Clinical Learning Australia

Training Guide

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

CREATING AND MANAGING GROUPS

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

Contents

1 Creating groups

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

The main type of group you will need to create is a **Cohort** group. A cohort group is a group of Postgraduate Year (PGY) trainees that will be progressing through the training program together i.e. 2026 PGY1, 2026 PGY2, PGY1 IMG 2026, or PGY3+ 2026 as examples[1].

Cohort groups are required to link a group of trainees to a PGY Instance which then associates them with the required assessment forms and the number of terms that they are undertaking.

Create a group for each PGY cohort of doctors that you have per clinical year. That means you will need to create separate cohort groups for PGY1 doctors, PGY2 doctors, PGY3+ doctors and additional groups per PGY if you want to include IMGs and manage them separately.

If you also run a mixture of 4-term and 5-term clinical years for the same PGY, create separate cohort groups for these as well. That is, a group for PGY1 4-term doctors, PGY1 5-term doctors, PGY2 4-term doctors and PGY2 5-term doctors, etc.
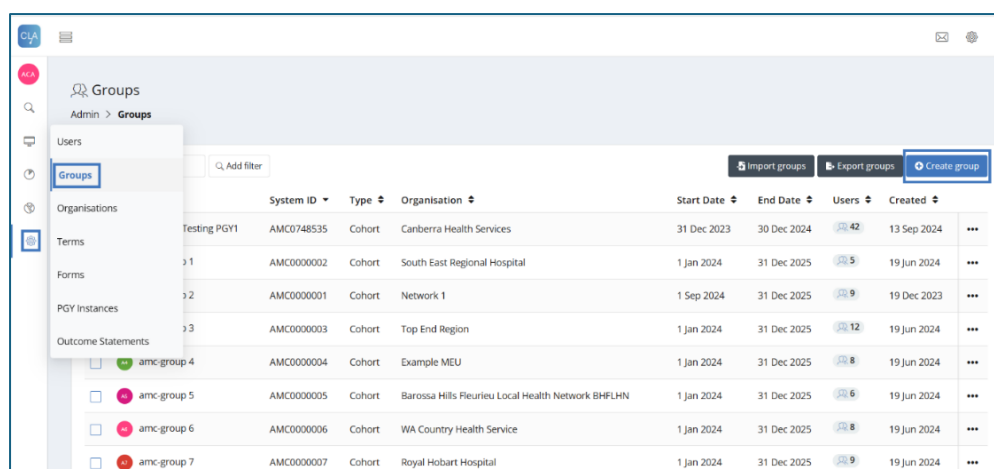
You will need to repeat this step at the start of each clinical year and create new cohort groups for incoming PGY1 doctors and those progressing to PGY2 and beyond.

Note. You need to create Groups before you can create PGY Instances. You do not need to add trainees to Groups before you create your Instances; trainees can be added at a later date. You must add trainees to your Group before you can create Term Allocations.

1.1   Creating groups manually

Where to create groups manually

- Navigate to the Admin 'cog' icon on the left-hand menu bar and click **'Groups'**
- Click the '**Create group**' button

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[1] Individual trainees within a cohort group can have different start and end dates for their terms but will generally be the group of trainees that are progressing through PGY1, PGY2 or PGY3+ terms together in any given year.

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

Inputting group details

- Complete the fields shown below ensuring you enter data in all mandatory fields as a minimum.
- Anything with a (*) is a mandatory field.
- Once you enter and select and Organisation, then the Type field will become available.
- Users can be added as part of the Group creation process if they already exist in CLA or at a later time, e.g. if they have not been created in CLA yet or you want to add users that already exist in a group.
- Click **Create** when you have finished entering all the data.

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

Field name	Description	Field Type
Organisation*	• Search and select the organisation to which the group will be attached. A minimum of 3 characters must be entered to populate results. • **Note:** You can only select the organisation your user account is attached to or any sub-organisations that sit beneath this in the organisational hierarchy.	**Mandatory**
Type*	There are multiple options for group type. • **Cohort** (the default) is used to group together Trainee users, usually by year group, along with relevant Directors	**Mandatory**

	of Clinical Training / Executive Directors of Medical Services. This group type is used to group trainees as PGY1, PGY2, or PGY3+, +/- IMG trainees. The Cohort Group is the one you use to link to the PGY Instance. • **Group** is a more generic group type and is available in the event you want to group users together for any other reason, e.g. Term Supervisors or Pharmacists. • **Assessment Review Panel** is used to group your ARP Lead(s) and ARP members as well as trainees and give the ARP members visibility of trainee ePortfolios. • **Placement Allocation** is not used in CLA and can be ignored. **Note:** Please ensure you use the group type of **Cohort** when creating Trainee groups that will be linked to PGY Instances.	
Name*	You enter any name for the group you are creating, however for ease of support, it is recommended that all group names include the state/territory, the primary organisation or facility responsible for management of training, the PGY year and the year in which training is occurring. Some example Group names are noted below: • **State/Territory - PGY1 - 2026** – this would be to group all 2026 PGY1 trainees in a state together • **State/Territory - Hospital X - PGY1 - 2026** – this would be to group all PGY1 trainees from a particular hospital/facility together • **State/Territory - Network A - PGY1 - 2026** – this would be to this would be to group all PGY1 trainees across a network of hospitals/facilities together • **State/Territory - Network A - PGY1 (5-term) - 2026** – this would be to group together all PGY1 trainees that are doing a 5-term clinical year across a network of hospitals/facilities. You only need to add this if you are running both 4 and 5-term clinical years to assist with telling them apart. • **FOR ARP Groups** – use the same name as your PGY Group name but append it with ARP so that you know this is an ARP Group when searching for it in other screens. **State/Territory - Hospital X - PGY1 - 2026 - ARP** How you set up and name your groups will depend on how training is managed in your particular state/territory. CLA is designed to provide flexibility to accommodate a range of	**Mandatory**

	different models, including where you choose to include PGY3+ trainees and IMGs in CLA.	
Description	• You can provide any additional information related to the group you are creating if relevant. • **Note:** This isn't used anywhere within the system apart from when viewing that particular group.	Optional
Start / End Date	• This is the date range for when a group will start and end. • **Note:** Although this is optional, it is recommended to input a start and end date as it defines how long a group is active for and also provides benefit when running reports and only wanting to see data within the system between certain points in time. • Once a group's end date has been reached, it will no longer appear as an option in the Groups dropdown list on the Trainee Dashboard. You can tick the 'Include past and future groups' tickbox on the Dashboard to display these groups.	Optional – Recommended

Adding users to a group

Users can be added to groups during the process of creating a group if they already exist in CLA.

• Type the user's name or email address in the text box to the right of the group creation window.

Note: You must type a minimum of 3 characters to populate results.

• Click on the user you want to add and this will add them to the group.

- A user isn't fully added to the group until you click the **Create** button.

Note: As well as adding Trainees to a cohort group, it is recommended to add the Director(s) of Clinical Training (DCT) and/or Executive Director(s) of Medical Services (EDMS) users to the **cohort** group. This will ensure these roles have access to the relevant trainees to view and track training progress. Add the DCT/EDMS roles in the same way as you add Trainees.

- For users that need a role in relation to a group <u>in addition</u> to their Main role, for example MEU Administrators or Supervisors who need DCT or EDMS access, or ARP Leads and Members in an ARP Group, add these users to the group(s) too and assign them the DCT/EDMS, or ARP Lead/Member role within the groups.
    - Search for and add the user
    - Click on the 3 dots to the right of the user's name and select **Assign Role**
    - Select the required role

    - Repeat this step for all Groups that the user(s) require access to.
    - Click **Update** to save changes.

- You do not need to add roles for Trainees or users where their role in a Group is the same as their Main role in Users.
- If you click on the wrong user, click on the 3 dots to the right of the user's name and select **Remove**.

Do not add supervisors to Trainee Cohort groups. It is not necessary to add supervisors to the trainee cohort groups which are linked to PGY Instances. They do not get any additional access or visibility but do get included in the Completion Report by PGY reports which can create confusion.

TIP: Users can also be added to groups during the user creation process, either individually or in bulk. This is the recommended way of adding users to cohort groups as opposed to using the Groups screen.

For trainees progressing from PGY1 to PGY2, etc. or to add trainees from your Cohort groups to your ARP groups, create the new group in the Groups screen and then in the Users screen, you can add trainees from an existing group to a new group in bulk.

Please refer to **Creating and managing users** quick reference guide for more information.

1.2   Creating groups in bulk

Creating groups in bulk can be done by filling out and uploading of a spreadsheet.

Where to create groups in bulk

- Navigate to the Admin 'cog' icon on the left-hand menu bar and click **Groups**
- Click the **Import groups** button
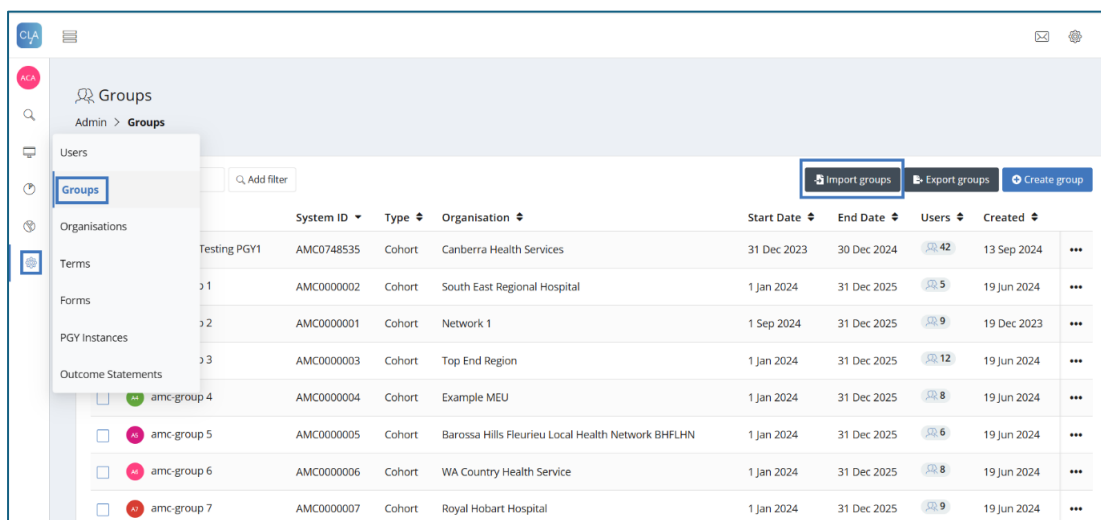
A pop-up box will appear with the option to 'Download import template' – click on this.
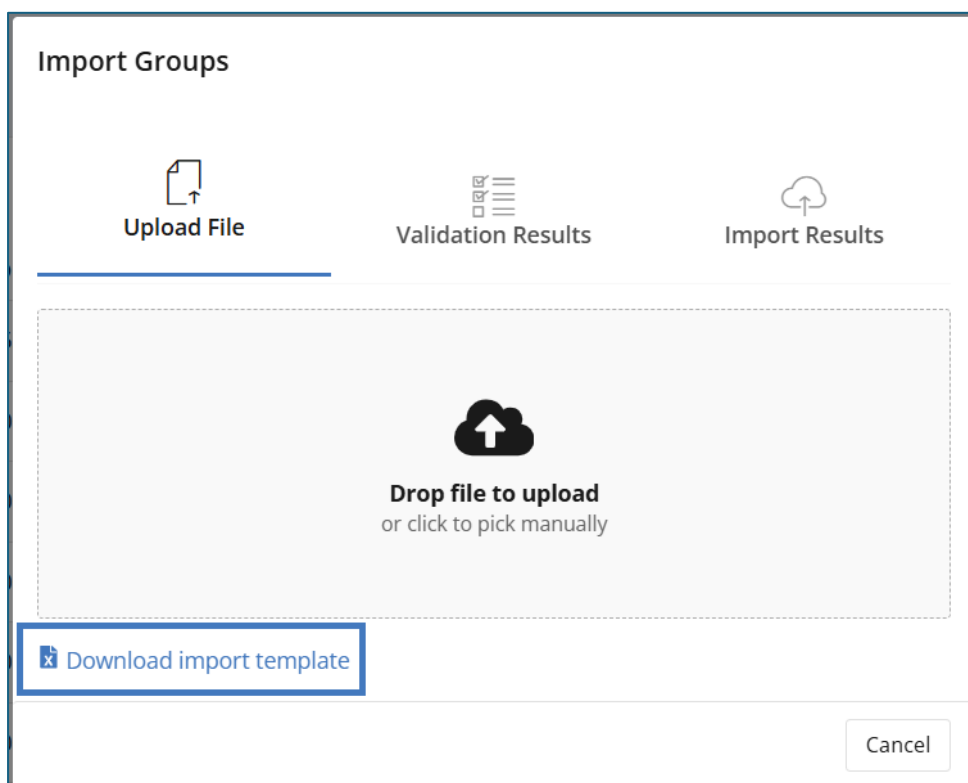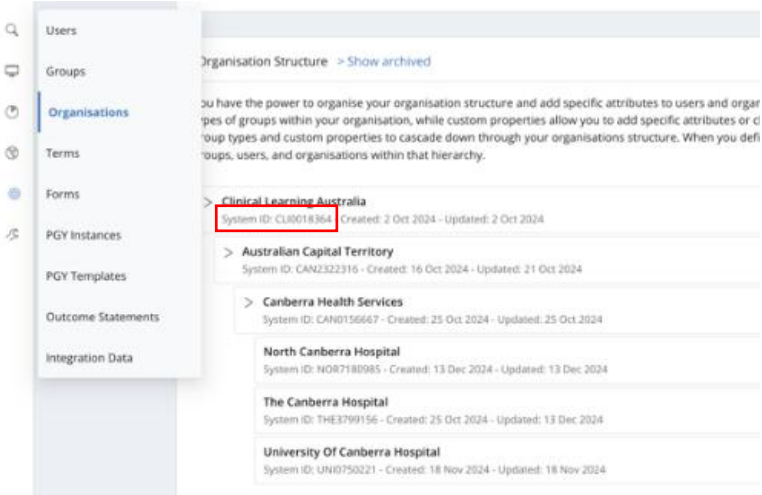
This will download an excel spreadsheet which you can use to enter group details in bulk.

Completing the Group Import Spreadsheet

Complete the below fields in the spreadsheet ensuring all mandatory fields are complete before uploading. All mandatory columns are highlighted in **bold**.

GroupIdentifier	**Name(en-GB)**	Description(en-GB)	StartDate	EndDate	**OrgReference**	GroupTypeName

GroupIdentifier	This only needs to be entered if you are updating details of a group that already exists in the system. If you are creating a new group, leave this blank.	Optional
Name*	This is the name that you want to give to the new group you are creating. See Inputting group details above for more information on recommended naming conventions for groups.	**Mandatory**
Description	Provide any additional information related to the group you are creating if relevant.	Optional
StartDate **EndDate**	This is the start and end date for when the group will be used. **Note:** Although this is optional, it is recommended to input a start and end date as it defines how long a group is active for and provides benefit when running reports and only wanting to see data within the system between certain points in time. It also removes groups from the Trainee Dashboard when they have exceeded their end date.	Optional
OrgReference*	This is the SystemID for the organisation (i.e. network, facility, hospital) that the group will be attached to. You can find this in the '**Organisations**' screen in CLA by clicking on the Admin cog icon in the side toolbar and clicking 'Organisations'. Copy and paste the SystemID for the organisation that you want the group to belong to. 	**Mandatory**
GroupTypeName	Enter '**Cohort**' where you are creating a group of Trainees or '**Assessment Review Panel**' for an ARP group, or '**Group**' for any other type of group. **Note:** Although this is optional, please ensure the group type of **Cohort** is entered here when creating Trainee groups to link to PGY Instances.	Optional

Uploading the Group Import Spreadsheet

Once you have completed the group import spreadsheet, save it to your desktop or another local file location. Navigate back to the **Groups** screen in CLA and click **Import Groups.**
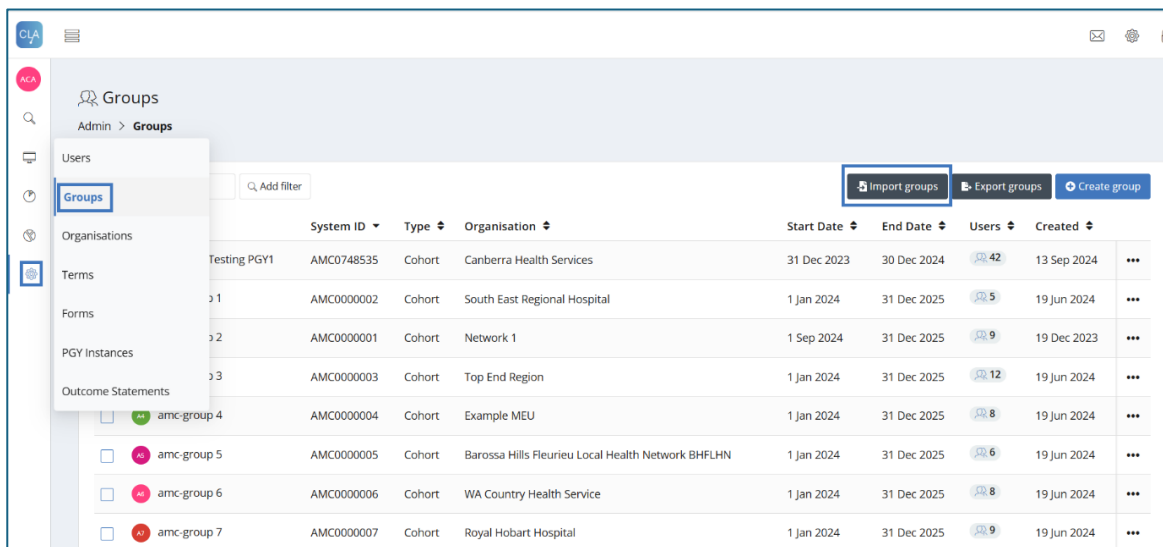
Click the 'Drop file to upload' icon to select and upload your file.
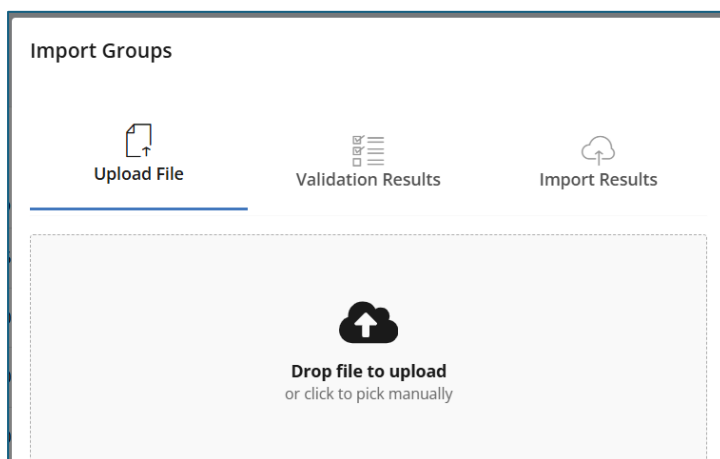
The screen will display the size and name of the file you are importing. Click **Validate**.

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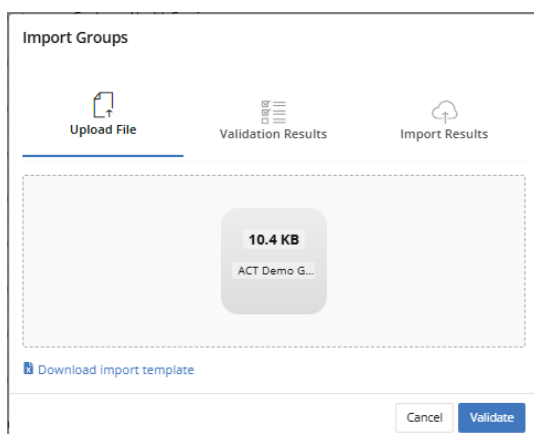
If there are no issues with the data, the file name will be displayed with a blue tick. Click **Import**.

You will see a notification that the data has been successfully imported. Click **Done**.

The data in the spreadsheet has been successfully uploaded and the relevant groups have been set up in the system.

Data validation

The data in your spreadsheet undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded, for instance incorrect OrgReference, or duplicate group name, or invalid Group Type, these will be flagged on the screen for review.

Review your group import spreadsheet, make necessary corrections, save the latest version and try to upload again.

2 Managing groups

Where to manage groups

- Navigate to the Admin 'cog' icon on the left-hand menu bar and click '**Groups**'
- Click the **three dots (…)** to the far right of the group's details
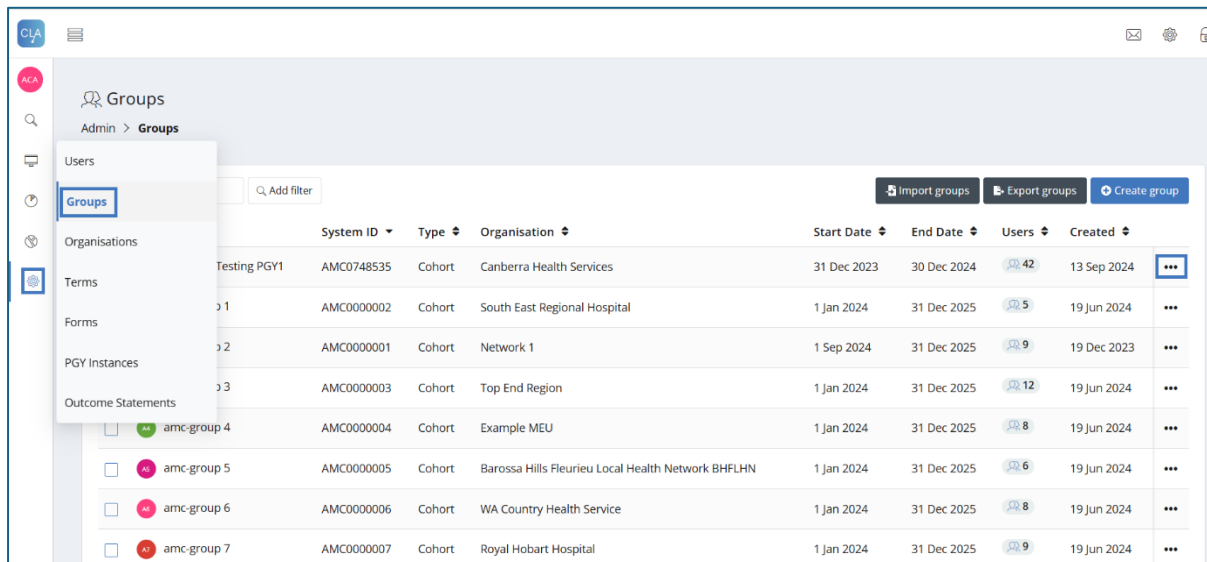
Clicking this will display a pop-up menu of options.
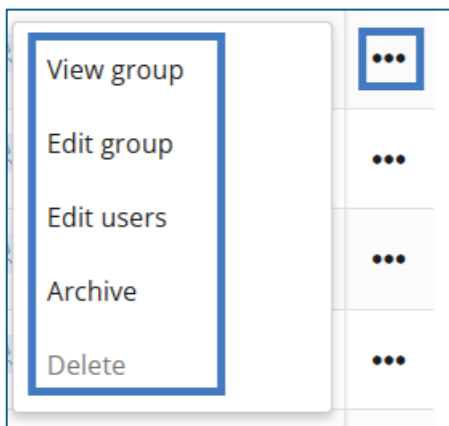
View Group - Administrators can view an overview of a group's details here. The same window opens if you click on the row of a group.

View the user's linked to the group directly from this view by clicking the **Users** tab.

Edit Group - Administrators can edit a group's **Basic Information** in the first tab, for instance the Group Name and Start and End Dates.

Administrators can also view the **Users** that are members of the group, add users to a group from this view by searching and selecting the required user, and assign roles to users in relation to the group.

Roles assigned to users in relation to this groups can be changed, and users can be removed from a group by clicking the **three dots (…)** to the right of the user's name. Click **Assign Role** or **Remove** as required.

If you select **Assign Role**, a dropdown box of available roles is displayed. Select the required role and click **Update.** Use this to assign users with a non-DCT main role to be a DCT for trainees within the groups, e.g. a user that is both an MEU Administrator and DCT, and ARP Leads and Members

Note: You do not need to add roles for Trainee users.

To remove the assigned role, click on the three dots to the right of the user and select **Remove Role**.

Edit Users - Administrators can also edit the users attached to a group by using the **Edit Users** option.

You will follow the same process for adding users, assigning roles and removing users as described above.

Use the Search field to add new users and click on the three dots to the right of a user to assign a role or remove.

Deleting and archiving groups

Administrators can delete a group if there are no assigned users or if assigned users have not yet logged into CLA. Once users have logged in, the option to delete the group will be greyed out.

Administrators can archive a group at any time by clicking the **three dots** (...) and select **Archive.**

Note: Use care when Archiving Groups and do not archive groups where trainees are currently on clinical terms. If you archive a group during a clinical year where trainees are allocated to terms, it will remove the trainees from all dashboards and they will no longer be visible to Admins, DCTs, EDMS' and Supervisors. Trainees will lose their view of the ePortfolios when they login – they will be able to access forms through workarounds.

Administrators can view archived groups by clicking **Show archived** (located at the bottom of the groups page).


Archived groups will appear in the group list with a yellow tag, 'Archived.' To hide archived users from the list, click **Hide archived**.
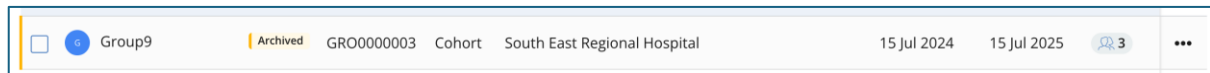
If you want to unarchive a group, click on the **three dots (…)** and select **Unarchive** for the group that is tagged as **Archived**. This will reinstate the group and relevant visibility for all users that previously had permission to view information for that group.

Bulk actions

Administrators can apply actions to multiple selected groups by first selecting the groups that changes need to be applied to, this is done by clicking the tick-box to the left of the **Name** column and clicking **Bulk actions** on the far-right hand side of the page above the table of groups.
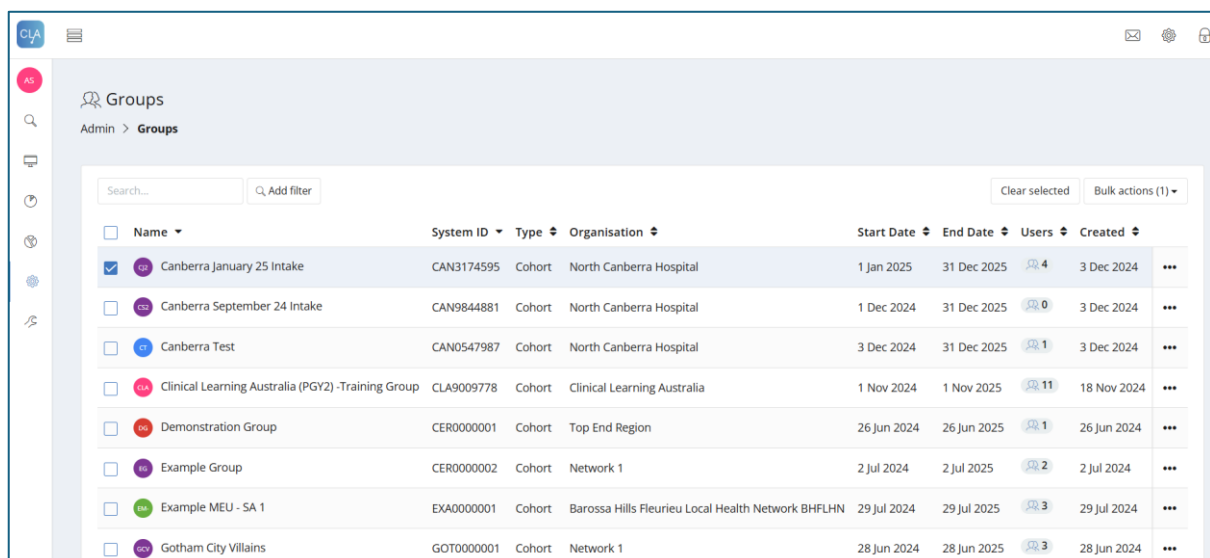
Alternatively, you can select all groups on the current page displayed by clicking the main tick-box to the left of the **Name** column in the heading row.

Once you select the relevant groups you want to make changes to, you then need to select **Bulk action** on the far-right side of the page and choose from one of the following options:


Add users - To one or multiple add users to a number of group(s), click **Add users,** search for and select users and click to add them to all of the selected groups. For example, use this to add a new DCT to all of your groups at once.

Archive/Unarchive - To archive or unarchive the group(s), click **Archive/Unarchive.** A confirmation dialogue box will appear. Click **OK** to proceed.

Delete - To delete the group(s), click **Delete.** A confirmation dialogue box will appear. Click **OK** to proceed. This is subject to the Delete limitations noted previously of users in a group not having logged into CLA previously.

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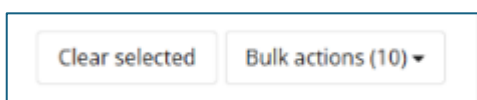
3 Support

If you require any support, please contact the Nationwide Administrator. Contact details can be found on the CLA website.