

Clinical Learning Australia

Training Guide

Clinical **LEARNING** Australia

The ePortfolio for **prevocational doctors**

MANAGING SUBMITTED FORMS

This quick reference guide provides information on how Medical Education Unit Administrators (MEU Admins) can manage submitted forms in Clinical Learning Australia (CLA), including deleting and editing forms, returning forms to the submitter as a draft, and moving forms between terms.

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1 Managing forms in CLA

MEU Admin have permissions to manage submitted forms in various ways within CLA in response to requests or issues that may occur.

From the Manage Responses screen, MEU Admins can:

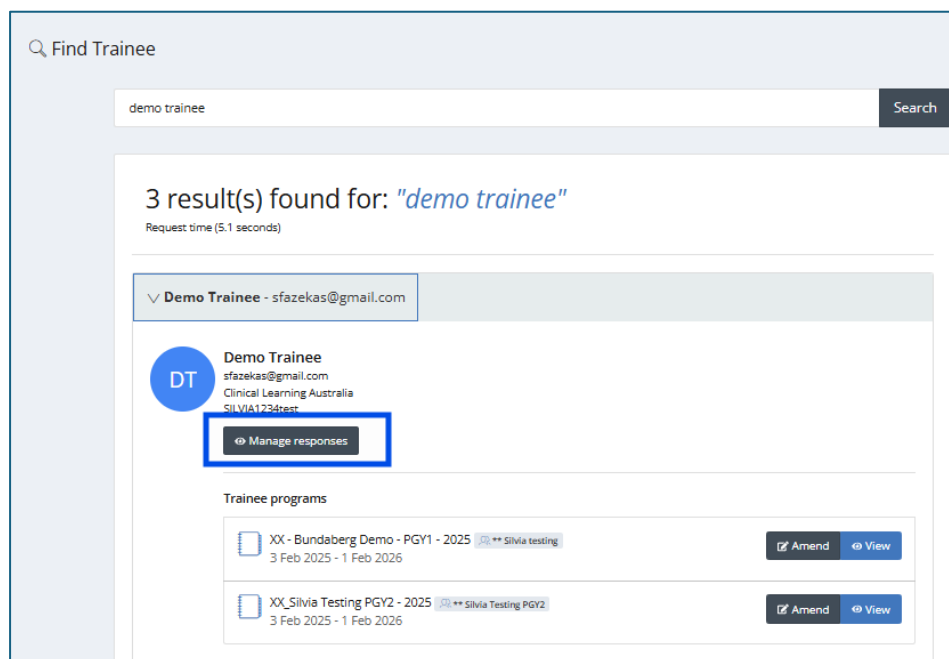
- Delete forms
- Edit forms
- Return forms to the submitter as a draft
- Move forms between terms and PGY instances

1.1 Navigate to the 'Manage responses' screen

There are two ways to navigate to the **Manage responses** screen:

1) Using **Find Trainees**

- Search for the trainee using name, email or AHPRA number
- Click on the trainee's name to expand their result segment
- Click **Manage responses**



2) Using the **Trainee Dashboard**

- Find the trainee on the Dashboard
- Click on the trainee's name to open their ePortfolio home page
- Click **Manage responses** on the left side of their ePortfolio

XX - Bundaberg Demo - PGY1 - 2025 Updated a few seconds ago

Trainees > Demo Trainee > XX - Bundaberg Demo - PGY1 - 2025

DT
Demo Trainee
sfazekas@gmail.com
[Manage responses](#)

ORGANISATION
Clinical Learning Australia

AHPRA NUMBER
SVLIA1234rest

Current Term - Riverland General Hospital - General Surgery

TERM
Riverland General Hospital - General Surgery
START DATE - END DATE
30 Jun 2025 - 21 Sep 2025

Don't forget
Nothing upcoming

What's next?

- DCT Sign Off
You are not able to complete this form
Deadline: 21 Sep 2025
- EPA 2 - Self Assessment - Recognition and care of the acutely unwell patient
You are not able to complete this form
Deadline: 1 Feb 2026
- EPA 3 - Self Assessment - Prescribing
You are not able to complete this form
Deadline: 1 Feb 2026

Progress View

The Manage Responses screen displays all forms/responses that have been submitted for the trainee to date.

[Demo Trainee Responses](#) (28)

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	
									Show All	Show All	
8 Sep 2025 16:26	EPA 4 - Team Communica...	XX - NSW ...	PGY1	EPAs		St George...	Silvia Trai...	sfazekas...	Released		
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW ...	PGY1	EPAs		St George...	Demo Su...	silvia.faze...	Released		
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW ...	PGY1	Term 4	ASSESSM...	St George...	Demo Su...	silvia.faze...	Released	9 Sep 2025 13:54	
19 Aug 2025 14:06	EPA 4 - Self Assessment - ...	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		
19 Aug 2025 14:06	EPA 1 - Self Assessment - ...	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		
18 Aug 2025 08:19	Beginning of Term Discus...	XX - NSW ...	PGY1	Term 3	START	Bundaber...			Released		
15 Aug 2025 09:31	Self Assessment	XX - NSW ...	PGY1	Term 3	ASSESSM...	Bundaber...			Released		
30 Jul 2025 12:33	Beginning of Term Discus...	XX - NSW ...	PGY1	Term 3	START	Bundaber...			Released		
7 Jul 2025 08:21	EPA 1 - Clinical Assessment	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		
3 Jul 2025 16:53	End of Term Assessment	XX - NSW ...	PGY1	Term 2	ASSESSM...	Northern ...			Released		

Previous Page 1 of 3 10 rows Next

1.2 Moving forms/responses

To move a form response that may have been entered against the incorrect term or PGY Instance:

- Go to the **Manage responses** screen as described in section 1.1
- Tick the checkbox to the right of the form that needs to be moved

Bulk actions (1) ▾

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	<input type="checkbox"/>
									Show All ▾	Show All ▾	
8 Sep 2025 16:26	EPA 4 - Team Communication	XX - NSW D...	PGY1	EPAs		St George ...	Silvia Trainee	sfazekas@g...	Released		<input type="checkbox"/>
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		St George ...	Demo Supe...	silvia.fazek...	Released		<input type="checkbox"/>
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW D...	PGY1	Term 4	ASSESSME...	St George ...	Demo Supe...	silvia.fazek...	Released	9 Sep 2025 13:54	<input checked="" type="checkbox"/>
19 Aug 2025 14:06	EPA 4 - Self Assessment - Te...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
19 Aug 2025 14:06	EPA 1 - Self Assessment - CIL...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
18 Aug 2025 08:19	Beginning of Term Discussion	XX - NSW D...	PGY1	Term 3	START	Bundaberg ...			Released		<input type="checkbox"/>
15 Aug 2025 09:31	Self Assessment	XX - NSW D...	PGY1	Term 3	ASSESSME...	Bundaberg ...			Released		<input type="checkbox"/>
30 Jul 2025 12:33	Beginning of Term Discussion	XX - NSW D...	PGY1	Term 3	START	Bundaberg ...			Released		<input type="checkbox"/>
7 Jul 2025 08:21	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
3 Jul 2025 16:53	End of Term Assessment	XX - NSW D...	PGY1	Term 2	ASSESSME...	Northern B...			Released		<input type="checkbox"/>

Previous Page 1 of 3 10 rows ▾ Next

- Select **Bulk actions** and **Move responses**

Bulk actions (1) ▾
Move responses

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	<input type="checkbox"/>
									Show All ▾	Show All ▾	
8 Sep 2025 16:26	EPA 4 - Team Communication	XX - NSW D...	PGY1	EPAs		St George ...	Silvia Trainee	sfazekas@g...	Released		<input type="checkbox"/>
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		St George ...	Demo Supe...	silvia.fazek...	Released		<input type="checkbox"/>
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW D...	PGY1	Term 4	ASSESSME...	St George ...	Demo Supe...	silvia.fazek...	Released	9 Sep 2025 13:54	<input checked="" type="checkbox"/>
19 Aug 2025 14:06	EPA 4 - Self Assessment - Te...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
19 Aug 2025 14:06	EPA 1 - Self Assessment - CIL...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>

- In the Move Responses window, select entries for each dropdown field
 - **Instance:** Select the correct PGY Instance, if more than one is listed
 - **Part:** Select PGY1 or PGY2, if more than one is listed
 - **Section:** Select the section of the ePortfolio the form should be in.
i.e. if moving a Mid Term Assessment from Term 3 to Term 2, select Term 2 (the term the form should be in). For EPAs, select EPA.

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025 ▾

Part *
PGY1 ▾

Section *
Please select ▾

Term 1
Term 2
Term 3
Term 4
EPAs
ASSESSMENT REVIEW PANEL

- **Tab:** Select the tab of the ePortfolio the form should be on.
 - Use *Start* for forms that are on the Start tab
 - Learning Goals or Beginning of Term Discussion
 - Use *Assessments* for forms that are on the Assessments tab
 - Self-Assessments, Mid Term Assessment, End of Term Assessments, Term Supervisor Sign-off, DCT Sign-off, IPAP forms
 - Use *Logbook* for forms that are on the Logbook tab
 - Logbook or Case Procedure Log

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025

Part *
PGY1

Section *
Term 2

Tab
Please select

START
ASSESSMENTS
LOGBOOK
Please select

Cancel Update

- **Item:** Select the form type (note, you cannot use this to change the form type from the submitted form, i.e. you cannot convert an MTA to an EOTA)

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025

Part *
PGY1

Section *
Term 3

Tab
ASSESSMENTS

Item *
Please select

Self Assessment
Mid Term Assessment
End of Term Assessment
Term Supervisor Sign-off (if assessment conducted by clinical supervisor)
DCT Sign Off
Improving Performance Action Plan (IPAP) - Open
Improving Performance Action Plan (IPAP) - Closed

Cancel Update

- **Term:** Select the relevant term allocation

- Click **Update**

The form will have been moved to the correct section of the ePortfolio.

The Dashboard may take up to 2 hours to update and for the icons to reflect the form movement.

You CAN:

- move multiple forms of the same type at the same time, e.g. moving multiple Self Assessments from one Term to another.

You CANNOT:

- move different form types at the same time, e.g. moving an MTA and EOTA from Term 2 to Term 3 – these must be moved one at a time
- use Move Responses to convert an MTA to an EOTA if the incorrect form was submitted because these forms have different underlying structures. The MTA should be deleted and a new EOTA submitted using the correct form type.

1.3 Deleting forms/responses

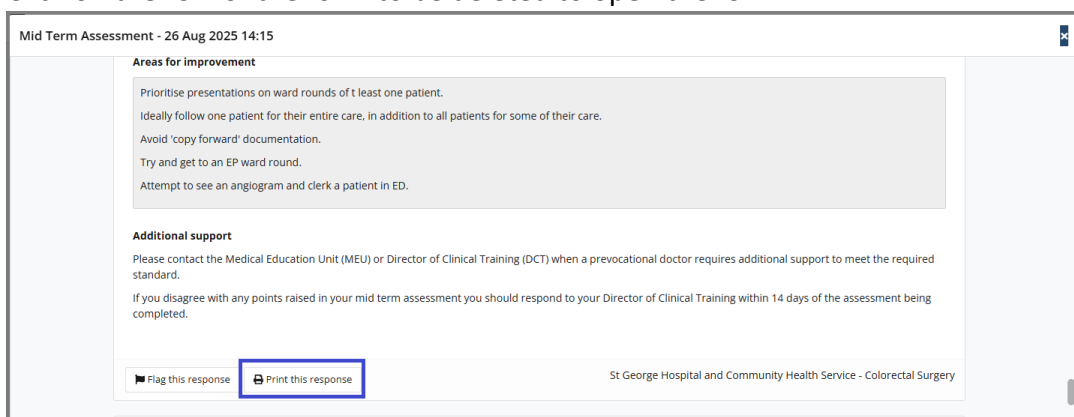
Caution when using the Delete function - once forms are deleted, they cannot be retrieved from CLA. It is recommended to print or download a copy of the form before deleting to save a copy.

Examples of when to use:

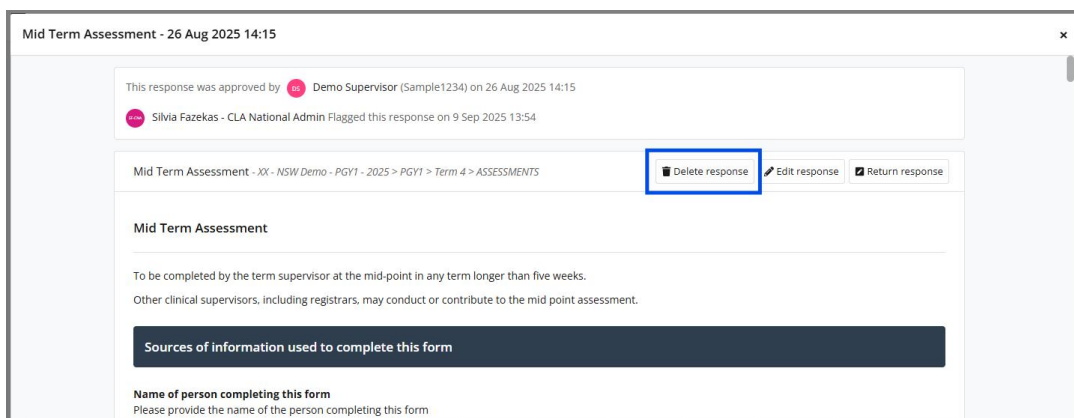
- Form has been submitted for the incorrect trainee
- Incorrect form was used, e.g. Mid Term Assessment was completed when End of Term Assessment was intended
- Duplicate forms have been submitted
- A form was submitted using a non-valid guest assessor email
- On request, if appropriate

To delete forms without outcome statements mapped:

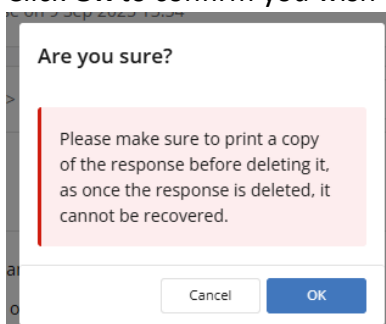
- Go to the **Manage responses** screen as described in section 1.1
- Click on the row of the form to be deleted to open the form



- Click the **Delete** button



- Click **OK** to confirm you wish to delete the form



To delete a form with Outcome Statements mapped, e.g. End of Term Assessments or EPAs, unmap the outcome statements from the form before deleting to remove them from the Wheel of Progress:

- Click on the row of the form to be deleted to open the form
- See the mapped responses in the blue box at the top of the form

The screenshot shows the 'EPA 1 - Clinical Assessment' form. At the top, a blue box displays 'Demo Supervisor (Sample1234) Submitted this response on 7 Jul 2025 08:21'. Below this, a section titled 'Outcome statements selected when completed' lists three statements: 1.1 Place the needs and safety of patients at the centre of the care process, working within statutory and regulatory requirements and guidelines. Demonstrate skills including effective clinical handover, graded assertiveness, delegation and escalation, infection control, and adverse event reporting. 1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues. 2.2 Identify factors and optimise personal wellbeing and professional practice, including responding to fatigue, and recognising and respecting one's own limitations to mitigate risks associated with professional practice.

- Scroll to the end of the form, select **Map this Response**

The screenshot shows the 'EPA 1 - Clinical Assessment' form. At the bottom, there are three buttons: 'Flag this response', 'Map this response' (highlighted with a red box), and 'Print this response'. Below these buttons is a section titled 'LINKED RESPONSES (0)' with a 'Link completed response' button. At the very bottom, there is a 'No comments...' section with a 'Write a comment...' text area.

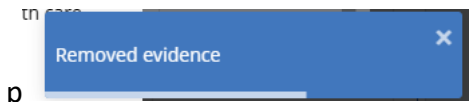
- Select Prevocational Outcome Statements in the dropdown box

The screenshot shows the 'EPA 1 - Clinical Assessment mappings' dropdown menu. The 'SELECT OUTCOME STATEMENTS' section has a dropdown menu with 'Select Outcome Statements' as the current selection. Below the dropdown, 'Prevocational Outcome Statements' is listed as an option.

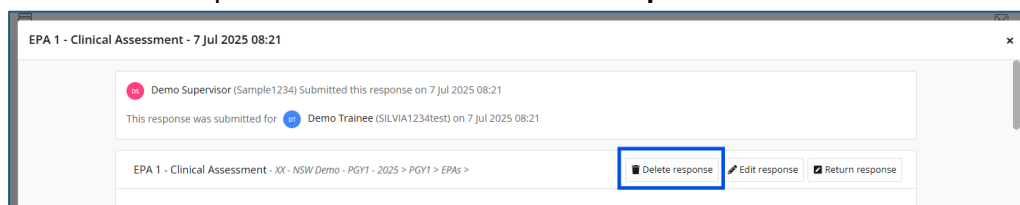
- Untick all ticked outcome statements to unmap them

The screenshot shows the 'EPA 1 - Clinical Assessment mappings' dropdown menu. The 'SELECT OUTCOME STATEMENTS' section has a dropdown menu with 'Prevocational Outcome Statements' as the current selection. Below the dropdown, a list of outcome statements is shown under the heading 'PRACTITIONER'. The statements are: 1.1 Place the needs and safety of patients at the centre of the care process, working within statutory and regulatory requirements and guidelines. Demonstrate skills including effective clinical handover, graded assertiveness, delegation and escalation, infection control, and adverse event reporting. 1.2 Communicate sensitively and effectively with patients, their family and carers, and health professionals, applying the principles of shared decision-making and informed consent. 1.3 Demonstrate effective, culturally safe interpersonal skills, empathetic communication and respect within an ethical framework inclusive of indigenous knowledges of wellbeing and health models to support Aboriginal and Torres Strait Islander patient care. 1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues. 1.5 Request and accurately interpret common and relevant investigations using evidence-informed knowledge and principles of sustainability and cost-effectiveness. 1.6 Safely perform a range of common procedural skills required for work as a PGY1 or PGY2 doctor. 1.7 Make evidence-informed management decisions and referrals using principles of shared decision-making with patients, carers and the health care team. 1.8 Prescribe therapies and other products including drugs, fluids, electrolytes, and blood products safely, effectively and economically. 1.9 Recognise, assess, communicate and escalate as required, and provide immediate management to deteriorating and critically unwell patients. The checkboxes for 1.1 and 1.4 are ticked, while the others are unticked.

- When outcome statements are removed, a notification will appear for each statement



- Return to the top of the form and click **Delete response**



1.4 Editing forms/responses

MEU Admins can edit the contents of forms if required.

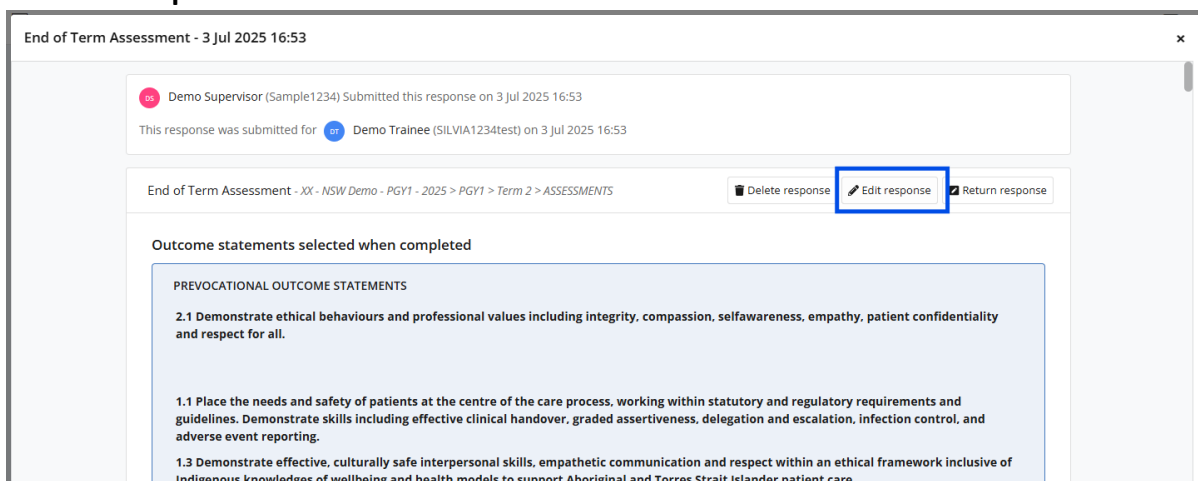
It is recommended to notify the submitting user, and/or supervisor, of any edits being made to forms. Details of edits can also be recorded in the Comments section at the bottom of a completed form for transparency.

Examples of when to use:

- To remove patient identifying or confidential information
- On request by a supervisor, DCT or trainee

To edit form responses:

- Go to the **Manage responses** screen as described in section 1.1
- Click on the row of the form to be edited to open the form
- Click **Edit response**



- Edit any portion of the form as needed
- Click **Submit**

Editing - End of Term Assessment

End of Term Assessment - Completing for Demo Trainee

End of Term Assessment

To be completed by the term supervisor at the end of the term.

Other clinical supervisors, including registrars may conduct or contribute to the assessment with final sign off of the end-of term assessment completed by the term supervisor.

Note: Where prevocational outcomes are shown at the top of this form, these are the prevocational outcomes that the term description identifies could be demonstrated during this term. If a Trainee has not met some or any of these outcome statements, or there are other outcome statements not identified above that have been demonstrated you can add or remove these via the prevocational outcome statements tab above.

Sources of information used to complete this form

Position/Role
Please provide the position/role of the Assessor undertaking the End of Term Assessment

HoD Cardiology

- Add a comment to the end of the submitted form to document the edit and click **Add Comment**

End of Term Assessment - 3 Jul 2025 16:53

Additional support
Please contact the Medical Education Unit (MEU) or Director of Clinical Training (DCT) when a prevocational doctor requires additional support to meet the required standard.
If you disagree with any points raised in your end of term assessment you should respond to your Director of Clinical Training within 14 days of the assessment being completed.

Flag this response Map this response Print this response

Northern Beaches Hospital - Cardiology Team A

No comments...

Edit details - amended Domain 3 rating on behalf of Supervisor Dr S Smith

Add comment

1.5 Returning forms/responses

To allow users to edit forms themselves and resubmit, forms can be sent back to the person who submitted the form as a Draft. They can edit the forms and resubmit.

Examples of when to use:

- On request of a supervisor, trainee or DCT to edit portions of the form themselves
- If a trainee entered an incorrect email address when submitting a form initiated in their login. Using return response will allow them to resubmit with the correct email address
- If an incomplete form was submitted, e.g. an EPA accidentally submitted with only the Trainee portion filled in when Email for Later should have been used to send the partially completed form to an assessor to complete and submit.

To return forms to the submitting user as a draft:

- Go to the **Manage responses** screen as described in section 1.1
- Click on the row of the form to be returned to open the form
- Click **Return response**

- The form will be available to the submitting user as a draft in the trainee's ePortfolio Draft indicator beside the Complete New button for the form.

- The user clicks on the (x) to view the draft and clicks on the draft to open

- Once the user has made the required changes, they click Submit.

2 Support

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