Clinical Learning Australia

Training Guide

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

CREATING AND MANAGING PGY INSTANCES

This quick reference guide provides information on how to create and manage PGY instances in Clinical Learning Australia (CLA). This guide will explain the process to follow for creating PGY instances and how to manage them once created.

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# 1 What is a PGY Instance?

An **instance** creates a 'version' of CLA to support a specific training program/cohort group. Within an instance, administrator users can assign a group of trainees to a relevant PGY template within the system (such as a 4-term or a 5-term template), identify PGY and term dates relevant to their training program and assign trainees to term allocations.

Creating an instance is done once per **cohort group,** after trainee **user accounts** are created and trainees are linked to their relevant cohort group.

2 Creating a PGY Instance

2.1 Where to create a PGY Instance

- Navigate to the 'cog' icon on the left-hand menu bar and click '**PGY Instances**'
- Click the '**Create instance**' button
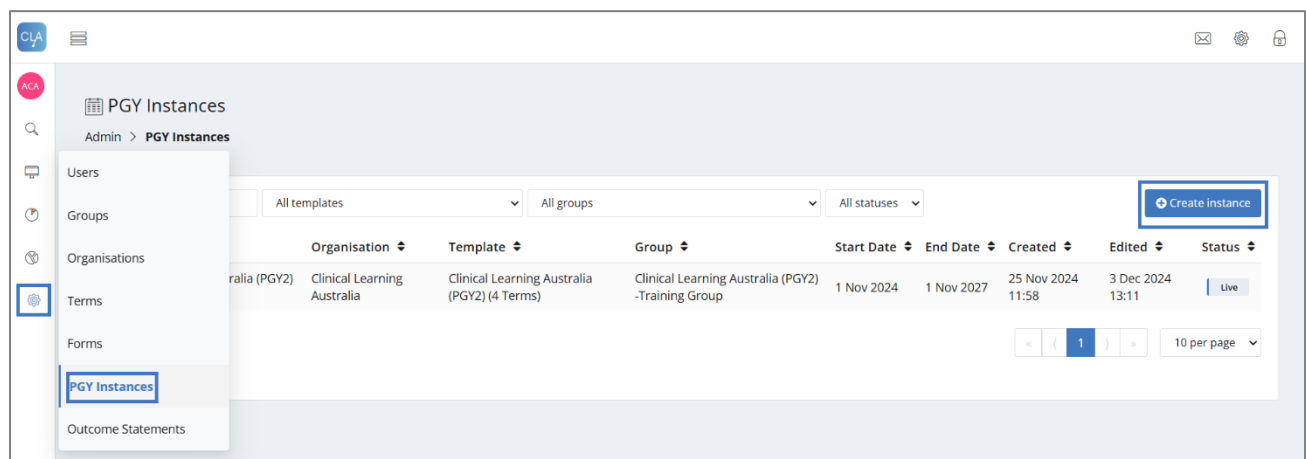
A window will pop up to allow the PGY instance details to be entered.

2.2 Initial creation of a PGY instance

- Complete the fields shown below ensuring you enter data in all mandatory fields as a minimum.
- Anything with a (*) is a mandatory field.
- Click **Create** when you have finished entering all the data. This will take you to a new screen in which you can add further details.

Create PGY

Name *

[   ]

Template *

[Select   ▾]

Group *

[Add a new group...   ]

You have yet to assign any group.

[Cancel] [Create]

The table below explains each of the fields within the PGY creation window.

Field name	Description	Field Type
Name*	You can choose to enter any name for the instance you are creating. It is recommended, however, that the name of the PGY instance matches that of the Trainee group that will be linked to the instance for ease of management. E.g. NSW – Nepean - PGY2– 2025 State - Hospital X – PGY1 – 2025	**Mandatory**
Template*	Select the relevant template from the drop-down list. The template selected ensures that the correct number of terms are assigned to the instance and that trainees and supervisors have access to the correct forms and assessments. There are 4 templates to select from: • PGY1 (4 Terms) • PGY1 (5 Terms) • PGY2 (4 Terms) • PGY2 (5 Terms)	**Mandatory**
Group*	Select the cohort group that you wish to assign to this instance. You will need to have created a cohort group before creating an instance. See the quick reference guide **Creating and managing groups** for more information.	**Mandatory**

	Adding the cohort group to the instance ensures that all trainees within that group have access to the correct template and forms relevant to their training program.	

2.3 Adding dates

Next you will need to populate relevant dates within the instance.

PGY Start and End dates

There are several places in which you will need to enter the start and end dates of the full training year as shown below. This is to set the date parameters for different aspects of the system:

- In the **Details** section – enter the start and end date of the training year to identify the date parameters of the instance
- In the **Allocation** section – enter the start and end of the training year to identify the start date of the first term and the end date of the last term
- In the **EPAs** section – enter the start and end date of the training year – this will allow EPAs to be completed at any time throughout the training year
- In the **Assessment Review Panel** section – enter the start and end date of training year – this will allow the ARP assessment to be undertaken at any time throughout the year – you are able to restrict this to occur at a later time should you choose to by entering dates later in the year for this section

Note: To enter the dates for the PGY, EPAs, Assessment Review Panel blocks, click on that section to expand it, and the start and end date fields will be located within that block.

Note: Target Hours is not used in Australia - please disregard wherever you see this.

IMPORTANT. Click 'Save changes' (top right corner) regularly as you populate the instance with information and data to ensure no work is lost.

Term dates

In addition to the start and end dates for the training year, you need to enter the start and end date for each term. Click on each term block and enter the start and end date of that term.

Note: You don't need to enter all term dates and term allocations straight away if they are not known.

Note: The term start and end date sets the overall date parameters for that term but individual trainee allocations within that term can have different dates i.e. if a certain trainee starts late, their term allocation can have a different start date to other trainees.

It is possible to manage split or blended terms in situations where a PGY doctor may require two term allocations within a single term. For instance, an ED allocation for the first 5 weeks of a term and then General Medicine for the remaining 5 weeks. See the **Creating and managing term allocations** quick reference guide for more information.

A **Grace Period** can be added to Term, EPA and Assessment Review Panel blocks. The grace period is to allow a period of time after the end date of that block to allow users to complete forms. If you do not wish to have a grace period, you can leave it as 0. After the grace period has expired, users will not be able to complete forms for that term.

2.4 Adding Term Allocations

Term allocations are added to the table within each Term block. For further information how to upload term allocations, please refer to the **Creating and managing term allocations** quick reference guide.

2.5 Set the PGY Instance to 'Live'

Once all the above steps have been completed, you will need to set the **Status** of the PGY instance to **Live** to allow Trainees to begin using their ePortfolio.

Navigate to the left-hand panel, click **Status** and set to **Live**.

Click **Save changes** on the far-right hand side of the page.

2.6 Attach the Progress View Deployments

The final step in the setup of a PGY instance is adding the **Progress View Deployments** which links the Prevocational Outcome Statement and the progress wheel to the instance. This will enable Trainees to attach evidence to the Outcome Statements and track progress against these.

Note: The option to add a new Progress Views Deployments will not appear until you have set a PGY instance to Live and saved the changes.

In the **Allocation** section of the instance screen click '**Add templates**' located at the bottom of the screen.

A window will pop up to select the Progress View Template.

Select **Prevocational Outcome Statements.**

Click **OK**.

You will now see the Prevocational Outcome Statement attached to this Instance.

Click **Save changes** to ensure the Prevocational Outcome Statements have been deployed to the PGU Instance before exiting.

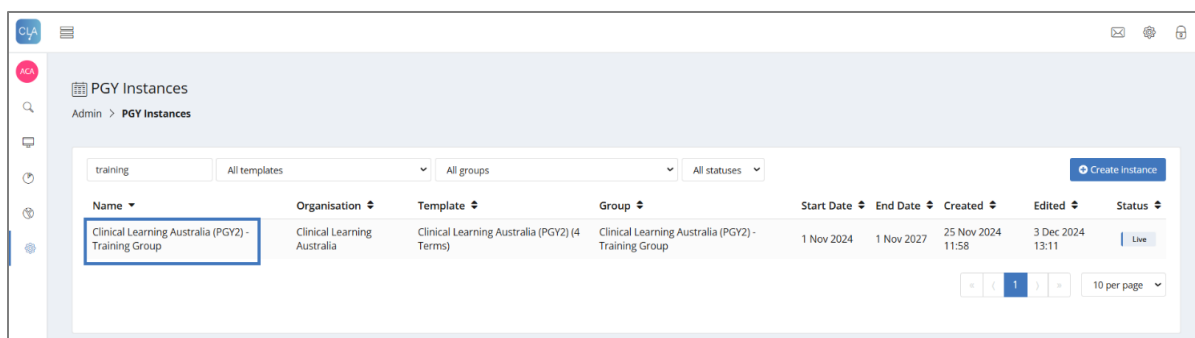The PGY instance is now and ready to use.

3   Managing PGY Instances

Once you have created a PGY instance, administrators can view, edit or update as required.

3.1   Where to manage PGY Instances

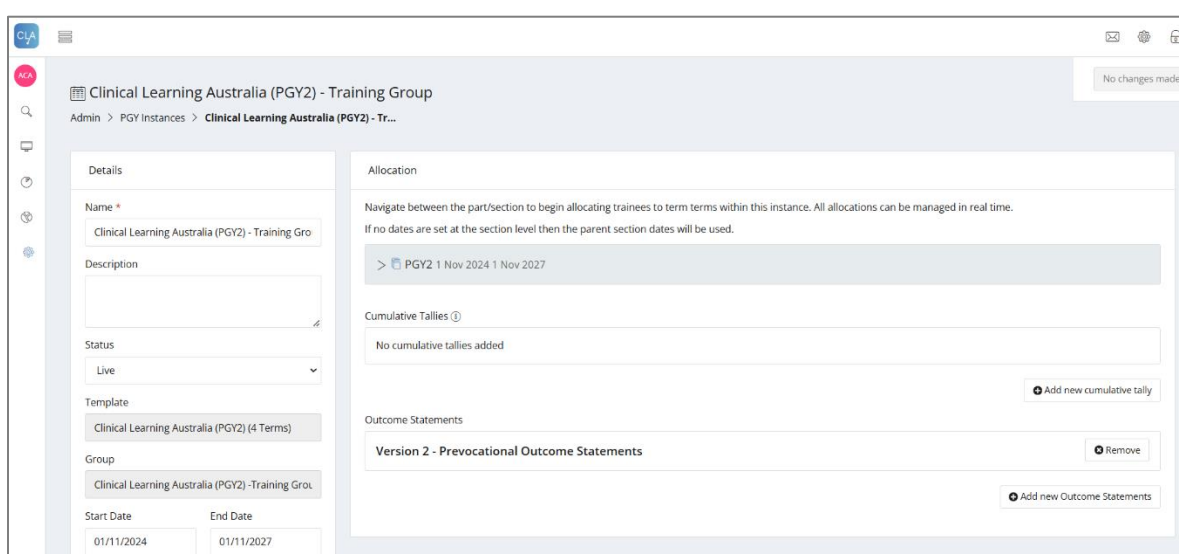- Navigate to the 'cog' icon on the left-hand menu bar and click '**PGY Instances**'

- Click any instance you wish to update, edit or view

Once you click into an instance, you can edit as required, e.g. term dates, form grace periods, adjust trainee term allocations, add or remove supervisors.

Ensure to click **Save changes** if any updates are done to an instance before exiting.

4   Support

If you require any support you can find contact details for the national CLA system administrator as well as relevant state based system administrators on the CLA website.