

Clinical Learning Australia

Training Guide



MANAGING SUBMITTED FORMS

This quick reference guide provides information on how Medical Education Unit Administrators (MEU Admins) can manage submitted forms in Clinical Learning Australia (CLA), including deleting and editing forms, returning forms to the submitter as a draft, and moving forms between terms.

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1 Managing forms in CLA

Medical Education Unit (MEU) Administrators have permissions to manage submitted forms in various ways within CLA in response to requests or issues that may occur.

From the **Manage Responses / Evidence** screen, MEU Admins can:

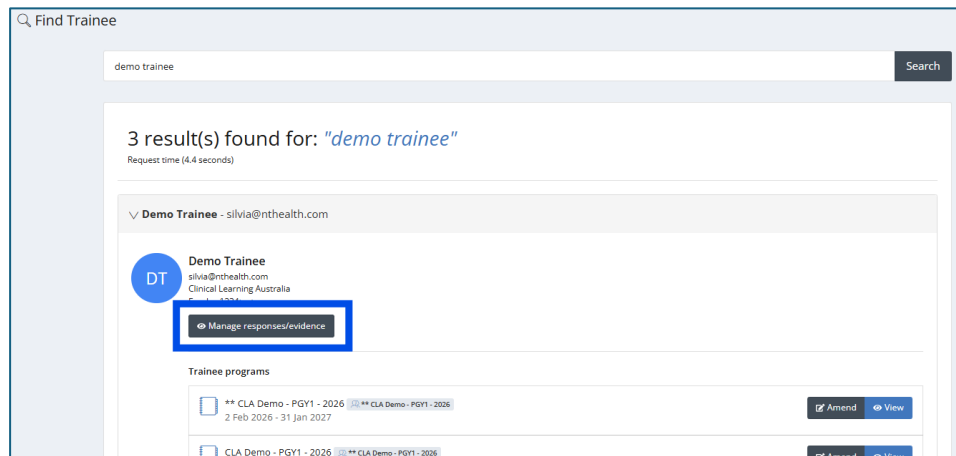
- Delete forms
- Edit forms
- Return forms to the submitter as a draft
- Move forms between Terms and PGY Instances

1.1 Navigate to the 'Manage responses/evidence' screen

There are two ways to navigate to the **Manage responses/evidence** screen:

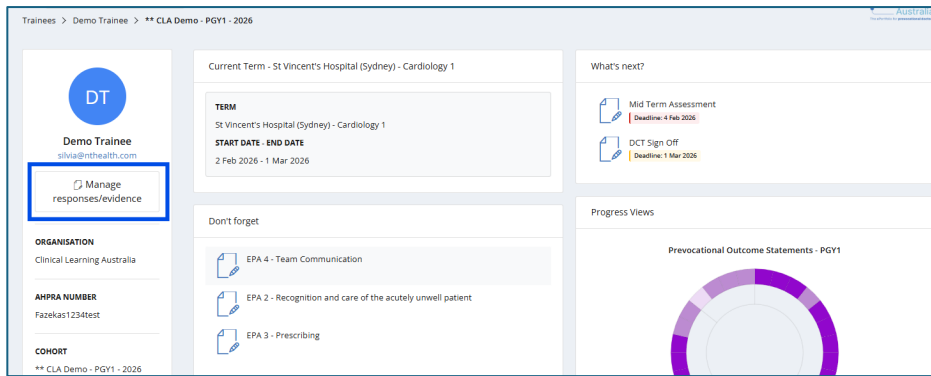
1) Using **Find Trainees**

- Search for the trainee using name, email or AHPRA number
- Click on the trainee's name to expand their result segment
- Click **Manage responses/evidence**



2) Using the **Trainee Dashboard**

- Find the trainee on the Dashboard
- Click on the trainee's name to open their ePortfolio home page
- Click **Manage responses/evidence** on the left side of their ePortfolio



The **Manage responses/evidence** screen displays all forms/responses that have been submitted for the trainee to date.

🔗 Demo Trainee Responses (28)

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	<input type="checkbox"/>
									Show All	Show All	
8 Sep 2025 16:26	EPA 4 - Team Communica...	XX - NSW ...	PGY1	EPAs		St George...	Silvia Trai...	sfazekas...	Released		<input type="checkbox"/>
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW ...	PGY1	EPAs		St George...	Demo Su...	silvia.faze...	Released		<input type="checkbox"/>
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW ...	PGY1	Term 4	ASSESSM...	St George...	Demo Su...	silvia.faze...	Released	9 Sep 2025 13:54	<input type="checkbox"/>
19 Aug 2025 14:06	EPA 4 - Self Assessment - ...	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		<input type="checkbox"/>
19 Aug 2025 14:06	EPA 1 - Self Assessment - ...	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		<input type="checkbox"/>
18 Aug 2025 08:19	Beginning of Term Discus...	XX - NSW ...	PGY1	Term 3	START	Bundaber...			Released		<input type="checkbox"/>
15 Aug 2025 09:31	Self Assessment	XX - NSW ...	PGY1	Term 3	ASSESSM...	Bundaber...			Released		<input type="checkbox"/>
30 Jul 2025 12:33	Beginning of Term Discus...	XX - NSW ...	PGY1	Term 3	START	Bundaber...			Released		<input type="checkbox"/>
7 Jul 2025 08:21	EPA 1 - Clinical Assessment	XX - NSW ...	PGY1	EPAs		Bundaber...			Released		<input type="checkbox"/>
3 Jul 2025 16:53	End of Term Assessment	XX - NSW ...	PGY1	Term 2	ASSESSM...	Northern ...			Released		<input type="checkbox"/>

Previous Page 1 of 3 10 rows Next

1.2 Moving forms/responses

To move a form response that may have been entered against the incorrect term or PGY Instance:

- Go to the **Manage responses/evidence** screen as described in section 1.1
- Tick the checkbox to the right of the form that needs to be moved

Demo Trainee Responses (28) Bulk actions (1) ▾

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	<input type="checkbox"/>
8 Sep 2025 16:26	EPA 4 - Team Communication	XX - NSW D...	PGY1	EPAs		St George ...	Silvia Trainee	sfazekas@ig...	Released		<input type="checkbox"/>
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		St George ...	Demo Supe...	silvia.fazek...	Released		<input type="checkbox"/>
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW D...	PGY1	Term 4	ASSESSME...	St George ...	Demo Supe...	silvia.fazek...	Released	9 Sep 2025 13:54	<input checked="" type="checkbox"/>
19 Aug 2025 14:06	EPA 4 - Self Assessment - Te...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
19 Aug 2025 14:06	EPA 1 - Self Assessment - Cli...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
18 Aug 2025 08:19	Beginning of Term Discussion	XX - NSW D...	PGY1	Term 3	START	Bundaberg ...			Released		<input type="checkbox"/>
15 Aug 2025 09:31	Self Assessment	XX - NSW D...	PGY1	Term 3	ASSESSME...	Bundaberg ...			Released		<input type="checkbox"/>
30 Jul 2025 12:33	Beginning of Term Discussion	XX - NSW D...	PGY1	Term 3	START	Bundaberg ...			Released		<input type="checkbox"/>
7 Jul 2025 08:21	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
3 Jul 2025 16:53	End of Term Assessment	XX - NSW D...	PGY1	Term 2	ASSESSME...	Northern B...			Released		<input type="checkbox"/>

Previous Page 1 of 3 10 rows Next

- **Select Bulk actions and Move responses**

Demo Trainee Responses (28) Bulk actions (1) ▾
Move responses

Date Submitted	Form	PGY	PGY Part	PGY Section	PGY Tab	Term	Assessor Name	Assessor Email	Released to Trainee	Flagged On	<input type="checkbox"/>
8 Sep 2025 16:26	EPA 4 - Team Communication	XX - NSW D...	PGY1	EPAs		St George ...	Silvia Trainee	sfazekas@ig...	Released		<input type="checkbox"/>
2 Sep 2025 15:37	EPA 1 - Clinical Assessment	XX - NSW D...	PGY1	EPAs		St George ...	Demo Supe...	silvia.fazek...	Released		<input type="checkbox"/>
26 Aug 2025 14:15	Mid Term Assessment	XX - NSW D...	PGY1	Term 4	ASSESSME...	St George ...	Demo Supe...	silvia.fazek...	Released	9 Sep 2025 13:54	<input checked="" type="checkbox"/>
19 Aug 2025 14:06	EPA 4 - Self Assessment - Te...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>
19 Aug 2025 14:06	EPA 1 - Self Assessment - Cli...	XX - NSW D...	PGY1	EPAs		Bundaberg ...			Released		<input type="checkbox"/>

- In the **Move Responses** window, select entries for each dropdown field
 - **Instance:** Select the correct PGY Instance, if more than one is listed
 - **Part:** Select PGY1 or PGY2 or PGY3+, if more than one is listed
 - **Section:** Select the section of the ePortfolio the form should be in.
i.e. if moving a Mid Term Assessment (MTA) from Term 3 to Term 2, select **Term 2** (the term the form should be in). For Entrustable Professional Activities (EPA), select **EPA**.

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025

Part *
PGY1

Section *
Please select

- Term 1
- Term 2
- Term 3
- Term 4
- EPAs
- ASSESSMENT REVIEW PANEL

- **Tab:** Select the tab of the ePortfolio the form should be on.
 - Use **Start** for forms that are on the **Start** tab
 - Learning Goals or Beginning of Term Discussion
 - Use **Assessments** for forms that are on the **Assessments** tab
 - Self Assessments, mid-term assessment (MTA), end of term assessment (EOTA), Term Supervisor Sign-off, Director of Clinical Training (DCT) Sign-off, Improving performance action plan (IPAP) forms
 - Use **Logbook** for forms that are on the **Logbook** tab
 - Logbook or Case Procedure Log

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025

Part *
PGY1

Section *
Term 2

Tab
Please select

START
ASSESSMENTS
LOGBOOK
Please select

Cancel Update

- **Item:** Select the form type (note, you cannot use this to change the form type from the submitted form, i.e. you cannot convert an MTA to an End of Term Assessment (EOTA)).

Move Responses

Instance
XX - NSW Demo - PGY1 - 2025

Part *
PGY1

Section *
Term 3

Tab
ASSESSMENTS

Item *
Please select

Self Assessment
Mid Term Assessment
End of Term Assessment
Term Supervisor Sign-off (if assessment conducted by clinical supervisor)
DCT Sign Off
Improving Performance Action Plan (IPAP) - Open
Improving Performance Action Plan (IPAP) - Closed

- **Term:** Select the relevant term allocation

The screenshot shows a 'Move Responses' form with the following fields:

- Instance: XX - NSW Demo - PGY1 - 2025
- Part *: PGY1
- Section *: Term 3
- Tab: ASSESSMENTS
- Item *: Mid Term Assessment
- Term: Please select (dropdown menu open)

The dropdown menu for Term is open, showing the following options:

- Campbelltown/Camden Hospital - Acute and General Medicine A
- Hornsby Ku-ring-gai Health Service - Medicine 4 - General Medicine / Endocrine
- Northern Beaches Hospital - Cardiology Team A
- St George Hospital and Community Health Service - Colorectal Surgery

- Click **Update**

The form will have been moved to the correct section of the ePortfolio.

The Dashboard may take up to 2 hours to update and for the icons to reflect the form movement.

You CAN:

- move multiple forms of the same type at the same time, e.g. moving multiple Self Assessments from one Term to another.

You CANNOT:

- move different form types at the same time, e.g. moving an MTA and EOTA from Term 2 to Term 3 – these must be moved one at a time.
- use Move Responses to convert an MTA to an EOTA if the incorrect form was submitted because these forms have different underlying structures. The MTA should be deleted and a new EOTA submitted using the correct form type.

1.3 Deleting forms/responses

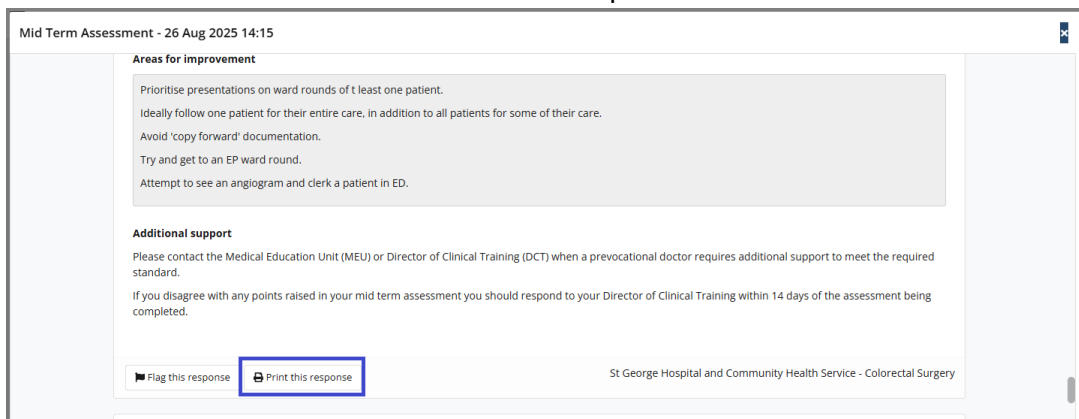
Caution when using the Delete function - once forms are deleted, they cannot be retrieved from CLA. It is recommended to print or download a copy of the form before deleting to save a copy.

Examples of when to use:

- Form has been submitted for the incorrect trainee.
- Incorrect form was used, e.g. Mid Term Assessment was completed when EOTA was intended.
- Duplicate forms have been submitted.
- A form was submitted using a non-valid guest assessor email.
- On request, if appropriate.

To delete forms without outcome statements mapped:

- Go to the **Manage responses/evidence** screen as described in section 1.1
- Click on the row of the form to be deleted to open the form



Mid Term Assessment - 26 Aug 2025 14:15

Areas for improvement

Prioritise presentations on ward rounds of t least one patient.
Ideally follow one patient for their entire care, in addition to all patients for some of their care.
Avoid 'copy forward' documentation.
Try and get to an EP ward round.
Attempt to see an angiogram and clerk a patient in ED.

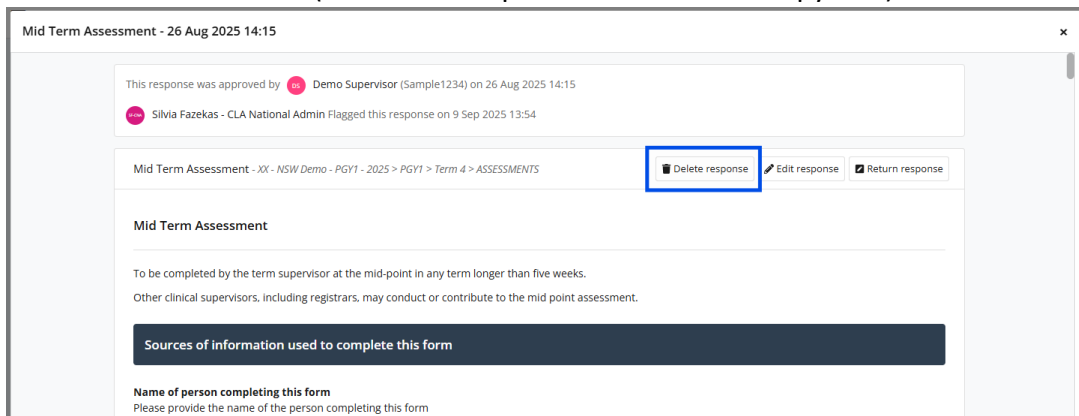
Additional support

Please contact the Medical Education Unit (MEU) or Director of Clinical Training (DCT) when a prevocational doctor requires additional support to meet the required standard.
If you disagree with any points raised in your mid term assessment you should respond to your Director of Clinical Training within 14 days of the assessment being completed.

Flag this response Print this response

St George Hospital and Community Health Service - Colorectal Surgery

- Click the **Delete** button (remember to print or download a copy first)



Mid Term Assessment - 26 Aug 2025 14:15

This response was approved by Demo Supervisor (Sample1234) on 26 Aug 2025 14:15

Silvia Fazekas - CLA National Admin Flagged this response on 9 Sep 2025 13:54

Mid Term Assessment - XX - NSW Demo - PGY1 - 2025 > PGY1 > Term 4 > ASSESSMENTS

Delete response Edit response Return response

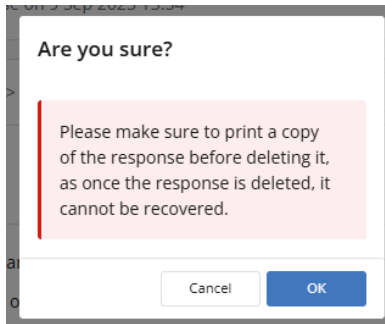
Mid Term Assessment

To be completed by the term supervisor at the mid-point in any term longer than five weeks.
Other clinical supervisors, including registrars, may conduct or contribute to the mid point assessment.

Sources of information used to complete this form

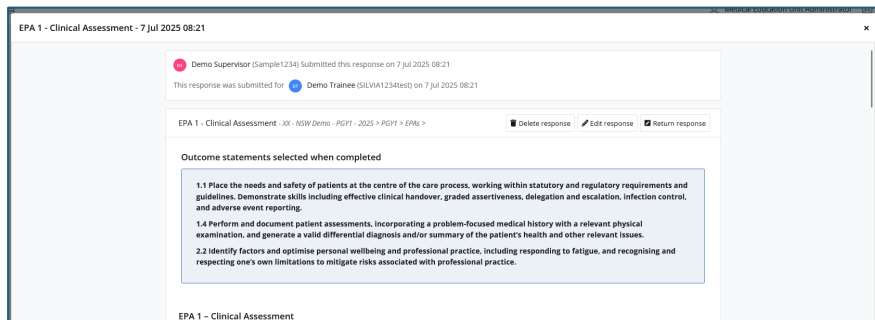
Name of person completing this form
Please provide the name of the person completing this form

- Click **OK** to confirm you wish to delete the form

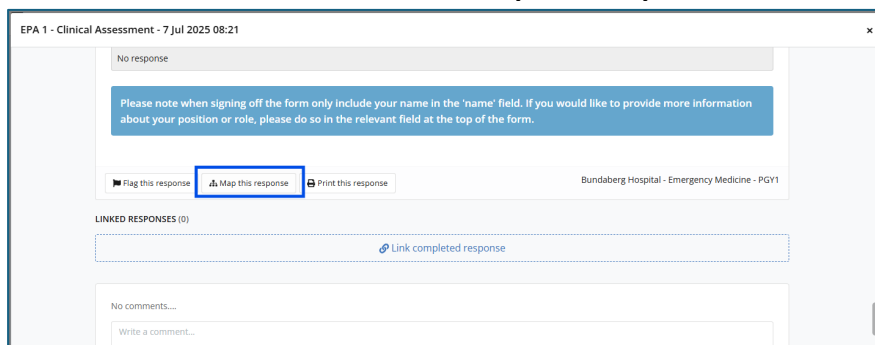


To delete a form with Outcome Statements mapped, e.g. EOTA or EPAs, unmap the outcome statements from the form before deleting to remove them from the Wheel of Progress:

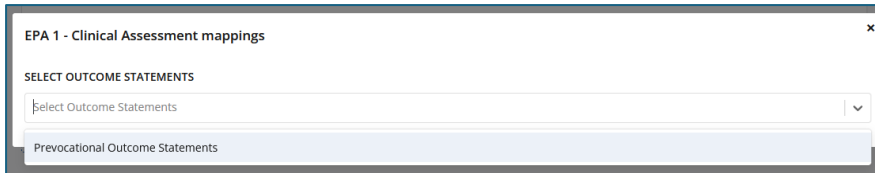
- Click on the row of the form to be deleted to open the form.
- See the mapped responses in the blue box at the top of the form.



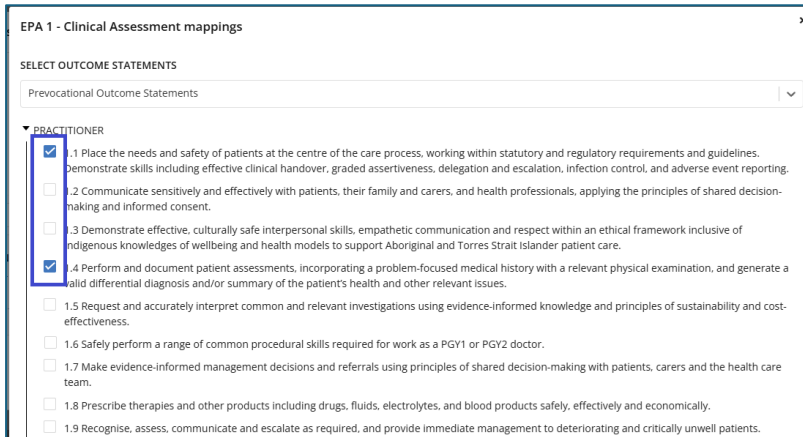
- Scroll to the end of the form, select **Map this Response**.



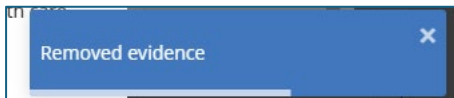
- Select Prevocational Outcome Statements in the dropdown box.



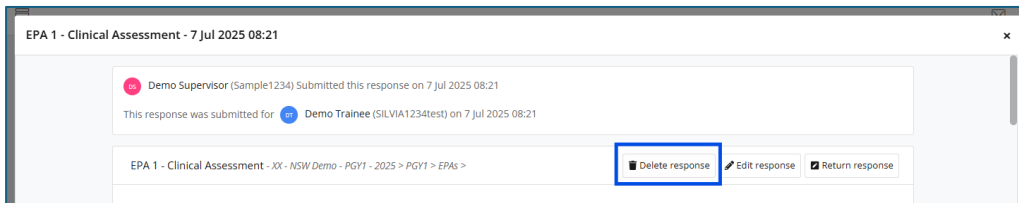
- Untick all ticked outcome statements to unmap them.



- When outcome statements are removed, a notification will appear for each statement.



- Return to the top of the form and click **Delete response**.



1.4 Editing forms/responses

MEU Admins can edit the contents of forms if required.

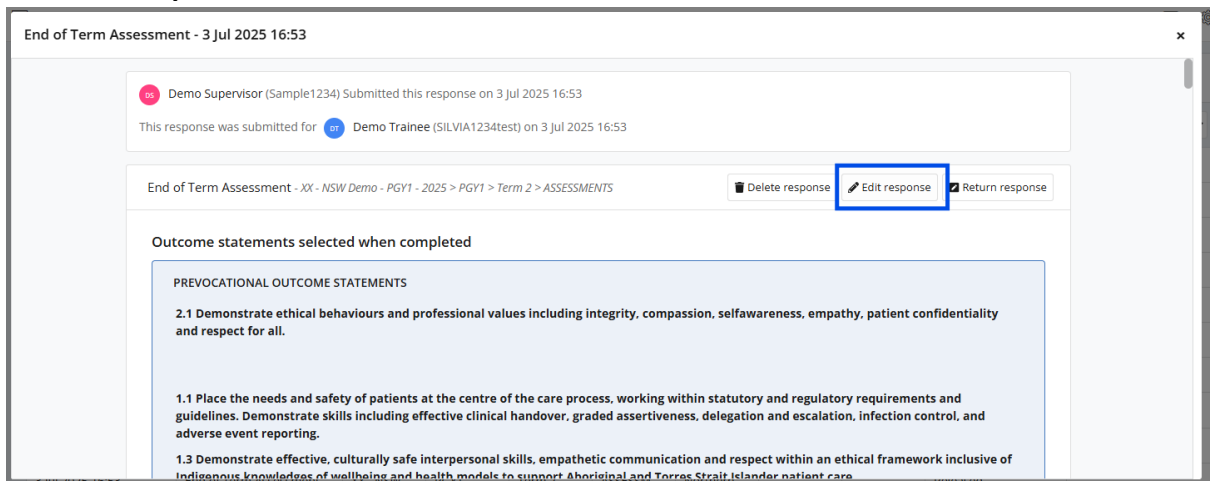
It is recommended to notify the submitting user, and/or supervisor, of any edits being made to forms. Details of edits can also be recorded in the Comments section at the bottom of a completed form for transparency.

Examples of when to use:

- To remove patient identifying or confidential information.
- On request by a supervisor, DCT or trainee.

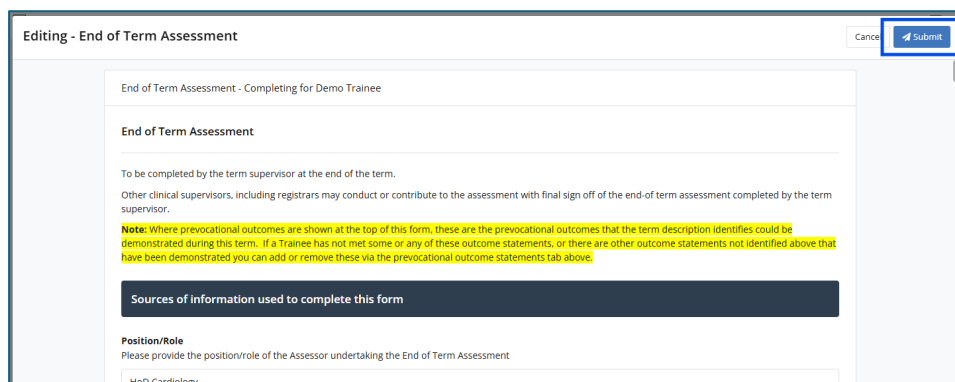
To edit form responses:

- Go to the **Manage responses/evidence** screen as described in section 1.1.
- Click on the row of the form to be edited to open the form.
- Click **Edit response**.



The screenshot shows a web interface for editing an 'End of Term Assessment' form. At the top, it indicates the form was submitted on 3 Jul 2025 16:53 by a 'Demo Supervisor (Sample1234)' for a 'Demo Trainee (SILVIA1234test)'. Below this, there are three action buttons: 'Delete response', 'Edit response' (highlighted with a blue box), and 'Return response'. The main content area is titled 'Outcome statements selected when completed' and contains a list of 'PREVOCATIONAL OUTCOME STATEMENTS'. The first statement is '2.1 Demonstrate ethical behaviours and professional values including integrity, compassion, selfawareness, empathy, patient confidentiality and respect for all.' Below it are two other statements: '1.1 Place the needs and safety of patients at the centre of the care process...' and '1.3 Demonstrate effective, culturally safe interpersonal skills...'. The 'Edit response' button is highlighted with a blue box.

- Edit any portion of the form as needed.
- Click **Submit**.



The screenshot shows the 'Editing - End of Term Assessment' form. At the top right, there are 'Cancel' and 'Submit' buttons, with 'Submit' highlighted by a blue box. The form content includes the title 'End of Term Assessment - Completing for Demo Trainee', followed by 'End of Term Assessment' and a description: 'To be completed by the term supervisor at the end of the term. Other clinical supervisors, including registrars may conduct or contribute to the assessment with final sign off of the end-of term assessment completed by the term supervisor.' A yellow-highlighted note states: 'Note: Where prevocational outcomes are shown at the top of this form, these are the prevocational outcomes that the term description identifies could be demonstrated during this term. If a Trainee has not met some or any of these outcome statements, or there are other outcome statements not identified above that have been demonstrated you can add or remove these via the prevocational outcome statements tab above.' Below the note is a dark grey button labeled 'Sources of information used to complete this form'. At the bottom, there is a 'Position/Role' field with the text 'Please provide the position/role of the Assessor undertaking the End of Term Assessment' and a text input field containing 'HoD Cardiology'.

- Add a comment to the end of the submitted form to document the edit and click **Add Comment**.

1.5 Returning forms/responses

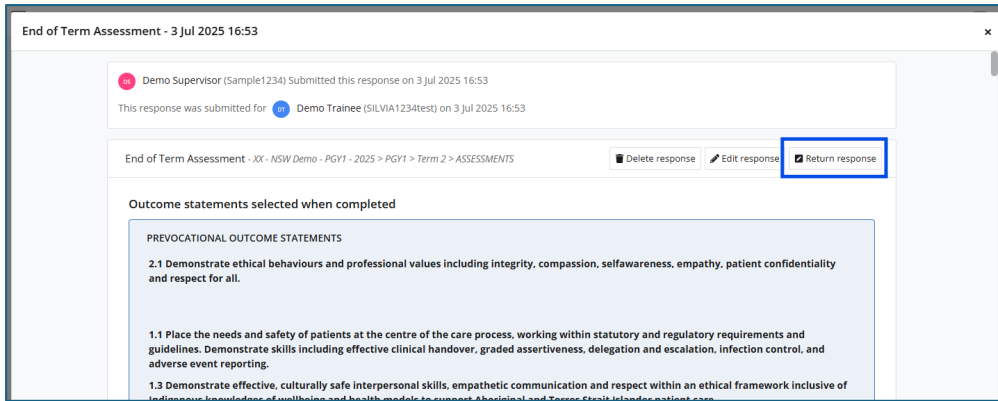
To allow users to edit forms themselves and resubmit, forms can be sent back to the person who submitted the form as a Draft. They can edit the forms and resubmit.

Examples of when to use:

- On request of a supervisor, trainee or DCT to edit portions of the form themselves
- If a trainee entered an incorrect email address when submitting a form initiated in their login. Using return response will allow them to resubmit with the correct email address.
- If an incomplete form was submitted, e.g. an EPA accidentally submitted with only the Trainee portion filled in when Email for Later should have been used to send the partially completed form to an assessor to complete and submit.

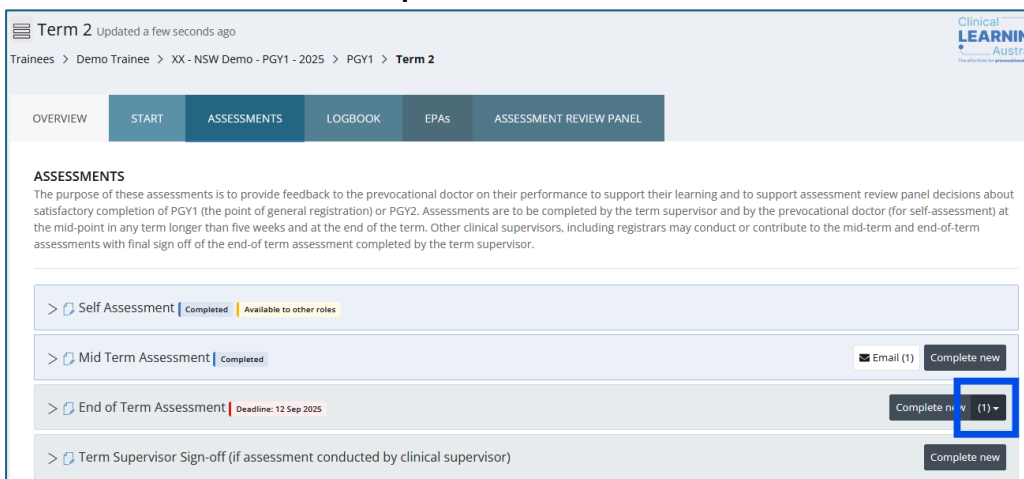
To return forms to the submitting user as a draft:

- Go to the **Manage responses/evidence** screen as described in section 1.1.
- Click on the row of the form to be returned to open the form.
- Click **Return response**.

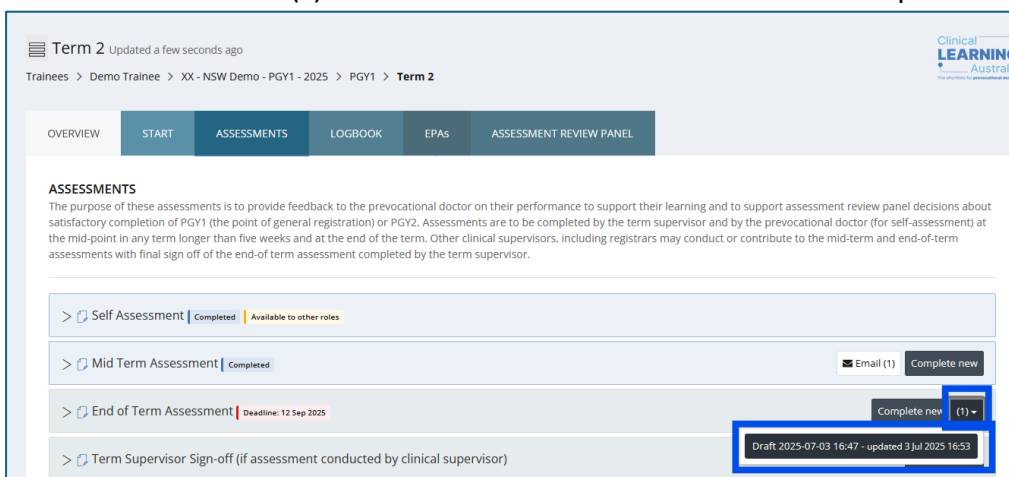


If the form was submitted directly by a user (not using the Email functions):

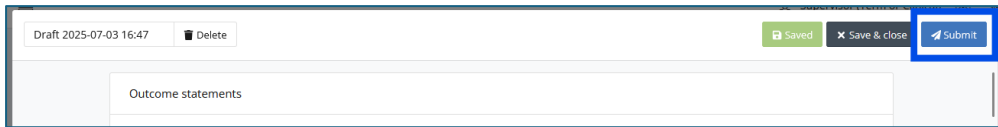
- The form will be available to the submitting user as a draft in the trainee’s ePortfolio Draft indicator beside the **Complete new** button for the form.



- The user clicks on the (x) to view the draft and clicks on the draft to open.

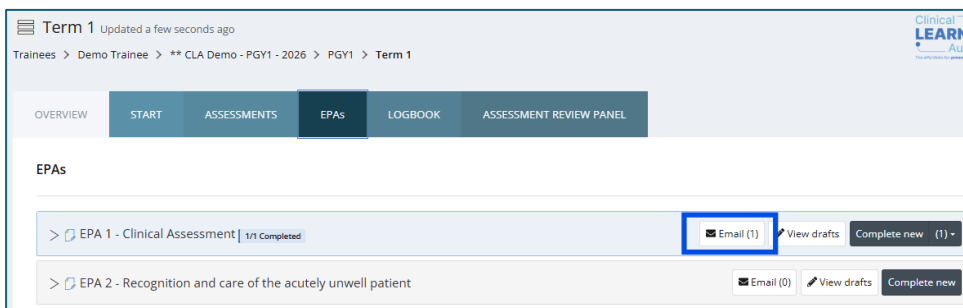


- Once the user has made the required changes, they click **Submit**.

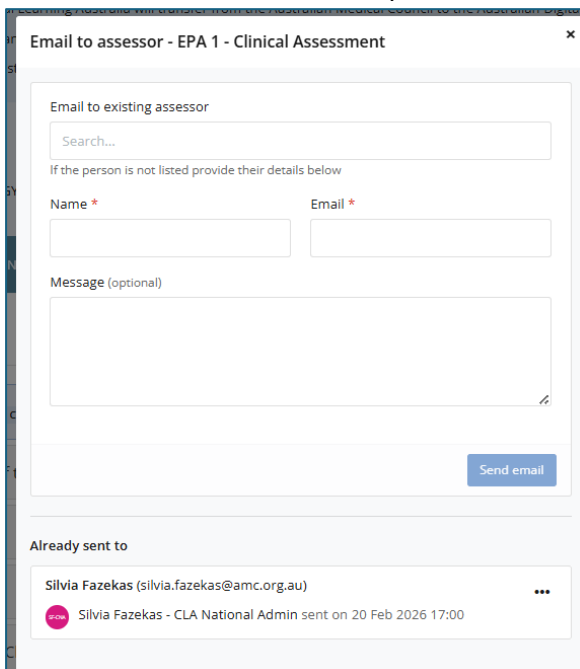


If the form was submitted via Email or Email for Later

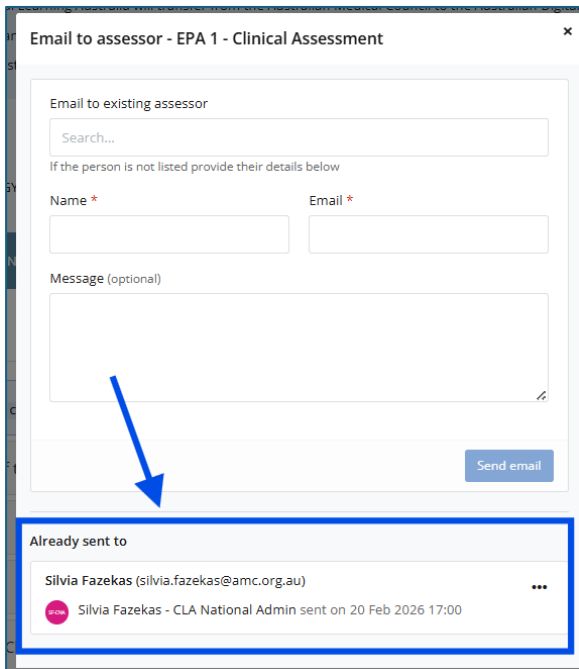
- Clicking **Return Response** will return the form to the **Email** state, not to the **Complete new** button.
- To view this, go to the Trainee's ePortfolio for that form. The **Email** button will have a (x) showing:



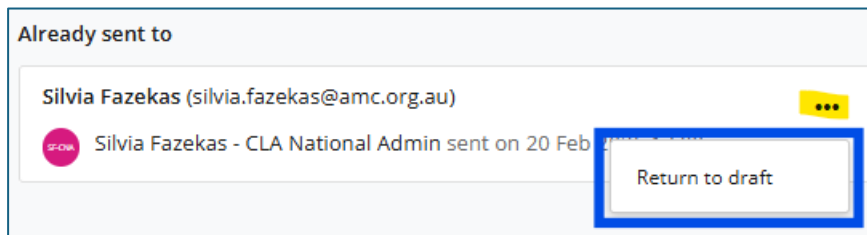
- Click on the **Email** button to open the window.



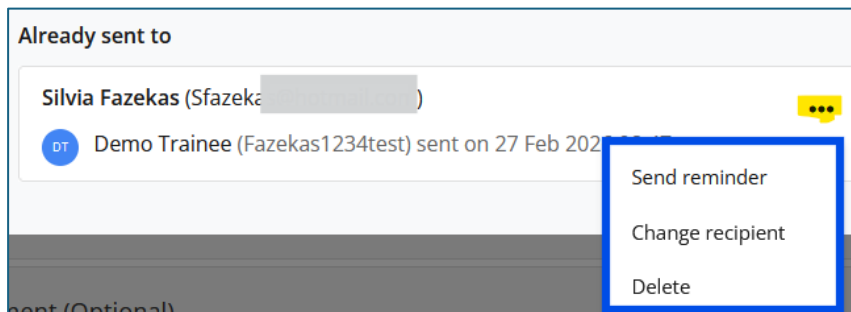
- At the bottom of the window, it will show who the email was sent to and when.



- MEU Admins can click on the three dots to the right of the entry and select **Return to Draft** to return the draft to the trainee in their ePortfolio next to the **Complete new** button.



- The user who sent the email (trainee or other user), can click on the three dots to the right of the entry and will have the options to:
 - Send Reminder.
 - Change Recipient.
 - Delete.



The MEU Admin can choose to either send the form back to draft or can ask the user to resent the form to the Assessor to complete via a new email.

2 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