Clinical Learning Australia

Training Guide

Quick Reference Guide for CLA Administrators

Initial / Annual Setup of Clinical Learning Australia

This training guide describes the process that administrator users of Clinical Learning Australia (CLA) will need to follow for the initial setup of the system. administrator users will need to follow these steps each year when new cohorts of Postgraduate Year (PGY) doctors commence training and as the prior cohort of PGY doctors transitions to the next PGY.

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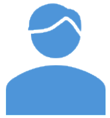
Contents

1 Glossary of Key Terms

Group	• A 'group' associates a number of individual user accounts together, such as PGY1 doctors (trainees). This allows the 'group' to be assigned to an 'instance' which identifies the particular clinical year and associated forms that the group will have access to. • Groups can be set up to associate users in any way that supports local training delivery. However, the most common approach to grouping trainees is by the post graduate year group – this is known as a 'cohort' group, i.e. PGY1 - 2026 / PGY2 - 2026 / PGY1 IMG – 2026, etc.
PGY Instance	• A PGY Instance within CLA is created to establish a 'version' of CLA to support a specific training program and/or cohort group. • Within PGY Instance, administrators can assign a group of trainees to a relevant template within the system (such as a PGY1, PGY2, or PGY3+ 4-term or a 5-term template), identify term dates relevant to their training program and assign trainees to term allocations. • Administrator users must create a PGY Instance and assign a group of users to that instance for those users to be able to access the correct forms and assessments. • A PGY Instance should be setup for each PGY cohort group in each training program (i.e. State - Hospital A - PGY1 - 2026, State - Hospital A - PGY2 - 2026)
Term Allocation	• Term allocations link a trainee to the relevant terms that they will be undertaking throughout the training year. • Within the term allocation, administrators can assign a Term Supervisor and other Clinical Supervisors to trainees which ensures these users have access to the relevant trainee's ePortfolios to complete their assessments.
Term Description	• A term description describes the learning experiences and outcomes that a trainee will have the opportunity to participate in or demonstrate in a particular term. Supervisors can be linked to a term description which means they are automatically linked to any trainees allocated to that term.

2 Overview of initial / annual setup process

The initial setup of CLA is done by following the steps below. These steps must be repeated annually at the start of each clinical year. Further detail about each step is included in subsequent sections of this guide. Accompanying videos are also available via the CLA website.



CLA Administrator

Step 1

Create Groups

First create relevant groups within the system to which users can be linked. The main focus will be on creating **cohort** groups to link **trainees** to.

Step 2

Create Users

Next, create users either **manually** in the system or via the **bulk upload** spreadsheet. The main focus will be in creating **Trainees** and **Supervisor** users.

Step 3

Link Supervisors to Term Descriptions

Next, link **supervisor** users to **term descriptions** (where supervisors are known are unlikely to change frequently). This enables these supervisors to be automatically linked to trainees allocated to their terms.

Step 4

Create PGY Instances

Next, create PGY instances for the **upcoming year**. This creates a specific version of CLA configured to reflect the training program's structure and term dates. Link the relevant cohort groups to each PGY instance.

Step 5

Create Term Allocations

Within each instance assign trainees to the terms that they will be undertaking, you can also assign supervisors to individual trainees in the **term allocation** enabling them to view the trainees progress and complete assessments.

2.1. Step 1 - Create Groups

In this step, you will focus on creating groups to associate trainees together. As a minimum, groups should be set up to associate cohorts of PGY1 and PGY2 doctors separately. This is because PGY1 and PGY2 doctors are assigned different templates in the system to reflect the process and assessments forms to be completed.

Where you run both a 4-term and 5-term clinical year for the same PGY, it is recommended to create separate groups, one for the trainees undertaking the 4-term clinical year, and one for the trainees undertaking a 5-term clinical year.

The groups should be created and managed by the local hospital or health service administration team that is responsible for managing CLA users in a particular training program/facility, however these can also be created by the nationwide administrator if you need assistance.

Examples of groups to be created include:

- State - Organisation - PGY1 - Year
- State - Organisation - PGY2 - Year

Where groups are being created and managed by an administration team that oversees training across a number of training programs/facilities, they might also want to group users by the program or primary facility. For example:

- State - Hospital A - PGY1 - 2026
- State - Hospital A - PGY2 - 2026
- State - Hospital B - PGY1 - 2026
- State - Hospital B - PGY2 - 2026

If your site runs both 4-term and 5-term clinical years for the same PGY cohort, e.g. for PGY2, create separate cohort groups and include the number of terms in the name of the group for easy differentiation.

- State - Hospital A - PGY2 - 2026 (4-terms)
- State - Hospital A - PGY2 - 2026 (5-terms)

How groups are set up will depend on how training is managed in your particular circumstance. CLA is designed to provide flexibility to allow groups to be set up in a way that best suits local practice.

Groups can be created in CLA either one-by-one **manually** or via the **bulk group import spreadsheet**.

Once you have created your PGY Groups, you can either create/add your trainees (step 2) or you can go directly to creating PGY Instances (step 4) and add trainees to your Group later.

Please refer to the **Creating and managing groups** quick reference guide and video for further information.

2.2. Step 2 - Create Users

In this step, you will focus on creating all relevant users either **manually** or via the **bulk upload spreadsheet**. You may want to focus on creating **Trainees** and any new **Term** or **Clinical Supervisors** first, however you have the ability to add all user types at the same time if preferred.

As part of the user creation process, you can add users to groups. For Trainees, you can add them to their Group before you go to step 4, creating PGY Instance, or you can create a group, then create a PGY Instance with the Group linked and then add trainees later. You must have trainees added to your Group before you can move on to step 5, creating term allocations and making your PGY Instance 'Live'.

For any PGY1 trainees progressing on to PGY2 training at your organisation, you can add these trainees to your new PGY2 group via the Users screen and should not create new accounts for them.

For any trainees moving to your organisation for PGY2 that completed their PGY1 training at another site, contact the Nationwide Administrator to move their existing CLA account to your organisation to maintain the continuity of their ePortfolio.

Please refer to the **Creating and managing users** quick reference guide and video for further information.

2.3. Step 3 - Link Supervisors to Term Descriptions

In this step, you will add a term supervisor and/or clinical supervisors to term descriptions. This enables these supervisors to be automatically linked to trainees that are allocated to their term. It is recommended that this is done where supervisors are known and unlikely to change frequently and where there are many supervisors that need to be linked to many trainees. By linking supervisors to term descriptions, this avoids having to link supervisors individually to trainees when assigning term allocations.

Linking supervisors to term descriptions is also important to support the management of training where trainees rotate to organisations outside of their 'home' organisation and where the home organisation may not have visibility of who the local supervisors are. In this case, the organisation in which the term is occurring can add supervisors to their term descriptions allowing those supervisors to be automatically added to term allocations assigned by the trainee's home organisation.

Note that currently, adding supervisors to term descriptions only assigns those supervisors to <u>new</u> term allocations entered after the date on which the supervisors were added. Adding or changing supervisors in a term description **does not** currently update current or future term allocations already assigned in the system.

Please refer to the **Managing Term Descriptions** quick reference guide and video for further information.

2.4. Step 4 - Create PGY Instances

In this step, you will focus on creating a **PGY Instance** for each cohort of Trainees for the upcoming year (i.e. a PGY1 instance, a PGY2 instance, a PGY1 IMG instance and a PGY3+ instance pe).

An 'instance' associates PGY cohort groups to the relevant templates/forms in CLA and is where the start and end dates of the training year and each term are identified. The number of instances required to be set up will depend on what groups you created in Step 1 and whether you run 4 or 5 terms in your clinical year. If you run both, you will need to create an instance for each as well as by PGY.

In the PGY Instance is also where you manage your Grace periods for how long after the end of a term forms can still be completed, set up cumulative tallies to track number of EPAs completed over the course of the clinical year, and add in the 'Progress Views' template that adds a Wheel of Progress to each trainee's ePortfolio.

Please refer to the **Creating and managing PGY instances** quick reference guide and video for further information.

2.5. Step 5 - Create Term Allocations

In this step, you will focus on creating or uploading the **term allocations** for all **Trainees**. Term allocations occur within the **PGY Instances** that you created in Step 4. You don't have to upload or create term allocations for all terms at once if the information for future terms is not yet ready or subject to significant change, for example term swaps, however, you will need to create term allocation data for at least one term to enable CLA for your trainees. Once created, term allocations can be updated or amended in the system as required.

You will need to do this step for each PGY Instance that you created. That is, for PGY1 and for PGY2, or for PGY1 - 4 Terms, PGY1 - 5 Terms, and so on (if applicable).

Where you have linked supervisors to terms in Step 3, those supervisors will automatically be linked to trainees allocated to their term once the term allocation is created. You can also add or change supervisors for each trainee in the term allocation itself. Supervisors linked to term descriptions or via the term allocation will be able to view trainees assigned to their term on their dashboard and complete all relevant assessments.

Please refer to the **Creating and managing term allocations** quick reference guide and video for further information.

3 Support

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