

Clinical Learning Australia
Training Guides



QUICK REFERENCE GUIDE FOR
CLA ADMINISTRATORS

**CREATING TERMS AND MANAGING TERM
ALLOCATIONS**

This quick reference guide provides information on how to create term allocations in Clinical Learning Australia (CLA). This guide will explain the process to follow for allocating trainees to terms including linking term and clinical supervisors and how term allocations can be managed.

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1 Creating term allocations

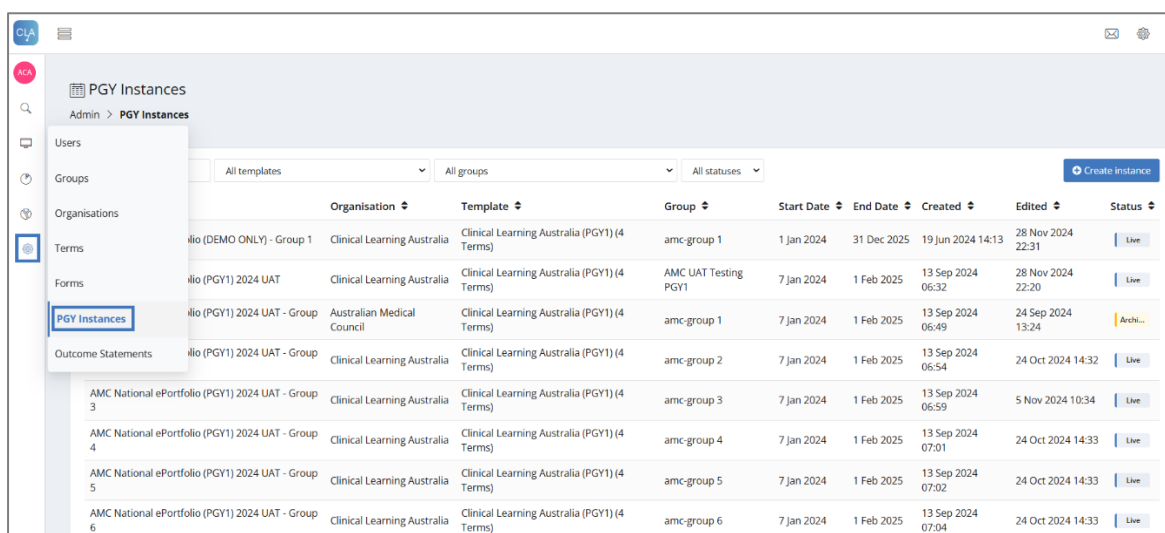
Medical Education Unit / Administrator users of CLA can create term allocations either manually (one by one) in the system or in bulk via the **single term** or **multi-term allocations import spreadsheet**.

The following steps are done once a cohort group, trainee user accounts and PGY Instance are created.

You do not need to enter term allocations for the full clinical year at once if you do not yet have this information to hand and can add/upload on an ongoing basis if needed.

1.1 Where to create term allocations

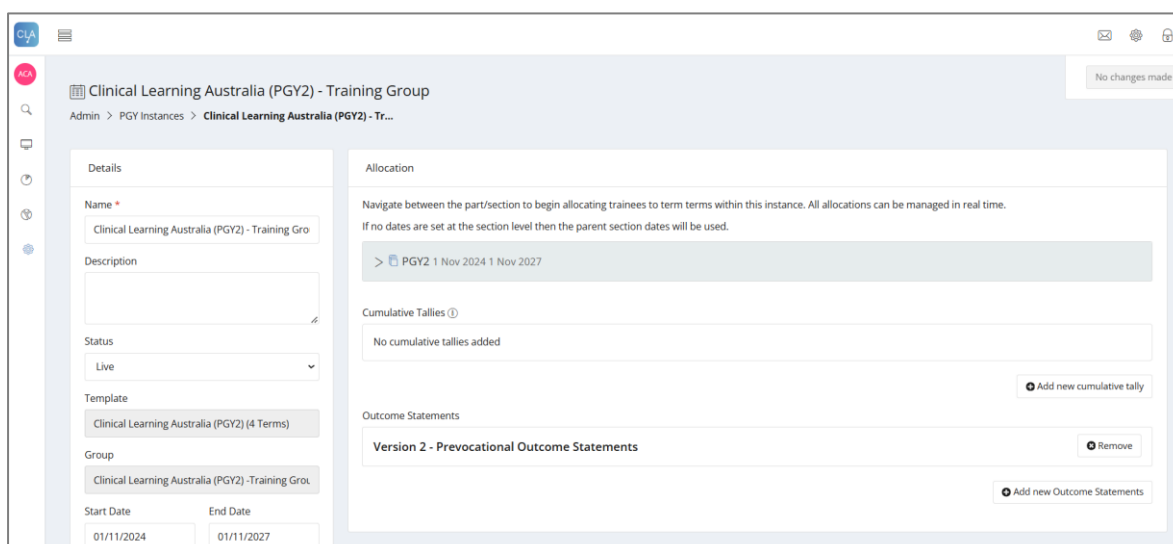
- Navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to add term allocations to.



The screenshot shows the 'PGY Instances' page in the system. A left-hand menu is open with 'PGY Instances' selected. The main area displays a table with the following columns: Organisation, Template, Group, Start Date, End Date, Created, Edited, and Status. The table contains several rows of data, including 'Clinical Learning Australia (PGY1) (4 Terms)' and 'AMC National ePortfolio (PGY1) 2024 UAT - Group 1' through 'Group 6'. A 'Create Instance' button is visible in the top right corner.

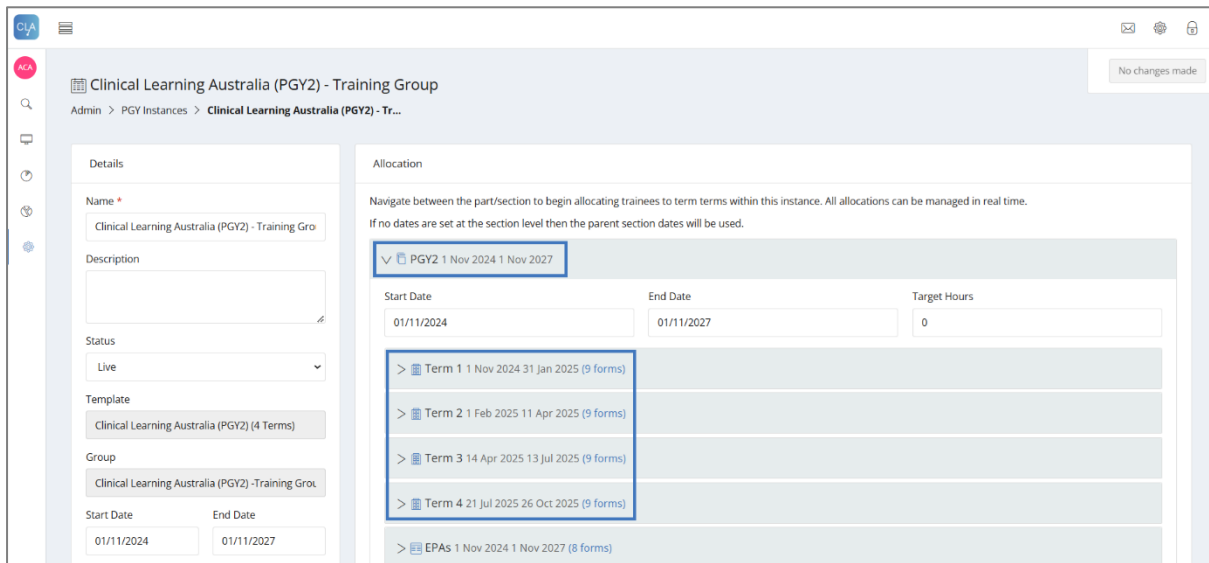
Organisation	Template	Group	Start Date	End Date	Created	Edited	Status
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 1	1 Jan 2024	31 Dec 2025	19 Jun 2024 14:13	28 Nov 2024 22:31	Live
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	AMC UAT Testing PGY1	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:32	28 Nov 2024 22:20	Live
Australian Medical Council	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 1	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:49	24 Sep 2024 13:24	Arch...
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 2	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:54	24 Oct 2024 14:32	Live
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 3	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:59	5 Nov 2024 10:34	Live
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 4	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:01	24 Oct 2024 14:33	Live
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 5	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:02	24 Oct 2024 14:33	Live
Clinical Learning Australia	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 6	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:04	24 Oct 2024 14:33	Live

You will then be taken into that PGY Instance.

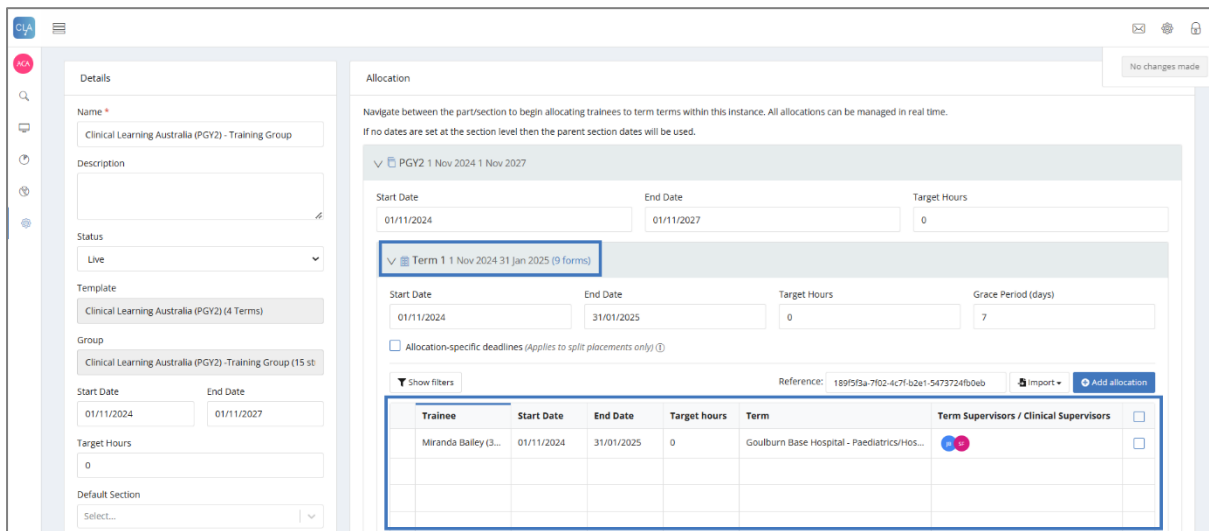


The screenshot shows the 'Clinical Learning Australia (PGY2) - Training Group' details page. The page is divided into two main sections: 'Details' and 'Allocation'. The 'Details' section includes fields for Name, Description, Status (set to 'Live'), Template, Group, Start Date (01/11/2024), and End Date (01/11/2027). The 'Allocation' section contains instructions on how to allocate trainees to term terms, a section for 'Cumulative Tallies' (currently empty), and 'Outcome Statements' (currently showing 'Version 2 - Prevocational Outcome Statements').

- Click on the PGY block to expand and display the terms.



- Click on the relevant **Term** to expand and display the **term allocations** table.



Note: If any term allocations have been created previously, these will be visible in the table. If no term allocations have been created previously, the table will be empty.

For Additional Support; see also [Term Allocations Dashboard Section](#) below.

1.2 Creating term allocations manually in the system

You can create term allocations manually (one by one) in the system or in bulk (see section 1.3 below).

To create term allocations manually:

- Navigate to the relevant term you wish to create term allocations for within the PGY Instance.
- Click on **Add allocation**.

The screenshot shows the 'Create allocation' window. The 'Details' panel on the left contains the following information:

- Name: Test Instance 123
- Description: (empty)
- Status: Draft
- Template: Clinical Learning Australia (PGY2) (5 Terms)
- Group: Canberra Admins (0 students)
- Start Date: (empty)
- End Date: (empty)
- Target Hours: 0
- Default Section: (empty)

The 'Allocation' panel on the right shows the following details:

- Section: PGY2
- Start Date: (empty)
- End Date: (empty)
- Target Hours: 0
- Section: Term 1 (10 forms)
- Start Date: (empty)
- End Date: (empty)
- Target Hours: 0
- Grace Period (days): 0
- Allocation-specific deadlines: (unchecked)
- Reference: 1c24c781-ca76-4820-968b-b21159dfa540
- Buttons: Show filters, Import, Add allocation (highlighted)

At the bottom, there is a table with the following columns: Trainee, Start Date, End Date, Target hours, Term, Term Supervisors / Clinical Supervisors, and a checkbox. The table is currently empty, with 'No rows found' displayed below it.

- This will open the 'Create allocation' window.

Create allocation

Trainee *

Term

Start Date * End Date *

Target Hours

Term Supervisors / Clinical Supervisors

You have yet to assign any assessors/supervisors.

Add trainee

- Select a trainee from the drop-down list or start to type the trainee's name to find the trainee you want to add a term allocation for.
- **Note:** Only trainees that are assigned to the Group associated with this instance will be available to select from.

Assign term allocation

- In the 'Term' field, start to type the name of the term you wish to allocate this trainee to.
- **Note:** All accredited terms have already been created in the system. If the term you wish to allocate the trainee to is not available, please contact CLA Support.

Create allocation

Trainee *

Fergus Jackson - (holly.fowler+amcs11@myknowledgemap.com)
 ▼

Term

goul
 ▼

Goulburn Base Hospital - General Medicine
 Goulburn Base Hospital - General Medicine (Canberra Region Medical Education Council)

Goulburn Base Hospital - General Surgery
 Goulburn Base Hospital - General Surgery (Canberra Region Medical Education Council)

Goulburn Base Hospital - Obstetrics & Gynaecology
 Goulburn Base Hospital - Obstetrics & Gynaecology (Canberra Region Medical Education Council)

Goulburn Base Hospital - Orthopaedic Surgery
 Goulburn Base Hospital - Orthopaedic Surgery (Canberra Region Medical Education Council)

Close
Create

Add start and end dates for this term allocation

- Enter the term start and end date for this term allocation.
- **Note:** The start and end date of a term allocation for a particular trainee can be different to the overall term start and end dates. In this way, trainees could have different start and end dates for term allocations within a term. Trainees can also be put on split terms where required, meaning two allocations are given for a term.
- See section 2.4 for more information about setting up split/blended terms or split contracts.
- **Note:** Leave the Target Hours field blank – this is not relevant for CLA.

Linking supervisors directly to a trainee

If you are wanting or needing to link a trainee directly to a Term or Clinical Supervisor as a one-on-one relationship, you do this by adding the relevant supervisor to the trainee allocation and assign them their relevant relationship of Term or Clinical Supervisor to link them to the trainee. This step gives the supervisor access to the relevant trainee's ePortfolio, and they are able to complete assessments for them for the duration of the term. Please refer to HOW SUPERVISORS ARE MANAGED IN V8.7

If you have directly linked a Term or Clinical Supervisors as a role to specific terms within the **Terms** area, then by default these Term or Clinical Supervisors will see all trainees currently

on any term they are directly linked to and this will also allow them to complete any assessments available to their role.

There isn't then a need to add them directly to a trainee's term allocation unless you want or need to specifically give them a one-on-one relationship with a specific trainee/s.

If you are adding a supervisor as a one-on-one relationship to a trainee's term allocation, follow the steps below:

- Start typing the name of the supervisor in the Term Supervisors / Clinical Supervisors field.
- Select the relevant user to add them to the term allocation.
- Select the Term Supervisor or Clinical Supervisor relationship for each supervisor added.
- **Note:** There can be only **one user with the Term Supervisor role per trainee** per term allocation but there can be **multiple Clinical Supervisors**. Both Term and Clinical Supervisors can complete mid and end of term assessments as well as EPAs. Individuals assigned as the Term Supervisors are able to complete an additional sign off form to confirm they have read and agree with the end of term assessment where this has been completed by a Clinical Supervisor if necessary.
- If you have multiple individuals that may act as the Term Supervisors for a trainee, it is recommended that you enter all supervisors as Clinical Supervisors, either directly to the term as a role or as a one-on-one relationship with a trainee to their term allocation, it is dependent on how your MEU wants/needs to manage your supervisors. This will allow them to review who has completed the End of Term assessments through the Detailed Response Report to determine if additional review and approval is required.
- **Note:** Supervisors must already be set up as users in CLA to be added to a term allocation. Please see the [Creating and managing users](#) quick reference guide. Supervisors can be added or removed from a term allocation at any time (see section below on managing term allocations).
- **DCTs as Supervisors:** Where your DCT/DPETs also have a supervisor role in relation to some terms, e.g. Relief, to be able to allocate these, they must have a Main Role in CLA of 'Supervisor (Term or Clinical)'. Change their role in Users to the External Only role and add them to your PGY cohort groups with the role of Director of Clinical Training. Please see the [Creating and managing users](#) and [Creating and managing groups](#) quick reference guides.
 - **Note.** Changing some to have the External Only role will move them from the Users area to the External Users area.
- Once you have completed all relevant fields, click **Create** to create the term allocation.
- The term allocation will then show in the term allocation table for the relevant term.

PGY1 1 Jan 2024 31 Dec 2024 Save changes

Start Date: 01/01/2024 End Date: 31/12/2024 Target Hours: 0

Term 1 1 Jan 2024 28 Feb 2024 (8 forms)

Start Date: 01/01/2024 End Date: 28/02/2024 Target Hours: 0 Grace Period (days): 7

Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters Reference: e76f8f0e-a0b6-41f7-88a4-83f6e996279f Import Add allocation

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	
Fergus Jacks...	01/01/2025	28/03/2025	0	Goulburn Base Hospital - Gen...		<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

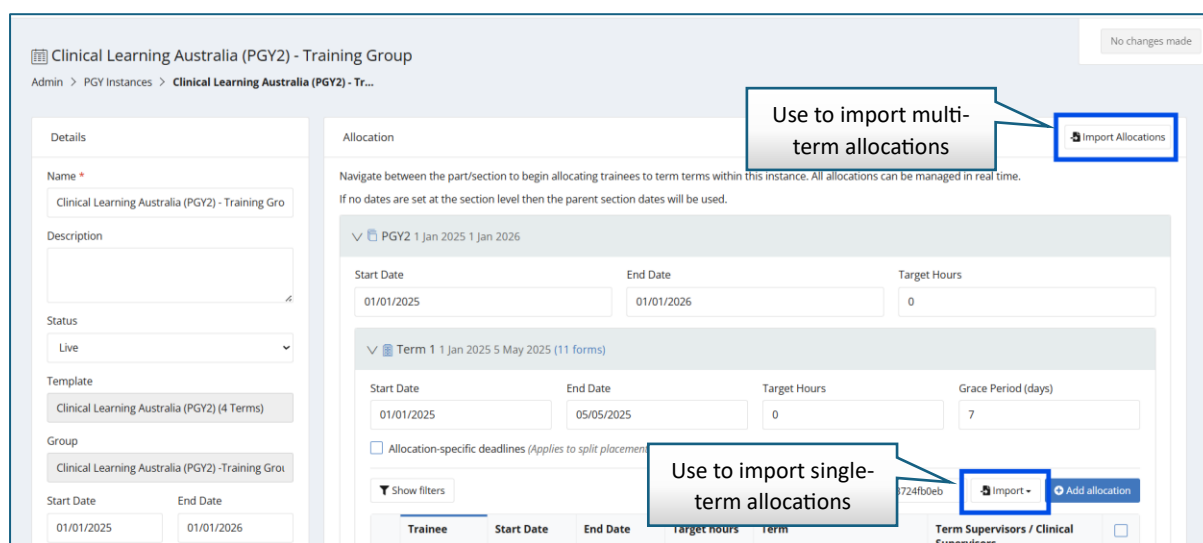
- Repeat the above steps for each trainee and for each term allocation you wish to assign them to if creating allocations manually.

1.3 Importing term allocations in bulk – Individual PGY Instances

You can import term allocations for multiple trainees in bulk, either for each specific term one by one, or for multiple terms at once.

To import term allocations in bulk for a specific term, download and complete the **'allocations_import' spreadsheet** from within the Term you wish to create allocations for in the relevant PGY Instance.

To import term allocations for multiple terms at once, download and complete the **'allocations_import_bulk' spreadsheet** from above the PGY block in the PGY Instance.



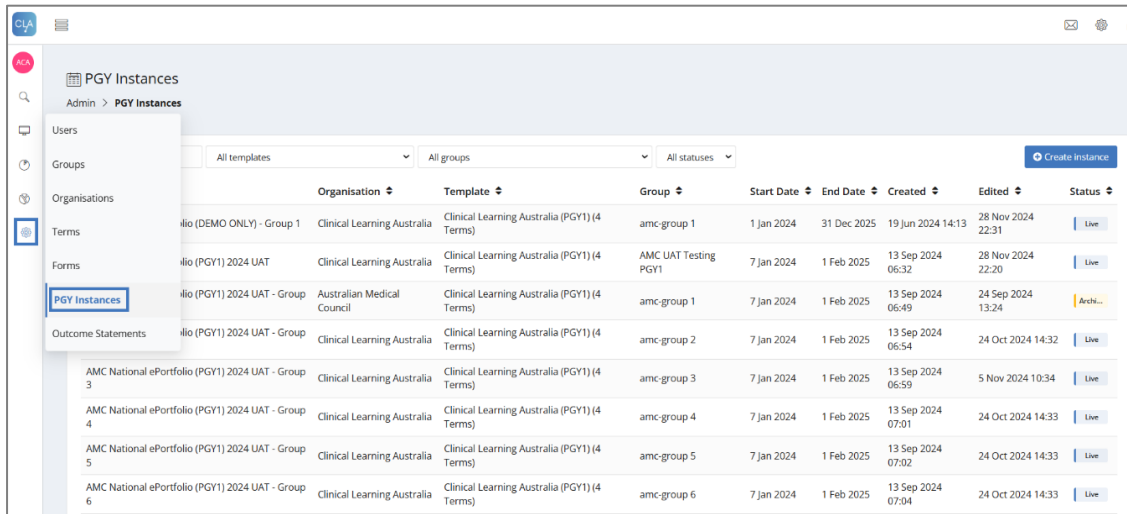
The key difference between the two methods is as follows:

Importing term allocations for multiple trainees at once: The multi-term allocation 'bulk' spreadsheet has a Reference column – here you put the reference code, which is a string of letters and numbers that uniquely identify each term in CLA, and this puts the trainee allocation in to the correct term. To upload multiple terms, create trainee allocation rows using the reference codes for the specific terms that you want to upload trainee allocations to.

Importing terms one by one: To import allocations using the single term import spreadsheet, you need to prepare a separate spreadsheet for each term and upload these separately into each term.

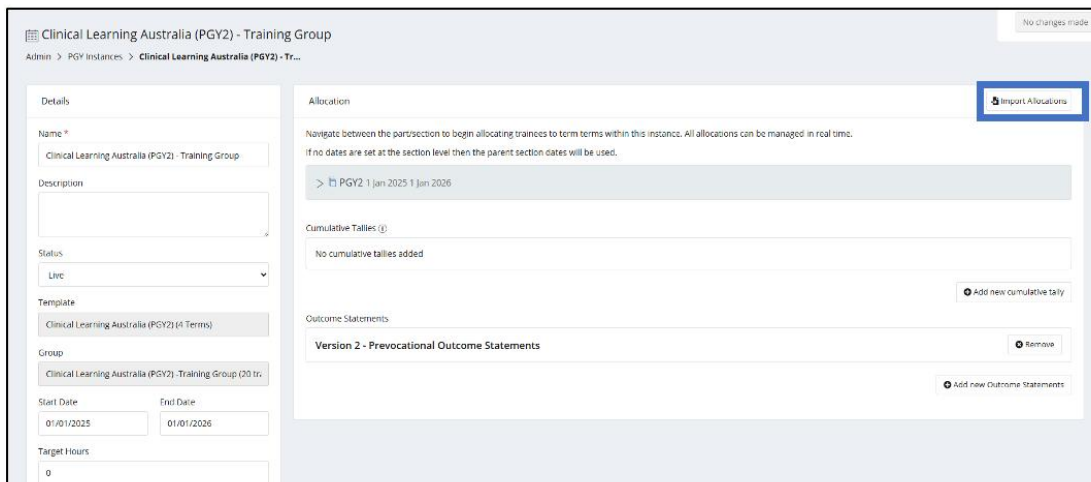
Downloading the term allocations import spreadsheets:

- Navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to add term allocations for.

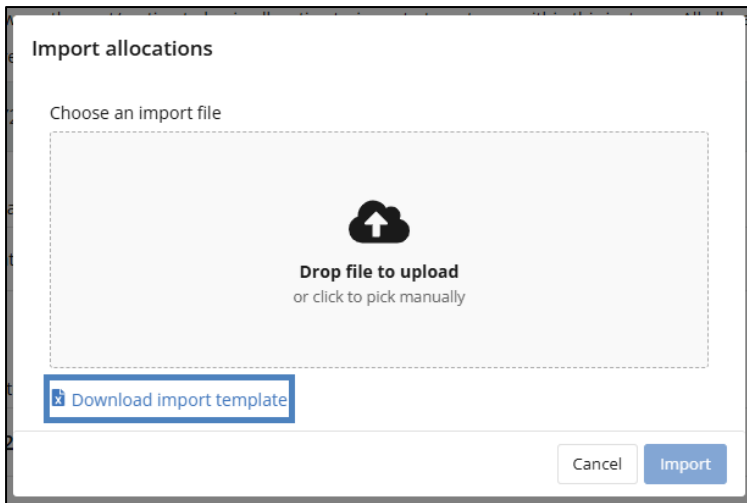


To download the multi-term allocations spreadsheet:

- Click the **Import allocations** button on the top right-hand side of the instance page, above the PGY section.



- A pop-up box will appear with the option to **Download import template** – click on this.

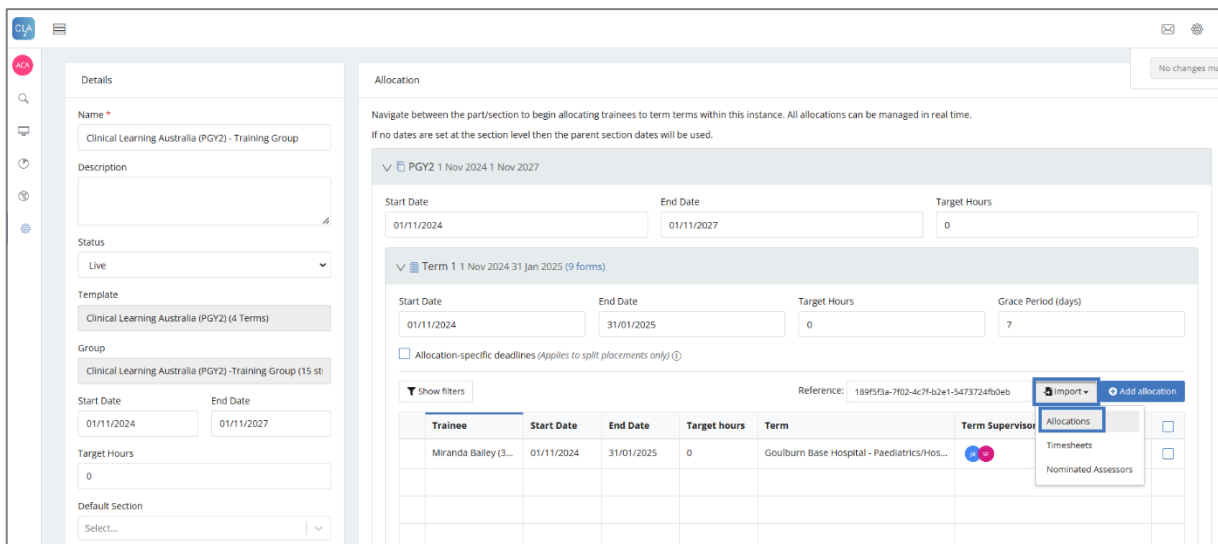


- This will download the ‘allocations_import_bulk’ spreadsheet that you can use to enter term allocations for multiple terms for all trainees.
- Save this spreadsheet to your preferred location.

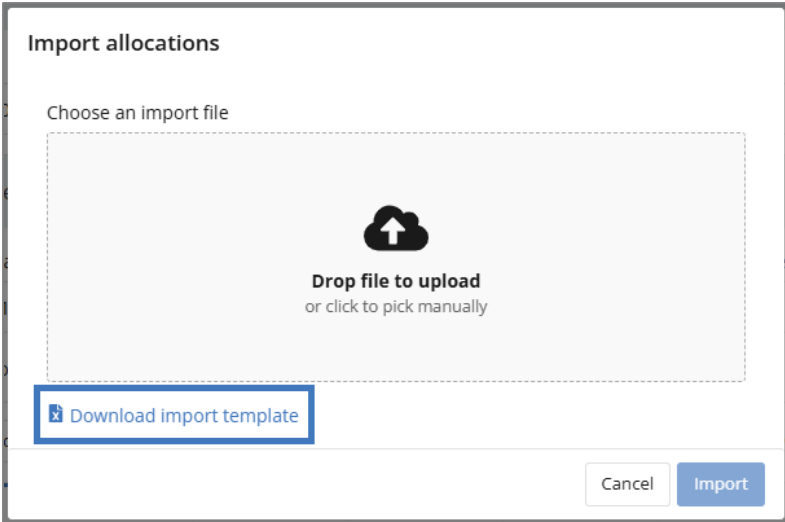
To download the single term allocation spreadsheet:

In this method, a separate spreadsheet will need to be completed and uploaded for each term.

- Expand the PGY block on the right half of the screen.
- Navigate to and expand the term you want to import allocations for.
- Click on **Import** and then **Allocations** button



- A pop-up box will appear with the option to **Download import template** – click on this.



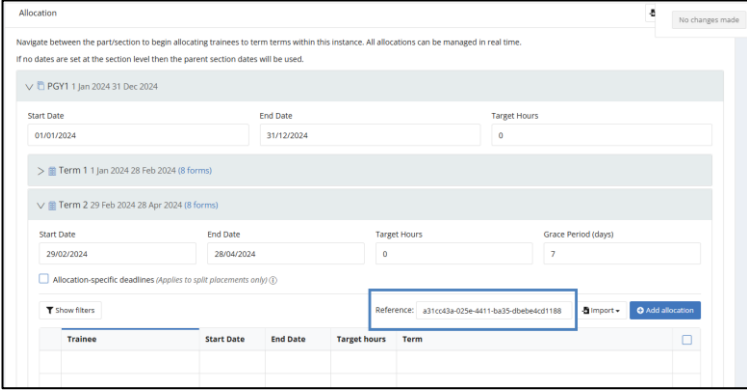
- This will download the ‘allocations_import’ spreadsheet that you can use to enter term allocations for all trainees for a single term.
- Save this spreadsheet to your preferred location.

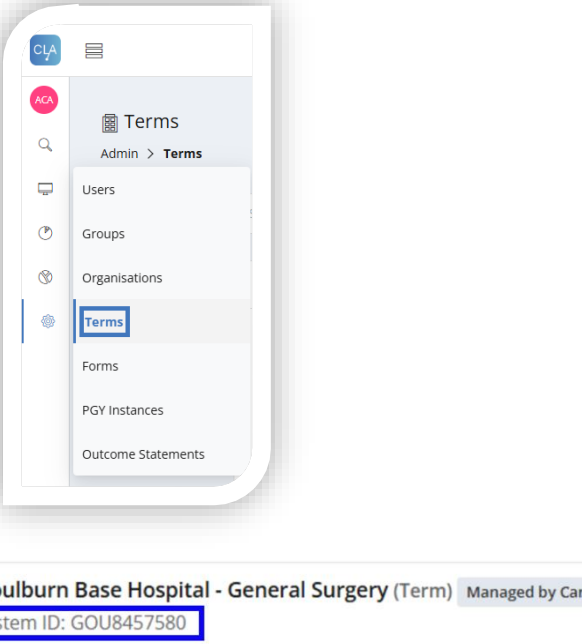
Completing the Term Allocations Spreadsheet

Complete the below fields in the spreadsheet, noting that the column A, Reference, is only included in the ‘allocations_import_bulk’ spreadsheet used to upload allocations for multiple terms.

A	B	C	D	E
Reference	StudentId	Provider SystemId or Short Code	StartDate	EndDate
F	G	H	I	J
Target Hours	AssessorEmail1	AssessorRelationship1	AssessorEmail2	AssessorRelationship2

Column	Description	Field Type
Reference*	<ul style="list-style-type: none"> • This Reference column is only relevant if you are completing the multi-term ‘allocations_import_bulk’ spreadsheet. • The Reference column is where you put the Term Reference code and this is how the system knows which term (Term1, Term 2, Term3, etc...) the allocation on that row belongs to. • This reference is a string of letters and numbers that is found within each of the term blocks of the PGY instance. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> Reference: <input type="text" value="a31cc43a-025e-4411-ba35-dbebe4cd1188"/> </div> <ul style="list-style-type: none"> • Click on the PGY block at the top right of the PGY Instance window to reveal all the term blocks. 	Mandatory

	<ul style="list-style-type: none"> Click into each of the term blocks within the PGY Instance that you wish to add term allocations to. Within each block, you will see a string of letters and numbers under the 'reference' part of the term.  <p>The screenshot shows the 'Allocation' interface. It displays two term blocks: 'Term 1' (Jan 2024 - Feb 2024) and 'Term 2' (Feb 2024 - Apr 2024). Each block has fields for Start Date, End Date, Target Hours, and Grace Period (days). Below the term blocks, there is a 'Reference' field containing the code 'a31cc43a-025e-4411-ba35-dbe64c01188'. An 'Add allocation' button is visible next to the reference field.</p> <ul style="list-style-type: none"> This is the reference that needs to go into this column of the spreadsheet. Note: The reference code will be different for every term and between PGY Instances. Reference codes are not reused in CLA. Caution: When entering reference codes into your spreadsheet, be careful to not enter the reference in the first row and drag this down in Excel as this will change the numbering of the code and will cause errors when you attempt to upload the file. Copy and paste this reference into each row. 	
<p>StudentID*</p>	<ul style="list-style-type: none"> This is the Trainee's Ahpra number or email address associated with their account. You can find the Ahpra number and/or email by navigating the relevant user in the Users section of the administrator panel and searching for the relevant Trainee's user profile. 	<p>Mandatory</p>
<p>Provider SystemID or Short Code *</p>	<ul style="list-style-type: none"> This ID links a Trainee to a specific term. The Term Name or System ID reference for a Term can be used in this field. Note that where you use the Term Name, it must be exactly as stored in CLA. If using the Term System ID, navigate to the 'cog' icon on the administrator side menu bar and click 'Terms'. Find the term that you want to link the trainee to. Below the heading of each term is a '<i>System ID</i>'. Copy the System ID reference and enter this into the '<i>Provider SystemID or Short Code</i>' column in the upload spreadsheet (see screen shot below). 	<p>Mandatory</p>

	 <ul style="list-style-type: none"> • Note: If you get a 'No provider found' error for a term when uploading using the term name, change this term identifier to the System ID. 	
StartDate*	<ul style="list-style-type: none"> • This is the start date of the term. • For multi-term allocations, change the start and end dates for each term to reflect the start and end date for each specific trainee • Note: The start and end date of a term allocation for a particular trainee can be different to the overall term start and end date. In this way, trainees could have different start and end dates for term allocations within a Term. 	Mandatory
EndDate*	<ul style="list-style-type: none"> • This is the end date of the term. 	Mandatory
TargetHours	<ul style="list-style-type: none"> • This field isn't relevant for Clinical Learning Australia. Please leave blank. 	Not used
AssessorEmail1	<ul style="list-style-type: none"> • This is where Supervisors can be linked to trainees. • Enter the Supervisor's email address that is linked to their account in CLA. • Note: Supervisors must have been created as users in CLA before you can link them to trainees via the term allocations import process. If supervisors with matching emails do not exist in CLA at the time of importing, you will get an error message for each supervisor that does not already exist and you will need to resolve each error (i.e. find their email used in CLA or create an account if they don't exist) before being able to upload the spreadsheet. • Note: If you want to add more than one Supervisor during the allocation process, you can add additional columns at the end 	Optional

	<p>of the spreadsheet noting Assessor Email2/Relationship2 and so on depending how many you need to add for a Trainee (see example below). Please ensure you follow the same naming convention and order as below for any additional columns you add.</p> <table border="1" data-bbox="480 450 1098 533"> <tr> <td style="text-align: center;">H</td> <td style="text-align: center;">I</td> </tr> <tr> <td>AssessorEmail2</td> <td>AssessorRelationship2</td> </tr> </table> <p>* It is possible to link supervisors to Term Descriptions from May 2025. Where supervisors have been linked, you do not need to enter supervisors in the import spreadsheet – these supervisors will automatically populate in the individual trainee term allocations once imported.</p>	H	I	AssessorEmail2	AssessorRelationship2	
H	I					
AssessorEmail2	AssessorRelationship2					
<p>Assessor Relationship1</p>	<ul style="list-style-type: none"> • Enter the Supervisor’s relationship to the Trainee – this should be Term Supervisor or Clinical Supervisor. • If you want to assign a Term Supervisor relationship, enter Term Supervisor in the Assessor Relationship field. Leaving the Assessor Relationship blank will automatically assign them as a Clinical Supervisor. • Note: A Trainee can only have one Term Supervisor linked to them per term. The Term Supervisor can be replaced at any point if required • Note: A Trainee can have multiple Clinical Supervisors. Add additional columns for additional Clinical Supervisors as above. <p>Where Supervisors have been linked to a Term Description, the relationship as per the Term Description will automatically populate in the term allocation. This can be adjusted if a different supervisor is taking the Term Supervisor designation in relation to trainees.</p>	<p>Optional</p>				

Example of a completed multi-term allocation spreadsheet for Terms 1 – 4 for a single trainee.

A	B	C	D	E	F	G	H
Reference	StudentId	Provider SystemId or Short Code	StartDate	EndDate	Target Hours	AssessorEmail1	AssessorRelationship1
7d91bcae-fd19-486d-9bfe-7517ba374bdd	Term1 holly.fowler+testuser34@myknowledgemap.com	ACT6707192	5/02/2025	13/05/2025		assessor@example.com	Term Supervisor
318ead71-f707-43c1-bfb8-232476762bcb	Term2 holly.fowler+testuser34@myknowledgemap.com	ACT9535097	14/05/2025	28/07/2025			
91c1b831-eb71-49d0-872e-8e1639722eb4	Term3 holly.fowler+testuser34@myknowledgemap.com	ACT3476178	29/07/2025	27/10/2025			
52c3ec63-f5c5-4aa8-824d-f839abf6a6c9	Term4 holly.fowler+testuser34@myknowledgemap.com	ACT4722321	28/10/2025	2/02/2026			

Reminder: The main difference in the multi-term spreadsheet is Column A ‘Reference’.

This reference is a string of letters and numbers. It is located within each term block (see below).

Ensure you highlight the full reference string, copy and paste into Column A of the multi-term spreadsheet.

Each term block has its own unique reference string.

Example of a completed single term allocation spreadsheet for three trainees for one term.

	A	B	C	D	E	F	G	H	I
1	StudentId	Provider SystemId or Short Code	StartDate	EndDate	Target Hours	AssessorEmail1	AssessorRelationship1	AssessorEmail2	Assess
2	trainee1@example.com	Wollongong Hospital - Endocrinology	14/04/2025	29/06/2025	0.00	Sample@assessor.com	Term Supervisor		
3	MED123EXAMPLE	WAG8934280	14/04/2025	29/06/2025	0.00				
4	trainee3@example.com	Fiona Stanley Hospital - Acute Medical Unit	14/04/2025	29/06/2025	0.00				
5									

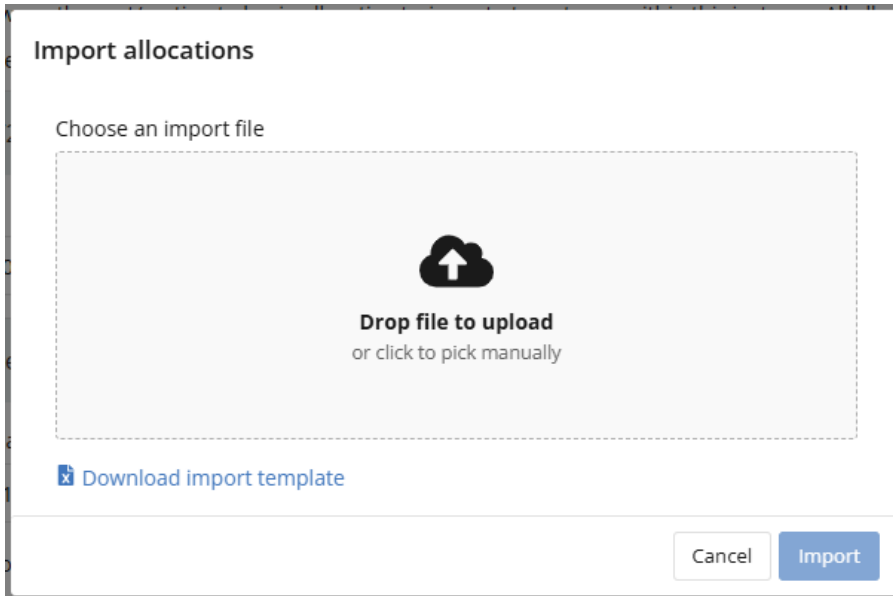
Uploading the Term Allocation Spreadsheet

- Once you have completed the term allocation spreadsheet, save it to your desktop or another local file location.
- Navigate back to the PGY Instance.

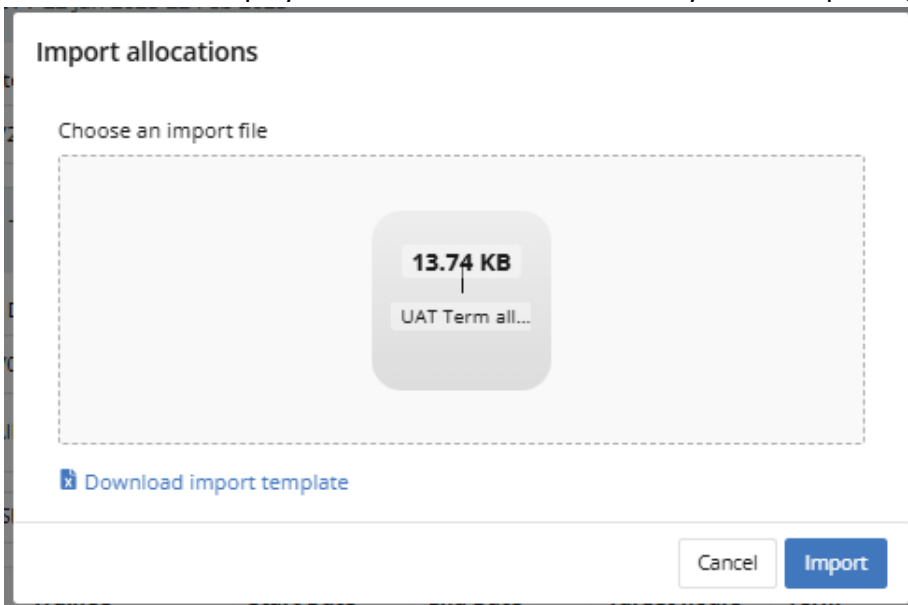
To upload the multi-term 'allocations import bulk' spreadsheet:

- Click on **Import allocations** located at the top right-hand side of the PGY Instance page.

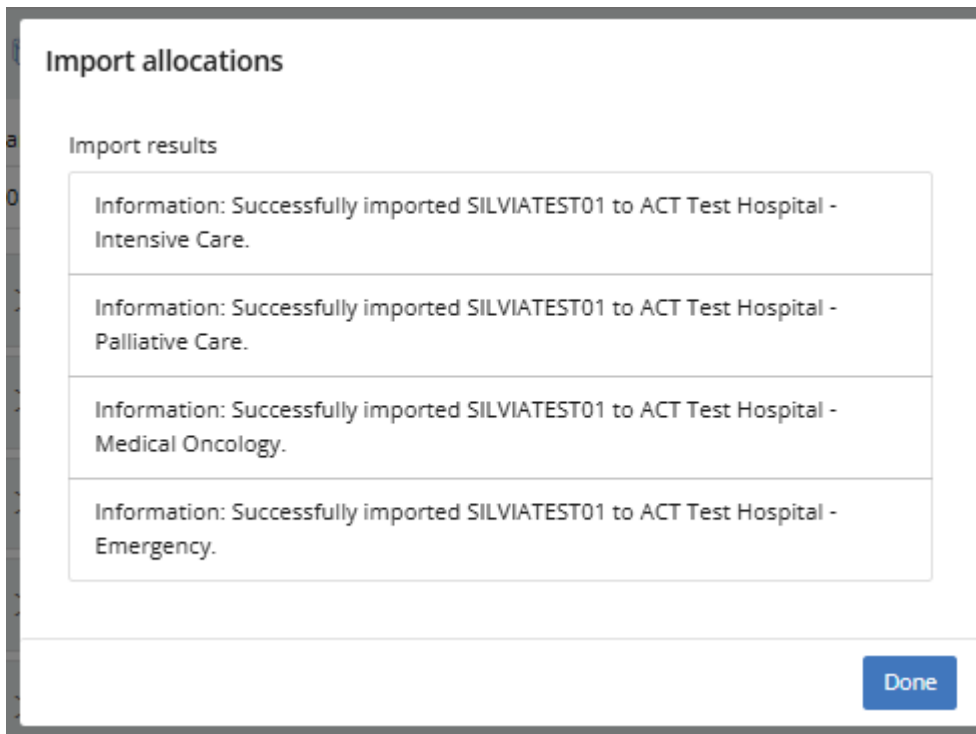
- Click the **Drop file to upload** icon to select the file you created with the multi-term allocations and then **Upload** to upload the file.



- The screen will display the size and name of the file you are importing. Click **Import**.



- If there are no issues with the data, you will see a notification that the data has been successfully imported. Click **Done**.



- Once the file has been uploaded successfully, a message will appear and the term allocations will appear within each of the term allocation tables under each term block.

Allocation Import Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY1 8 Jan 2025 2 Feb 2026

Start Date: 08/01/2025 End Date: 02/02/2026 Target Hours: 0

> Term 1 5 Feb 2025 13 May 2025 (11 forms)

▼ Term 2 14 May 2025 28 Jul 2025 (11 forms)

Start Date: 14/05/2025 End Date: 28/07/2025 Target Hours: 0 Grace Period (days): 7

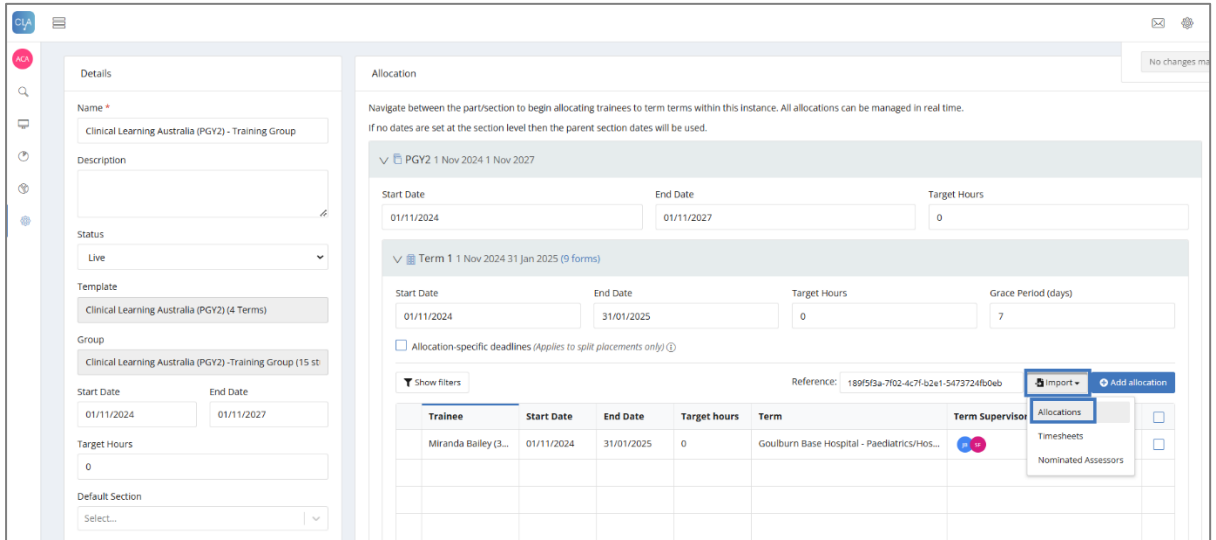
Allocation-specific deadlines (Applies to split placements only) ⓘ

 Reference: 318ead71-f707-43c1-bfb8-232476762bcb

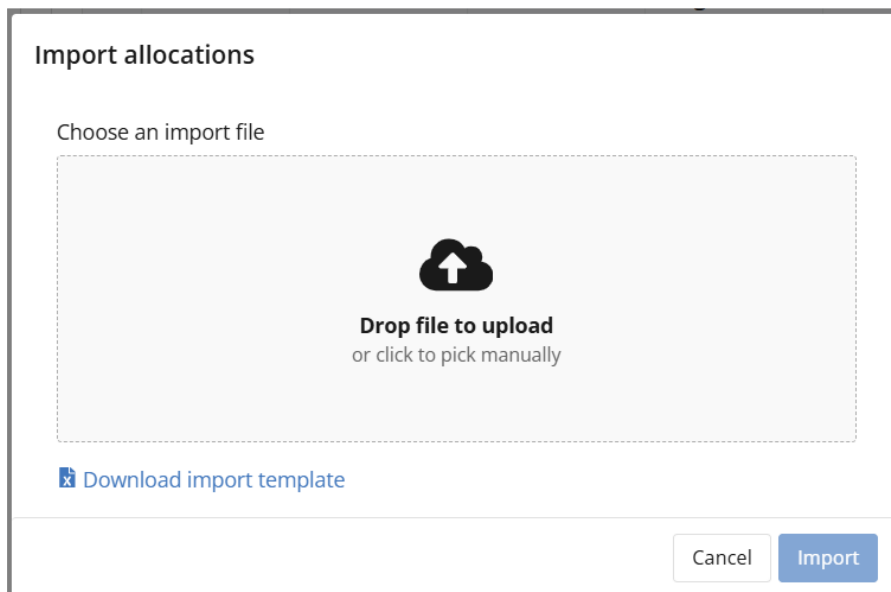
Trainee	Start Date	End Date	Term	Term Supervisors / Clinical Supervisors	<input type="checkbox"/>
34					
Test Trainee 34	14/05/2025	28/07/2025	ACT Test Hospital - Palliative Care	Leon Avery	<input type="checkbox"/>

To upload the single term 'allocations import' spreadsheet:

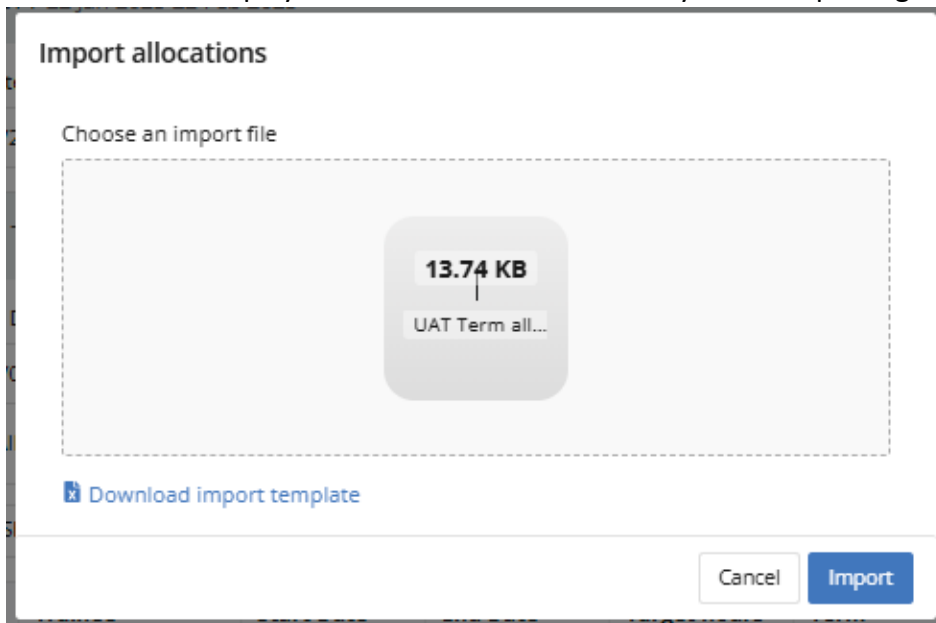
- Expand the Term section for the term you want to import allocations for.
- Above the term allocation table click **Import -> Allocations**.



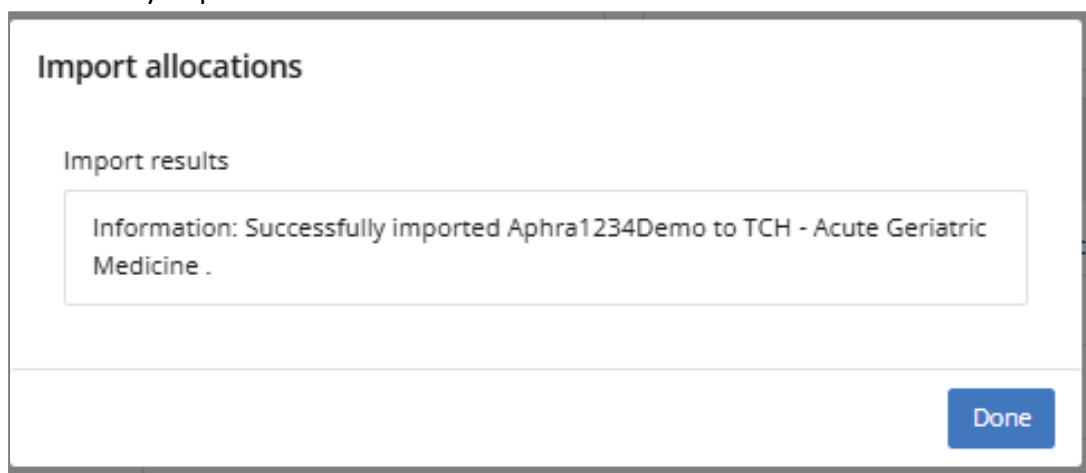
- Click on the **Drop file to upload** icon to select the file you created with the term allocations and then **Upload** to upload the file.



- The screen will display the size and name of the file you are importing. Click **Import**.



- If there are no issues with the data, you will see a notification that the data has been successfully imported. Click **Done**.



- Once you file has been successfully uploaded, the relevant term allocations will be visible in the table within the single term.

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY1 22 Jan 2025 22 Feb 2025

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0

Term 1 22 Jan 2025 22 Feb 2025 (10 forms)

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0 Grace Period (days): 0

Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters Reference: 318ef38e-85fd-4d70-8315-52dee02a9b6c Import Add allocation

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	
Example Doctor (A...	22/01/2025	22/02/2025	0	TCH - Acute Geriatric Medicine	Demo Term Supervisor	<input type="checkbox"/>

Previous Page 1 of 1 5 rows Next

Data validation

Regardless of whether you import the single or multi-term allocation spreadsheet, 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 these will be flagged on the screen for review and correction. Issues with data include:

- invalid Term Reference codes
- incorrect Ahpra number or email address for a Trainee
- invalid Term names or System IDs ('No provider found' error)
- a supervisor email does not exist in CLA yet ('Could not find user' error)
- multiple supervisors with the Term Supervisor role for a trainee allocation

Import allocations

Import results

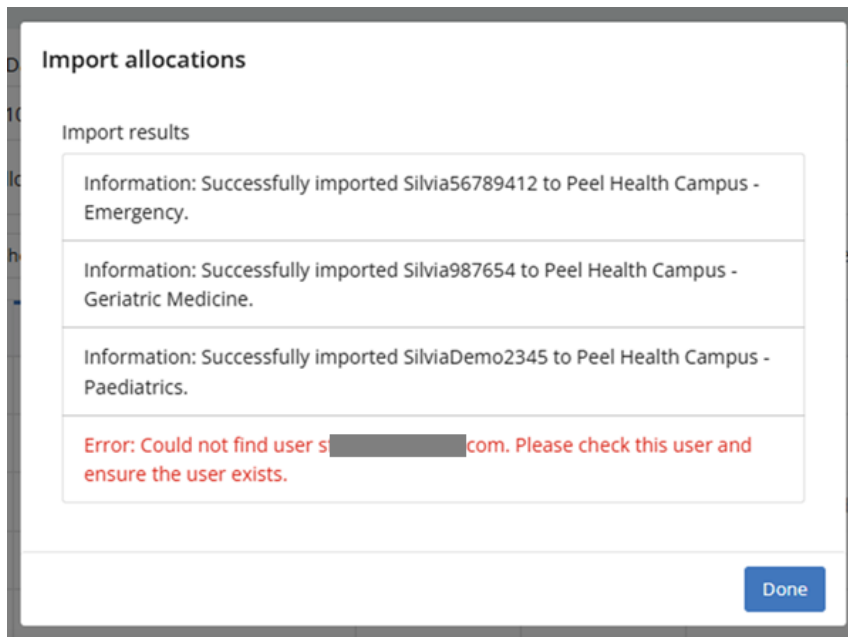
Error: Could not find user TESTAhpra123. Please check this user and ensure the user exists.

Error: Student Apha1234Demo - No provider found for GBH89336223412.

Done

Review your term allocation import spreadsheet, make necessary corrections, save the latest version and try to upload again. Some errors will allow the import for other trainees to go ahead. For example, a **No provider found** error for one term/trainee will allow the rest of the import to proceed and allocations to be created.

Take note of, or screenshots, of the red errors where the rest of the import rows display as 'Successfully Imported', resolve these errors and redo the import for the trainees that had an error or manual allocation.



2 Managing term allocations

2.1 Where to manage term allocations

- Term allocations can be updated as and when needed by administrator users with relevant permissions.
- To manage term allocations, navigate to the 'cog' icon on the left-hand menu bar and click **PGY Instances**.
- Search for and click on the PGY Instance you want to manage term allocations for.

Organisation	Template	Group	Start Date	End Date	Created	Edited	Status
ilio (DEMO ONLY) - Group 1	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 1	1 Jan 2024	31 Dec 2025	19 Jun 2024 14:13	28 Nov 2024 22:31	Live
ilio (PGY1) 2024 UAT	Clinical Learning Australia (PGY1) (4 Terms)	AMC UAT Testing PGY1	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:32	28 Nov 2024 22:20	Live
ilio (PGY1) 2024 UAT - Group	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 1	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:49	24 Sep 2024 13:24	Arch...
ilio (PGY1) 2024 UAT - Group	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 2	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:54	24 Oct 2024 14:32	Live
AMC National ePortfolio (PGY1) 2024 UAT - Group 3	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 3	7 Jan 2024	1 Feb 2025	13 Sep 2024 06:59	5 Nov 2024 10:34	Live
AMC National ePortfolio (PGY1) 2024 UAT - Group 4	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 4	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:01	24 Oct 2024 14:33	Live
AMC National ePortfolio (PGY1) 2024 UAT - Group 5	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 5	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:02	24 Oct 2024 14:33	Live
AMC National ePortfolio (PGY1) 2024 UAT - Group 6	Clinical Learning Australia (PGY1) (4 Terms)	amc-group 6	7 Jan 2024	1 Feb 2025	13 Sep 2024 07:04	24 Oct 2024 14:33	Live

- You will then be taken into that PGY Instance.

Clinical Learning Australia (PGY2) - Training Group

Admin > PGY Instances > Clinical Learning Australia (PGY2) - Tr...

Details

Name *
Clinical Learning Australia (PGY2) - Training Gro

Description

Status
Live

Template
Clinical Learning Australia (PGY2) (4 Terms)

Group
Clinical Learning Australia (PGY2) - Training Gro

Start Date
01/11/2024

End Date
01/11/2027

Allocation

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

> PGY2 1 Nov 2024 1 Nov 2027

Cumulative Tallies

No cumulative tallies added

Add new cumulative tally

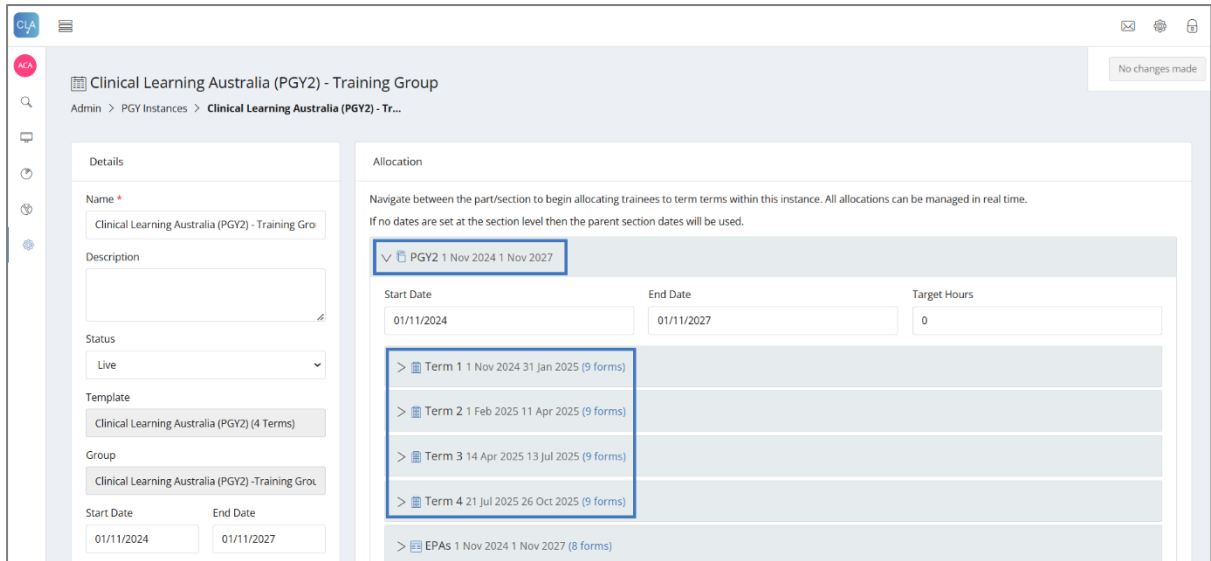
Outcome Statements

Version 2 - Prevocational Outcome Statements

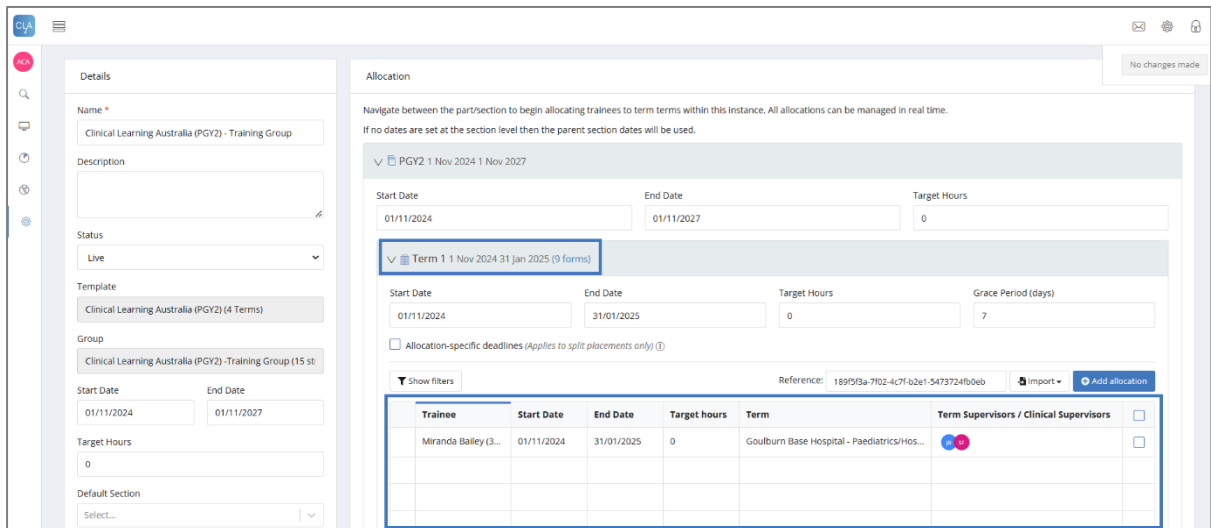
Remove

Add new Outcome Statements

- Click on the PGY block to expand and display the terms.



- Click on the relevant **Term** to expand and display the allocations table.



- Any updates that need to be made to a term allocation can be done either manually (one by one) by clicking on the term allocation to be changed or in bulk.

2.2 Manual updates

- Click on the Trainee / Term Allocation you wish to make changes to.
- A pop-up box will appear with the current information for that Trainee's term.

Update allocation - Miranda Bailey

Term
 Goulburn Base Hospital - Paediatrics/Hospital in the Home

Start Date * 01/11/2024 End Date * 31/01/2025

Target Hours
 0

Term Supervisors / Clinical Supervisors
 Add a new user...

Joe Bloggs
 holly.fowler+termsupervisor1@myknowle Clinical Supervisor

Nominated Assessors
 Please ensure the forms you want nominated assessors to access are fully set up **before** adding nominated assessors.

Add or create nominated assessor...

You have yet to assign any nominated assessors.

Delete Close Update

- You can then make any required changes to that Trainee’s allocation by selecting any of the fields available.
 - **Term** – Clicking into this field will allow you to type and search for the term you may want to update this Trainee to.
 - **Start/End Date** – Clicking into this field will pop up a calendar to allow you to select a start/end date you may need to amend.
Note: These date fields can also have the dates typed into them.
 - **Term Supervisors / Clinical Supervisors** – Clicking into this field will allow you to type and search for Term Supervisors and Clinical Supervisors that you may want to add to this Trainee’s term. After you select the Supervisor, select their relationship relevant to that Trainee.
 - You can edit existing Term Supervisors and Clinical Supervisors that are attached by changing the relationship they have to the trainee/allocation by clicking the dropdown that notes their role and updating it to be something else. Or you can delete existing Term Supervisors and Clinical Supervisors by clicking the bin icon to the right of the role dropdown.
 - **Nominated Assessors** - Ignore this field. This is not being used by CLA.

2.3 Bulk updates

Note: Bulk actions make modifying term allocations simpler when you’re making the same change to more than one Trainee.

- Click on the boxes to the right of Trainee’s term allocations that you wish to make changes to.

Allocation No changes made

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date: 01/11/2024 End Date: 01/11/2027 Target Hours: 0

Term 1 1 Nov 2024 31 Jan 2025 (9 forms)

Start Date: 01/11/2024 End Date: 31/01/2025 Target Hours: 0 Grace Period (days): 7

Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters Reference: 189f5f3a-7f02-4c7f-b2e1-5473724fb0eb Bulk actions (2) ▾

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	<input type="checkbox"/>
April Kepner (666...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - General Medici...	Joe Bloggs Approved	<input checked="" type="checkbox"/>
Miranda Bailey (3...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - Paediatrics/Hos...		<input checked="" type="checkbox"/>

- Click on the **Bulk actions** button above.

Allocation No changes made

Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.
If no dates are set at the section level then the parent section dates will be used.

PGY2 1 Nov 2024 1 Nov 2027

Start Date: 01/11/2024 End Date: 01/11/2027 Target Hours: 0

Term 1 1 Nov 2024 31 Jan 2025 (9 forms)

Start Date: 01/11/2024 End Date: 31/01/2025 Target Hours: 0 Grace Period (days): 7

Allocation-specific deadlines (Applies to split placements only) ⓘ

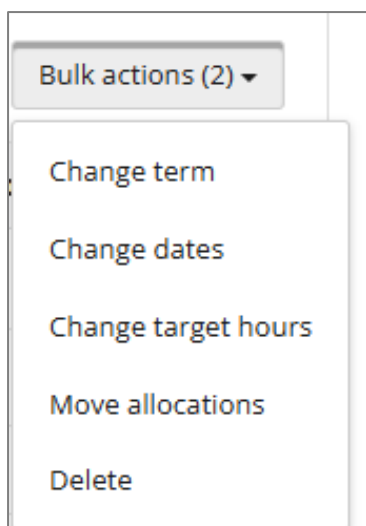
Show filters Reference: 189f5f3a-7f02-4c7f-b2e1-5473724fb0eb Bulk actions (2) ▾

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Sup	<input type="checkbox"/>
April Kepner (666...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - General Medici...	Joe Bloggs Approved	<input type="checkbox"/>
Miranda Bailey (3...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - Paediatrics/Hos...		<input type="checkbox"/>

Bulk actions (2) ▾

- Change term
- Change dates
- Change target hours
- Move allocations
- Delete

This will display a list of options that you can perform with the bulk actions.



- **Change term** – This will allow you to type and search for the term you may want to update the selected Trainees to.
- **Change dates** – This will allow you to update the start and end dates for the terms for those selected Trainees.
- **Change target hours** – This field can be ignored. This is not being used by CLA.
- **Move allocations** – This would only be used if you happen to create term allocations in an incorrect term and you need to move them to the correct term.
- **Delete** – This will allow you to delete the term allocations for those selected Trainees.

Bulk updating Supervisors

You can update supervisors already existing for a trainee’s term allocation. If you’re needing to add new supervisors to a large number of trainees within a cohort group, you can use either of the bulk import spreadsheet processes noted in section 1.3. Ensure that the trainees term and start and end dates are the same in the import spreadsheet as those in CLA and the import will not create a new or split term - it will add supervisors only.

If you’re needing to remove or update the relationship of a supervisor to a trainee, you will need to go into the relevant term, locate the trainee’s term allocation, click the trainees name, and update the relevant information.

2.4 Managing term allocations for specific scenarios

Split terms:

CLA can accommodate situations where a PGY doctor has multiple allocations within a single term. This includes situations where they have one allocation for part of the term and another for the remainder (e.g. ED for 5 weeks and Gen Med for 5 weeks).

Term allocation display of a split term:

	Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	<input type="checkbox"/>
▼	Miranda B...	03/02/2025	03/05/2026	0	Multiple (2)		
		03/02/2025	28/03/2025	0	Goulburn Base Hospital - ...		<input type="checkbox"/>
		29/03/2025	03/05/2026	0	Goulburn Base Hospital - ...		<input type="checkbox"/>

Include the multiple allocations to the Term Allocation Upload spreadsheet with the respective start and end dates or manually add the allocations using the **Add Allocations** function.

Note: If bulk uploading more than one term allocation for a Trainee, you will need to create a new line for the same Trainee for the other term allocations they may require. See example below.

A	B	C	D	E	F	G
StudentId	Provider SystemId or Short Code	StartDate	EndDate	Target Hours	AssessorEmail1	AssessorRelationship1
trainee1@example.com	Wollongong Hospital - Endocrinology	14/04/2025	22/05/2025	0.00	Sample@assessor.com	Term Supervisor
trainee1@example.com	Wollongong Hospital - Hospital in the Home (HITH)	23/05/2025	29/06/2025	0.00		

Split contracts:

Where a Trainee works across two organisations during a clinical year, there are two scenarios that can take place.

- If the trainee continues to be 'employed' by Health Site A but rotates to Health Site B on secondment for a specific term, then Site A continues to maintain 'ownership' of the trainee and will have access to their record across all sites that they are assigned to. Other sites that they rotate to will only have access to the trainee's record for the duration that the trainee is 'seconded' to or working within their term.
 - Add this trainee to your term allocations as usual for all terms and allocate the trainee to Site B for the required term.
- If the trainee's employment / contract transfers from one site to another, it would be necessary to transfer them to the new site's organisation within CLA (i.e. change the Organisation to which they are attached in the Users profiles – see the [Creating and managing users quick reference guide](#)) so that the new site becomes their primary 'owning' organisation. If the trainee is moving to a new organisation within the same state/territory, then a state administrator user with relevant permissions across both sites can manage the change in 'ownership'. If moving interstate, then this change needs to be made by the Nationwide System Administrator, i.e. contact CLA Support. You will need to provide local DMS/EDMS approval at the new site for the trainee's account to be transferred to the new organisation.
- If you have a trainee on split contracts:
 - Site A: Allocate the trainee to the terms for your organisation as per usual.

- Statewide or Nationwide Administrator (must be notified by the sites): When the trainee transfers Site B, update the PGY doctor’s Organisation in Users to the new site.
- Site B: Add the trainee to the relevant cohort Group and assign the trainee Term Allocations for their site in PGY Instance.
- **Note:** The trainee’s record will transfer with them to the new site and users with relevant permissions (administrator users, DCTs etc.) in the new site will be able to view prior assessments for that trainee even where these have been completed in a previous site.

3 Term Allocations Dashboard

3.1 What is the Term Allocations Dashboard?

Term Allocations represent the assignment of trainees to specific Terms for defined time periods. The new Dashboard represents an overview of all trainee allocations across all PGY instances.

3.2 Viewing Allocations

Access the **Terms Allocations** Dashboard from the **Admin** side-bar menu.

THIS IS UAT, not the Live CLA site.

Term Allocations

Admin > Term Allocations

Term allocations assign trainees to a specific term for a defined period of time. Each allocation links a trainee to a term with a pgy, part, and section, date range, and target hours. Use the search box to find allocations by term name, trainee name, root term name, pgy name, part name, or section name. Note that search matches from the start of each field, not anywhere within it. Use the filters below for more precise filtering by specific term, trainee, pgy, date range, or custom properties.

Root Term	Term	PGY	Part	Section	Trainee	Start Date	End Date	Term Supervisors / Clinical Supervisors	Created
--	Tilpa Riverlands Test Hospital...	**Silvia 8.7 UAT - PGY2 - 2026	PGY2	Term 2	Jano Salthor (AHPRA0004)	13 Apr 2026	21 Jun 2026	1	25 Mar 2026
--	Mater Hospital Sydney - Ortho...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 3	Barney TraineeN1	1 Aug 2026	30 Nov 2026	0	25 Mar 2026
--	Dubbo Subacute Unit - Dubbo...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 3	Ned TraineeN1	1 Aug 2026	30 Nov 2026	0	25 Mar 2026
--	Dubbo Hospital - General Me...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 3	Charles TraineeN1	1 Aug 2026	30 Nov 2026	0	25 Mar 2026
--	Royal Prince Alfred Hospital - ...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 3	Moe TraineeN1	1 Aug 2026	30 Nov 2026	0	25 Mar 2026
--	Royal Prince Alfred Hospital - ...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 3	Edna TraineeN1	1 Aug 2026	30 Nov 2026	0	25 Mar 2026
--	Royal Prince Alfred Hospital - ...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 4	Barney TraineeN1	1 Dec 2026	1 Jan 2027	0	25 Mar 2026

The allocations list displays information in a sortable, paginated table, including:

- **Root Term** – The top-level term. **Note.** CLA has a flat, single level term structure so you won’t see anything populated in this column
- **Term** – The location of that trainee’s allocation for that term
- **PGY** – The name of the trainee’s PGY Instance
- **Part** – The trainee’s PGY they are currently on

- **Section** – The specific term the trainee is on for that allocation
- **Trainee** – The trainee’s name and AHPRA number
- **Start Date / End Date** – Allocation duration
- **Term Supervisors/Clinical Supervisors** – Number of users assigned. **Note.** Clicking this will open a pop-up window where you can see who is assigned to that trainee
- **Created** – When the allocation was created

3.3 Creating an Allocation

To create an allocation, select **Create Term Allocation** and complete the required fields:

THIS IS UAT, not the Live CLA site.

Term Allocations

Admin > Term Allocations

Term allocations assign trainees to a specific term for a defined period of time. Each allocation links a trainee to a term with a pgy, part, and section, date range, and target hours. Use the search box to find allocations by term name, trainee name, root term name, pgy name, part name, or section name. Note that search matches from the start of each field, not anywhere within it. Use the filters below for more precise filtering by specific term, trainee, pgy, date range, or custom properties.

Search... Add filter Import term allocations Export term allocation Create term allocation

<input type="checkbox"/>	Root Term	Term	PGY	Part	Section	Trainee	
<input type="checkbox"/>	---	Mater Hospital Sydney - Orth...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 1	Ned TraineeN1	...
<input type="checkbox"/>	---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Chris TraineeMATER	...
<input type="checkbox"/>	---	Tilpa Riverlands Test Hospital...	NSW - Network 1 - PGY1 - 2026	PGY1	Term 1	Bart TraineeN1	...
<input type="checkbox"/>	---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 2	Peter TraineeMATER	...
<input type="checkbox"/>	---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Kath TraineeMATER	...
<input type="checkbox"/>	---	Mater Hospital Sydney - Gen...	NSW - Mater Hospital Sydney...	PGY1	Term 3	Vicky TraineeMATER	...

1. **Trainee*** – Select the trainee (cannot be changed once saved)
2. **Term*** – Select the allocation location (only terms that allow allocations are shown)
3. **PGY*** – Select from the trainee’s PGY instance they are linked to. **Note.** The PGY must exist in a ‘draft’ or ‘live’ status to show
4. **PGY Part*** – Filtered based on the selected PGY instance
5. **PGY Section*** – Filtered based on the terms available to choose from within that PGY instance
6. **Start Date*** – Must be before end date

7. **End Date*** – Must be after start date
8. **Target Hours** – Leave blank as this isn't relevant to CLA
9. **Assessors** – Assign assessors with relationship types (see note below)

Note. Anything marked * indicates the field is mandatory

3.4 Assigning Term Supervisors/Clinical Supervisors

Term Supervisors/Clinical Supervisors can be added in two ways:

- **From available users** – Users already pre linked to the term
- **Ad-hoc search** – Add any user, even if they are not already pre linked to the term

Each user must be assigned a **relationship type** (e.g., **Term Supervisor/Clinical Supervisor**), which defines their role and permissions for that specific allocation.

3.5 Editing Allocations

You can edit an allocation, by clicking on the three dots (...) to the right of the allocation and selecting **edit term allocation**.

THIS IS UAT, not the Live CLA site.

Term Allocations
Admin > Term Allocations

Term allocations assign trainees to a specific term for a defined period of time. Each allocation links a trainee to a term with a pgy, part, and section, date range, and target hours. Use the search box to find allocations by term name, trainee name, root term name, pgy name, part name, or section name. Note that search matches from the start of each field, not anywhere within it. Use the filters below for more precise filtering by specific term, trainee, pgy, date range, or custom properties.

Search... Add filter Import term allocations Export term allocations Create term allocation

Root Term	Term	PGY	Part	Section	Trainee	
---	Mater Hospital Sydney - Orth...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 1	Ned TraineeN1	...
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Chris TraineeMATER	...
---	Tilpa Riverlands Test Hospital...	NSW - Network 1 - PGY1 - 2026	PGY1	Term 1	Bart TraineeN1	...
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 2	Peter TraineeMATER	...
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Kath TraineeMATER	...
---	Mater Hospital Sydney - Gen...	NSW - Mater Hospital Sydney...	PGY1	Term 3	Vicky TraineeMATER	...

Available updates include:

- Changing the **term**
- Updating **PGY instance or PGY part**
- Modifying **start and end dates**
- Adding/removing **Term Supervisors/Clinical Supervisors** or changing their relationship types
- Target Hours is not relevant to CLA, please leave blank
- Deleting the allocation

Note: The trainee cannot be changed after creation, if the trainee's name needs changing you will need to delete the old allocation and create a new one.

3.6 Filtering and Searching

The screenshot shows the 'Term Allocations' page in a web application. On the left is a navigation sidebar with 'Admin' and 'Term Allocations' highlighted. The main content area has a search bar and a dropdown menu for filters. The dropdown menu is open, showing 'DEFAULT PROPERTIES' and 'CUSTOM PROPERTIES'. The table below shows a list of term allocations with columns for Part, Section, Trainee, Start Date, and End Date.

Part	Section	Trainee	Start Date	End Date
PGY2 - 2026	PGY1	Term 1	Ned TraineeN1	1 Apr 2026 - 7 Apr 2026
ital Sydney...	PGY1	Term 1	Chris TraineeMATER	1 Jan 2026 - 31 Mar 2026
PGY1 - 2026	PGY1	Term 1	Bart TraineeN1	1 Jan 2026 - 31 Mar 2026
ital Sydney...	PGY1	Term 2	Peter TraineeMATER	1 Apr 2026 - 30 Jun 2026
ital Sydney...	PGY1	Term 1	Kath TraineeMATER	1 Jan 2026 - 31 Mar 2026
ital Sydney...	PGY1	Term 3	Vicky TraineeMATER	1 Jul 2026 - 30 Sep 2026
ital Sydney...	PGY1	Term 2	Vicky TraineeMATER	1 Apr 2026 - 30 Jun 2026
ital Sydney...	PGY1	Term 4	Chris TraineeMATER	1 Oct 2026 - 31 Dec 2026
ital Sydney...	PGY1	Term 4	Chris TraineeMATER	1 Oct 2026 - 31 Dec 2026

You can filter allocations using:

Default filters:

- Root Term - **Note.** CLA has a flat, single level term structure so you don't need to use this filter
- Term
- Term Type

- Trainee
- PGY
- Term Supervisor / Clinical Supervisor
- Start / End Date
- Created date

Custom filters:

- Additional CLA specific properties also appear to filter on

3.7 Bulk Actions

You can select multiple allocations and apply bulk actions, from the Dashboard:

The screenshot shows the 'Term Allocations' dashboard. On the left is a navigation sidebar with 'Admin' and 'Term Allocations' highlighted. The main content area displays a table of allocations with columns for Root Term, Term, PGY, Part, Section, Trainee, Start Date, and End Date. Two rows are selected, and a 'Bulk actions (2)' dropdown menu is visible in the top right of the table area.

<input type="checkbox"/>	Root Term	Term	PGY	Part	Section	Trainee	Start Date	End Date	
<input checked="" type="checkbox"/>	Mater Hospital Sydney - Orth...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 1		Ned TraineeN1	1 Apr 2026	7 Apr 2026	...
<input checked="" type="checkbox"/>	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1		Chris TraineeMATER	1 Jan 2026	31 Mar 2026	...
<input type="checkbox"/>	Tilpa Riverlands Test Hospital...	NSW - Network 1 - PGY1 - 2026	PGY1	Term 1		Bart TraineeN1	1 Jan 2026	31 Mar 2026	...
<input type="checkbox"/>	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 2		Peter TraineeMATER	1 Apr 2026	30 Jun 2026	...
<input type="checkbox"/>	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1		Kath TraineeMATER	1 Jan 2026	31 Mar 2026	...
<input type="checkbox"/>	Mater Hospital Sydney - Gen...	NSW - Mater Hospital Sydney...	PGY1	Term 3		Vicky TraineeMATER	1 Jul 2026	30 Sep 2026	...
<input type="checkbox"/>	Mater Hospital Sydney - Orth...	NSW - Mater Hospital Sydney...	PGY1	Term 2		Vicky TraineeMATER	1 Apr 2026	30 Jun 2026	...

- **Change Term** – Move allocations to a different term
- **Change Target Hours** – This isn't relevant for CLA, please ignore.
- **Change Dates** – Adjust start/end dates
- **Move** – Move allocations from one PGY instance to another. **Note.** This would only generally only be used if you added allocations to an incorrect instance initially
- **Archive/Unarchive** – Bulk archive (hide allocations for the listing so they are no longer usable or visible) or bulk unarchive (unhide allocations that were previously archived to reappear in the listing, so they are once again usable and visible). **Note.** If

needing to unhide archived allocations, you will need to click the 'show archived' button at the bottom of the page to allow them to be visible to select

- **Delete** – Permanently remove allocations

3.8 Importing allocations in bulk

Term allocations can be created in bulk using the import functionality available within the allocations dashboard. This allows multiple trainee allocations to be uploaded at once using a spreadsheet – across multiple PGY Instances.

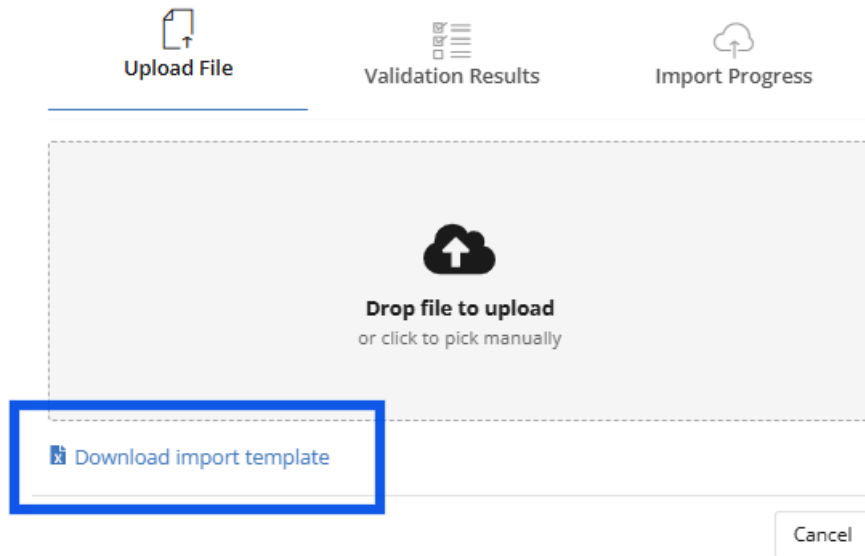
The screenshot shows the 'Term Allocations' dashboard. The sidebar menu on the left has 'Admin' and 'Term Allocations' highlighted. The main content area shows a table of term allocations with columns: Root Term, Term, PGY, Part, Section, Trainee, Start Date, and End Date. A modal window for 'Import term allocations' is open, and the 'Import term allocations' button is highlighted.

Root Term	Term	PGY	Part	Section	Trainee	Start Date	End Date
---	Mater Hospital Sydney - Orth...	NSW - Network 1 - PGY2 - 2026	PGY1	Term 1	Ned TraineeN1	1 Apr 2026	7 Apr 2026
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Chris TraineeMATER	1 Jan 2026	31 Mar 2026
---	Tilpa Riverlands Test Hospital...	NSW - Network 1 - PGY1 - 2026	PGY1	Term 1	Bart TraineeN1	1 Jan 2026	31 Mar 2026
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 2	Peter TraineeMATER	1 Apr 2026	30 Jun 2026
---	Tilpa Riverlands Test Hospital...	NSW - Mater Hospital Sydney...	PGY1	Term 1	Kath TraineeMATER	1 Jan 2026	31 Mar 2026
---	Mater Hospital Sydney - Gen...	NSW - Mater Hospital Sydney...	PGY1	Term 3	Vicky TraineeMATER	1 Jul 2026	30 Sep 2026
---	Mater Hospital Sydney - Orth...	NSW - Mater Hospital Sydney...	PGY1	Term 2	Vicky TraineeMATER	1 Apr 2026	30 Jun 2026

To import allocations:

- Navigate to the **Admin** side bar menu, then **Term Allocations**
- Click on **Import term allocations**, top right
- Download the Import template, bottom left from the modal window

Import Allocations



Preparing the import file

Before importing, you must complete the import spreadsheet.

The following fields are required:

- *** User ID** – Trainee identifier (e.g. email or AHPRA number)
- *** Term** – The term name or System ID
- **PGY** – The trainee’s enrolled PGY instance
- *** Section Name/Reference** – The section name, where the allocation will sit
- **Start Date** – Allocation start date
- **End Date** – Allocation end date
- **Supervisor Email** – Email address of supervisor
- **Supervisor Relationship** – Term Supervisor or Clinical Supervisor

Notes:

- Anything marked ***** indicates the field is mandatory
- Term names must match exactly as configured in the system, or use the System ID (this is located underneath the term name in the terms area)
- Supervisors must already exist as users before importing
- Additional supervisors can be added by including extra columns (e.g. Relationship 2 Identifier / Relationship 2 Relationship)

Importing the file

To upload the spreadsheet:

- Select or drag and drop the completed file into the **Import Allocations** modal window
- Click **Import**

If the file is valid, a confirmation message will be displayed and allocations will be created.

Data validation and errors

During import, the system validates all data in the file.

Common errors include:

- Invalid term name or System ID
- Missing or incorrect trainee identifiers
- Supervisor email not found
- Trying to assign more than one Term Supervisor to one trainee

If errors occur:

- Review the error messages displayed
- Update the spreadsheet
- Re-upload the corrected file

Notes:

- Valid rows may still import successfully even if some rows fail
- Failed rows will need to be corrected and re-imported

After import

Once successfully uploaded:

- Allocations will appear in the allocation's dashboard
- Trainees will be visible within their assigned terms
- Any linked supervisors will be attached to the allocation

Key notes:

- Bulk import can be used for both single-term and multi-term allocations

- You can re-import data to add supervisors to existing allocations (if dates and term match)

4 Support

For local set up issues, contact your MEU Administrator.

For system queries, refer to the [CLA website](#), user guides and support contacts.