Clinical Learning Australia

Training Guide

Clinical LEARNING Australia

The ePortfolio for **prevocational doctors**

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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Contents

1 What is a PGY Instance?

A **PGY Instance** creates a ‘version’ of CLA to support a specific training program/cohort group. When setting up a PGY Instance, MEU Admin and MEO users assign a group of trainees to the PGY Instance, select whether it is for PGY1, PGY2 or PGY3+ trainees and if it is a 4-term or a 5-term clinical year template, identify PGY and term dates relevant to their training program, set up Grace Period for terms and tallies for EPAs, and assign trainees to term allocations.

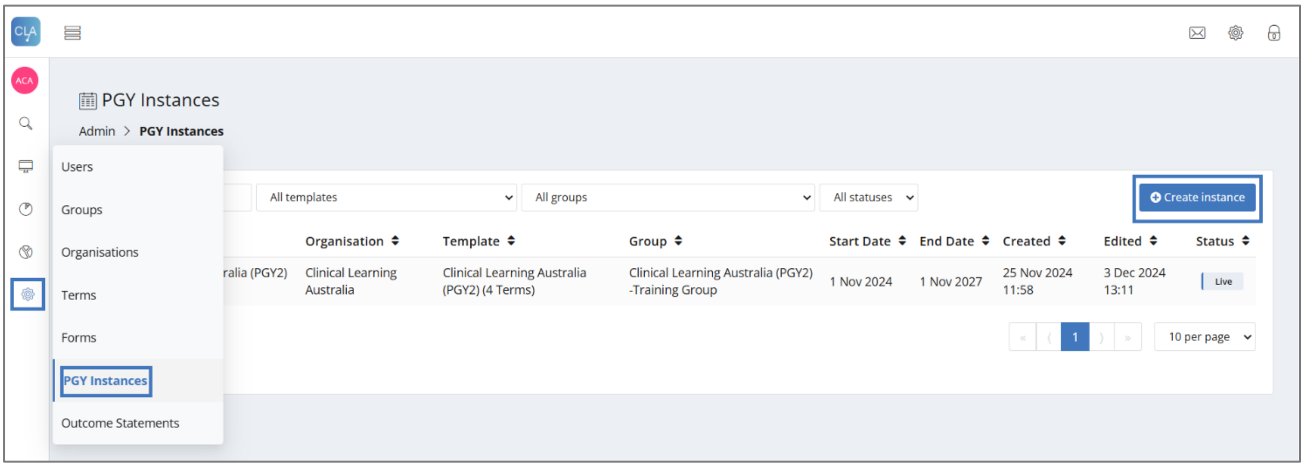
Creating a PGY Instance is done once per **cohort group,** after the Group has been created. Trainee user accounts can be created and trainees linked to their relevant cohort group prior to creating the PGY Instance or at a later time if needed.

Note for rotation sites: PGY Instances are created by primary employing organisations/health services and trainees are assigned to secondments at rotation sites as part of their term allocations. Rotation sites do not create trainee accounts or PGY Instances for trainees rotating to them for a secondment.

2 Creating a PGY Instance

2.1 Where to create a PGY Instance

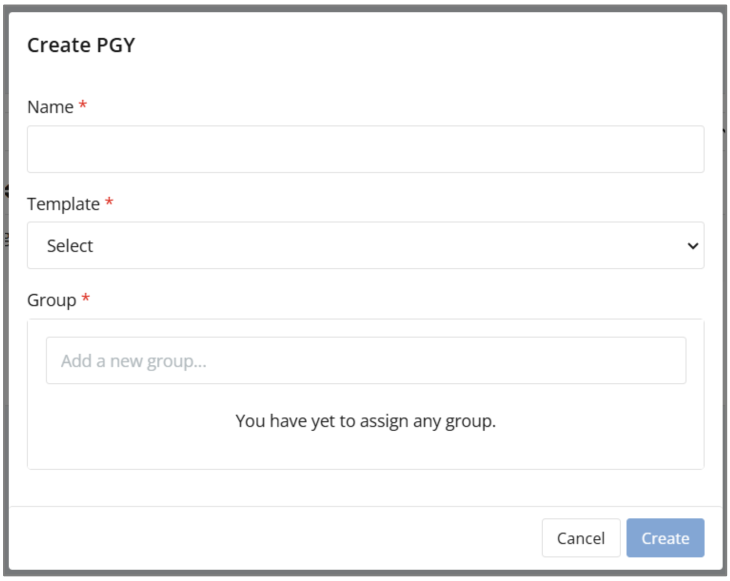
- Navigate to the Admin ‘cog’ icon on the left-hand menu bar and click **PGY Instances**
- Click the **Create instance** button



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.



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, however, for ease of use it is recommended that you make the name the same as the Trainee group you are linking to it. E.g. NSW - Nepean - PGY2 - 2026 State - Hospital X - PGY1 - 2026	**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 6 templates to select from: • PGY1 (4 Terms) • PGY1 (5 Terms) • PGY2 (4 Terms) • PGY2 (5 Terms) • PGY3+ (4 terms) • PGY3+ (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. Tip: Once you select your Group, you can copy and paste the name of the Group into the Name field.	

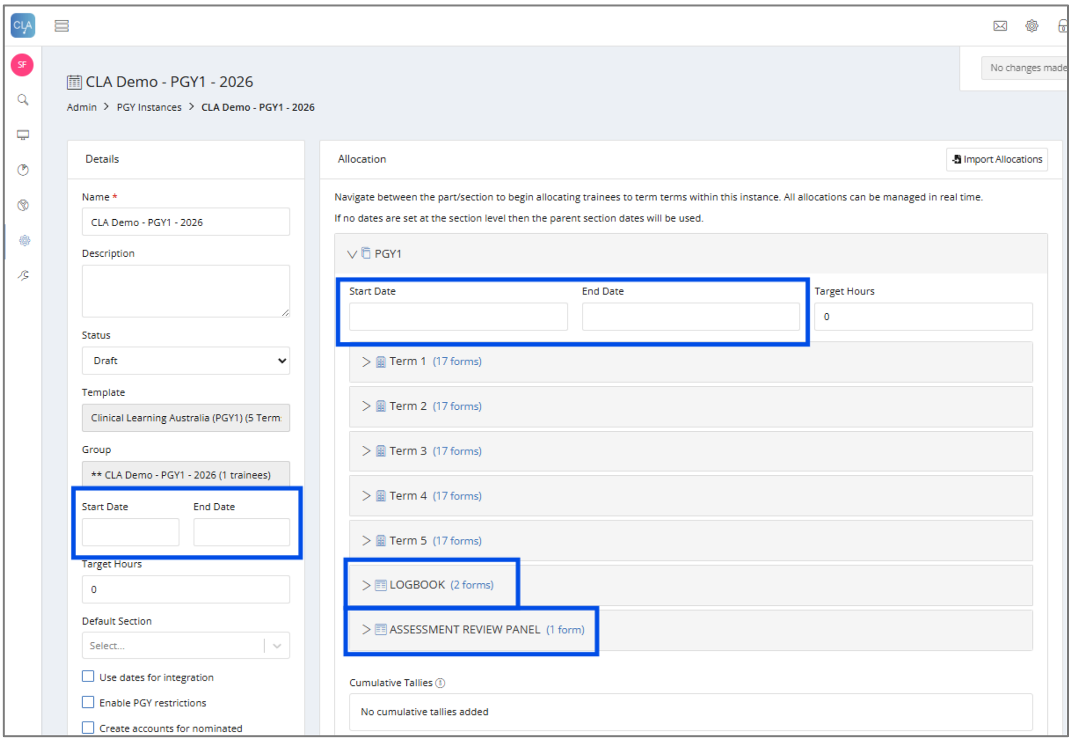
2.3 Add dates

Next you will need to populate relevant dates within the PGY 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 and to ensure Grace periods are honoured correctly:

- In the **Details** section on the left – 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 **Logbook** section – enter the start and end date of the training year – this will allow Logbook entries 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 can 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, Logbook, Assessment Review Panel blocks, click on that section to expand it, and the start and end date fields will be located within that block.

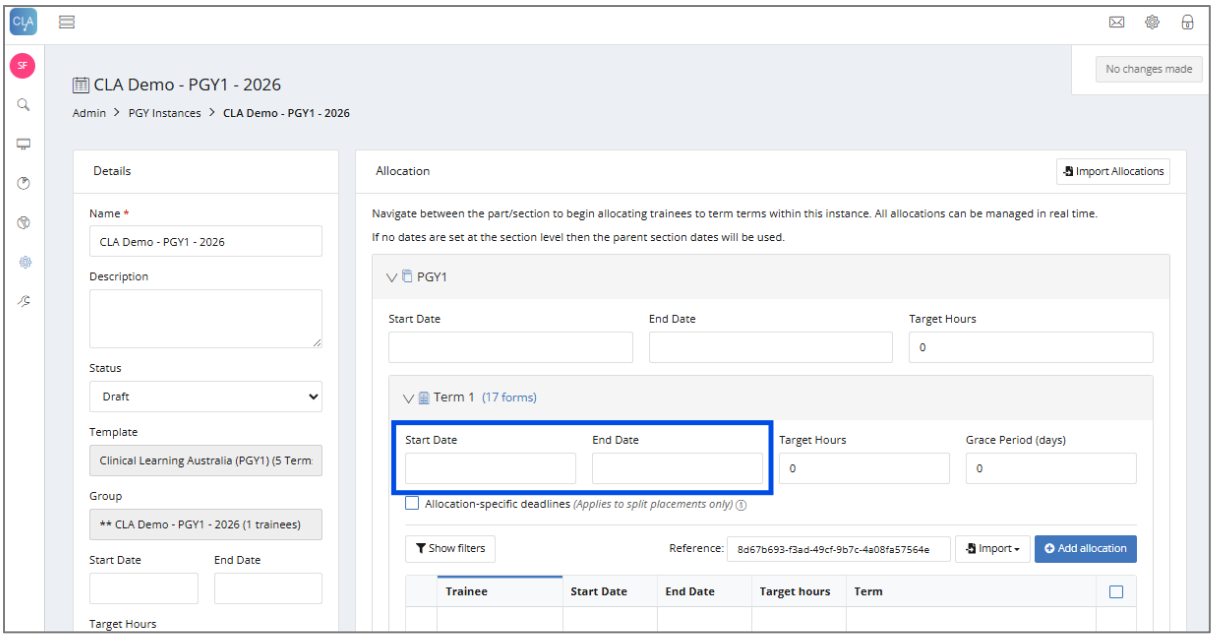
Target Hours and **Nominated Assessors** functions are not used in CLA - please disregard wherever you see these.

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

Do not make any other changes in the Details section on the left side of the PGY Instance. Do not select a Default Section – if this is selected, when trainees login to CLA, they will open directly to this term and may complete forms for incorrect terms as the year progresses.

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.

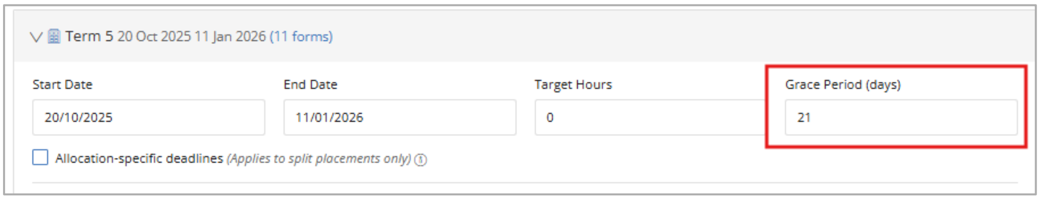


Note: The term start and end date sets the overall date parameters for that term but individual trainee allocations within that term can have different dates i.e. if a certain trainee starts late, their term allocation can have a different start date to other trainees.

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.

2.4 Set Grace Periods

Grace Periods are added to Term, Logbook and Assessment Review Panel blocks.



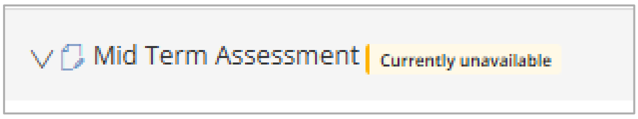
The grace period controls the visibility of the Complete New button on forms for that term/block after the end date for that term has been reached by trainees. The Grace is the number of days after the end date of that term/block during which users are able to still complete forms. If you do not wish to have a grace period, you can leave it as 0, however all forms for that term will lock as soon as the end date is reached. After the grace period has expired, users will not be able to complete forms for that term.

The Grace Period can be adjusted at any time. Simply change the duration in the Grace Period field for the required term, click **Save Changes** for the PGY Instance, and the change is applied instantly.

The recommended duration for Grace Periods is 21 days to allow supervisors to complete any outstanding End of Term Assessments and to give Directors of Clinical Training (DCTs) enough time to review and sign the DCT Sign-off form. However, you can set this as any duration.

Caution: Be careful of having long Grace Periods as the default as this leaves forms from previous terms accessible. Supervisors may accidentally click on the form icon for the incorrect term and they will be able to complete the form because of the grace. If you need to extend the grace to allow your DCT to sign-off forms or to allow for retrospective documentation, extend the grace for a short period of time and then shorten it again to reduce this risk. If supervisors or other users have submitted a form for the incorrect term, see the **How to manage submitted forms quick reference guide** for guidance on how to move forms to the correct terms.

If users see a **Currently unavailable** label beside forms from past terms, this means that it is past the grace period.



Note. The Grace Period is different to the ‘supervisor visibility buffer’ which is set to 14 days in CLA across all sites. Supervisors linked to trainee allocations only see trainees for the duration of the term plus an additional 14 days before a term commences and 14 days after a term concludes, based on individual trainee term dates. Once it is more than 14 days past the end of a term, supervisors will no longer see trainees from the previous term on their Dashboard, regardless of what the Grace Period has been set as. To put trainee’s back onto the Dashboards of their Supervisors, you must adjust their individual term end dates to be within the 14-day visibility buffer.

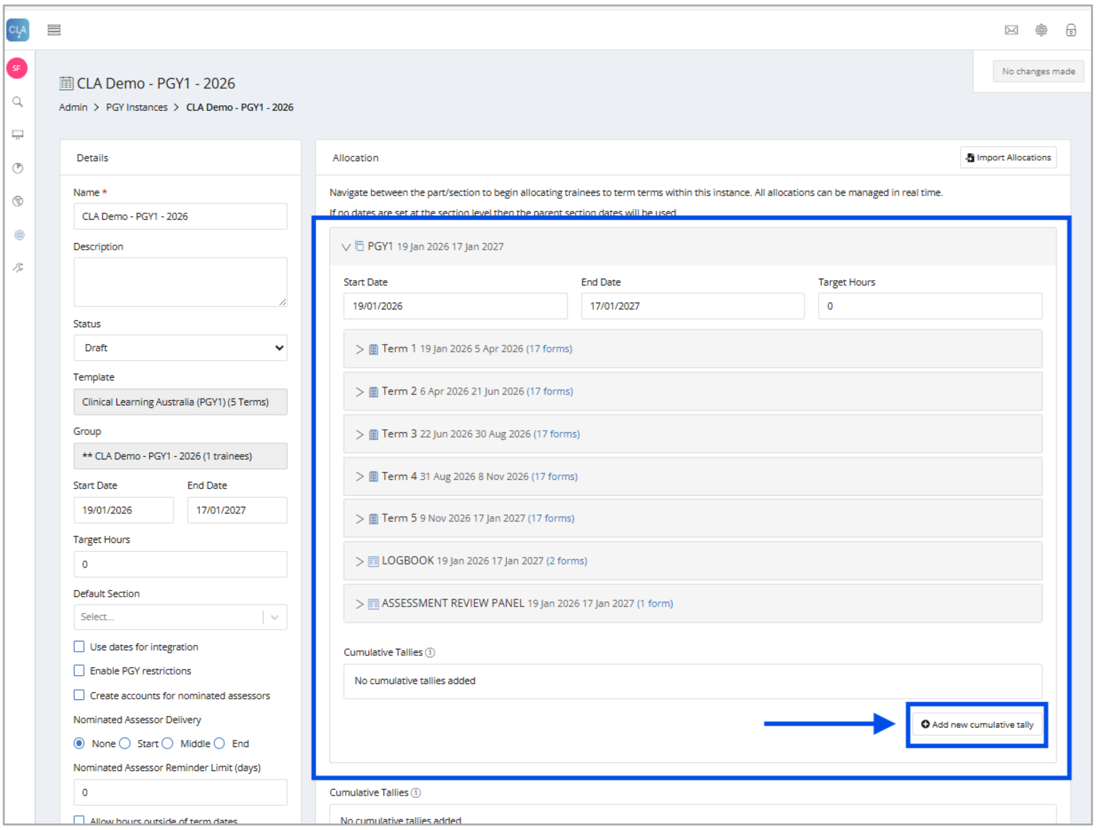
2.5 Set up Cumulative Tallies for EPAs

EPA forms have been set up within each term for the 2026 clinical year, as opposed to a longitudinal section of the trainees ePortfolio. This change makes is easier for sites to track that at least two EPAs have been completed each term.

In order to also track that 10 or 11 EPAs have been completed over the course of the clinical year, and how many have been completed of each type, sites can set up Cumulative Tallies.

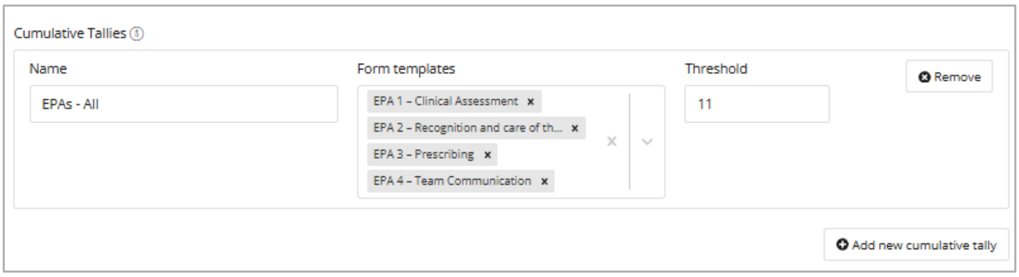
To set up Cumulative Tallies:

- In your PGY Instance, expand the PGY block to see the Term, Logbook and ARP sections
- <u>Within</u> the PGY block section, enclosed by a grey box, click **Add new cumulative tally**

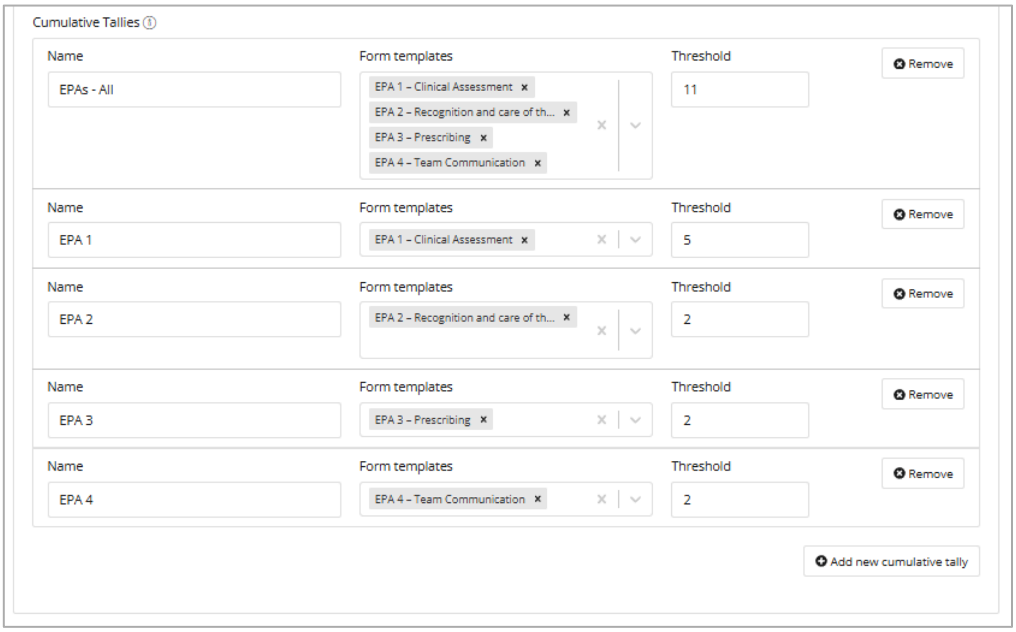


- In the Cumulative Tallies fields:
  - Enter a name for your Tally, e.g. EPAs – All
  - Select the Form Templates to include in the Tally, e.g. all of the EPA forms or specific EPA forms
  - Enter a Threshold, i.e. the target for how many forms should be completed

- To setup a tally to count all EPAs with a target of 11 for a 5-term clinical year
    - Name: EPAs – All
    - Form templates: EPA 1 – Clinical Assessment, EPA 2 – Recognition and care of the acutely unwell patient, EPA 3 – Prescribing, EPA 4 – Team Communication
    - Threshold: 11

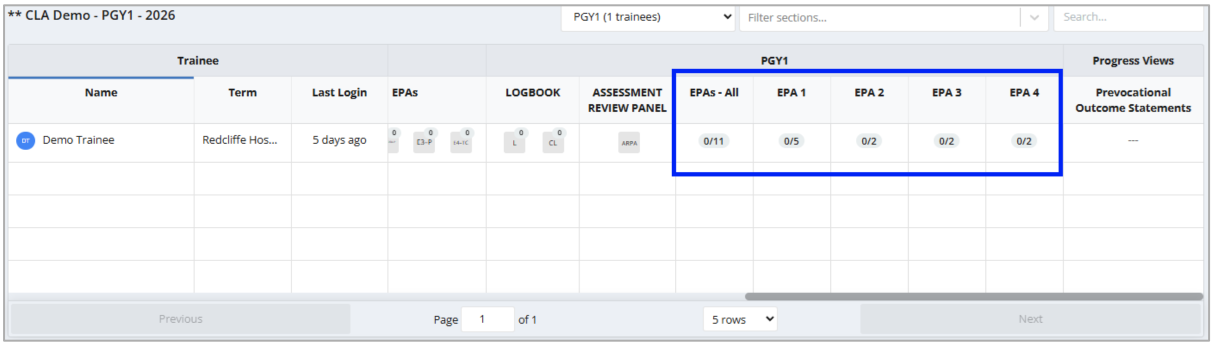


- Repeat to set up tallies for each individual EPA form



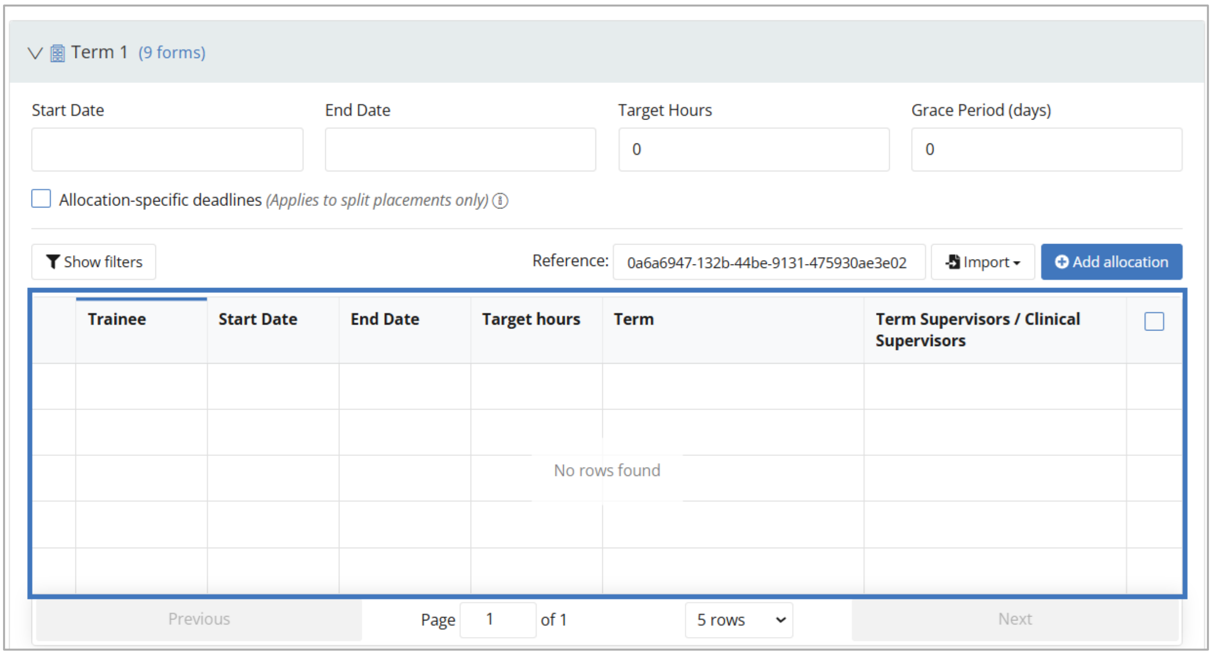
- Click **Save Changes** for your PGY Instance. Note that it may take up to 2 hours for this change to reflect on the Dashboard.
- To remove a tally, click the Remove button and Save Changes for your PGY Instance.

Once the Tallies have been set up and the PGY Instance saved, these will appear at the far right of the Dashboard and show the current tally of EPAs of that type completed to date.



2.6 Add Term Allocations

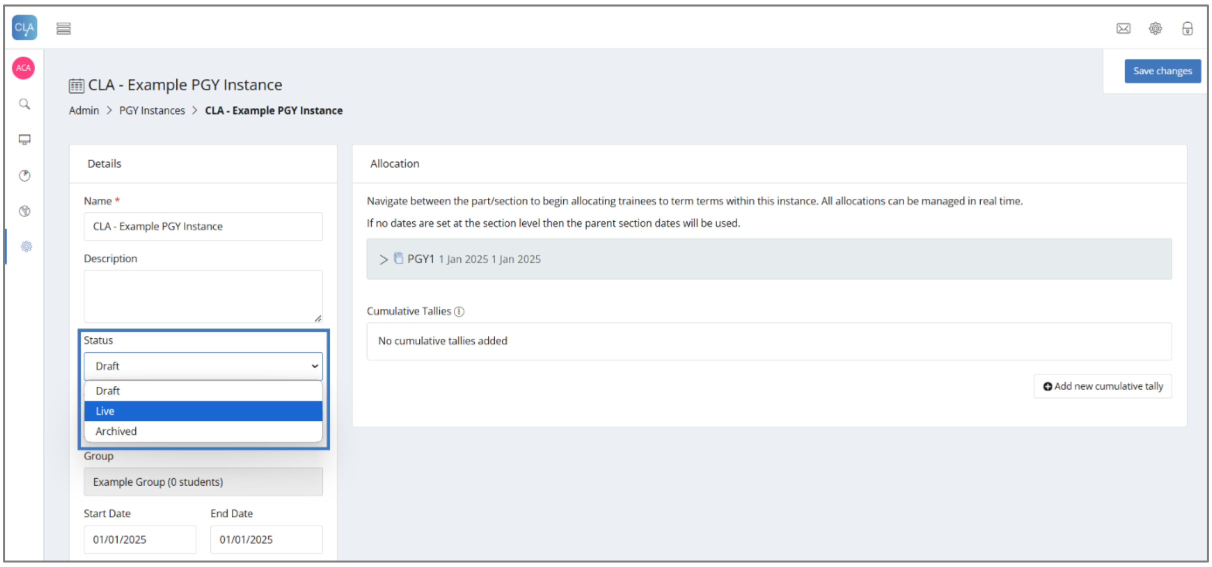
Term allocations are added to the table within each Term block. For further information how to upload term allocations, please refer to the **Creating and managing term allocations** quick reference guide.



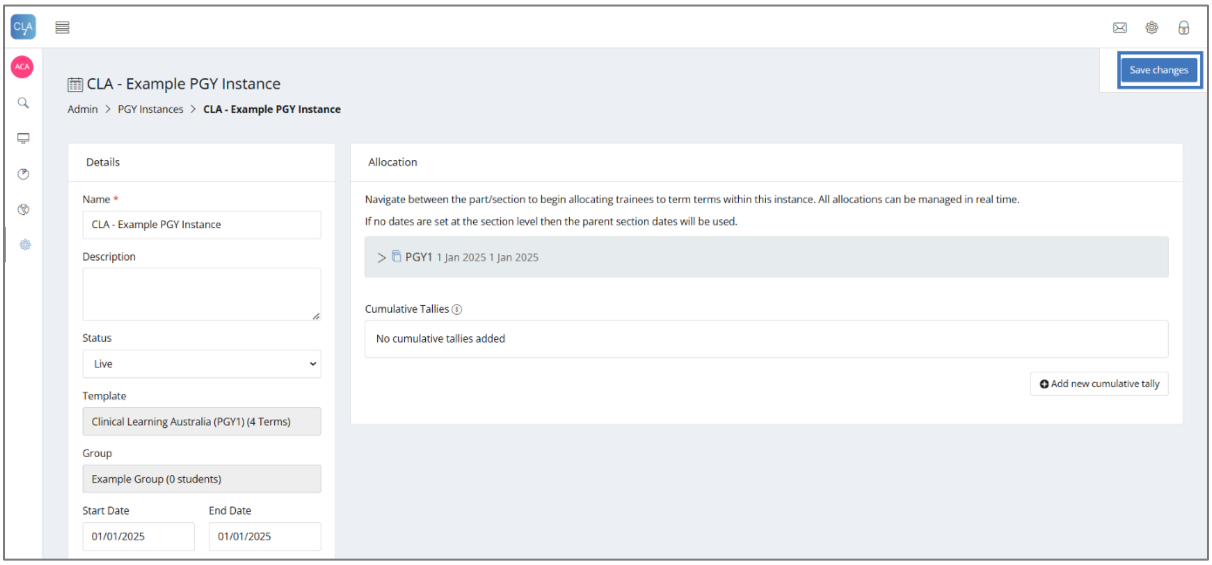
2.7 Set the PGY Instance to ‘Live’

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.

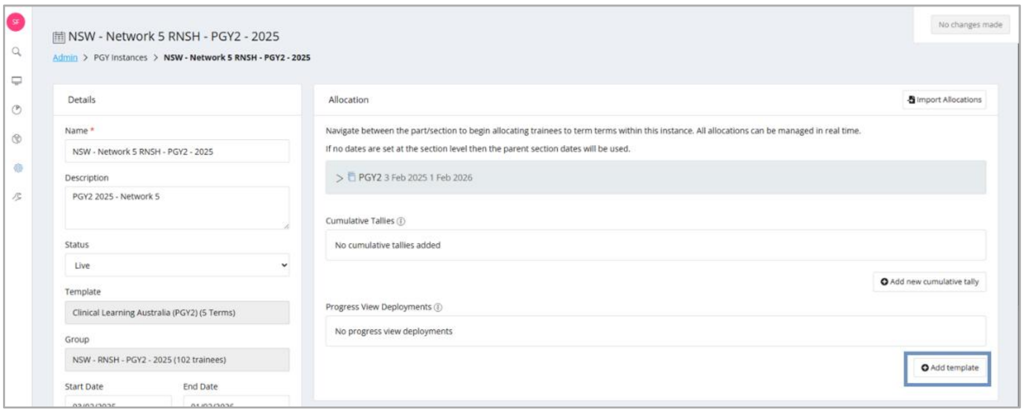


2.8 Attach the Progress View Deployments

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 the ePortfolios for all of the trainees in the PGY Instance. This will enable Trainees, Supervisors and other assessors to attach evidence to the Outcome Statements and track progress against these.

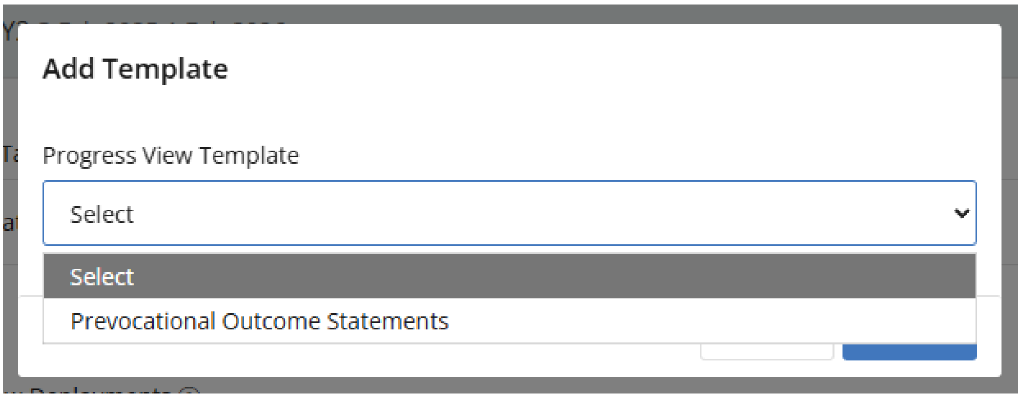
Note: The option to add a new Progress Views Deployments will not appear until you have set a PGY Instance to Live and saved the changes.

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

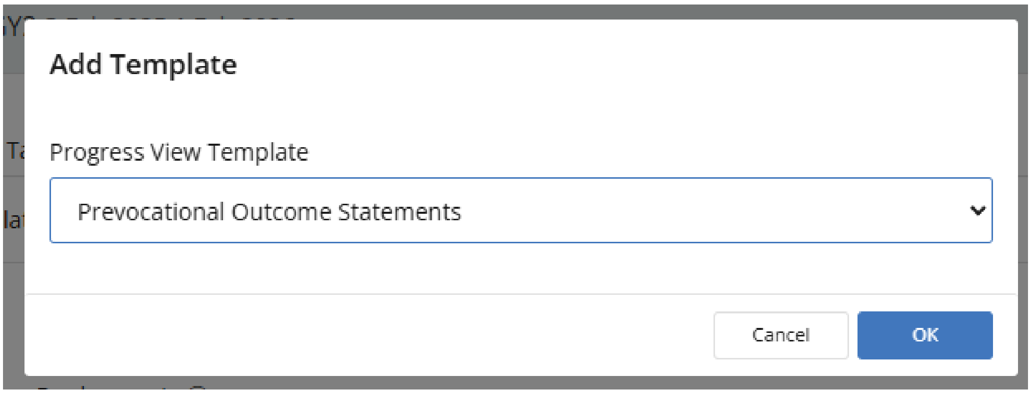


A window will pop up to select the Progress View Template.

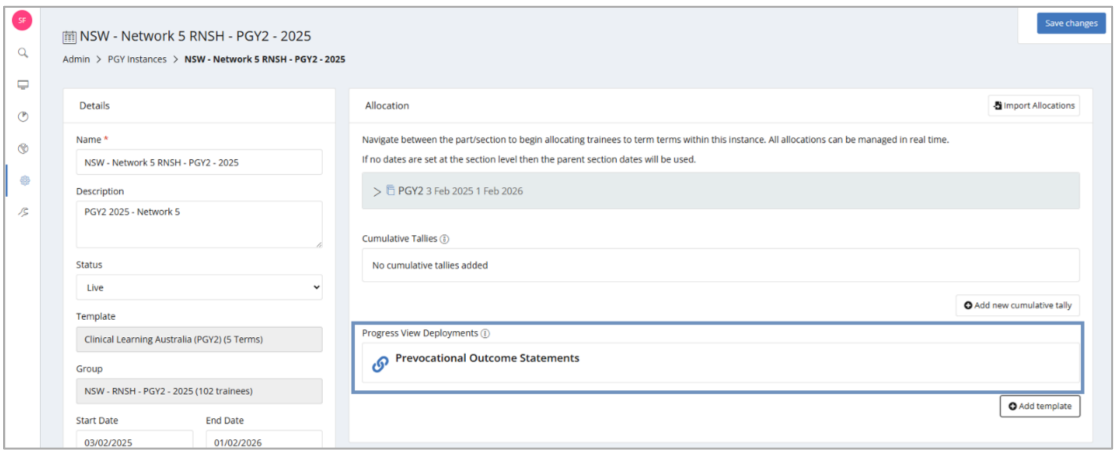
Select **Prevocational Outcome Statements.**



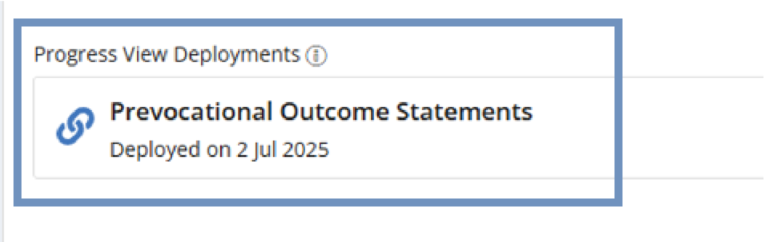
Click **OK**.



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



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



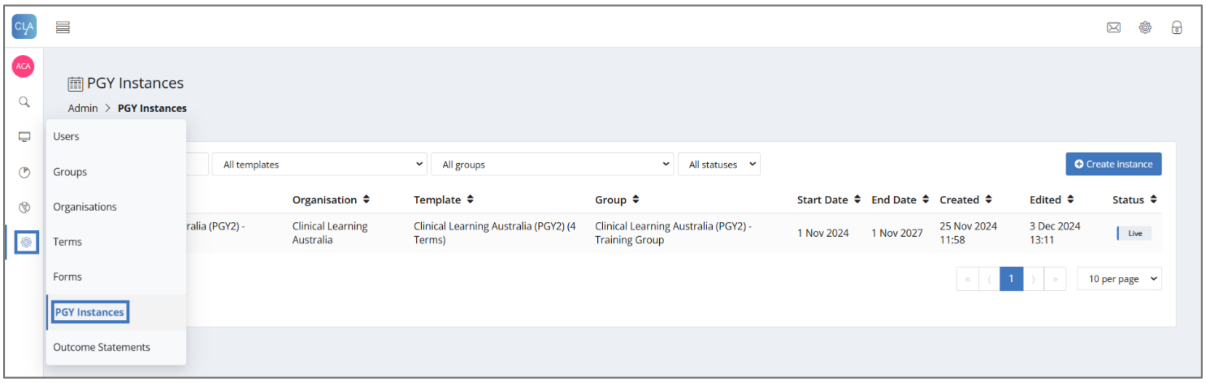
The PGY Instance is now and ready to use.

3 Managing PGY Instances

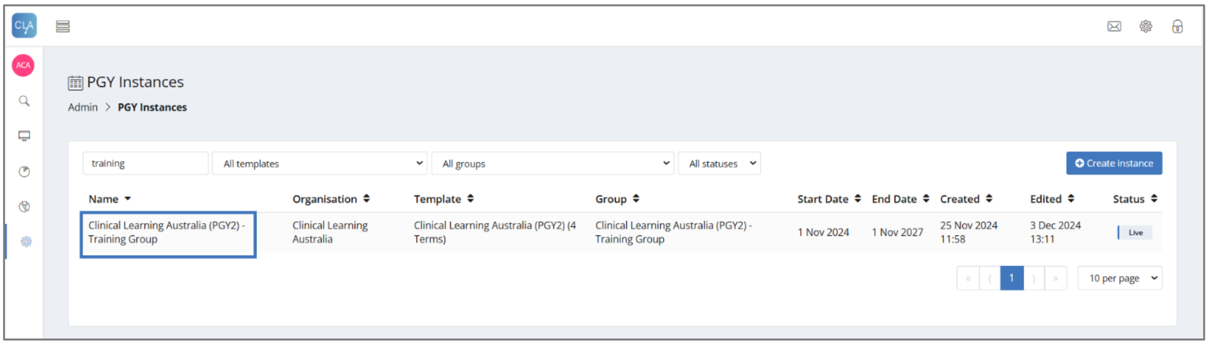
Once you have created a PGY instance, administrators can view, edit or update as required.

3.1 Where to manage PGY Instances

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

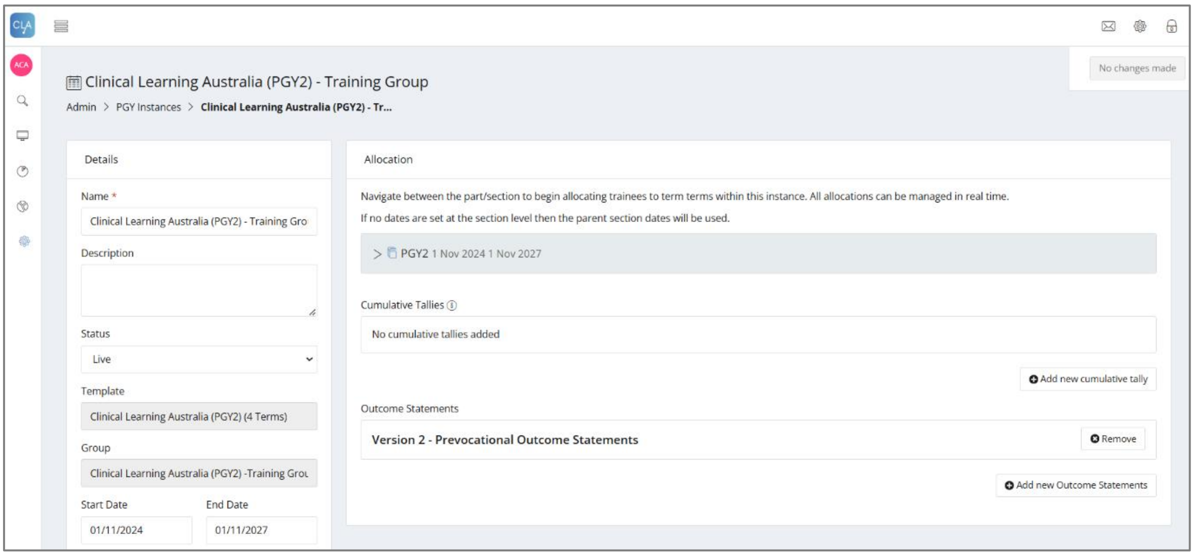


- Click any PGY Instance you wish to update, edit or view



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

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



4 Support

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