



Manage Term Descriptions

This quick reference guide describes how to manage Terms in Clinical Learning Australia (CLA). This guide will explain the process to follow to add Supervisors to Terms and manage other updates.

Contents

1. What is a Term?	3
2. Where do I find Terms?	3
2.1 State Administrators and Medical Education Unit (MEU) Administrators	3
2.2 Trainees, Supervisors and Director of Clinical Training/Executive Director of Medical Services (DCT/EDMS) roles	4
3. Who can edit Terms?	5
3.1 How to confirm the owner of Terms	5
4. Editing Terms	5
4.1 Adding Supervisors to a Term	7
4.1.1 Why add supervisors to terms	7
4.1.2 How to add supervisors to terms	7
4.2 Term screen overview	9
4.2.1 Basic info	9
4.2.2 Custom Properties	10
4.3 Bulk Updating or Adding Terms	11
4.3.1 Exporting Terms	11
4.3.2 Adding New Terms or Updating Existing Terms	11
5. Mapping Outcome Statements	12
6. Support	14

1. What is a Term?

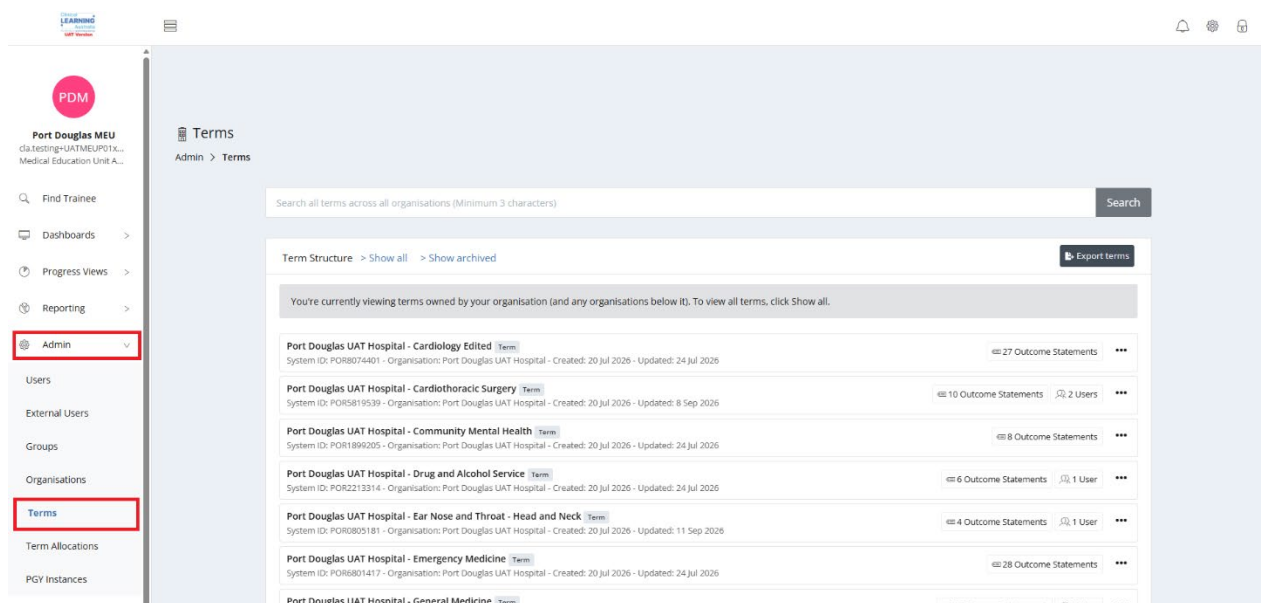
A **Term** describes the learning experiences and outcomes that a trainee will have the opportunity to participate in or demonstrate in a particular **Term**. It also identifies the speciality, subspecialty and clinical exposure classifications for the **Term** and the **prevocational outcomes statement** that a **trainee** will have the opportunity to demonstrate. Terms can also include details of CLA Supervisor users for that **Term**. Where Supervisors are added to a **Term** as described below, these Supervisors are automatically linked to any trainees assigned to that **Term** when **Term** Allocations are created.

2. Where do I find Terms?

2.1 State Administrators and Medical Education Unit (MEU) Administrators

Can view **Terms** via the **Admin** menu in CLA.

Navigate to the **Admin** icon (⚙️) in the left-hand menu and click **Terms**.



2.2 Trainees, Supervisors and Director of Clinical Training/Executive Director of Medical Services (DCT/EDMS) roles

Terms and their descriptions within each Trainee's ePortfolio for each Term that the Trainee is allocated to.

1. Click into the **Trainee's ePortfolio** for a particular **Term**.

The screenshot shows the Trainee's ePortfolio interface. On the left, there's a sidebar with the trainee's profile (TraineeP01 Douglas) and organization (Port Douglas UAT Hospital). The main content area displays the current term: "Port Douglas UAT Hospital - Cardiothoracic Surgery" with a start date of 24 Jul 2026 and an end date of 30 Sep 2026. Below this, there's a "Don't forget" section with links to EPA 2, EPA 4, and EPA 3. On the right, there's a "What's next?" section with links to "Beginning of Term Discussion", "Mid Term Assessment", and "End of Term Assessment". Below that, there's a "Progress Views" section with a "Prevocational Outcome Statements" gauge.

On the right-hand side of the screen, you will see the term details, including the Term Supervisors linked to the trainee. These supervisors may be linked either through the term configuration or via a direct supervisor assignment.

To view additional information about the term, click "View Full Term Content".

The screenshot shows the "Term 3" details page. The top navigation bar includes "OVERVIEW", "START", "ASSESSMENTS", "EPAs", "LOGBOOK", and "ASSESSMENT REVIEW PANEL". The main content area is divided into three sections: "TERM", "TERM PROGRESS", and "TERM ADDITIONAL DETAILS". The "TERM" section shows the term name "Port Douglas UAT Hospital - Cardiothoracic Surgery". The "TERM PROGRESS" section shows the start date (24 Jul 2026) and end date (30 Sep 2026). The "TERM ADDITIONAL DETAILS" section includes a table with fields for Jurisdiction, Program/Network/Health Service, Location, Specialty, and Subspecialty. Below this table, there's a "View full term content" link. At the bottom, there's a "TERM SUPERVISORS / CLINICAL SUPERVISORS" section with a list of supervisors, including "SupP01 Douglas" and "SupP04 Douglas".

3. Who can edit Terms?

Terms are 'owned' by an organisation in CLA. Only administrator users assigned to the owning organisation can edit Terms.

3.1 How to confirm the owner of Terms

Administrators can view the owning organisation in the Terms screen via Admin menu

- Click on the **Admin icon** (⚙️) in the left-hand menu and click **Terms**.

The screenshot shows the CLA Terms screen. On the left is a sidebar menu with the 'Admin' icon (⚙️) highlighted. The main content area has a header 'Check out the CLA User Guides, Videos and Fact Sheets here: CLA Website'. Below this is a 'Terms' section with a search bar and a list of terms. The list shows terms owned by the organisation, with columns for Term Name, System ID, Organisation, Created/Updated dates, and actions (Outcome Statements, Term Supervisor/Clinical Supervisor, and a 3-dot menu).

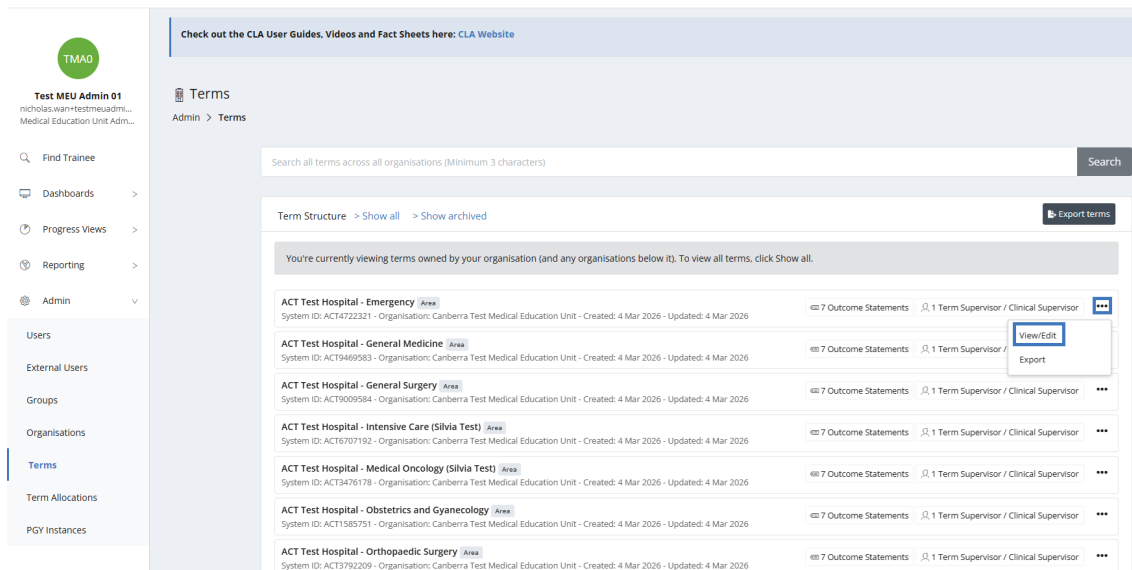
Term Name	System ID	Organisation	Created	Updated	Outcome Statements	Term Supervisor / Clinical Supervisor	Actions
ACT Test Hospital - Emergency	ACT4722321	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - General Medicine	ACT9469583	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - General Surgery	ACT9009584	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - Intensive Care (Silvia Test)	ACT6707192	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - Medical Oncology (Silvia Test)	ACT3476178	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - Obstetrics and Gynaecology	ACT1585751	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...
ACT Test Hospital - Orthopaedic Surgery	ACT3792209	Organisation: Canberra Test Medical Education Unit	4 Mar 2026	4 Mar 2026	7	1	...

Underneath the name of each Term, you will see an **Organisation** label. This identifies which organisation in CLA owns the Term and is therefore able to edit a Term.

4. Editing Terms

To edit a Term you need to be an administrator user from the owning organisation:

- Search for your Term(s) using the Search box at the top of the page.
- Click on the **3 dots** (⋮) to the right-hand side of the Term you wish to edit.
- Click **View/Edit**.



This will open the Term, and you will be able to edit the details of the Term.

Please follow the process for your state/territory for updating Terms. In some states/territories, changes are required to go through the relevant Prevocational Medical Council.

The screenshot shows the 'Update Term - ACT Test Hospital - Emergency' form. The form has three tabs: Basic Info, Custom Properties, and Integration. The 'Basic Info' tab is active, showing fields for Organisation, Type, Name, Description, Short Name, Global Identifier, Post Code, and External URL. The 'Custom Properties' tab is also visible, showing fields for Users (0) and Outcome Statements (7). The form includes a 'Cancel' button and an 'Update' button.

If you're wanting to update the Term Description you will select the **Custom Properties** tab.

Note – When updating a Term, any Admin who has visibility of it, will be notified.

4.1 Adding Supervisors to a Term

4.1.1 Why add supervisors to terms

Supervisors can be linked to trainees either directly via the term allocation or here via the term description.

Adding Supervisors with the role of either **Term Supervisor** or **Clinical Supervisor at a Term level** will provide these users with visibility of any trainees that are currently allocated to that Term. It will also give them the ability to complete all forms available to their role without needing to be allocated directly to a trainee as a relationship within the Term Allocation.

- a. This option is used where you may not want to specify that someone has a direct one on one relationship for trainees on that Term and you just want the option for multiple people to have access to trainees currently on that Term.
- b. If you feel you want or need to specify someone as having a direct one on one relationship with a trainee e.g. Term Supervisor, you can also allocate them manually to trainees as required when importing trainee Term allocations as done previously.

4.1.2 How to add supervisors to terms

Follow the steps below to setup Term or Clinical Supervisors against a Term:

1. Locate the Term you want to add Supervisors to within the **Terms** area
2. Select the **3 dots (...)** and click **View/Edit**
3. Click on the **Users** tab.
4. Type the name of the Supervisor/s you would like to add into the field and select the relevant user from those that appears below.
5. **Note.** You can only find and add Supervisors linked to your organisation. If you need to add a Supervisor linked to another organisation, contact the Nationwide Administrator to assist with this.
6. You will be prompted to add a role; you will select either **Term Supervisor** or **Clinical Supervisor** dependent on who needs to undertake which role.
7. Once you have added all relevant Supervisors to the Term, click **Update**.

Update Term - ACT Test Hospital - General Surgery

Basic Info	Custom Properties	Integration
Organisation * Canberra Test Medical Education Unit		
Type * Term		
Name * ACT Test Hospital - General Surgery		
Description Term		
Short Name		
Global Identifier		
Post Code		
External URL https://example.com		

Users (1)

Outcome Statements (7)

Add a new user...

MO May Orpeth
holly.fowler+cla-uat-cs2@...
Role is required for this user.

☒ Default scope (All) ☐ Other

Select role

- ARP Lead
- ARP Member
- Clinical Supervisor
- Director of Clinical Training
- Executive Director of Medical Services
- Guest Assessor
- Medical Education Officer

Some users may not be shown to your organisation hierarchy

Cancel Update

4.2 Term screen overview

4.2.1 Basic info

Update Term - ACT Test Hospital - General Surgery

Basic Info Custom Properties Integration

Organisation *
Canberra Test Medical Education Unit

Type *
Term

Name *
ACT Test Hospital - General Surgery

Description
Term

Short Name

Global Identifier

Post Code

External URL
https://example.com

Users (1) Outcome Statements (7)

Add a new user...

MO May Orpeth (Clinical Supervisor)
holly.fowler+cla-uat-cs2@myknowl... Clinical Supervisor

☒ Default scope (All) ☐ Override scope for this user

Some users may not be shown here because access is restricted to your organisation hierarchy.

Cancel Update

The number displayed beside each tab on the right-hand side of the screen (users/outcome statement) indicates the number of records already linked to the Term:

- **Users tab:** Displays the number of **Term or Clinical Supervisors** linked to the Term.
- **Outcome Statements tab:** Displays the number of **Outcome Statements** mapped to the Term.

If Supervisors have been added to a Term, it is recommended that their details are also entered in the **Term Supervisor** text fields. Information entered in these fields is visible to Trainees, so it is important to ensure the listed Supervisors are accurate and up to date.

4.2.2 Custom Properties

Update Term - ACT Test Hospital - Emergency

Basic Info

Custom Properties

Integration

Jurisdiction

ACT

Program/Network/Health Service

Canberra Health Services

Location

The Canberra Hospital

Specialty

Emergency medicine

Subspecialty

Please select...

Specialty 2

Please select...

Subspecialty 2

Please select...

Term Supervisor Name

Lucy Ingleton

Term Supervisor Email

holly.fowler+cla-uat-cs4@myknowledgemap.com

Users (1)

Outcome Statements (7)

Add a new user...

u Lucy Ingleton

holly.fowler+cla-uat-cs4@mykn...

Supervisor (Term o...

...

☒ Default scope (All)

☐ Override scope for this user

The **Term Supervisor** fields, along with other Term-related settings, can be found under the **Custom Properties** tab.

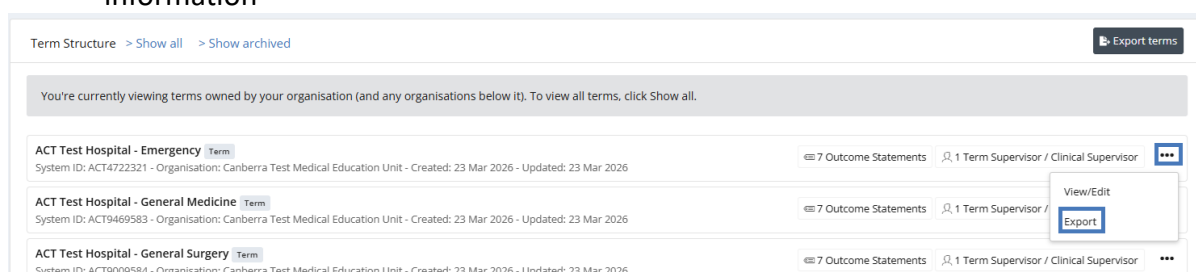
4.3 Bulk Updating or Adding Terms

You can bulk update existing terms by exporting your current term data to an Excel spreadsheet, making the required changes, and sending the updated spreadsheet to the Clinical Learning Australia (CLA) Support Team for processing.

4.3.1 Exporting Terms

To export your current terms:

1. Navigate to the **Terms** section in CLA.
2. Select **Export Terms**.
3. CLA will generate and download an Excel spreadsheet containing your current term information



This will export an excel spreadsheet of the information for the relevant **Term**.

4.3.2 Adding New Terms or Updating Existing Terms

Once you have exported your terms spreadsheet (as above)

1. Open the spreadsheet.
 - Add any new term information in a new row, using an existing term as a guide for the required format and structure.
 - Update any existing term information as required.
 - Leave any fields blank if the information is not available.

To help the CLA Support Team identify the required updates, please colour-code your spreadsheet as follows:

- **Green:** New terms to be added
- **Orange:** Changes to existing terms
- **Red:** Terms to be archived or deleted

Note: When adding a new term, you do not need to enter a **Term Identifier**, as this will be generated during the upload process.

2. Submit Your Changes

- Email the completed spreadsheet to the **CLA Support Team**. If applicable, please also include any supporting accreditation documentation required for the new or updated term.

Important: Individual term updates can be made directly within CLA. However, bulk term updates, as well as [adding new Terms](#), deletions, and archival requests, must be submitted to the CLA Support Team for processing via spreadsheet upload.

5. Mapping Outcome Statements

You can map prevocational outcome statements to a Term. Where outcome statements have been mapped to a Term they will automatically be ticked as having been demonstrated by the Trainee in their End of Term Assessment for that Term. The Supervisor completing the End of Term Assessment can untick any outcome statements that have not been demonstrated and include others should they wish to.

- Click on the **3 dots (...)** to the right-hand side of the Term.
- Click **View/Edit**.

The screenshot shows a web interface for managing terms. At the top, there are links for 'Term Structure', 'Show all', and 'Show archived', along with an 'Export terms' button. A message states: 'You're currently viewing terms owned by your organisation (and any organisations below it). To view all terms, click Show all.' Below this is a list of terms, each with a 'Term' label, system ID, organisation, creation and update dates, and icons for '7 Outcome Statements', '1 Term Supervisor / Clinical Supervisor', and a three-dot menu. The 'General Medicine' term is selected, and its three-dot menu is open, showing 'View/Edit' and 'Export' options. The 'View/Edit' option is highlighted with a blue box.

Term	System ID	Organisation	Created	Updated	7 Outcome Statements	1 Term Supervisor / Clinical Supervisor	...
ACT Test Hospital - Emergency	ACT4722321	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			View/Edit
ACT Test Hospital - General Medicine	ACT9469583	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			Export
ACT Test Hospital - General Surgery	ACT9009584	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			
ACT Test Hospital - Intensive Care (Silvia Test)	ACT6707192	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			
ACT Test Hospital - Medical Oncology (Silvia Test)	ACT3476178	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			
ACT Test Hospital - Obstetrics and Gynaecology	ACT1585751	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			
ACT Test Hospital - Orthopaedic Surgery	ACT3792209	Canberra Test Medical Education Unit	23 Mar 2026	23 Mar 2026			

- Click on the third tab on the right-hand side titled **Outcome Statements**.

Update Term - ACT Test Hospital - Emergency

Basic Info	Custom Properties	Integration
Organisation * Canberra Test Medical Education Unit		
Type * Term		
Name * ACT Test Hospital - Emergency		
Description Term		
Short Name		
Global Identifier		
Post Code		
External URL https://example.com		

Users (0)

Outcome Statements (7)

Select a Outcome Statements

- You will then be able to select the relevant Prevocational Outcome Statements to be mapped to the Term from the dropdown, any already mapped will appear ticked.
- When you have finished click the **Update** button in the bottom right corner of the window.

Note. When you make changes to the mapped outcome statements, these will show through to currently allocated Terms.

Update Term - ACT Test Hospital - Emergency

Basic Info

Custom Properties

Integration

Organisation *

Canberra Test Medical Education Unit

Type *

Term

Name *

ACT Test Hospital - Emergency

Description

Term

Short Name

Global Identifier

Post Code

External URL

https://example.com

Users (0)

Outcome Statements (7)

Version 2 - Prevocational Outcome Statements (7 selected)

▼ PRACTITIONER

☒ 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

6. Support

- For local set up issues, contact your MEU Administrator
- For guidance and learning resources, refer to the [CLA webpage and user guides](#)For MEU support enquiries, please email CLA.help@digitalhealth.gov.au