

Clinical **LEARNING** Australia

The ePortfolio for **prevocational doctors**

Managing Trainees and Dashboards

This guide is intended for CLA users who are responsible for monitoring and supporting prevocational doctors (PGY(X) and IMG's). It explains how to use the Trainee Dashboard, locate and access trainee records, navigate trainee ePortfolios and monitor trainee progress throughout the clinical year.

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1 Dashboards and Trainee Management

1.1 Trainee Dashboard

The **Trainee¹ Dashboard** shows Supervisors, Directors of Clinical Training (DCTs) and Executive Directors of Medical Services (EDMS') the prevocational doctors that are assigned to them, separated into relevant PGY groups.

Term Supervisors and **Clinical Supervisors** can only view prevocational doctors who have been assigned to them through the **Term allocation process**.

Supervisors will only see allocated prevocational doctors on their Dashboard during the period that the Term is available to them. Set through the PGY instance. This includes:

- The **Access Window**, which allows access before the Term commences to support handover and preparation activities.
- The **Term duration**.
- The **Grace Period**, which allows outstanding assessments and forms to be completed after the Term has ended.

The Access Window and Grace Period are designed to:

- Facilitate handover from previous supervisors before the Term begins.
- Provide sufficient time for supervisors and prevocational doctors to complete any outstanding forms, assessments, and reviews at the end of the Term

DCTs and **EDMS** can view prevocational doctors who are linked to the same Organisation and/or PGY Cohort Group(s) to which they have been assigned. This access is maintained throughout the clinical year, including when a prevocational doctor is undertaking a secondment at another site. The **Role / Relationship** column on the Dashboard identifies their relationship to each prevocational doctor.

DCTs and EDMS can also Dashboard view to display all prevocational doctors currently on rotation at their Organisation, including trainees from other Organisations who are completing a secondment Term at the site.

If you cannot see the prevocational doctors, you are responsible for on your Dashboard, contact your local **Medical Education Unit Administrator (MEU)** in the first instance. **Supervisors** should confirm they have been allocated to the appropriate prevocational doctors for the current Term, while **DCTs** and **EDMS** should confirm they have been assigned the correct Organisation and/or PGY Cohort Group access.

¹ Note that the CLA system uses the term 'Trainee' for a Prevocational Doctor. In all CLA training materials the terms 'Trainee' and 'Prevocational Doctor' mean the same thing and refer to the same role.

The Dashboard shows the prevocational doctors, listed in alphabetical order by surname, the organisation they are assigned to, when they last logged into CLA and their form completions across the full clinical year.

Note: If you are overseeing PGY doctors in different clinical years, e.g. PGY 1 and 2's, or different clinical year types, e.g. 4-term and 5-term clinical years, you may see multiple dashboards and need to scroll down.

Trainee dashboard example

The screenshot shows a web-based dashboard for managing trainee data. The main table lists trainees with columns for Name, Team, Role / Relationship, Last Login, and various assessment columns (START, ASSESSMENTS, DPAs, END, LOGBOOK, ASSESSMENT REVIEW PANEL, PROGRAMME REVIEW). Red icons indicate overdue forms, and green icons indicate completed forms. The dashboard also includes a sidebar with navigation links and a top navigation bar.

1.2 Dashboard Icons

The Dashboard provides a quick indication of how prevocational doctors are progressing.

- Red icons indicate that a deadline has passed and that a specific form has not yet been completed.
- Green icons indicate that a form has been completed and submitted.
 - For Mid Term Assessments, green indicates that the trainee has been rated as 3 (Consistently met), 4 (Often exceeded), or 5 (Consistently exceeded) across all assessment domains.
 - For End of Term Assessments, green indicates that a global rating of **Satisfactory** has been selected.
 - For Assessment Review Panel (ARP) forms, green indicates that the prevocational doctor's terms/outcomes of assessment have been discussed, and they have been recommended as ready for registration.
- Grey icons mean that a form has not yet been completed and is not overdue.
- Amber icons indicate that a threshold has not been met. This is relevant for the Mid and End of Term Assessment and ARP forms.

- Mid Term Assessments will appear amber where any domain rating has been marked as a 1 (Rarely met) or a 2 (Inconsistently met)
- End of Term Assessments will appear in amber where a global rating of **Conditional Pass** or **Unsatisfactory** has been selected.
- ARPs will appear amber where the form has not been completed by the deadline, or either of the following two questions haven't been selected as Yes:
 - the prevocational doctor's terms/outcomes of assessment have been discussed
 - the prevocational doctor is recommended as ready for registration.
- The numbers in the top corner of a form indicate the number of forms that have been completed, e.g. logbook entries. For the Entrustable Professional Activities (EPAs), the number will also include how many of that type are required as the denominator.

Amber icons for the Mid and End of Term Assessment and Assessment Review Panel forms are intended to flag to Directors of Clinical Training and other managers of training any prevocational doctors that may require additional attention.

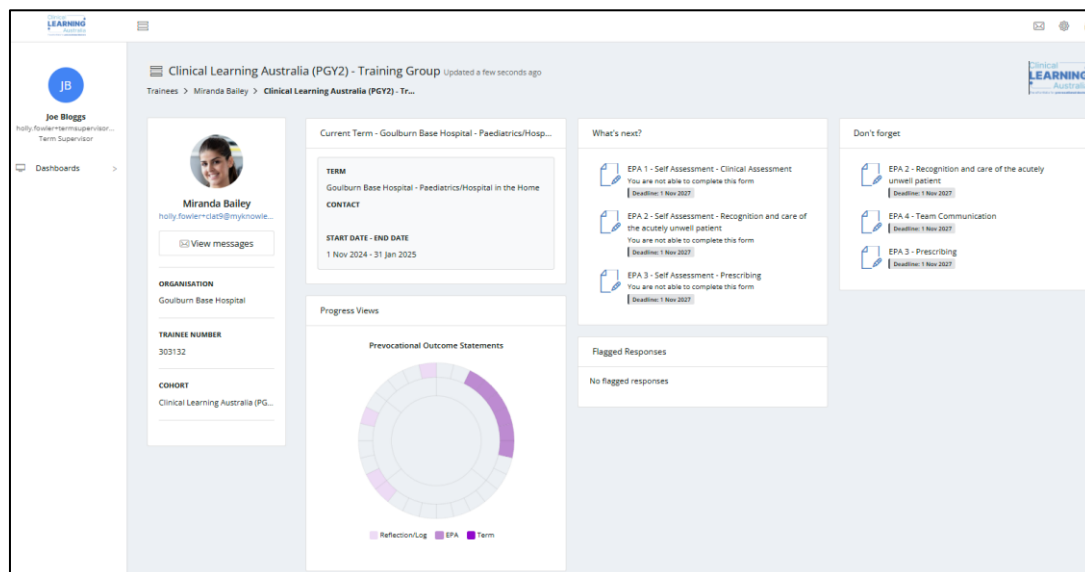
Hovering over any of the icons shows you information about the status of that assessment. For instance, when it was due or when an assessment was last completed.

Clicking on any of the icons will open the form in Preview mode and allow you to view blank or completed forms. Where the selected form is available for your role to complete, a **Complete new** button will be visible to the right of the form name.

Progress view displays visual representation of progress towards demonstrating evidence for each of the outcome statements. **Note:** Outcome statements must be selected and graded before they will appear in the trainee's Progress View.

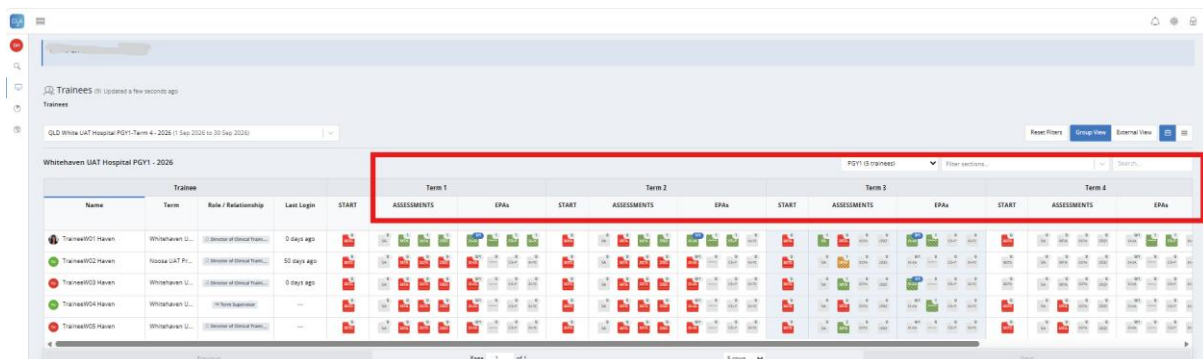
Click on a prevocational doctor's **name** in the dashboard to open their **Trainee Profile and Overview** page. Here you can review their ePortfolio and progress individually and complete forms as required for your role.

Trainee profile and overview page example



1.3 Dashboard Controls

The Dashboard shows the full clinical year, either 4 or 5 terms, EPAs and ARPs in separate sections. Supervisors and DCTs/EDMS' can see the status of forms completed during previous terms and can view completed forms by clicking on the icons. Use the scroll bar at the bottom of the trainee table to scroll to the right to see later terms, EPAs and ARP forms.



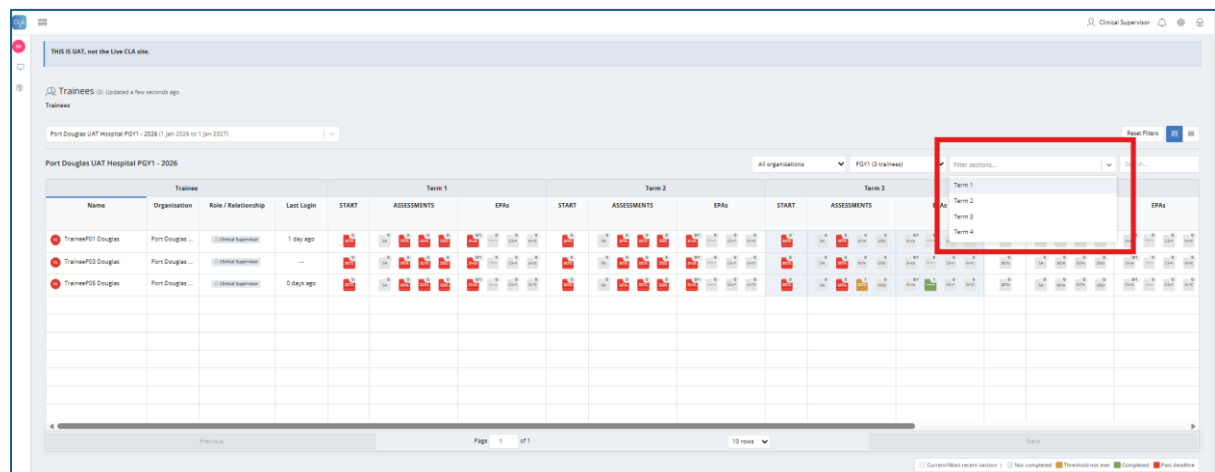
1.4 Filtering

Filtering to specific terms: To view only the current term, or specific terms, click on **Filter section** and select the term(s) you wish to see.

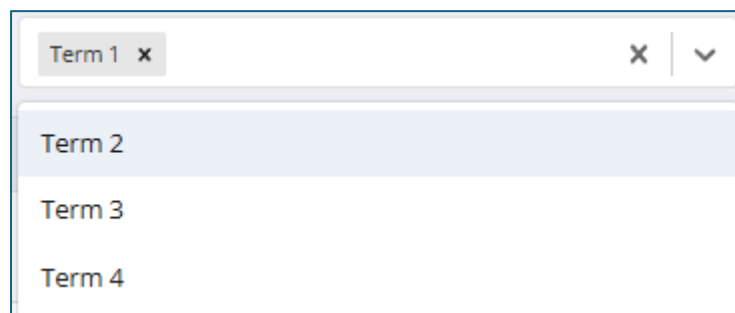
Note: Applying a **Term filter** only changes the Term information displayed on the Dashboard and does not filter the prevocational doctors shown.

For example, selecting **Term 3** will display Term 3 data and form completion information; however, the Dashboard will continue to show all prevocational doctors that you have permission to view. It will not restrict the list to only those prevocational doctors allocated to

you during Term 3. Users should therefore be aware that the displayed cohort may include prevocational doctors from other Terms, depending on their role and access permissions.



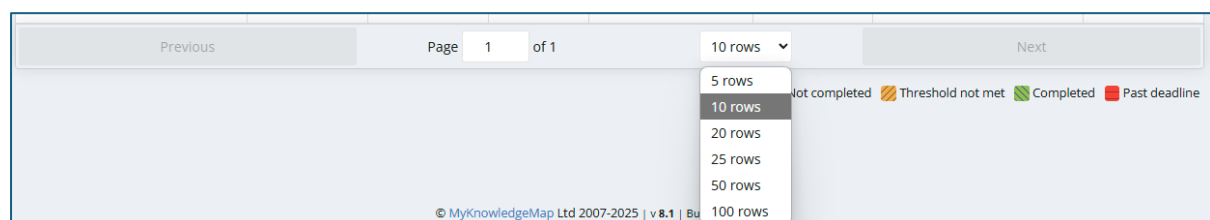
You can select one or multiple terms.



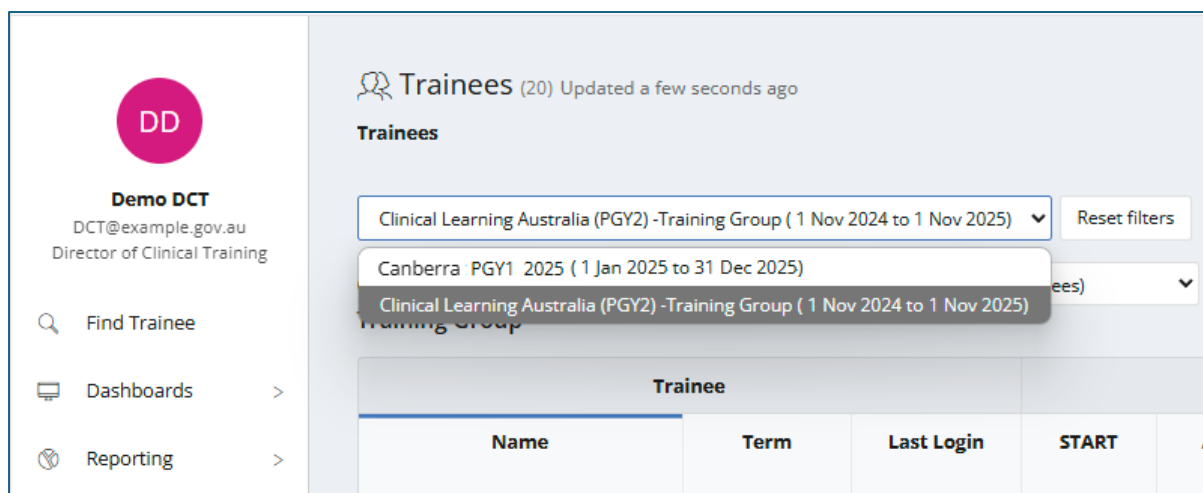
Viewing the list of prevocational doctors: The dashboard shows 10 prevocational doctors by default or reduces to five if displaying multiple dashboards. Move to the next page of prevocational doctors using **Previous** and **Next** buttons at the bottom of the dashboard or type in the page number you want to go to.



To increase the number of results you see, click on the **(X) rows** dropdown box at the bottom of the dashboard and select from the options.



Viewing different PGY Groups: Users can change which PGY groups they are looking at by using the dropdowns at the top of the dashboards. For instance, a **DCT** user that has been assigned to multiple **PGY cohort** groups can click on the dropdown to change the group being viewed.

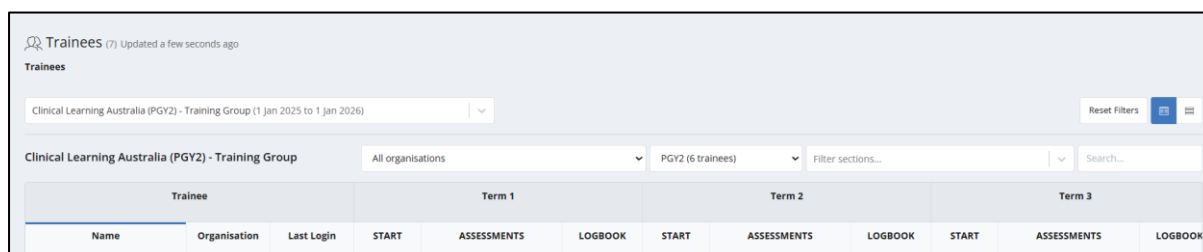


Filtering returned results: To **filter** the current group, use the additional dropdown options located on the right-hand side of the dashboard - these will vary if you are a **Supervisor** vs. a **DCT/EDMS**.

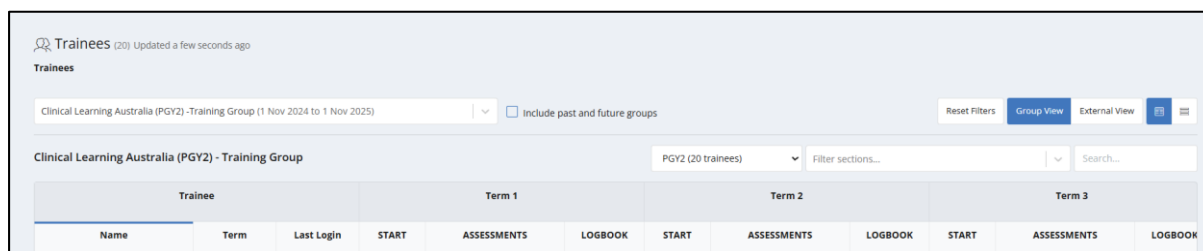
1.5 Searching

Use the Search field on the far right to filter by prevocational doctor's name or term.

Supervisor view

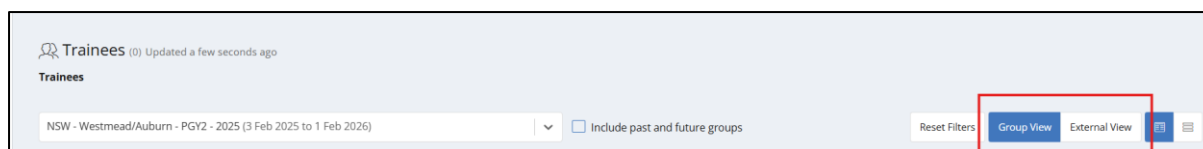


DCT/EDMS view



Group View vs External View – DCT/EDMS' only:

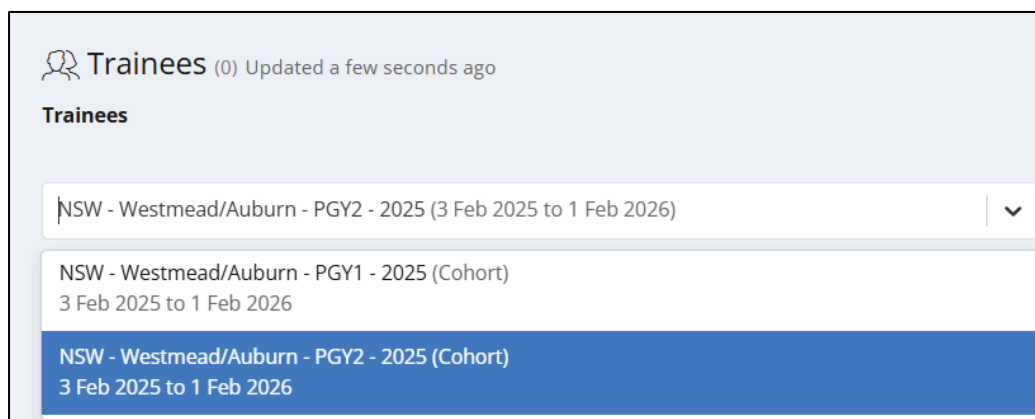
When viewing the Dashboard, DCTs and EDMS' have two options for how to view trainees – Group View and External View.



2 Dashboard Views

2.1 Group View

The default Dashboard view is the **Group View**. In this view, you will see all prevocational doctors in the Groups that you have access to, either by having been added to the Groups or Groups linked to your Organisation. This will show you your prevocational doctors, even if they have rotated to a secondment site for a term.



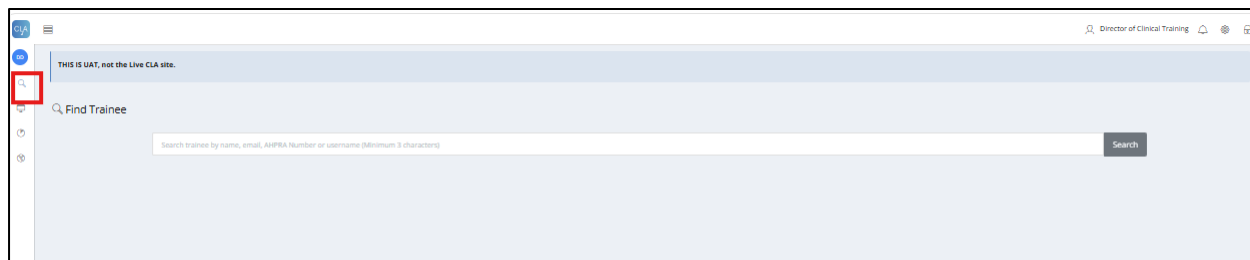
2.2 External View

The **External View** shows you all prevocational doctors that are currently undertaking a term at your site. This will include the prevocational doctors linked to your site, as well as trainees on secondment from other sites for a term. They will appear in separate Dashboards identifying the organisation they originated from.

The External View is particularly useful for DCTs at secondment hospitals as this enables you to view prevocational doctors at your site and can oversee and support their progress during the term.

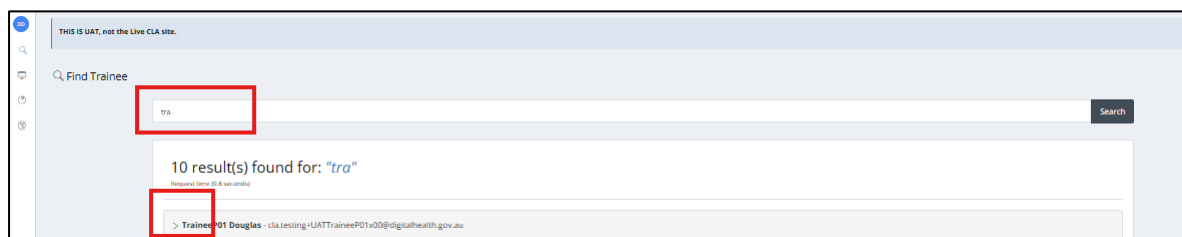
3 Find Trainee

The Find Trainee screen is available to DCTs and EDMS' to search for individual prevocational doctors within the groups that they are allocated to and access their ePortfolio.



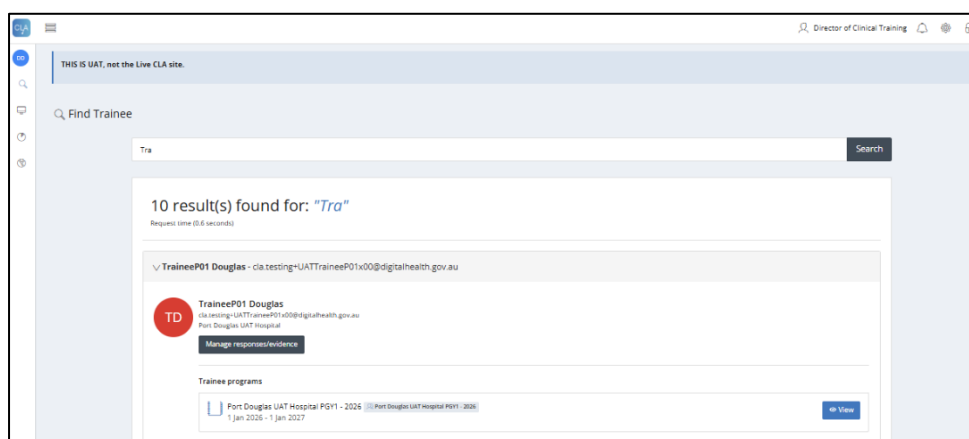
3.1 Searching for Trainees

Enter at least 3 characters of the prevocational doctor's name, email or Ahpra number into the Search field and click **Search**.



3.2 Viewing Results

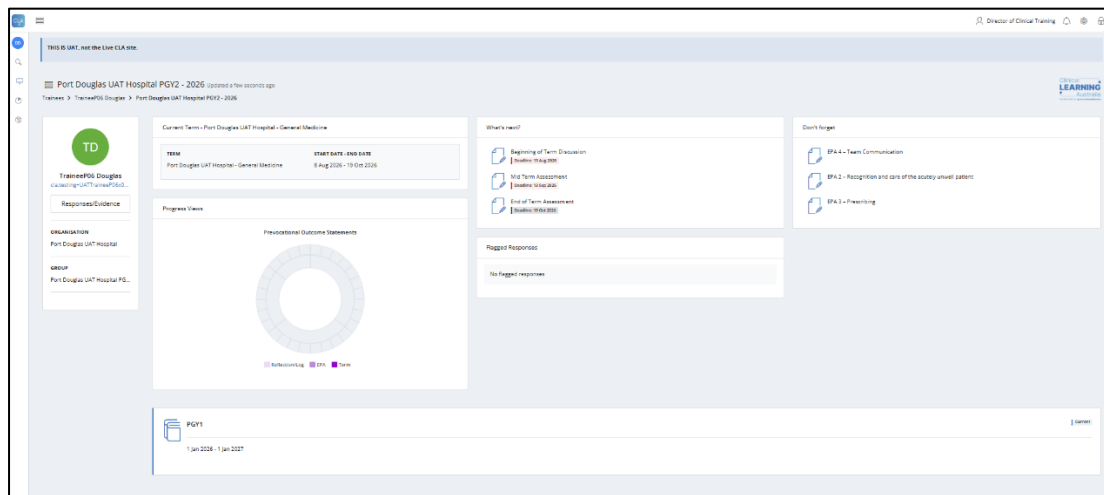
Click in the chevron next to the name of the prevocational doctor you are looking for to expand the box. Click on **View** to see their *Trainee Profile and Overview*.



4 Trainee Overview and Profile

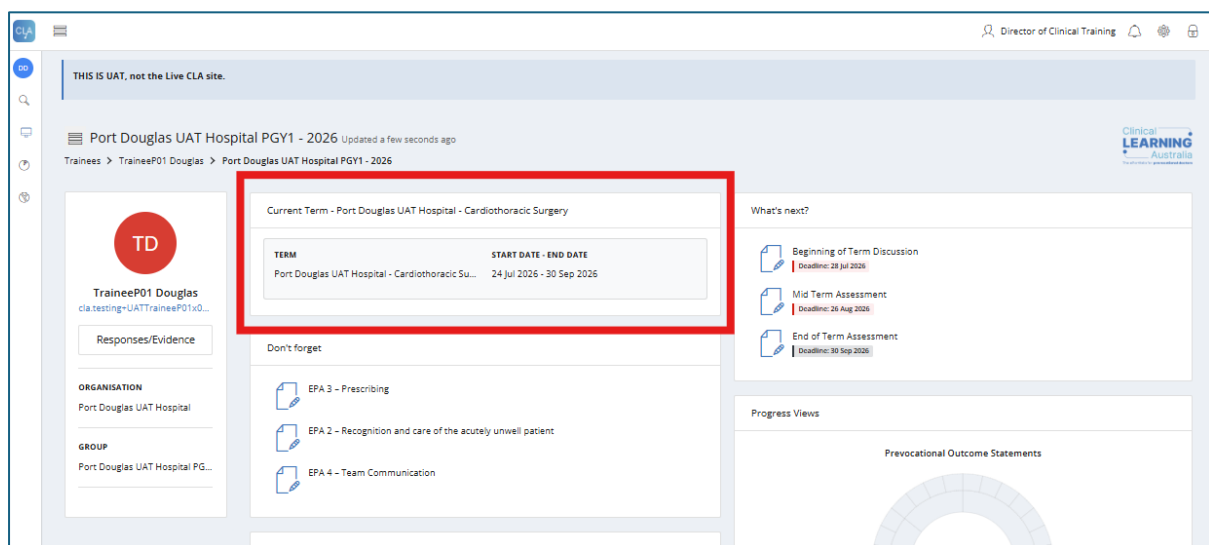
4.1 ePortfolio Overview

The **Trainee Overview and Profile** page is the front page of a prevocational doctor's **ePortfolio**. It shows details about the prevocational doctor on the left as well as their current term, any upcoming forms that require completion based on a deadline (**Note:** Deadlines are only there as a guidance), any flagged responses, and their progress against the Prevocational Outcome Statements. It also provides access to see their Learning Plan and overview of their full clinical year by clicking on the PGY block at the bottom of the page.



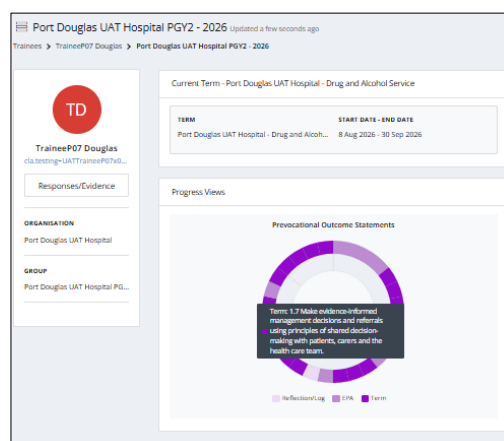
4.2 Current Term

Clicking in the **Current Term** box opens the full profile of forms to be completed for the current term, as well as Logbooks and EPAs. Alternatively, Supervisors can click on any forms showing in the **What's next?** and **Don't Forget** sections to open a new editable version of that form.



4.3 Outcome Statements Overview

The **Prevocational Outcome Statements** section is an interactive visual representation of progress towards demonstrating evidence for each of the outcome statements in the [National Framework for Prevocational \(PGY1 and PGY2\) Medical Training](#). Hover over the segments in the visual to see the Statement each represents.

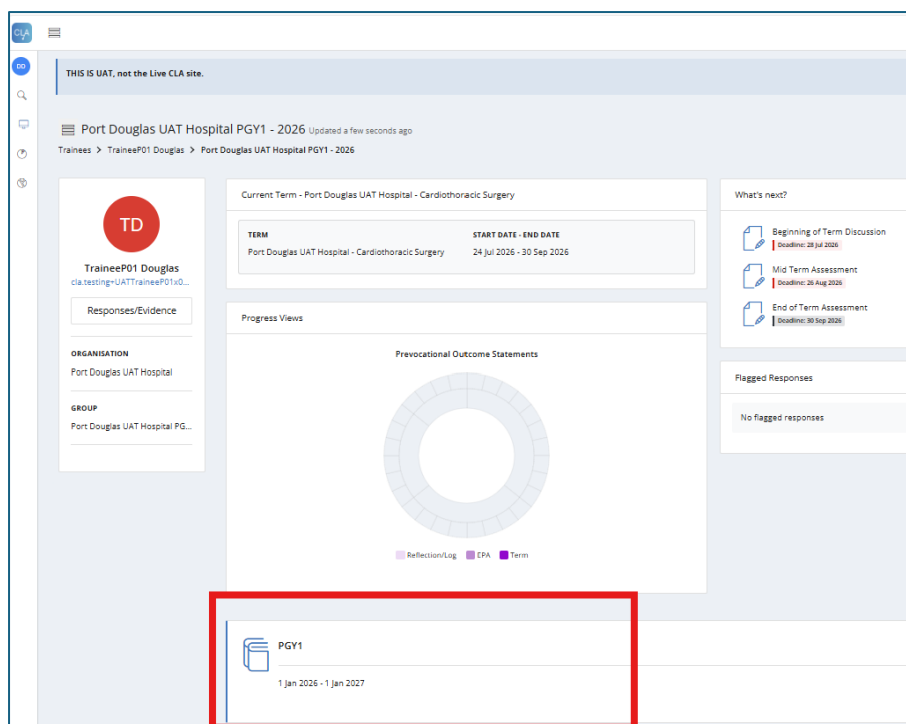


The shading of the segments shows if the statement was evidenced as part of a logbook entry, evidenced and validated as part of an approved EPA assessment, or fulfilled as part of the completion of a term. Click on the visual to drill into the progress of the prevocational doctor in more detail

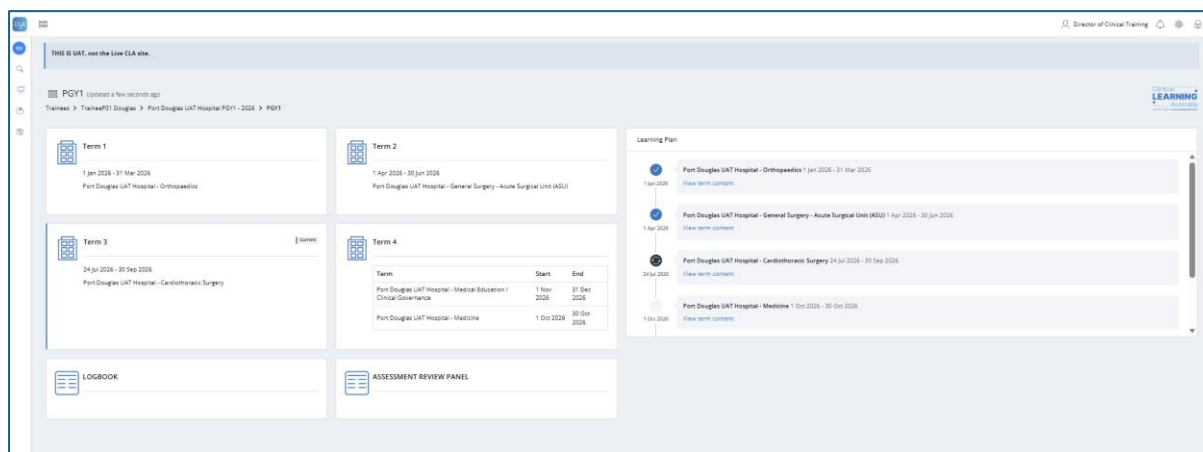
Note: Outcome statements must be selected and graded before they will appear in the trainee's Prevocational Outcome Statements.

4.4 Learning Plans

Clicking on the **PGY block** at the bottom of the screen, authorised CLA users can access the prevocational doctor's Learning Plan for the full clinical year, if the full clinical year has been loaded into CLA (see note below). The Learning Plan lists each allocated term, and it is possible to drill into each term to see term overviews, descriptions and forms associated with that term.



Note: Terms for the full clinical year may be loaded into CLA all at once, or terms may be loaded into CLA progressively by site administrators over the course of the year just prior to the start of upcoming terms. If the full year hasn't been loaded, CLA will only display the current term and any past terms.



Any forms not completed by prevocational doctors by the end of term will no longer be accessible to them to complete, unless a grace period has been set against the term to allow more time for forms to be completed. The decision on if a grace period is set and for how long is decided locally, so please contact your local MEU administrator to find out the details for your state/territory.

Note (Term and Clinical Supervisors Only): By default, all Term and Clinical Supervisors have 14 days following the end of a term to complete any outstanding forms.

5 Support

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