Clinical Learning Australia

Training Guide

Clinical LEARNING Australia

The ePortfolio for **prevocational doctors**

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

CREATING AND MANAGING USERS

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

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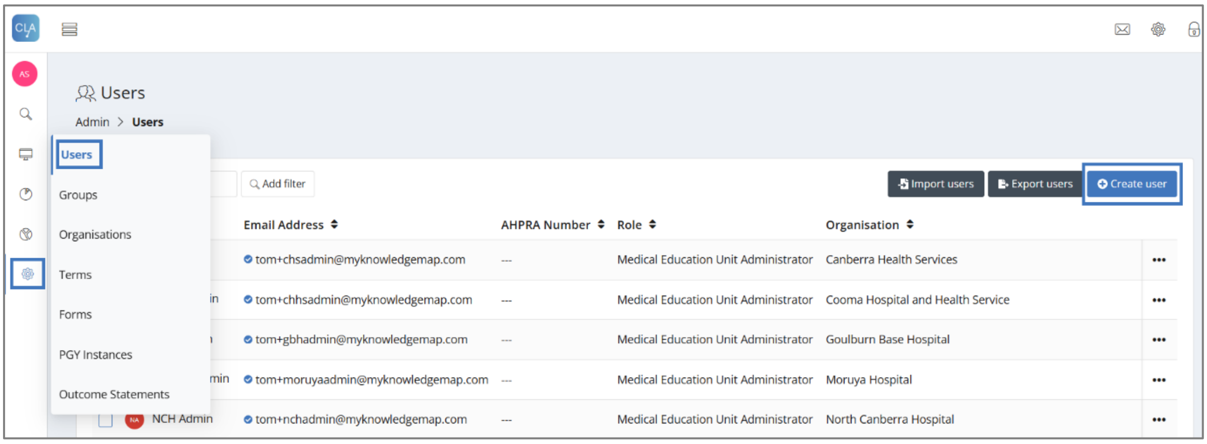
1 Creating users

Medical Education Unit / Administrator users of CLA can create users either manually (one by one) or in bulk via a **user import spreadsheet**.

1.1 Creating users manually

Where to create users manually

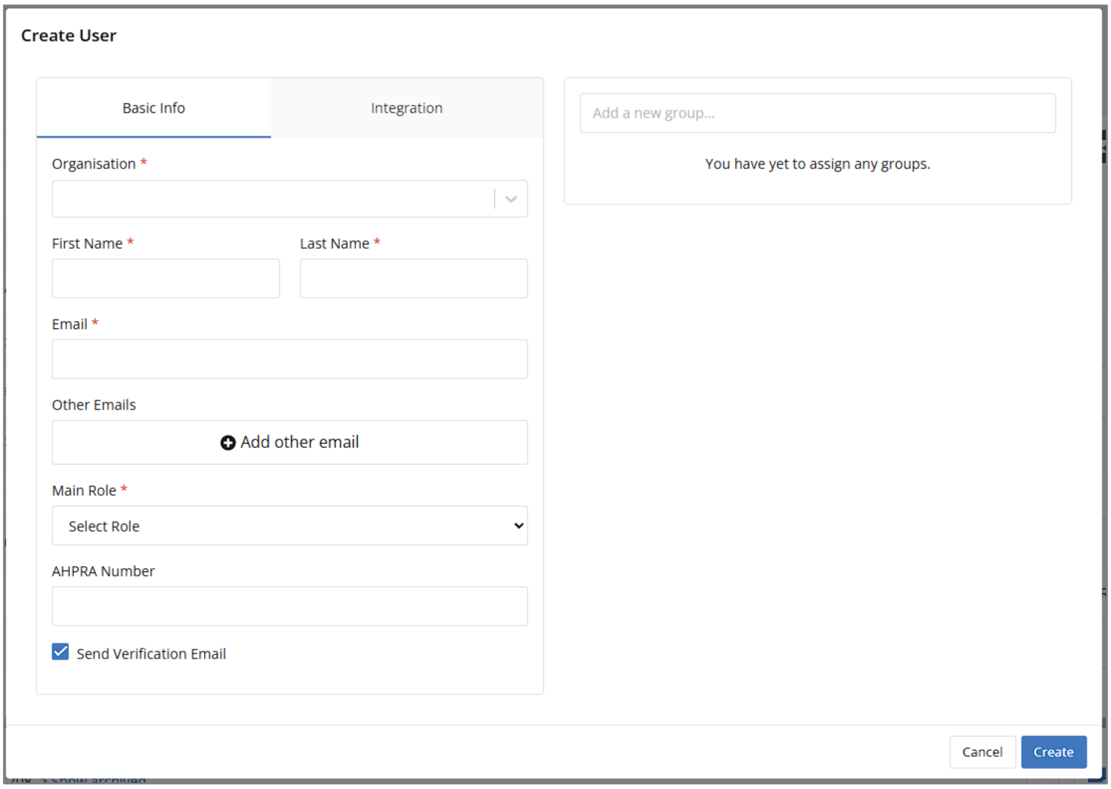
- Navigate to the 'cog' icon on the left-hand menu bar and click **'Users'**
- Click the '**Create user**' button



A window will pop up to allow a user's details to be entered.

Inputting user details

- 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.



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

Field name	Description	Field Type
Organisation*	• Search and select the organisation to which the user will be attached. A minimum of 3 characters must be entered to populate results. • **Note:** You can only select your organisational level and below (if there are organisations that sit underneath yours). The organisation to which the user is attached, alongside their role, will determine what users and information the user will be able to see.	**Mandatory**
First Name and Last Name*	• Enter the user's first and last name. • To include a middle name, populate this after the first name. • To include a prefix, populate this before the first name. • If the user does not have a first name enter '-' in the first name field.	**Mandatory**
Email*	• Enter the email address for the user.	**Mandatory**

	• There can only be one user profile with a unique email address. • The welcome email will be sent to the email address specified here. • It is strongly recommended to use a professional email address where this is available. If a professional email address has not yet been created, an alternative email address can be used in the interim and changed later. • Email addresses can be updated after users have been created.	
Other Emails	• Users can have multiple email addresses attached to their account however these are included for information only and only the main email address is used for notifications.	Optional
Main Role*	• Select the system role to be assigned to the user. This will determine what they will be able to see in the system and what actions they will be able to perform. • Please see the table below for details on user roles.	**Mandatory**
Ahpra Number	• Please enter the user's Ahpra number where appropriate and known. • This is not a mandatory field however this is used as the key identifier for Term Allocation uploads and should be entered for all PGY doctors at minimum. It should also be included for other medical professionals using the system (i.e. supervisors, Directors of Clinical Training etc.).	Optional, however highly recommended

By default, the **Send verification email** option will be ticked. This will send a welcome email to the user immediately after you create their account. If you do not wish to not send a welcome email straight away, please untick this box.

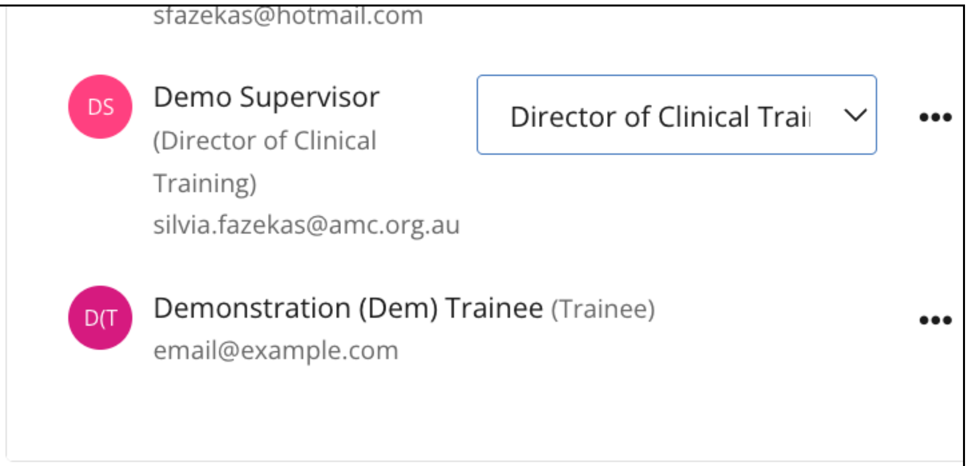
You can send the welcome email at a later time, once you're ready (see below).

Welcome emails allow new users to verify their account and set up a password.

Role types

The following outlines the system roles and functions that can be assigned to users.

Role	Definition
Trainee	A Trainee is a prevocational doctor in their first or second year, also known as a PGY1 or PGY2 doctor. This role allows the user to access CLA as a trainee, complete self-assessment forms, view mid/end of term assessments, EPAs completed for themselves and email assessment forms to supervisors to complete later Trainees will have access to an ePortfolio when assigned to a group and instance – see the quick reference guides **Creating and managing groups** and **Creating and managing PGY instances.**
Supervisor (Term or Clinical)	This role is designed for Supervisors who are responsible for oversight of trainees during a particular term. It allows these users to complete mid and end of term assessments, EPAs, track and monitor progress of training for trainees they are assigned to. You should select this role for both Term and Clinical Supervisors. Within the Term Allocations process administrator users can assign these users a 'relationship' to a trainee. This will determine whether the user can perform the functions of a Term or Clinical Supervisor for each trainee that they are linked to. Term and Clinical Supervisors can perform the same functions except for the Term Supervisor having the additional system privilege of being able to sign off the mid and end of term assessment. See the quick reference guide for **Creating and managing term allocations.**
Director of Clinical Training OR Executive Director of Medical Services	This role provides access to view all trainees where they are added to the same cohort group to track and monitor training progress and assessments. DCTs and EDMS' need to be added to the same Cohort Groups as their trainees to be able to access their ePortfolios. See the **Create and manage groups** and **How to import users in bulk** quick reference guides. In situations where a DCT or EDMS is also a Supervisor, set their Main Role as Supervisor, then in the Groups, assign an additional role of DCT or EDMS – this will enable them to have permissions as both a Supervisor (main role) where they can be linked to specific trainee term allocations and DCT/EDMS for any groups they're added to with the DCT/EDMS role.

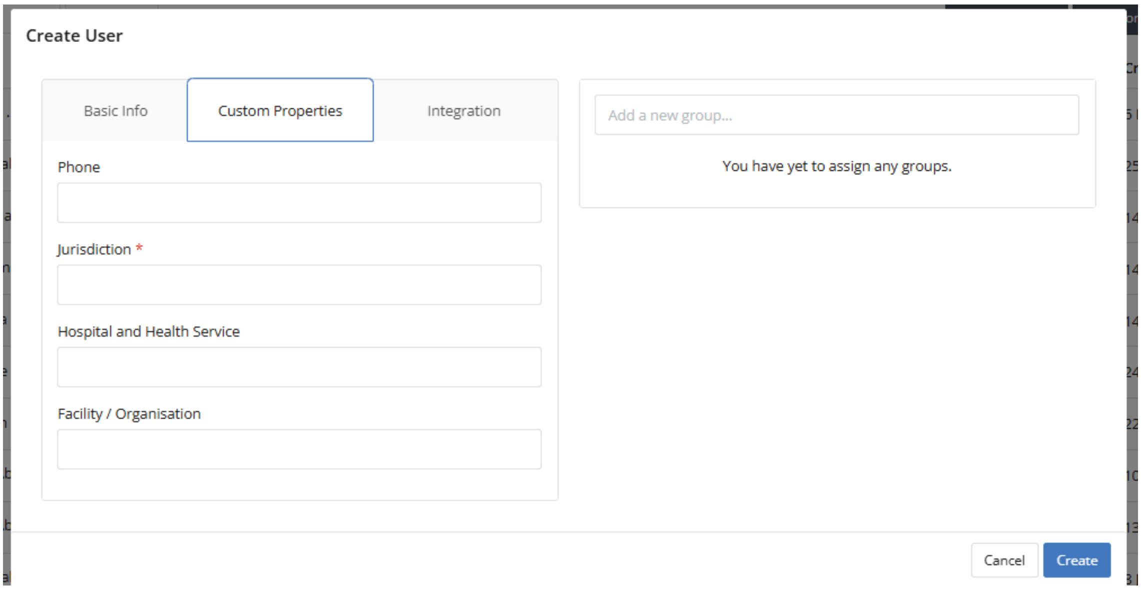
	
Medical Education Unit Administrator	This role provides access to all administration functions for the organisation to which the user is assigned and any organisations below (where applicable). This includes the ability to create and manage user accounts, create and manage groups, create and manage PGY instances, create and manage term allocations, view and track training progress and assessments for trainees assigned to any organisations the administrator has access to. For situations where a user requires both the MEU Administrator role for an organisation and a DCT role in relation to a group of Trainees, set their Main role as MEU Administrator and add them to the trainee cohort group, assigning them the role of DCT within the group.
Medical Education Officer	This role can perform the same functions as a Medical Education Unit Administrator with the exception of creating and managing user accounts.
Statewide Administrator	This role can only be assigned by administrator users that already have statewide access. It provides access to view aggregate data across all organisations within a particular state or territory and run reports.

Custom properties

Once you have populated all the mandatory fields within the ‘basic info’ tab, a new tab called **Custom Properties** will appear.

The following fields are not mandatory and are only relevant if you wish to provide further information about users, e.g. states who manage admin users centrally may want a quick reference to the hospital, facility, health service they reside within.

- **Phone** – A phone number for a user can be entered if necessary
- **Jurisdiction* (mandatory)** – This should be formatted as the state/territory abbreviation, e.g. NSW, WA
- **Hospital and Health Service**
- **Facility / Organisation**



The **Integration** tab is not relevant for CLA at this time and can be ignored.

Adding a user to a group

Trainee users will need to be added to a group and the group to an instance for them to have access to the relevant forms and assessments for their clinical year. The quick reference guides **Creating and managing groups** and **Creating and managing PGY instances** provide more information on this.

If you have already created groups, users can be assigned to those groups during the user creation process by searching for the relevant group in the **Add a new group** search bar.

Note: The group being added must have been created already before being able to add a user to the group. Be sure to include DCTs and EDMS' to the trainee Cohort groups and ensure that their assigned role in the Group is that of a DCT/EDMS if their Main Role is different (e.g. Supervisor (Term or Clinical)).

Create user account

Once all fields have been completed, click **Create**.

The new user is now created and will be displayed in the user list.

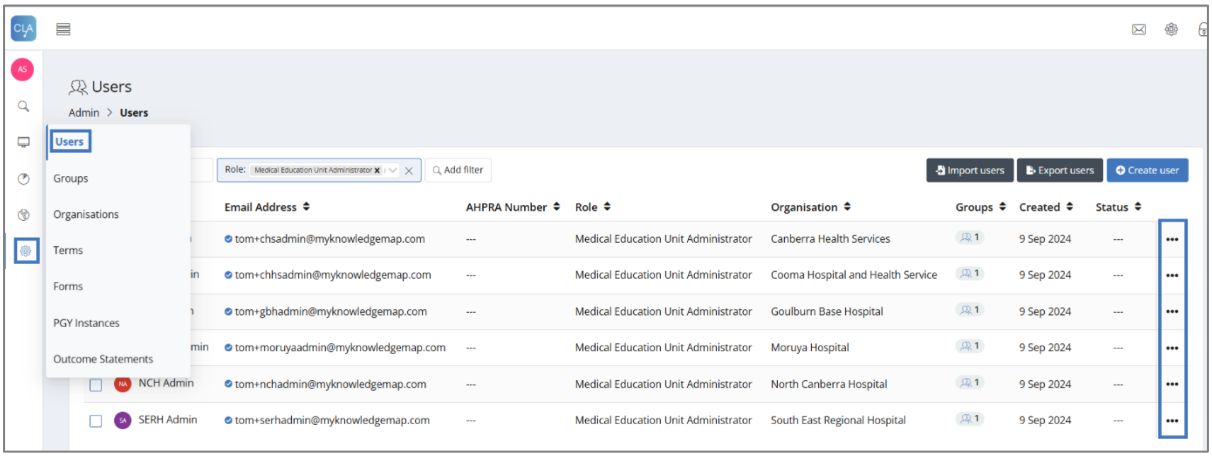
1.2 Creating users in bulk

Creating users in bulk can be done via the completion and uploading of a spreadsheet. Please refer to the **How to Import Users in Bulk** quick reference guide for further information.

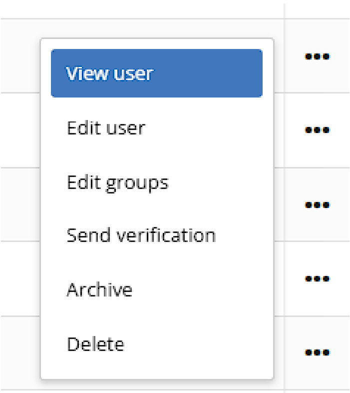
2 Managing users

Where to manage users

- Navigate to the ‘cog’ icon on the left-hand menu bar and click ‘**Users**’
- Note that the blue circle with a tick next to the users email address indicates that this user has verified their account and logged into CLA. A black circle with a dash indicates that the account has not been verified and the user has not logged in previously.
- Click the **three dots (…)** to the far right of the user’s details

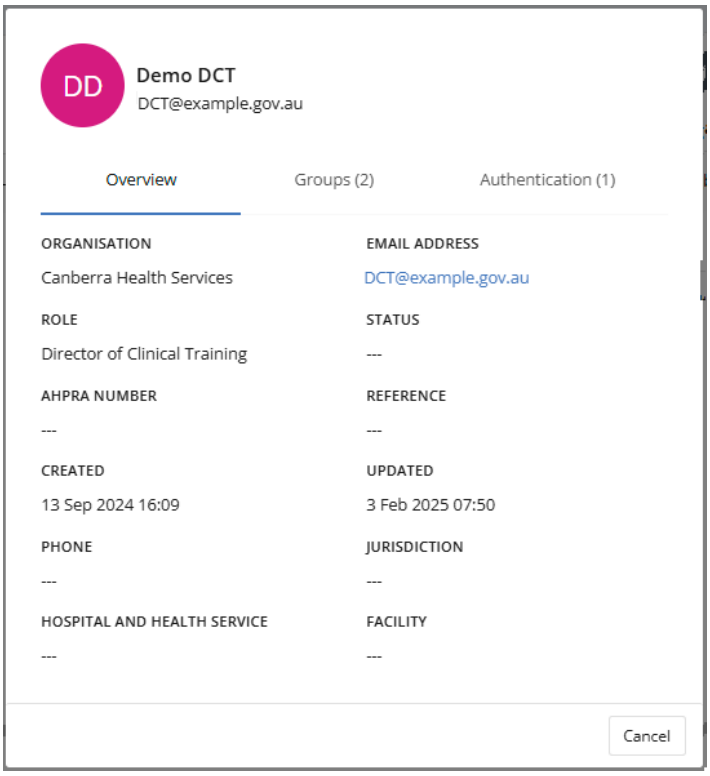


Clicking this will display a pop-up menu of options.

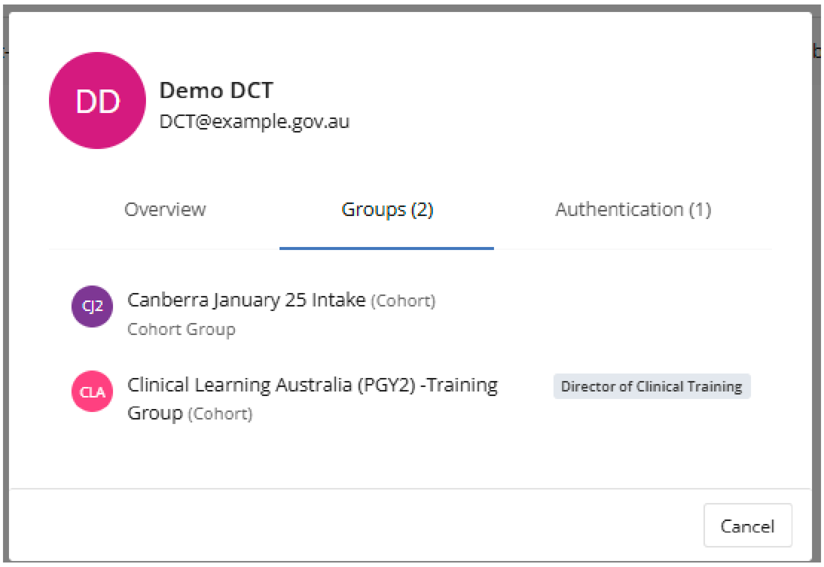


View User

Administrators can see an overview of the user’s details here. You can also click anywhere on a user’s row to see this overview.

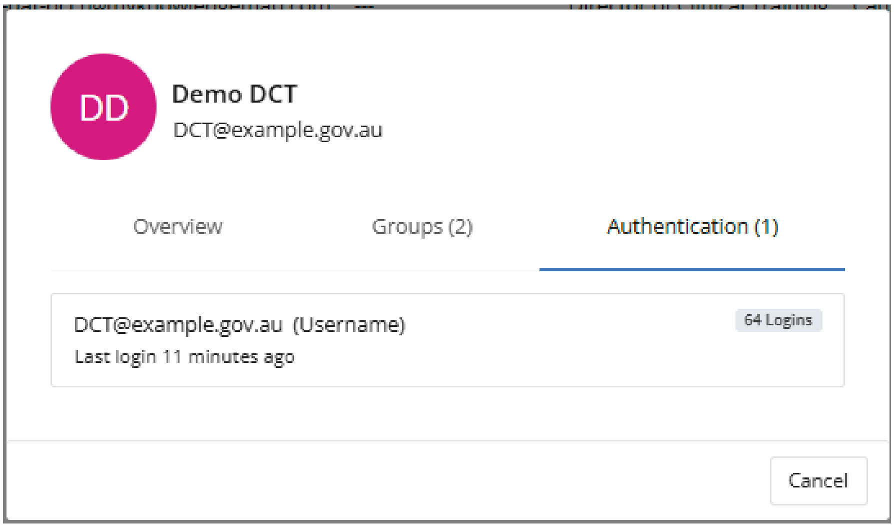


Click on the **Groups** tab to view the groups the user is attached to and if they have been assigned roles.



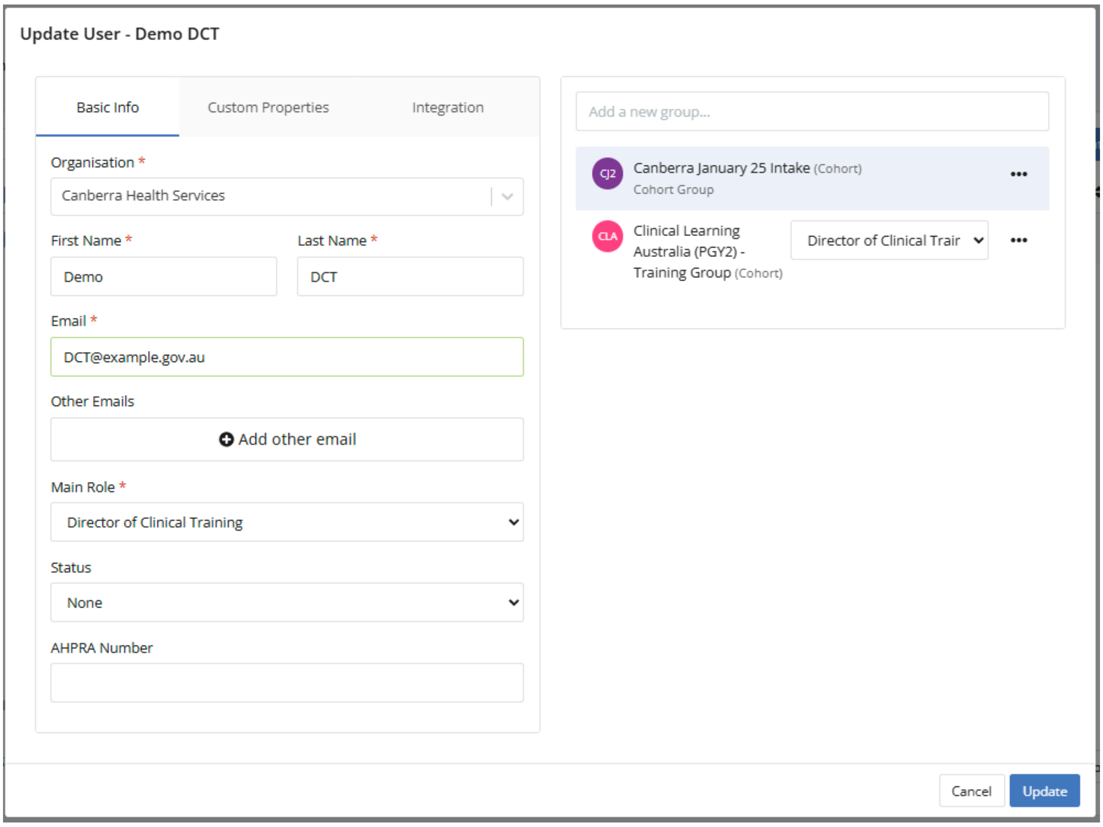
The **Authentication** tab provides details of previous log-in attempts from the user.

Note: If a user has not logged into the system previously, there will no information visible in this area.



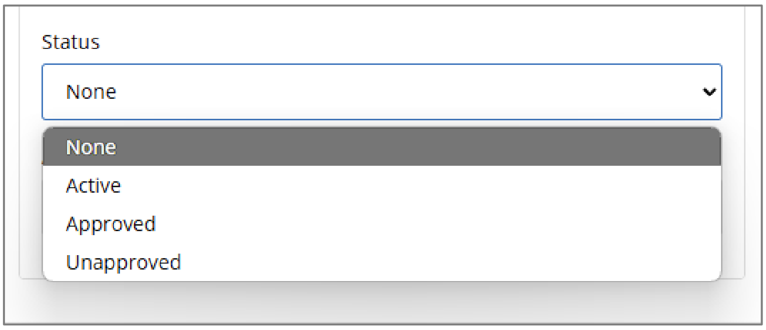
Edit user

Administrators can edit a user's **Basic Information** in the first tab.



The **Status** of the user can also be updated here.

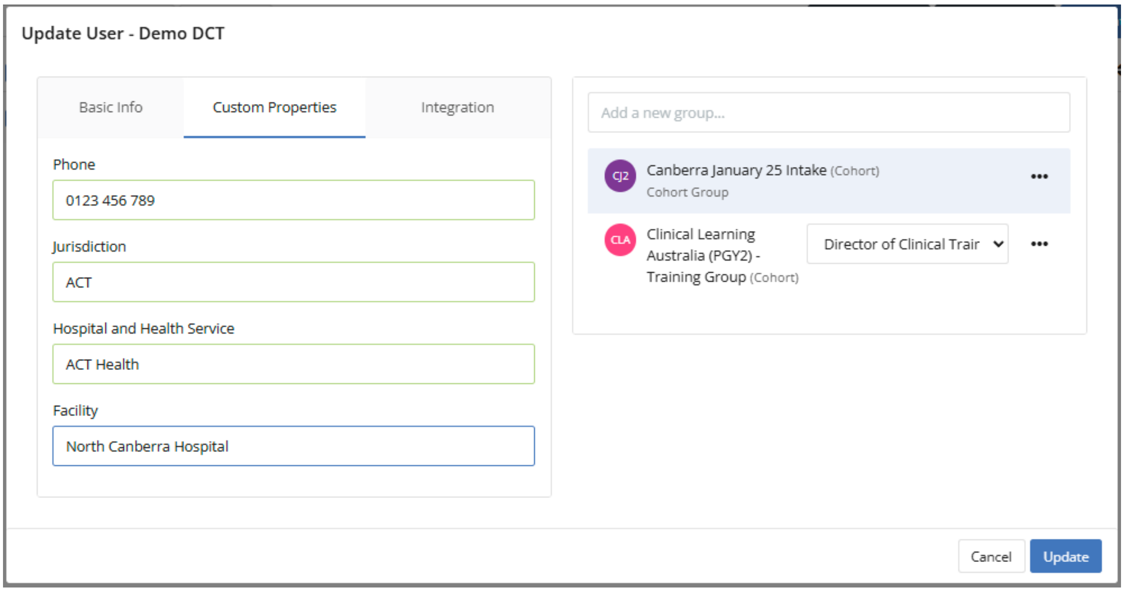
Note: The **Status** is only relevant in the event of a Guest Assessor completing a Mid Term Assessment or EPA for a Trainee. The Guest Assessor will appear as Unapproved and can be changed to Approved by an Admin. No action is required in the status field for users manually added or added as part of a bulk upload.



For more information about Guest Assessors, see the **Guest Assessor** quick reference guide.

Custom Properties that have been set up against the users can be viewed, entered and edited in the second tab.

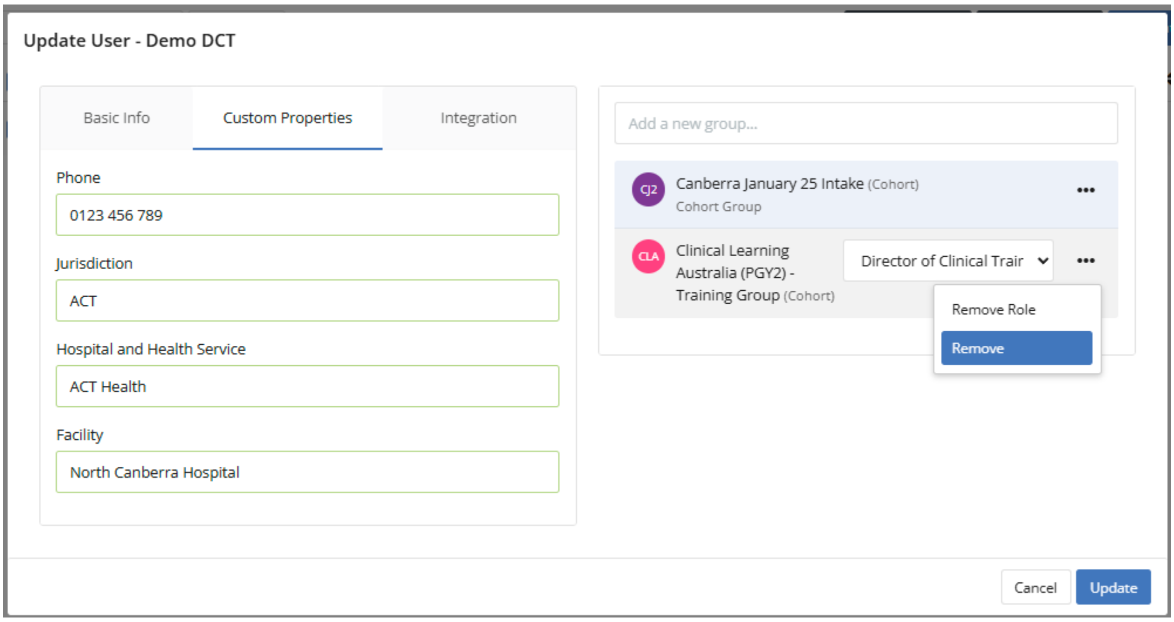
Note: Check the Custom Properties tab and update as required when editing a user, in particular if changing their Organisation in Basic info to ensure that Phone, Jurisdiction, Hospital and Health Service and/or Facility/Organisation are still correct.



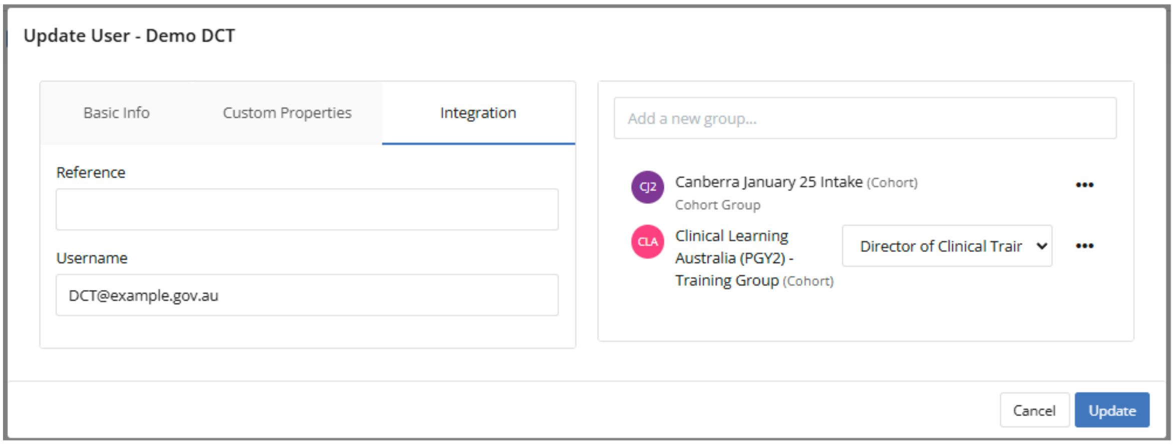
Administrators can also view the **Groups** the user is a member of.

Users can be added to a group from this view by searching and selecting the required group.

Users can be removed from a group directly in the Update User screen by clicking the **three dots (…)** of the group and clicking **remove**.



The Integration tab is not being used at this time. This can be ignored.

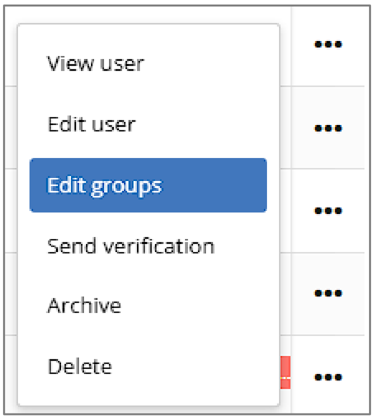


Once changes have been made, click **Update** to save changes and close.

Edit groups

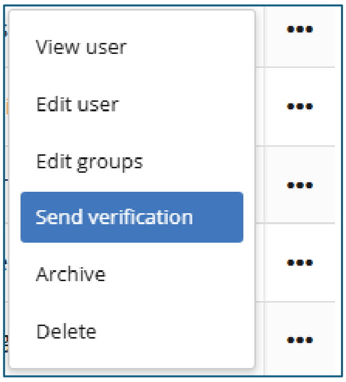
Administrators can edit the groups that a user is assigned to from the search results screen by clicking the **three dots (…)** and clicking **Edit groups.**

You will follow the same process for adding and removing as mentioned in the section above.



Send verification / Activating Users

If you have either not sent a verification email during the user creation process or need to resend a verification email to a user, click the **three dots (…)** and **Send verification** to trigger the welcome email to be sent to that user. A confirmation window will appear prior to sending ensure you want to trigger this action.



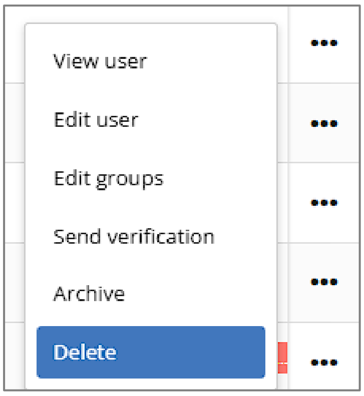
To send verification emails to users in bulk, e.g. to activate all users at your site and go-live with CLA, see the Bulk Actions section below.

Deleting and Archiving

Administrators can delete a user account if the user has not yet logged in.

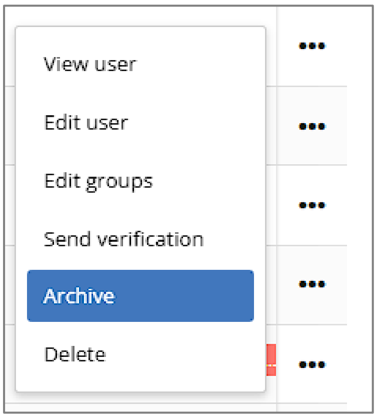
To delete a user, click the **three dots (…)** and click **Delete.**

Note: User accounts cannot be recovered if they have been deleted.



Once users have logged into CLA, the option to delete will be greyed out. The user, however, can be archived to remove them from the users list.

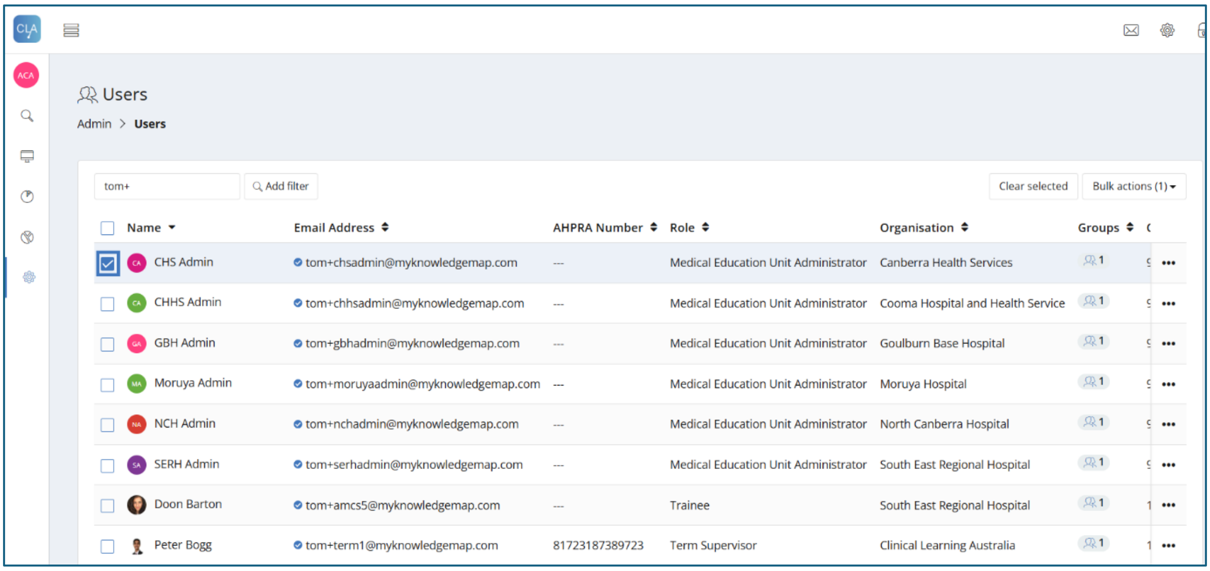
To archive a user, click the **three dots (…)** and click **Archive.**



Administrators can view archived users by clicking **Show archived** (located at the bottom of the Users page). Archived users will appear in the user list with a yellow tag, ‘Archived.’ To hide archived users from the list, click **Hide archived**.

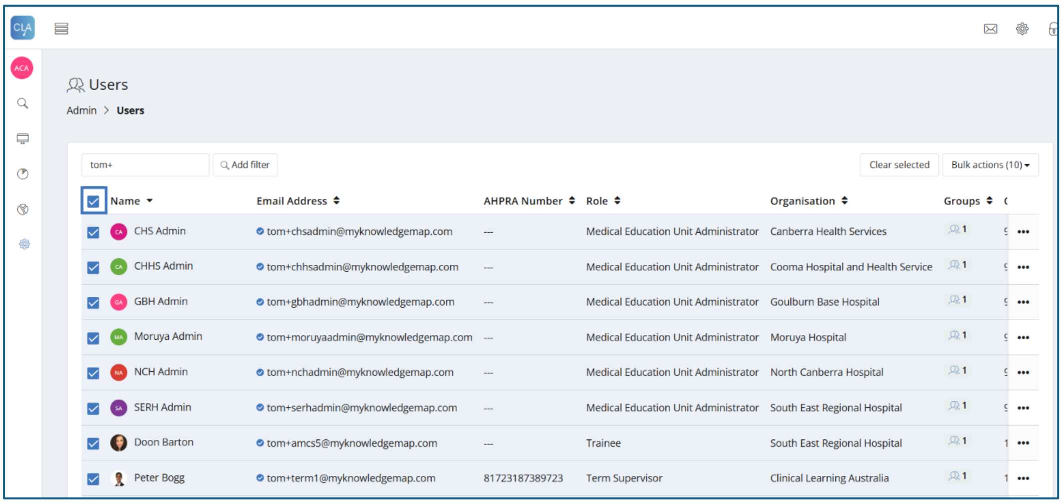
Bulk actions

Administrators can apply actions to multiple users by first selecting the users that changes need to be applied to. To select multiple users, click the tick-box to the left of the **Name** column and click **Bulk actions** on the far-right side of the page.

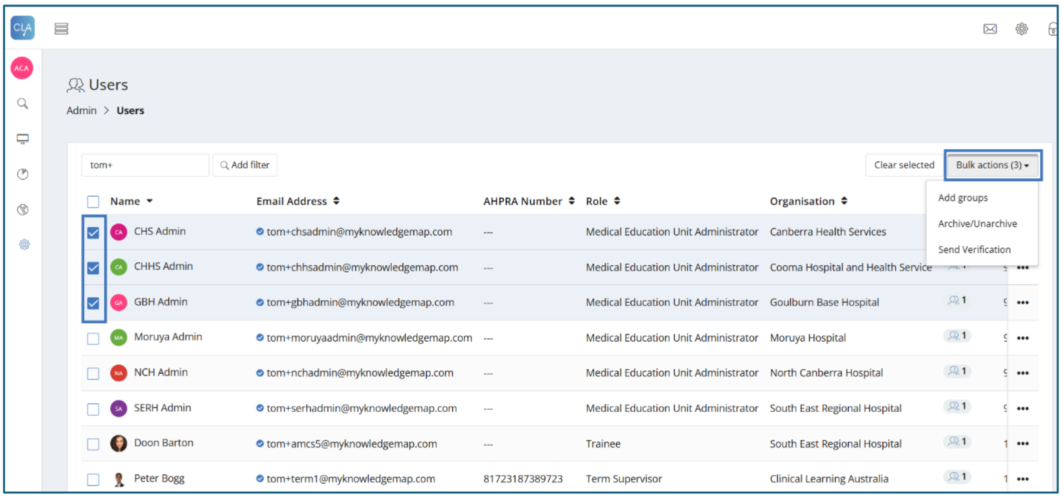


Alternatively, you can select all users on the current page displayed by clicking the tick-box to the left of the **Name** column in the header row.

Note: This will only select users displayed on the current page. Go to the next page to repeat the action for the next set of users. To select the maximum number of users, change your view to 50 per page.



Once you have selected the required users, click on **Bulk action** on the far right-side of the page and choose from one of the following options:



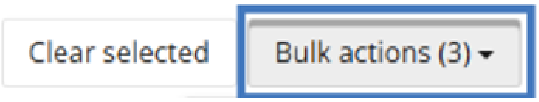
Add groups - To add groups to the selection of users, click **Add groups,** search, and select groups and click **Add**.

Archive/Unarchive - To archive or unarchive the selected users, click **Archive/Unarchive.** A confirmation dialogue box will appear. Click **OK** to proceed.

Send Verification - To send verification emails to the selected users, click **Send Verification**. A confirmation dialogue box will appear. Click **OK** to proceed.

This is used to activate multiple users at a site – using filters, adjust your list of users as necessary, e.g. filtering by Group to activate PGY1 or PGY2 trainees only, filtering by Role to activate Supervisors, filtering by Verified -> Unverified to find users that have not activated their accounts and only sending the verification email to them.

Note: You will see how many users have been selected in brackets **(NUMBER)** to the right of the **Bulk actions** button.



3 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.