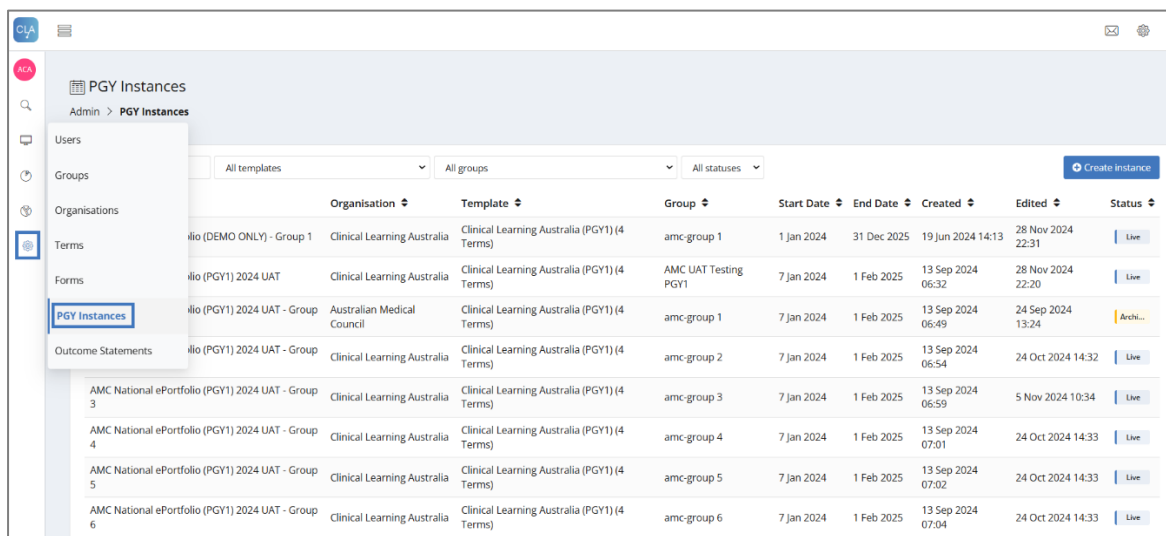
Take note of, or screenshots, of the red errors where the rest of the import rows display as 'Successfully Imported', resolve these errors and redo the import for the trainees that had an error or manual allocation.



2 Managing term allocations

2.1 Where to manage term allocations

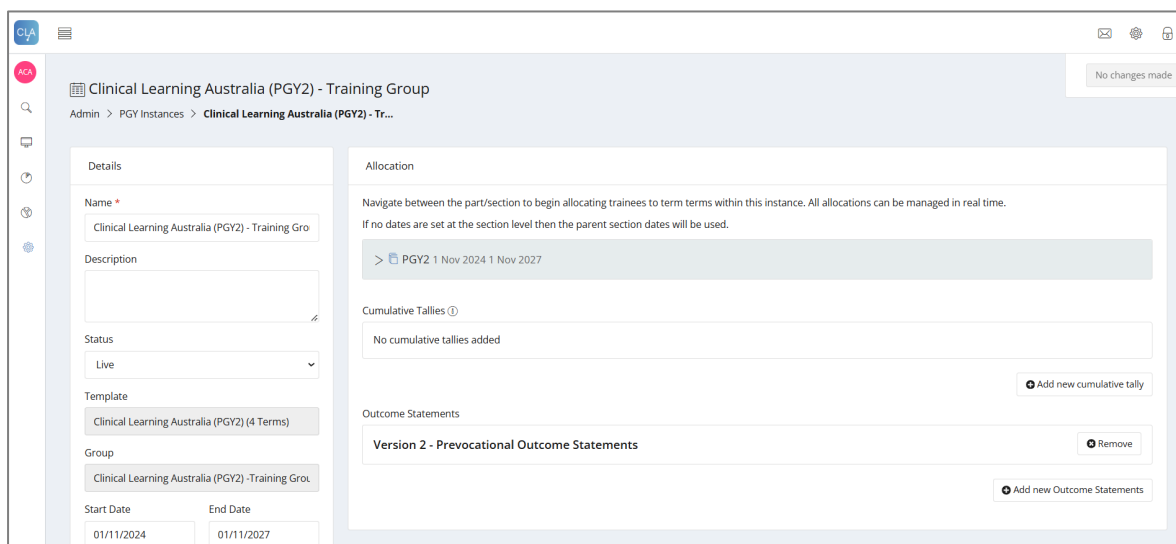
- Term allocations can be updated as and when needed by administrator users with relevant permissions.
- To manage term allocations, navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to manage term allocations for.



The screenshot shows the 'PGY Instances' page. On the left, a sidebar menu has the 'PGY Instances' option highlighted. The main area displays a table with columns: Organisation, Template, Group, Start Date, End Date, Created, Edited, and Status. There are filters for 'All templates', 'All groups', and 'All statuses' at the top. A 'Create Instance' button is in the top right. The table lists several instances, including 'Clinical Learning Australia (PGY1) (4 Terms)' and 'AMC National ePortfolio (PGY1) 2024 UAT - Group 1' through 'Group 6'. Each row has a status indicator (Live or Archived).

| Organisation | Template | Group | Start Date | End Date | Created | Edited | Status |
|-----------------------------|--|----------------------|------------|-------------|-------------------|-------------------|----------|
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 1 | 1 Jan 2024 | 31 Dec 2025 | 19 Jun 2024 14:13 | 28 Nov 2024 22:31 | Live |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | AMC UAT Testing PGY1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:32 | 28 Nov 2024 22:20 | Live |
| Australian Medical Council | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 1 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:49 | 24 Sep 2024 13:24 | Archived |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 2 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:54 | 24 Oct 2024 14:32 | Live |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 3 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 06:59 | 5 Nov 2024 10:34 | Live |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 4 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:01 | 24 Oct 2024 14:33 | Live |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 5 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:02 | 24 Oct 2024 14:33 | Live |
| Clinical Learning Australia | Clinical Learning Australia (PGY1) (4 Terms) | amc-group 6 | 7 Jan 2024 | 1 Feb 2025 | 13 Sep 2024 07:04 | 24 Oct 2024 14:33 | Live |

- You will then be taken into that PGY Instance.



The screenshot shows the details page for a PGY Instance. The left sidebar has the 'PGY Instances' option highlighted. The main area is titled 'Clinical Learning Australia (PGY2) - Training Group'. It has a 'Details' section on the left with fields for Name, Description, Status (Live), Template, Group, Start Date, and End Date. The right section is titled 'Allocation' and contains instructions on how to allocate trainees. Below the instructions, there is a 'Cumulative Tallies' section with a button to 'Add new cumulative tally'. At the bottom, there is an 'Outcome Statements' section with a button to 'Add new Outcome Statements'.

Details

Name *
Clinical Learning Australia (PGY2) - Training Gro

Description

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) - Training Gro

Start Date
01/11/2024

End Date
01/11/2027

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.

> PGY2 1 Nov 2024 1 Nov 2027

Cumulative Tallies

No cumulative tallies added

Add new cumulative tally

Outcome Statements

Version 2 - Prevocational Outcome Statements

Remove

Add new Outcome Statements

- Click on the PGY block to expand and display the terms.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *
Clinical Learning Australia (PGY2) - Training Gro

Description

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) -Training Gro

Start Date
01/11/2024

End Date
01/11/2027

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date
01/11/2024

End Date
01/11/2027

Target Hours
0

Term 1 1 Nov 2024 31 Jan 2025 (9 forms)

Term 2 1 Feb 2025 11 Apr 2025 (9 forms)

Term 3 14 Apr 2025 13 Jul 2025 (9 forms)

Term 4 21 Jul 2025 26 Oct 2025 (9 forms)

EPAs 1 Nov 2024 1 Nov 2027 (8 forms)

- Click on the relevant **Term** to expand and display the allocations table.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *
Clinical Learning Australia (PGY2) - Training Group

Description

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) -Training Group (15 st

Start Date
01/11/2024

End Date
01/11/2027

Target Hours
0

Default Section
Select...

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date
01/11/2024

End Date
01/11/2027

Target Hours
0

Grace Period (days)
7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Reference: 189f93a-7f02-4c7f-b2e1-5473724fb0eb

Import Add allocation

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors |
|----------------------|------------|------------|--------------|---|---|
| Miranda Bailey (3... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - Paediatrics/Hos... | |

- Any updates that need to be made to a term allocation can be done either manually (one by one) by clicking on the term allocation to be changed or in bulk.

2.2 Manual updates

- Click on the Trainee / Term Allocation you wish to make changes to.
- A pop-up box will appear with the current information for that Trainee's term.

Update allocation - Miranda Bailey

Term
 Goulburn Base Hospital - Paediatrics/Hospital in the Home

Start Date * 01/11/2024 End Date * 31/01/2025

Target Hours
 0

Term Supervisors / Clinical Supervisors
 Add a new user...

Joe Bloggs
 holly.fowler+termsupervisor1@myknowle Clinical Supervisor

Nominated Assessors
 Please ensure the forms you want nominated assessors to access are fully set up **before** adding nominated assessors.

Add or create nominated assessor...

You have yet to assign any nominated assessors.

Delete Close Update

- You can then make any required changes to that Trainee's allocation by selecting any of the fields available.
 - **Term** – Clicking into this field will allow you to type and search for the term you may want to update this Trainee to.
 - **Start/End Date** – Clicking into this field will pop up a calendar to allow you to select a start/end date you may need to amend.
Note: These date fields can also have the dates typed into them.
 - **Term Supervisors / Clinical Supervisors** – Clicking into this field will allow you to type and search for Term Supervisors and Clinical Supervisors that you may want to add to this Trainee's term. After you select the Supervisor, select their relationship relevant to that Trainee.
 - You can edit existing Term Supervisors and Clinical Supervisors that are attached by changing the relationship they have to the trainee/allocation by clicking the dropdown that notes their role and updating it to be something else. Or you can delete existing Term Supervisors and Clinical Supervisors by clicking the bin icon to the right of the role dropdown.
 - **Nominated Assessors** - Ignore this field. This is not being used by CLA.

2.3 Bulk updates

Note: Bulk actions make modifying term allocations simpler when you're making the same change to more than one Trainee.

- Click on the boxes to the right of Trainee's term allocations that you wish to make changes to.

Allocation

No changes made

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.

If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date

01/11/2024

End Date

01/11/2027

Target Hours

0

Term 1 1 Nov 2024 31 Jan 2025 (9 forms)

Start Date

01/11/2024

End Date

31/01/2025

Target Hours

0

Grace Period (days)

7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters

Reference: 189f5f3a-7f02-4c7f-b2e1-5473724fb0eb

Bulk actions (2) ▾

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors | <input type="checkbox"/> |
|----------------------|------------|------------|--------------|---|---|-------------------------------------|
| April Kepner (666... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - General Medici... | Joe Bloggs Approved | <input checked="" type="checkbox"/> |
| Miranda Bailey (3... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - Paediatrics/Hos... | | <input checked="" type="checkbox"/> |

- Click on the **Bulk actions** button above.

Allocation

No changes made

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.

If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date

01/11/2024

End Date

01/11/2027

Target Hours

0

Term 1 1 Nov 2024 31 Jan 2025 (9 forms)

Start Date

01/11/2024

End Date

31/01/2025

Target Hours

0

Grace Period (days)

7

☐ Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters

Reference: 189f5f3a-7f02-4c7f-b2e1-5473724fb0eb

Bulk actions (2) ▾

| Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors | |
|----------------------|------------|------------|--------------|---|---|--|
| April Kepner (666... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - General Medici... | Joe Bloggs Approved | |
| Miranda Bailey (3... | 01/11/2024 | 31/01/2025 | 0 | Goulburn Base Hospital - Paediatrics/Hos... | | |

Change term

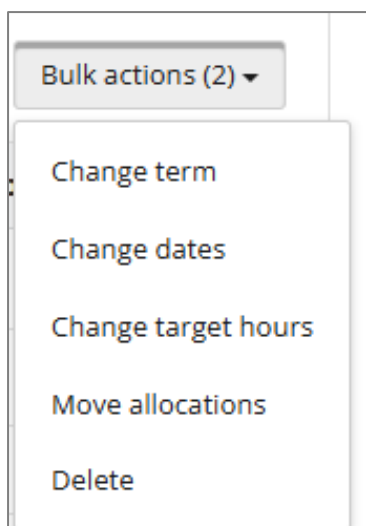
Change dates

Change target hours

Move allocations

Delete

This will display a list of options that you can perform with the bulk actions.



- **Change term** – This will allow you to type and search for the term you may want to update the selected Trainees to.
- **Change dates** – This will allow you to update the start and end dates for the terms for those selected Trainees.
- **Change target hours** – This field can be ignored. This is not being used by CLA.
- **Move allocations** – This would only be used if you happen to create term allocations in an incorrect term and you need to move them to the correct term.
- **Delete** – This will allow you to delete the term allocations for those selected Trainees.

Bulk updating Supervisors

You can update supervisors already existing for a trainee's term allocation. If you're needing to add new supervisors to many trainees within a cohort group, you can use either of the bulk import spreadsheet processes noted in section 1.3. Ensure that the trainee's term and start and end dates are the same in the import spreadsheet as those in CLA and the import will not create a new or split term - it will add supervisors only.

If you're needing to remove or update the relationship of a supervisor to a trainee, you will need to go into the relevant term, locate the trainee's term allocation, click the trainees name, and update the relevant information.

2.4 Managing term allocations for specific scenarios

Split terms:

CLA can accommodate situations where a PGY doctor has multiple allocations within a single term. This includes situations where they have one allocation for part of the term and another for the remainder (e.g. ED for 5 weeks and Gen Med for 5 weeks).

Term allocation display of a split term:

| | Trainee | Start Date | End Date | Target hours | Term | Term Supervisors / Clinical Supervisors | <input type="checkbox"/> |
|---|--------------|------------|------------|--------------|------------------------------|---|--------------------------|
| ▼ | Miranda B... | 03/02/2025 | 03/05/2026 | 0 | Multiple (2) | | |
| | | 03/02/2025 | 28/03/2025 | 0 | Goulburn Base Hospital - ... | | <input type="checkbox"/> |
| | | 29/03/2025 | 03/05/2026 | 0 | Goulburn Base Hospital - ... | | <input type="checkbox"/> |

Include the multiple allocations to the Term Allocation Upload spreadsheet with the respective start and end dates or manually add the allocations using the **Add Allocations** function.

Note: If bulk uploading more than one term allocation for a Trainee, you will need to create a new line for the same Trainee for the other term allocations they may require. See example below.

| A | B | C | D | E | F | G |
|----------------------|---|------------|------------|--------------|---------------------|-----------------------|
| StudentId | Provider SystemId or Short Code | StartDate | EndDate | Target Hours | AssessorEmail1 | AssessorRelationship1 |
| trainee1@example.com | Wollongong Hospital - Endocrinology | 14/04/2025 | 22/05/2025 | 0.00 | Sample@assessor.com | Term Supervisor |
| trainee1@example.com | Wollongong Hospital - Hospital in the Home (HITH) | 23/05/2025 | 29/06/2025 | 0.00 | | |

Split contracts:

Where a Trainee works across two organisations during a clinical year, there are two scenarios that can take place.

- If the trainee continues to be 'employed' by Health Site A but rotates to Health Site B on secondment for a specific term, then Site A continues to maintain 'ownership' of the trainee and will have access to their record across all sites that they are assigned to. Other sites that they rotate to will only have access to the trainee's record for the duration that the trainee is 'seconded' to or working within their term.
 - Add this trainee to your term allocations as usual for all terms and allocate the trainee to Site B for the required term.
- If the trainee's employment / contract transfers from one site to another, it would be necessary to transfer them to the new site's organisation within CLA (i.e. change the Organisation to which they are attached in the Users profiles – see the [Creating and managing users quick reference guide](#)) so that the new site becomes their primary 'owning' organisation. If the trainee is moving to a new organisation within the same state/territory, then a state administrator user with relevant permissions across both sites can manage the change in 'ownership'. If moving interstate, then this change needs to be made by the Nationwide System Administrator, i.e. contact CLA Support. You will need to provide local DMS/EDMS approval at the new site for the trainee's account to be transferred to the new organisation.
- If you have a trainee on split contracts:
 - Site A: Allocate the trainee to the terms for your organisation as per usual.

- Statewide or Nationwide Administrator (must be notified by the sites): When the trainee transfers Site B, update the PGY doctor's Organisation in Users to the new site.
- Site B: Add the trainee to the relevant cohort Group and assign the trainee Term Allocations for their site in PGY Instance.
- **Note:** The trainee's record will transfer with them to the new site and users with relevant permissions (administrator users, DCTs etc.) in the new site will be able to view prior assessments for that trainee even where these have been completed in a previous site.

3 Support

If you require any support, please contact the Nationwide Administrator. Contact details can be found on the [CLA website](#).