

Clinical Learning Australia

Training Guide



QUICK REFERENCE GUIDE

HOW SUPERVISORS ARE MANAGED IN v8.7

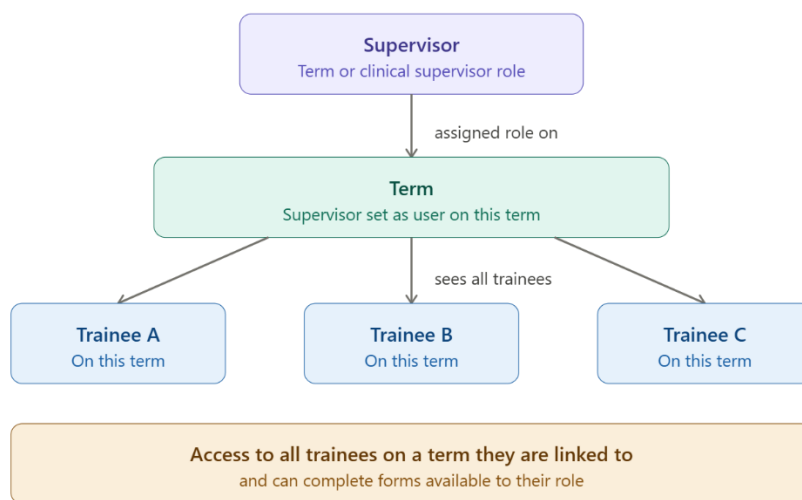
This Quick Reference Guide provides an overview of how Term and Clinical Supervisors are managed in Clinical Learning Australia (CLA) in v8.7.

1 Introduction

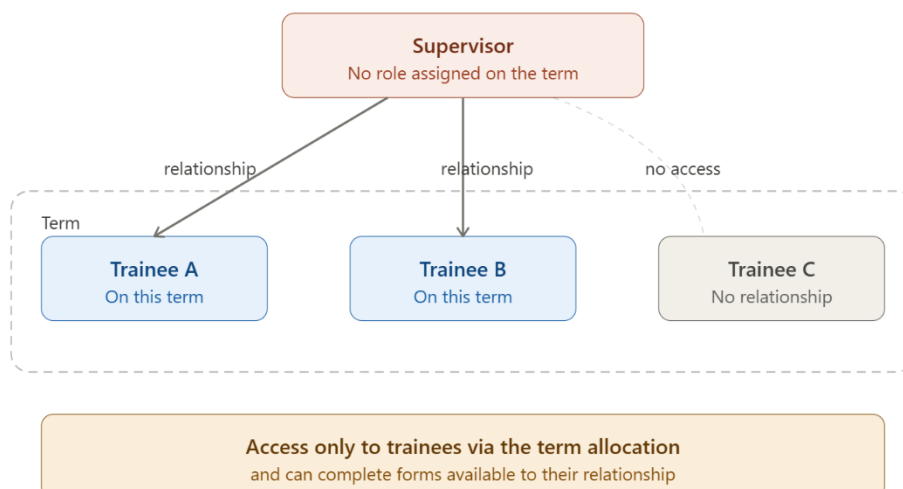
v8.7 of CLA, provides Medical Education Unit (MEU) Administrators with more robust and flexible ways for managing Term and Clinical Supervisors. How Term and Clinical Supervisors are setup and managed has changed from the prior version.

2 Role vs Relationship

Model 1 - Role-based access is the new v8.7 approach where a supervisor is assigned a role to the term itself, giving them automatic access to all trainees that are on a live, active term that they're attached to. This will be the main and advised approach to take.



Model 2 - Relationship-based access is the existing approach where a supervisor is linked to specific individual trainees through the term allocation, giving targeted access rather than term-wide access.



Both approaches are valid and MEUs can use either of the models or a mix of both depending on their requirements.

3 Dashboard View

The v8.7 dashboard view changes have simplified who you see and where on the dashboard.

Scenario 1

You are set up as:

- A **Clinical Supervisor** role against a term (Model 1), and
- A **Term Supervisor** relationship linked to a specific trainee’s term allocation (Model 2).

What You will see on the Dashboard

- Your **Clinical Supervisor** role appears on the **left** (person icon).
- Your **Term Supervisor** relationship appears on the **right** (handshake icon).

How Access Works

- You **do not need to toggle** between your role and relationship.
- By **default**, your **Clinical Supervisor** role is active.
- Any **additional access from your Term Supervisor** relationship is automatically applied when you view the linked trainee.

What this means for you?

Your primary role is always displayed, and relationship-based access is seamlessly added when required—no manual switching is needed.

THIS IS UAT, not the Live CLA site.

Trainees (4) Updated a few seconds ago

ACT Test Hospital - VQ - PGY2 2026 (2 Feb 2026 to 31 Jan 2027)

ACT Test Hospital - VQ - PGY2 2026

Trainee			Term 1			Term 2			Term 3		
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK
Maggie Simpson	Canberra Hea...	---	Not completed	SA MTA CL	0 0	Not completed	SA MTA CL	0 0	Not completed	SA MTA CL	0 0

Page 1 of 1 | 5 rows

Current/Most recent section | Not completed | Threshold not met | Completed | Past deadline

Scenario 2

You are set up as:

- A **Clinical Supervisor** role against a term (Model 1), and
- A **Term Supervisor** relationship linked to a specific trainee's term allocation (Model 2).

What You Will See on the Dashboard

- Your **Clinical Supervisor** role appears on the **left** (person icon).
- Your **Term Supervisor** relationship appears on the **right** (handshake icon).

How Access Works

- You **do not need to toggle** between your role and relationship.
- By **default**, your **Clinical Supervisor** role is displayed.
- Any access provided through your **Term Supervisor** relationship is **automatically added** when viewing the linked trainee.

What this means for you?

Your role remains active at all times, and relationship-based access is seamlessly applied —no manual switching is required.

In the example screenshot below, I have 3 trainees I have access to on this particular instance, Ali and Elis I am linked to by my role as Clinical Supervisor to the terms they are on and for April I have been linked to her term as a Term Supervisor relationship.

The key differences here is that for April, I have access to complete the Term Supervisor sign off form because my relationship to her is Term Supervisor and that form is only available to a Term Supervisor, where as for Ali and Elis I only have access to complete forms available to Clinical Supervisors. This shows how the relationship bolts onto an existing role.

THIS IS UAT, not the Live CLA site.

Trainees (5) Updated 13 minutes ago

Clinical Learning Australia (PGY2) - Training Group (1 Jan 2026 to 1 Jan 2027)

Clinical Learning Australia (PGY2) - Training Group

Trainee			Term 1			Term 2			Term 3		
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK
Ali Fowler	Big Rivers Reg...	324 days ago	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL
Ellis Grey	Big Rivers Reg...	---	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL
April Kepner	Goulburn Bas...	84 days ago	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL	Not completed	SA, MTA, DSD	L, CL

Page 1 of 1 | 5 rows

Current/Most recent section | Not completed | Threshold not met | Completed | Past deadline

Scenario 3

You are set up as:

- A **Clinical Supervisor** role against a term (Model 1), and
- A **Director of Clinical Training (DCT)** role linked to a specific group.

What You Will See on the Dashboard

- Only a **role toggle** is displayed.
- By default, the dashboard shows your **group-based DCT role** first.

How to Switch Roles

1. Select the role toggle where **Director of Clinical Training** is displayed.
2. Toggle to the **Clinical Supervisor** role to access Clinical Supervisor functionality.

What does this mean for you?

- Only **one role can be viewed at a time**.
- Switching roles updates your dashboard view and available actions accordingly.

The screenshot shows a dashboard interface for 'Clinical Learning Australia (PGY1) - Training Group'. At the top right, a 'CHANGE ROLE' dropdown menu is open, showing two options: 'Director of Clinical Training' (Clinical Learning Australia (PGY1) - Training Group) and 'Clinical Supervisor' (ACT Test Hospital - General Surgery). The main content area displays a table of trainees with columns for Name, Term, Last Login, and performance metrics for Term 1 and Term 2. The table includes trainees like Simone Griffith, Atticus Lincoln, Jules Millin, Addison Montgomery, George O'Malley, Derek Shepherd, and Amelia Shepherd.

Trainee	Name	Term	Last Login	Term 1			Term 2			START	ASSESSMENT:		
				START	ASSESSMENTS	EPAs	START	ASSESSMENTS	EPAs				
001	Simone Griffith	ACT Test Hos...	31 days ago	0	0	0	0	0	0	0	0	0	0
002	Atticus Lincoln	ACT Test Hos...	296 days ago	0	0	0	0	0	0	0	0	0	0
003	Jules Millin	ACT Test Hos...	---	0	0	0	0	0	0	0	0	0	0
004	Addison Montgomery	ACT Test Hos...	296 days ago	0	0	0	0	0	0	0	0	0	0
005	George O'Malley	ACT Test Hos...	71 days ago	0	0	0	0	0	0	0	0	0	0
006	Derek Shepherd	ACT Test Hos...	296 days ago	0	0	0	0	0	0	0	0	0	0
007	Amelia Shepherd	ACT Test Hos...	---	0	0	0	0	0	0	0	0	0	0

Scenario 4

You are set up as:

- A **Clinical Supervisor** role against a term (Model 1),
- A **Director of Clinical Training (DCT)** role linked to a specific group, and
- A **Term Supervisor** relationship for a specific trainee's term allocation.

What You Will See on the Dashboard

- Both role **toggles** and a **relationship indicator** are displayed.
- By default, your **group-based DCT role** is shown first.

How to Switch Roles

1. Select the role toggle where **Director of Clinical Training** is displayed.
2. Switch to the **Clinical Supervisor** role as required.

How Access Works

- Your **Term Supervisor** relationship is always applied, regardless of which role is active.
- When you navigate to a trainee you are linked to as a **Term Supervisor**, you automatically have access to all **Term Supervisor-related functionality**.

What this means for you?

Switching roles changes your dashboard context, but relationship-based access remains consistent across roles—no additional action is required.

The screenshot shows a web application interface. At the top right, there are two role toggle buttons: 'Clinical Supervisor' and 'Term Supervisor'. A 'CHANGE ROLE' dropdown menu is open, showing 'Director of Clinical Training' (Clinical Learning Australia (PGY1) - Training Group) as the selected role and 'Clinical Supervisor' (ACT Test Hospital - General Surgery) as an alternative. Below this, a search bar for 'Trainees' is visible, with a filter set to 'Clinical Learning Australia (PGY2) - Training Group (1 Jan 2026 to 1 Jan 2027)'. The main content area displays a table for 'Clinical Learning Australia (PGY2) - Training Group' with 3 trainees. The table has columns for 'Trainee' (Name, Organisation, Last Login) and three 'Term' sections (Term 1, Term 2, Term 3), each with 'START', 'ASSESSMENTS', and 'LOGBOOK' sub-columns. The 'ASSESSMENTS' columns contain colored status indicators (red for 'Not completed', orange for 'Threshold not met', green for 'Completed', and red for 'Fast deadline'). The 'LOGBOOK' columns contain numerical values. At the bottom, there is a pagination bar showing 'Page 1 of 1' and '5 rows'.

Trainee			Term 1			Term 2			Term 3		
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK
All Fowler	Big Rivers Reg...	324 days ago	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0
Ellis Grey	Big Rivers Reg...	---	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0
April Kepner	Goulburn Bas...	84 days ago	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0	Not completed	SA MTA DDP DSD	0 0

Scenario 5

You are set up as:

- A **Director of Clinical Training (DCT)** linked to a specific group,
- A **Clinical Supervisor** in a relationship for one trainee's term allocation, and
- A **Term Supervisor** for another trainee's term allocation.

What You Will See on the Dashboard

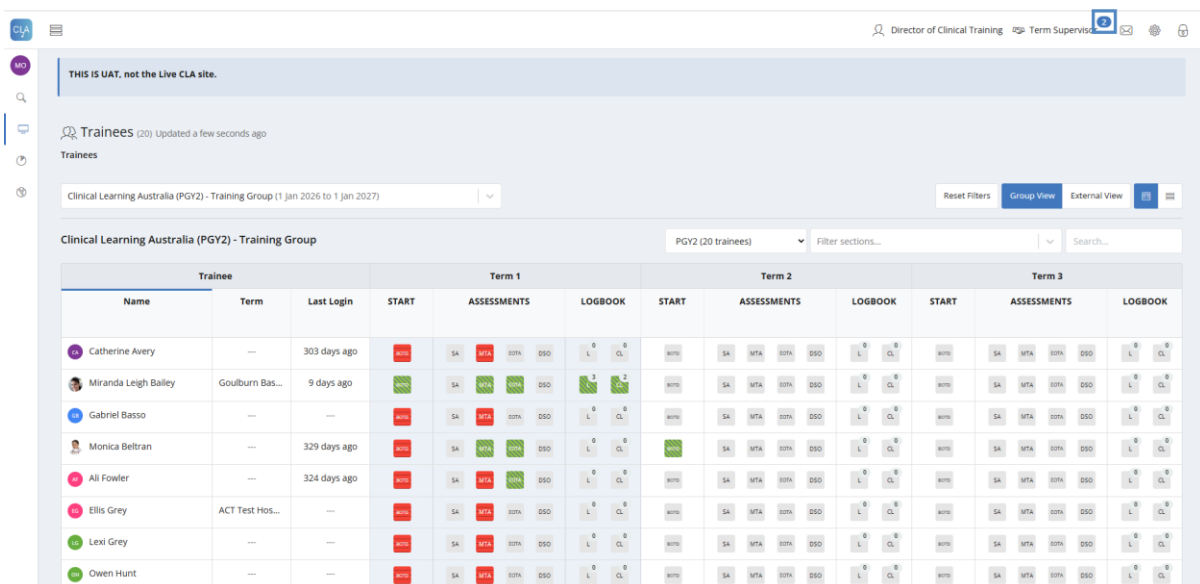
- Both **role** and **relationship** toggles are displayed.
- By default, the dashboard shows your **group-based DCT role** and **one of your supervisor relationships**.

How to Switch Roles or Relationships

1. Use the **role toggle** to switch between available roles.
2. Use the **relationship toggle** to switch between linked trainee relationships.

What does this mean for you?

- If you have **multiple roles or relationships**, a **number indicator** appears on the toggle to show that additional options are available.
- Switching roles or relationships updates your access and dashboard view accordingly.



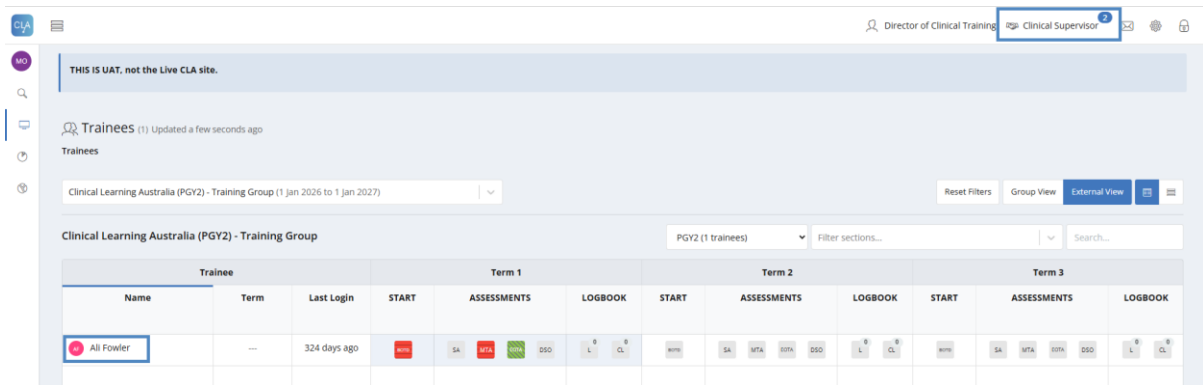
The screenshot shows a dashboard for 'Trainees' with a table of trainees. The table has columns for 'Trainee' (Name, Term, Last Login) and three 'Term' columns (Term 1, Term 2, Term 3). Each term column has sub-columns for 'START', 'ASSESSMENTS', and 'LOGBOOK'. The 'ASSESSMENTS' sub-columns contain colored icons representing different assessment types (SA, MTA, DPA, DSD). The 'LOGBOOK' sub-columns contain icons representing logbook entries (L, CL). The 'External View' toggle is visible in the top right of the dashboard area.

Trainee			Term 1			Term 2			Term 3		
Name	Term	Last Login	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK	START	ASSESSMENTS	LOGBOOK
Catherine Avery	---	303 days ago	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Miranda Leigh Bailey	Goulburn Bas...	9 days ago	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Gabriel Basso	---	---	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Monica Beltran	---	329 days ago	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
All Fowler	---	324 days ago	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Ellis Grey	ACT Test Hos...	---	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Lexi Grey	---	---	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL
Owen Hunt	---	---	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL	START	SA MTA DPA DSD	L CL

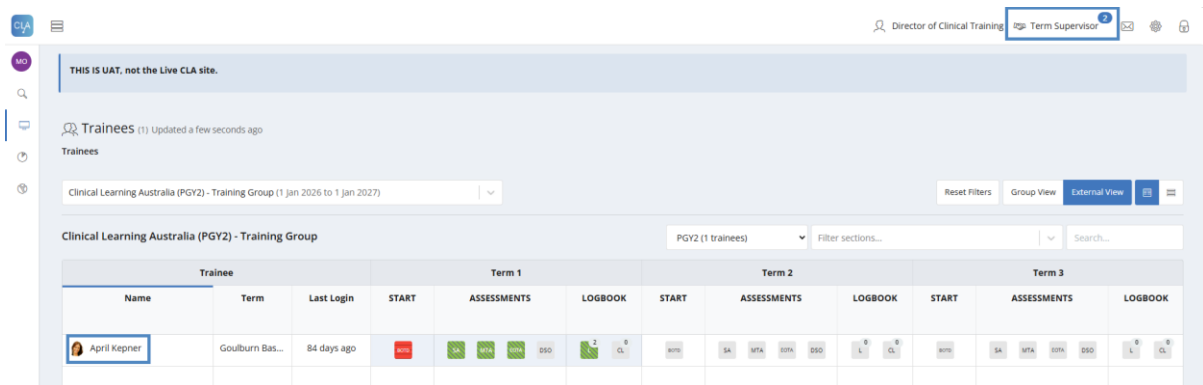
In this specific scenario, because you have a relationship alongside your group role, if you want to see your relationship to users, you will select the 'External View' toggle just above the dashboard. This function remains the same as it was pre v8.7.

If you have multiple relationships, you will need to ensure you select the appropriate relationship on the toggle in the top right of the screen before you then select the 'External View' toggle above the dashboard.

In the below example, I am on my Clinical Supervisor relationship and when selecting the 'External View' I can see Ali.



In the below example, I am on my Term Supervisor relationship and when selecting the 'External View' I can see April.



4 Support

For local set up issues, contact your MEU Administrator.

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