

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.

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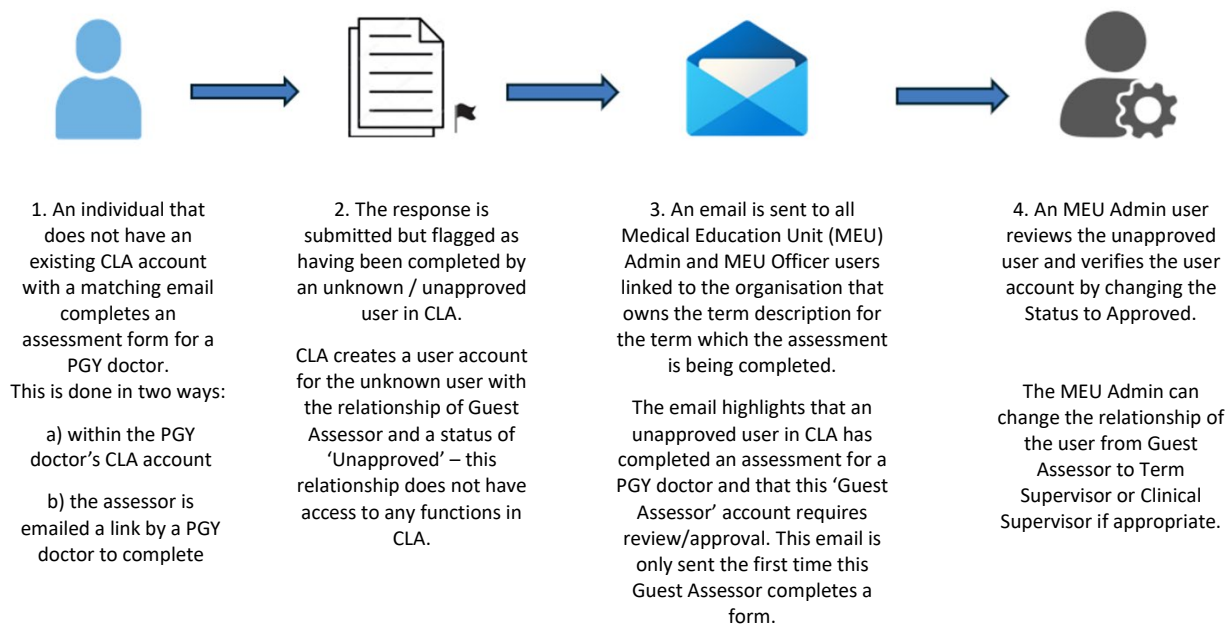
1. What is the Guest Assessor role?

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

A Guest Assessor account is created in the following circumstances:

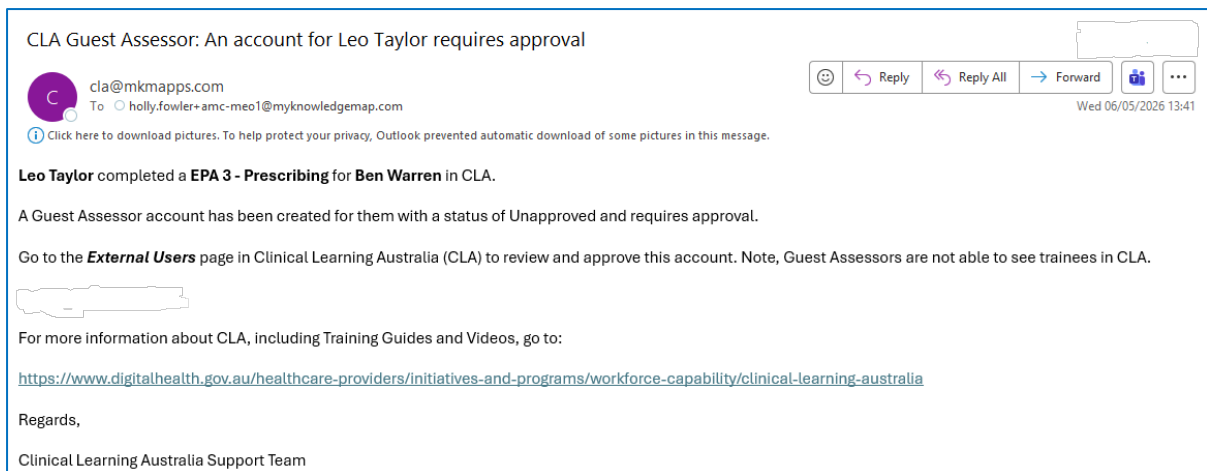
- a) An assessment, such as an EPA or Mid Term Assessment, is completed in the prevocational (PGY) doctor's account and the name and email address of the relevant assessor are manually entered into the assessment form.
- b) The prevocational doctor (or another CLA user) emails an assessment form to an individual to complete, using either the 'Email' function to send a blank form or 'Email for Later' function to send a partially completed form, entering in the assessing individual's name and email address into the required fields.

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. This email notification is **only sent the first time this email is used**. CLA does not send any more notification emails for additional forms completed.



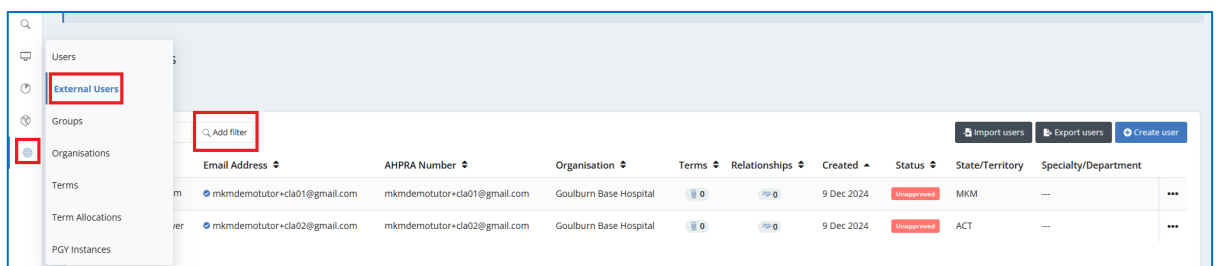
CLA also creates a new account for this Guest Assessor in the External Users screen. The relationship applied to this account is Guest Assessor to the trainee they are linked to and the Status of the user defaults to 'Unapproved'.

Name	Email Address	AHPRA Number	Role	Organisation	Groups	Created	Status
GA Guest Assessor	GuestAssessor@example.com	---	Guest Assessor	Canberra Health Services	0	11 Mar 2025	Unapproved

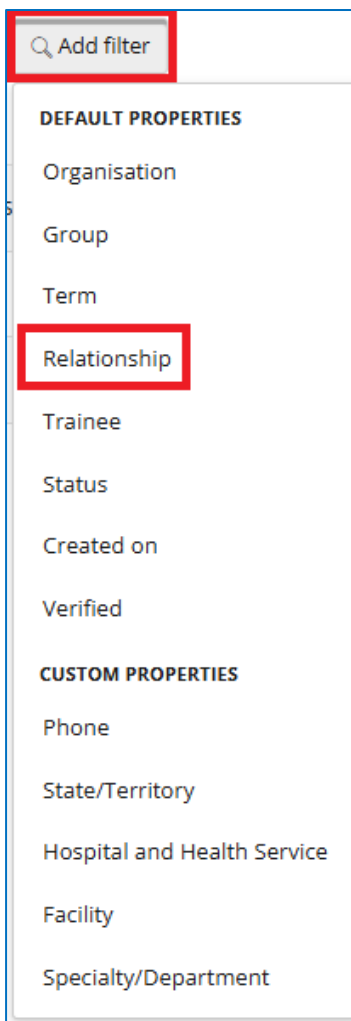
The Guest Assessor role has no privileges in CLA. Users with this role may be able to activate CLA accounts and login, but they do not have access to any information in CLA, including forms they have completed and trainees they are linked to.

To find Unapproved Guest Assessors for your organisation

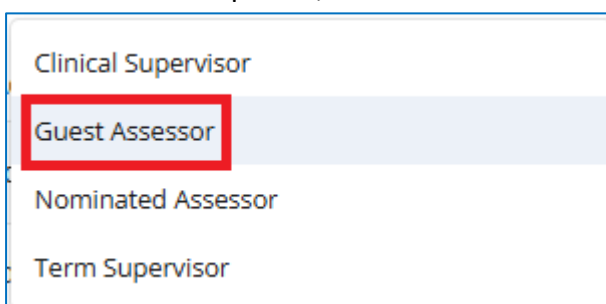
- Navigate to the 'cog' icon on the left-hand menu bar and click 'External Users'
- Click the 'Add Filter' button



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

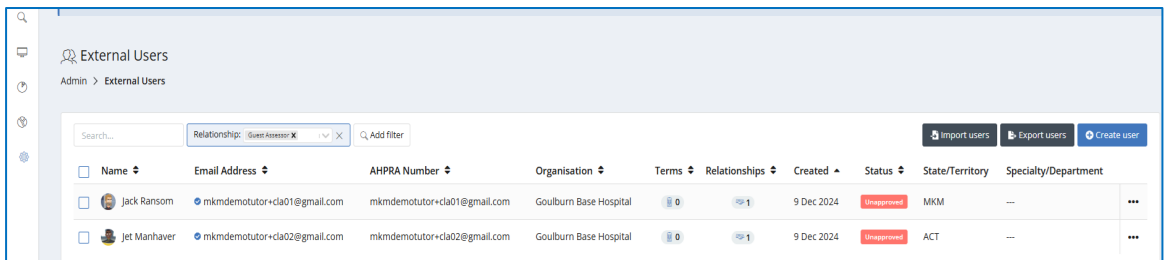


- In the Relationship filter, select **Guest Assessor**.

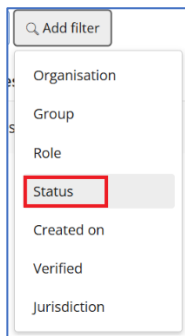


- This will display all users with the Guest Assessor relationship that have been created at your organisation level and those organisations below your organisation's level in

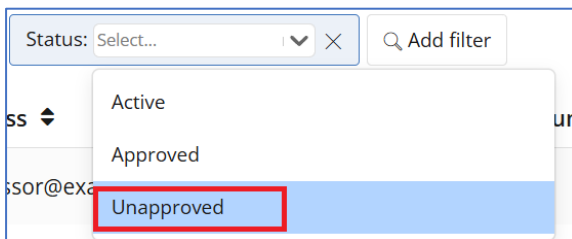
the hierarchy.



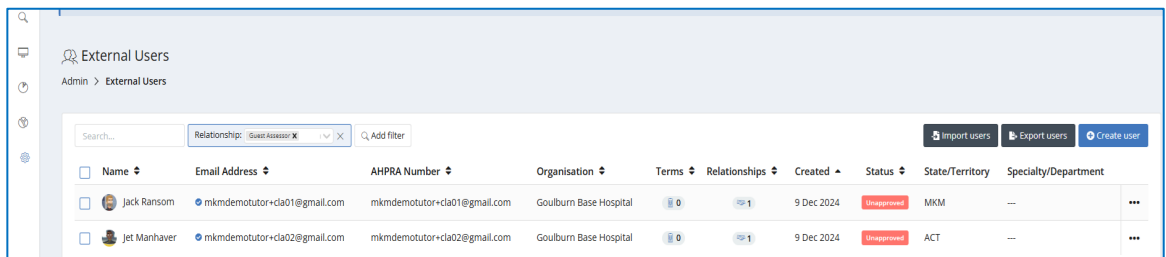
- Click the 'Add Filter' button again and select **Status**.



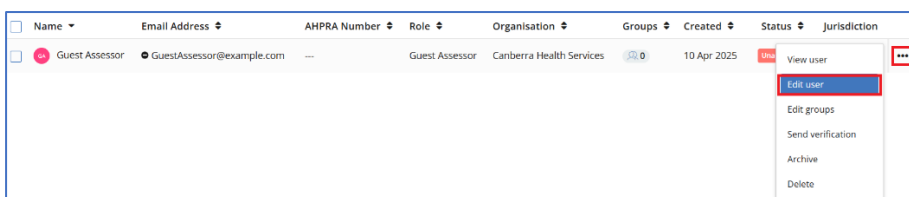
- Select the Status of **Unapproved**.



- 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**.

Update User - Jack Ransom

Basic Info	Custom Properties	Integration
<p>Organisation *</p> <p>Goulburn Base Hospital</p>		
<p>First Name *</p> <p>Jack</p>	<p>Last Name *</p> <p>Ransom</p>	
<p>Email *</p> <p>mkmdemotutor+cla01@gmail.com</p>		
<p>Other Emails</p> <p>+ Add other email</p>		
<p>Main Role *</p> <p>External Only</p>		
<p>Status</p> <p>Unapproved</p> <p>None</p> <p>Active</p> <p>Approved</p> <p>Unapproved</p>		

Groups (0)	Terms (0)	Relationships (1)
		<p>Search for a placement allocation...</p>
		<p>AK April Kepner - holly.fowler+clat... Goulburn Base Hospital - Genera... 4 May 2026 - 22 May 2026</p> <p>Guest Assessor</p>
		<p><input checked="" type="radio"/> Use allocation dates <input type="radio"/> Set specific dates</p>

Cancel Update

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

- If the user is not considered to be a valid assessor, leave their account status as Unapproved and follow up with the prevocational doctor or Director of Clinical Training (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 – this will remain as 'External Only', but you can update the relationship to the trainee they completed an assessment for to be **Term Supervisor** or **Clinical Supervisor** if the user is a regular and authorised assessor. This will allow them to login to CLA, see that PGY doctors that they have completed a form for using this email address. When changing their relationship from Guest Assessor to another relationship, send the user a Verification email from CLA so they can activate their account.

- Jurisdiction (State/Territory) - add this for their account on the Custom Properties tab and click Update.

See the quick reference guide [How to create and manage users](#) for more information.

Using Reports to see forms completed by Guest Assessors:

Use the **Detailed Response Report** or **Completion Report By Tags** (selecting the Format: Completion Details) to see all forms completed in CLA and these reports will include the name and/or email address of the assessor that completed each form.

Export the CLA reports to Excel and use filters and Excel features to find by name or email address any forms completed by users who are Guest Assessors for your site.

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

Users that have a Guest Assessor account will not have access any data if they attempt to activate their account and login to CLA. The approval process simply identifies that they are a verified assessor, and their assessments of the prevocational doctors are accepted.

Once a Guest Assessor has been verified, they can complete assessment forms for any prevocational doctors in the future using the same email address without their submissions being flagged as unapproved.

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 'Relationship' in their user account to **Term Supervisor** or **Clinical Supervisor** and click 'Send verification' to generate a welcome email prompting them to login. They will by default be linked to those prevocational doctors for whom they completed forms as a Guest Assessor previously. To be able to access the ePortfolio for other prevocational doctors, they will need to be linked to those doctors via the Term Allocations process in a PGY Instance (see the Quick Reference Guide [Creating and managing term allocations](#)).

Support

- For local set up issues, contact your MEU Administrator
- For guidance and learning resources, refer to the CLA website and user guides
- For MEU support enquiries, please email CLA.help@digitalhealth.gov.au