

Clinical Learning Australia

Training Guide



QUICK REFERENCE GUIDE

MANAGING GUEST ASSESSORS IN CLINICAL LEARNING AUSTRALIA

This Quick Reference Guide provides an overview of how the Guest Assessor role works in Clinical Learning Australia (CLA). It explains how to identify and manage Guest Assessor accounts in CLA.

Contents

1	What is the Guest Assessor role?	3
2	How does the Guest Assessor workflow work?	3
3	Viewing and managing Guest Assessors	4
4	What happens after a Guest Assessor is approved in CLA?	9
5	Support	9

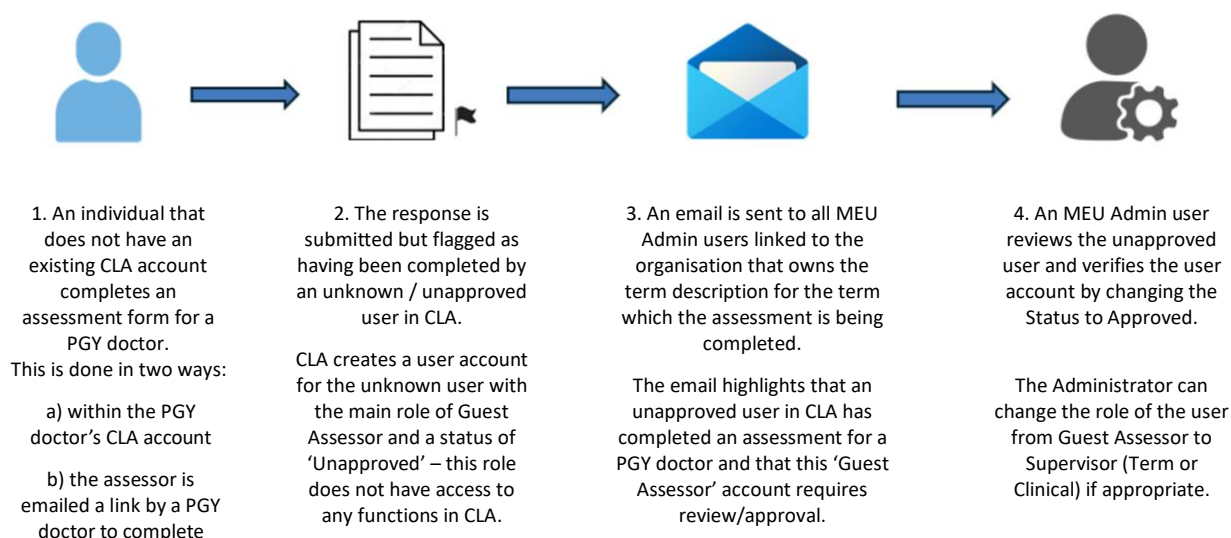
1 What is the Guest Assessor role?

The **Guest Assessor** role is automatically assigned to anyone who undertakes an assessment for a prevocational doctor that does not yet have an existing account in Clinical Learning Australia (CLA).

A Guest Assessor account is created in the following circumstances:

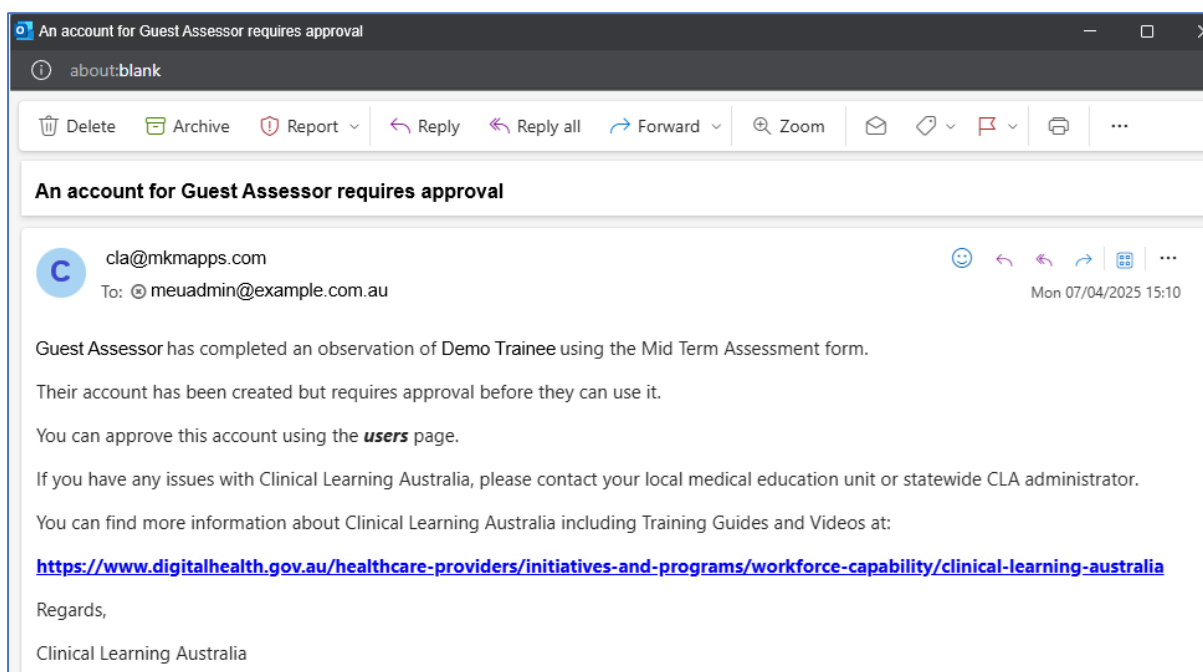
- a) An assessment, such as an EPA or Mid Term Assessment, is completed in the prevocational (PGY) doctor's account and the name and email address of the relevant assessor are manually entered into the assessment form.
- b) The prevocational doctor (or another CLA user) emails an assessment form to an individual to complete, using either the 'Email' function to send a blank form or 'Email for Later' function to send a partially completed form, and that individual does not currently have a user account in CLA.

2 How does the Guest Assessor workflow work?



3 Viewing and managing Guest Assessors

When a Guest assessor completes an Assessment form for a prevocational doctor, an email is automatically sent to Administrators at the organisation that the term is owned by notifying them that an assessment has been completed by an unknown assessor.



CLA also creates a new account for this Guest Assessor in the Users screen. The role applied to this account is Guest Assessor and the Status of the user defaults to 'Unapproved'.

<input type="checkbox"/>	Name	Email Address	AHPRA Number	Role	Organisation	Groups	Created	Status	
<input type="checkbox"/>	Guest Assessor	GuestAssessor@example.com	---	Guest Assessor	Canberra Health Services	0	11 Mar 2025	Unapprove...	...

The Guest Assessor role has no privileges in CLA. Users with this role may be able to activate CLA accounts and login, but they do not have access to any information in CLA, including forms they have completed and trainees they are linked to.

Additionally, CLA adds the Guest Assessor to the Trainee's term allocation for the term the form was completed for as a Clinical Supervisor.

Update allocation - Demo Trainee

Term
 Liverpool Hospital - Emergency

Start Date * 03/02/2025 End Date * 06/04/2025

Target Hours
 0

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

DS Demo Supervisor
 DemoSupervisor@example.com Term Supervisor

GA Guest Assessor
 GuestAssessor@example.com 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

To find Unapproved Guest Assessors for your organisation

- Navigate to the 'cog' icon on the left-hand menu bar and click 'Users'
- Click the 'Add Filter' button

Users
Admin > Users

Import users Export users Create user

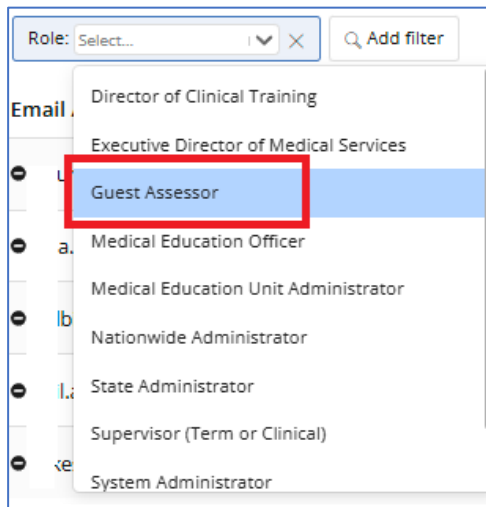
Email Address	AHPRA Number	Role	Organisation
holly.fowler+amcts1@myknowledgemap.com	---	Supervisor (Term or Clinical)	Canberra Health Services
holly.fowler+amcts1@myknowledgemap.com	---	Supervisor (Term or Clinical)	Canberra Health Services
holly.fowler+trainings1@myknowledgemap.com	123456790	Trainee	Canberra Health Services
GuestAssessor@example.com	---	Guest Assessor	Canberra Health Services

- In the dropdown box that appears, select **Role**.

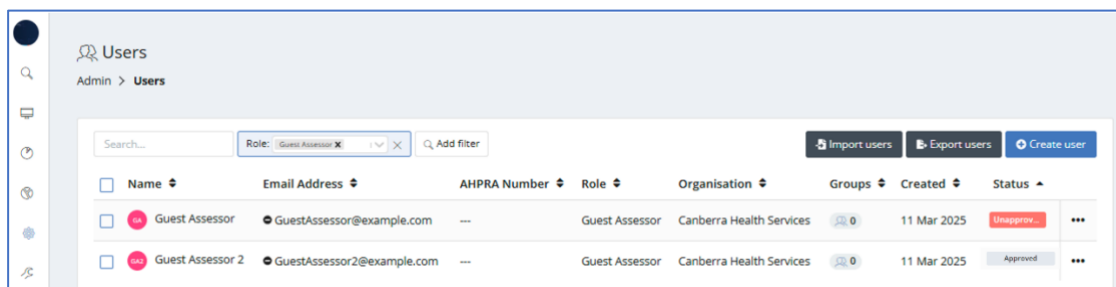
Add filter

Organisation
 Group
Role
 Status
 Created on
 Verified
 Jurisdiction

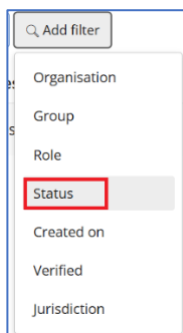
- In the Role filter, select **Guest Assessor**.



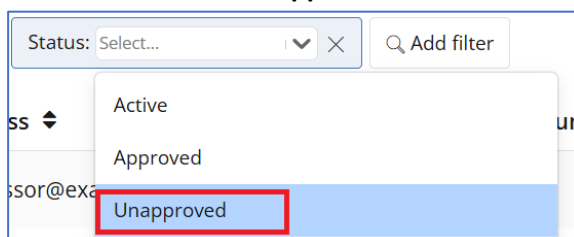
- This will display all users with the Guest Assessor role that have been created at your organisation level and those organisations below your organisation's level in the hierarchy.



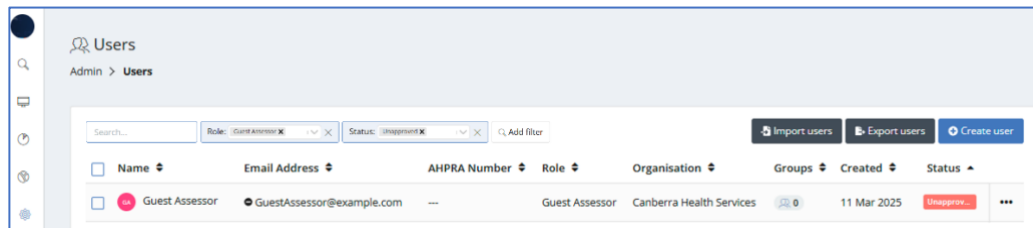
- Click the 'Add Filter' button again and select **Status**.



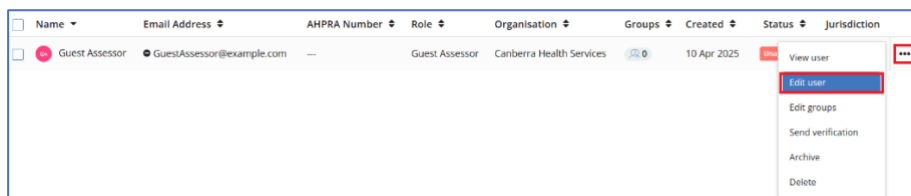
- Select the Status of **Unapproved**.



- This will display all the Guest Assessors for your organisation and below that have a status of Unapproved.



- Review the list of Unapproved Guest Assessors.
- For assessors that are valid for your site, click the three dots to the right of the user's row and select **Edit user**.



- Change their Status to **Approved**.

The screenshot shows the 'Update User - Guest Assessor' form. It has three tabs: 'Basic Info', 'Custom Properties', and 'Integration'. The 'Basic Info' tab is active. Fields include: Organisation (Canberra Health Services), First Name (Guest), Last Name (Assessor), Email (GuestAssessor@example.com), Other Emails (with an 'Add other email' button), Main Role (Guest Assessor), and Status. The 'Status' dropdown menu is open, showing options: Unapproved, None, Active, Approved (highlighted with a red box), and Unapproved. At the bottom right, there are 'Cancel' and 'Update' buttons.

Note: Status is not needed for any other user role types, only for the Guests Assessor role. All other role types default to a Status of None and do not need to be changed.

- If the user is not a valid user, leave their account status as Unapproved and follow up with the prevocational doctor or DCT. Note, forms can be edited or deleted if entered by unauthorised users.
- Modify other details of the user, if necessary, for instance:
 - Name – if entered incorrectly or partially displaying, e.g. Dr Smith
 - Email address – if entered incorrectly

Important – where changing the email address due to incorrect entry, it is recommended to contact the guest assessor to validate that they did complete form(s) for the PGY doctor(s), as the assessor would not have received a confirmation email of having completed forms.
 - Main role – you can change this to Supervisor (Term or Clinical) if the user is a regular and authorised assessor. This will allow them to login to CLA, see PGY doctors that they have completed forms for using this email address because they have been linked to them as a Clinical Supervisor for this term. When changing their role from Guest Assessor to another role, send the user a Verification email from CLA them to activate their account.
 - Jurisdiction (State) for them on the Custom Properties tab and click Update.

See the quick reference guide [Creating and Managing Users](#) for more information.

Using Reports to see forms completed by Guest Assessors:

You can use the Detailed Response Report or Completion Report By Tags -> Format: Completion Details to see all completed forms and the names and/or email addresses of the completing assessors.

Export the reports to Excel and use filters and Excel features to find by name or email form completed by users who are guest assessors for your site.

4 What happens after a Guest Assessor is approved in CLA?

Guest Assessors created by a prevocational doctor emailing them an assessment form will not have access to login to CLA. The approval process simply identifies that they are a verified Assessor and their assessment of the Trainee is accepted.

If the Guest Assessor requires ongoing access to CLA to provide future assessments for one or more prevocational doctors, then the administrator will need to change the 'Main role' in their user account to another role type e.g. Supervisor (Term or Clinical) and click 'Send verification' to generate a welcome email prompting them to login. They will also need to be linked to relevant prevocational doctor via the Term Allocations process in a PGY Instance (see the Quick Reference Guide [Creating and Managing Term Allocations](#)).

Once a Guest Assessor has been verified, the Guest Assessor can complete assessments for that PGY doctor and other PGY doctors in the future without their submissions being flagged as unapproved.

5 Support

If you require any support you can find contact details for the national CLA system administrator as well as relevant state based system administrators on the [CLA website](#).