Clinical Learning Australia

Training Guide

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

MANAGING TERM DESCRIPTIONS

This quick reference guide describes how to manage Term Descriptions in Clinical Learning Australia (CLA). This guide explains the process to follow to add Supervisors to Term Descriptions, how to manage other term description updates, as well as provides guidance about how to create new terms, archive existing terms and make changes to terms in bulk.

Release 2.0 – December 2025

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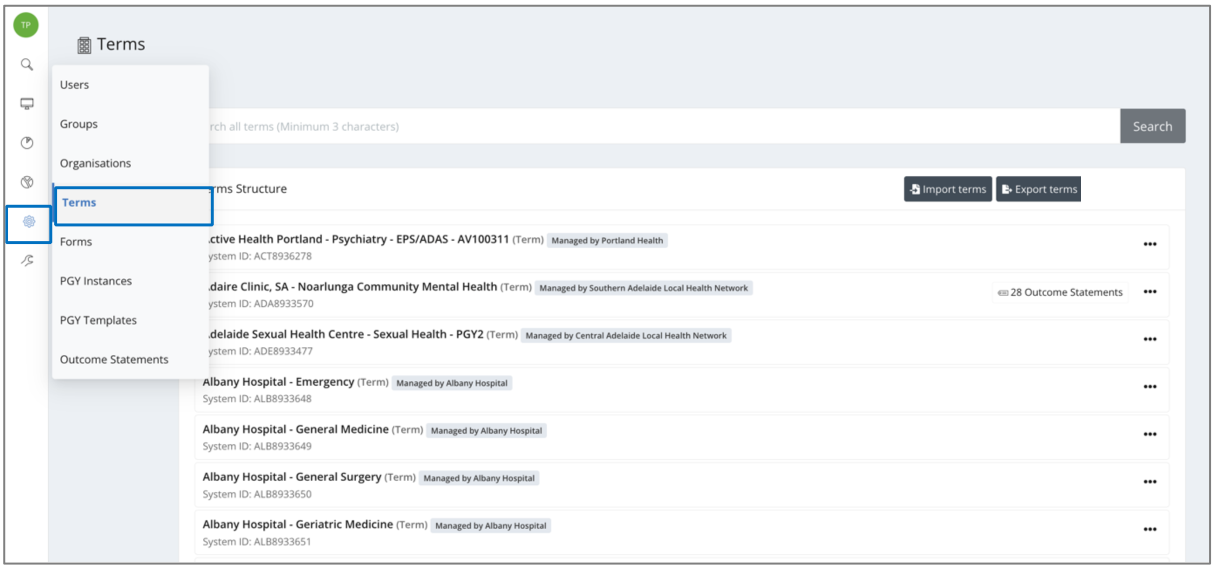
1 What is a Term Description?

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. It also identifies the speciality, subspecialty and clinical exposure classifications for the term and the prevocational outcomes statements that a trainee will have the opportunity to demonstrate. Term Descriptions can also include details of CLA supervisor users for that term. Where supervisors are added to a Term Description as described below, these supervisors are automatically linked to any trainees assigned to that term when term allocations are created.

2 Where do I find Term Descriptions?

State Administrators, MEU Administrators and **Medical Education Officers** can view Term Descriptions via the Admin menu in CLA.

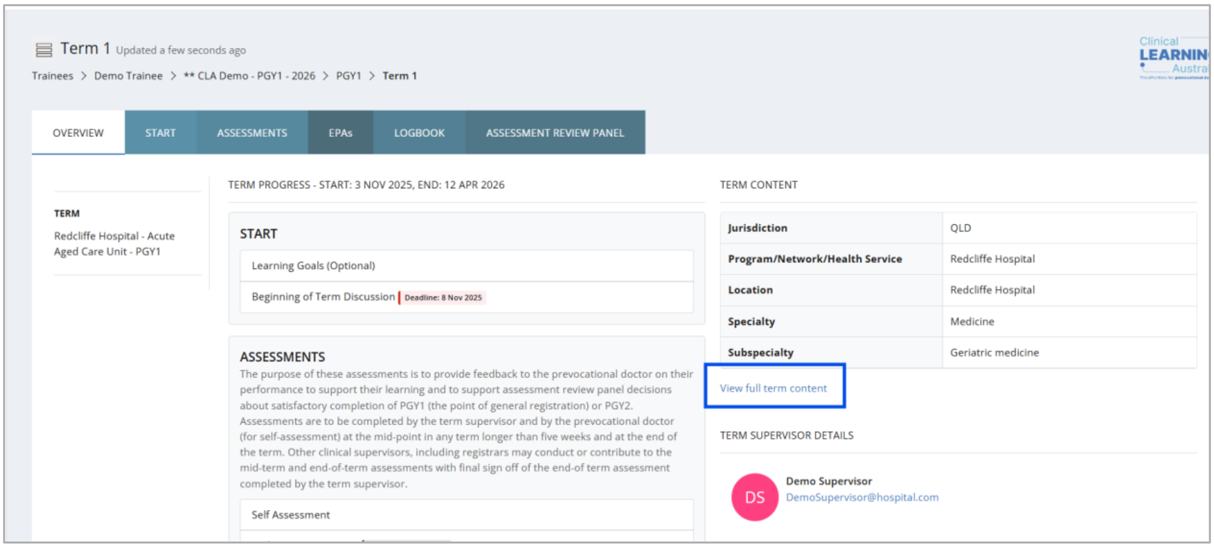
- Navigate to the Admin 'cog' icon in the left-hand menu and click **Terms**



Trainees, Supervisors and DCT/EDMS users will see Term Descriptions within each Trainee's ePortfolio for each term that the Trainee is allocated to.

- Click into the Trainee's ePortfolio for a particular term
- On the right-hand side under 'Term Content' click **View full term content**

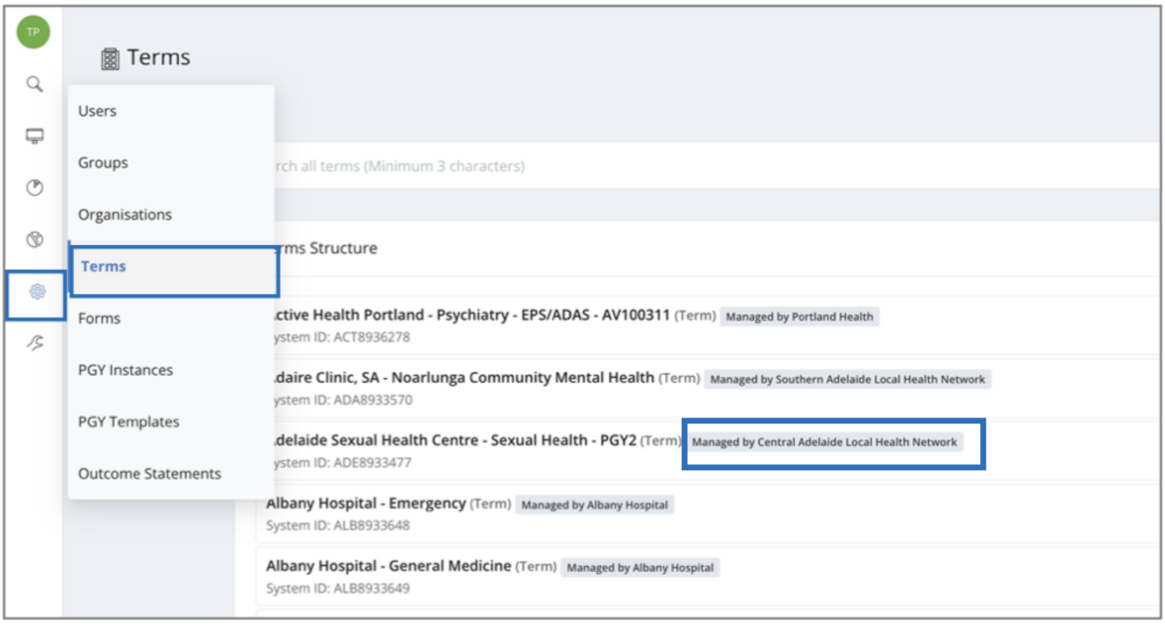
Where a supervisor has been nominated as the Term Supervisor for a particular term or trainee, this is also shown in this section.



3 Who can edit Term Descriptions?

Term Descriptions are 'owned' by an organisation in CLA. Only MEU Admin and MEO users assigned to the owning organisation can edit Term Descriptions. Administrators can view the owning organisation in the Terms screen via the Admin menu.

- Click on the Admin 'cog' icon in the left-hand menu and click **Terms**



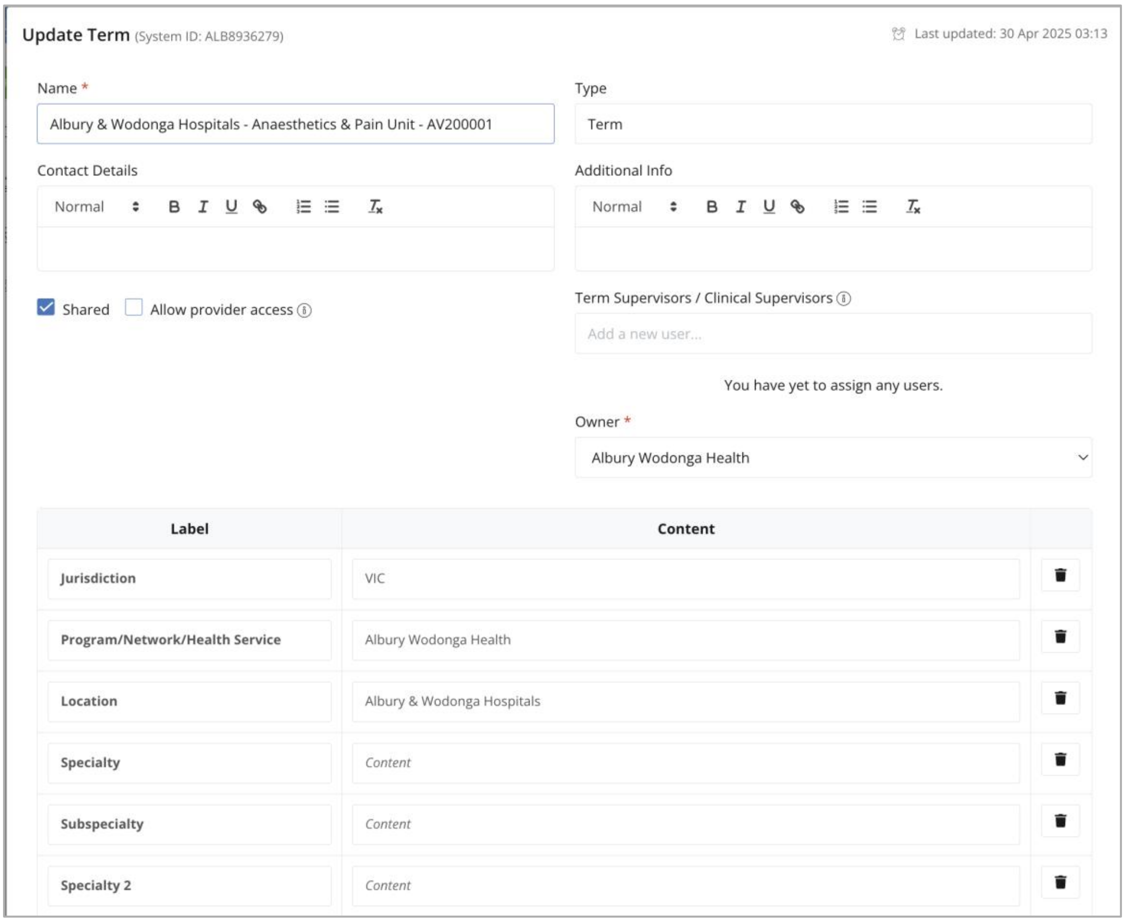
Beside the name of each term, you will see a 'Managed by' label. This identifies which organisation in CLA owns the term. Only those Admin users linked to that organisation can edit the term.

4 Editing term descriptions

To edit Term Descriptions one by one, an Admin user from the owning organisation can:

- Search for your term(s) using the Search box at the top of the page to bring terms with a matching name to the top of the screen
- Click on the three dots to the right-hand side of the term you wish to edit
- Click **View/Edit**

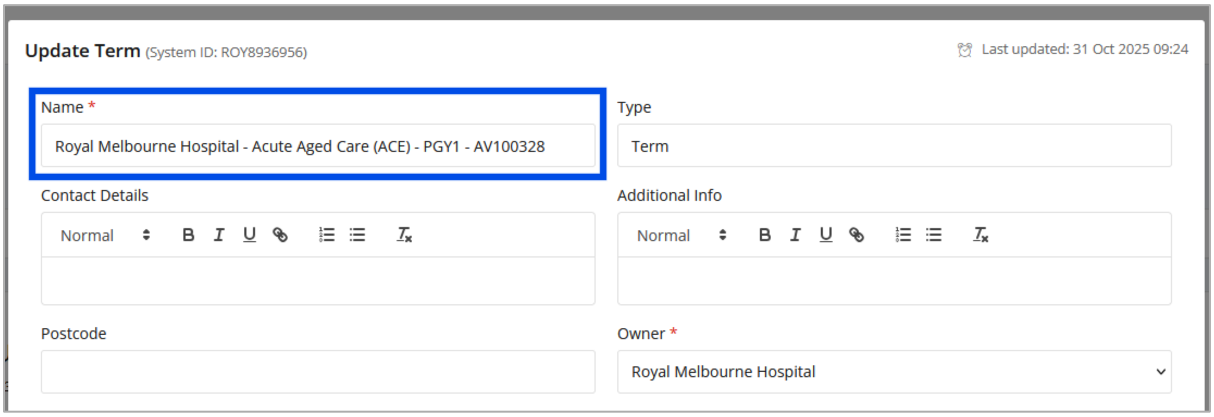
This will open the full Term Description and you will be able to edit the details within it.



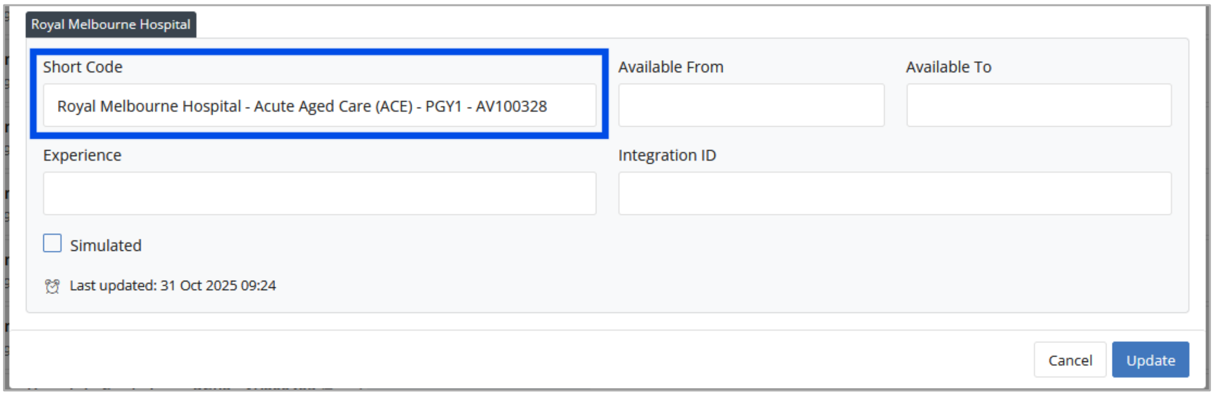
Please follow the process for your state/territory for updating term descriptions. In some states/territories, changes to Accredited PGY1 and PGY2 terms are required to go through the relevant Prevocational Medical Council.

Important: If you are changing the Name of a term, copy the new name and paste the same name in the Short Code field at the bottom the Term window.

Name field:



Short Code field:



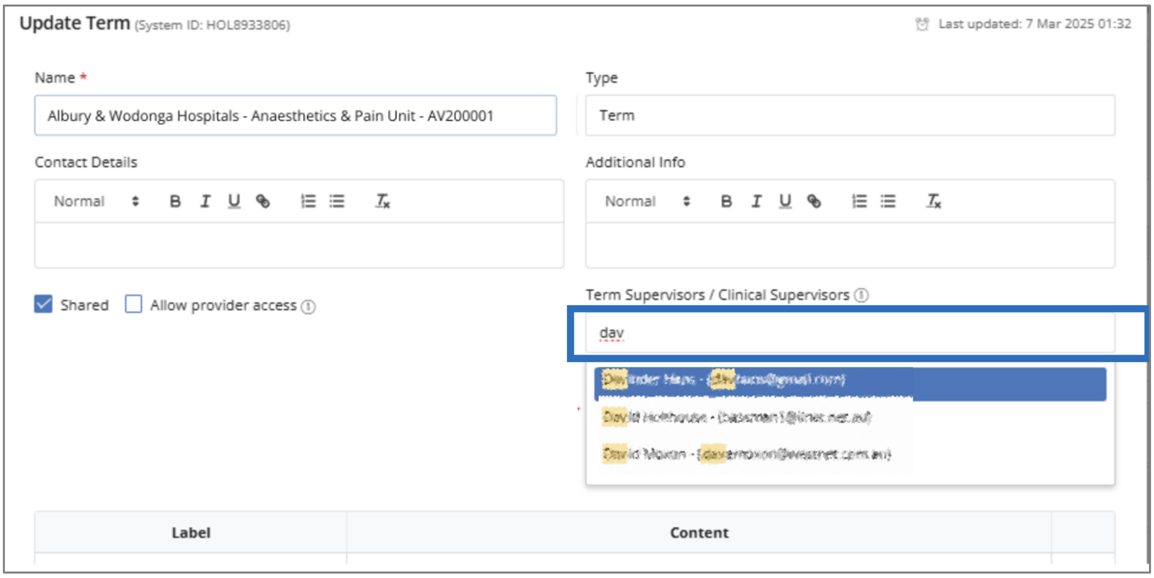
If the Name and Short Code field do not match for terms managed by your organisation, you will not be able to import term allocations using your term names and will need to use the SystemID.

4.1 Adding Supervisors to a Term Description

To add Supervisors to a Term Description:

- Click on the field at that top called ‘Term Supervisors / Clinical Supervisors’
- Type the name of the Supervisor you would like to add into the field and select the relevant user from those that appear below.

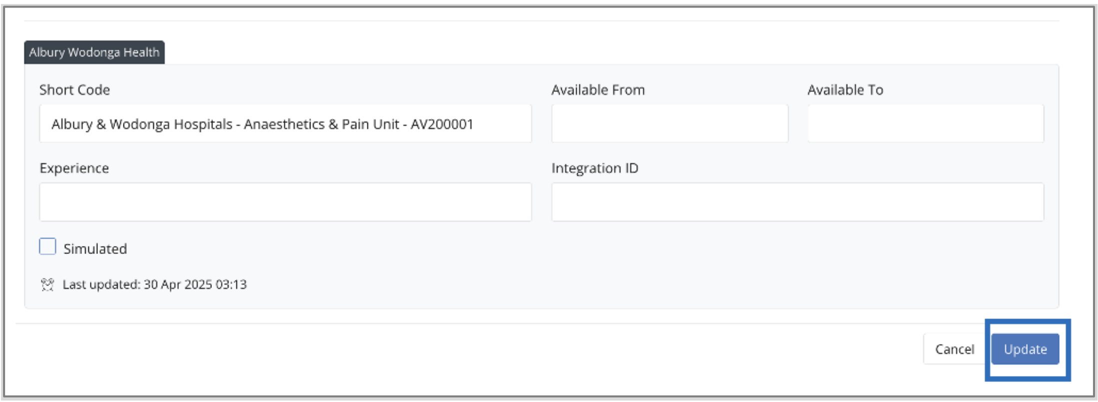
Note: You can only find and add supervisors linked to your organisation. If you need to add a supervisor linked to another organisation, contact the Nationwide Administrator to assist with this.



- You can add multiple supervisors in this way
- You can assign one supervisor as the 'Term Supervisor' and multiple as 'Clinical Supervisors'
- If there are multiple individuals who can be Term Supervisors, it is recommended to add all supervisors as Clinical Supervisors on the Term Description and assign one of the supervisors as the Term Supervisor for individual trainees in Term Allocations (see the **Quick Reference Guide Creating and Managing Term Allocations**).

If you have added supervisors to the Term Description as above, it is recommended to also add their details to the Term Supervisor text fields below, Name and Email, as these are visible to Trainees in their ePortfolio. Ensure the supervisors listed in these text fields are accurate.

When you've finished making changes to the Term Description, click **Update** at the bottom of the window.



Any changes made to Term Descriptions, including linking supervisors, require an overnight update to take place in CLA before these changes apply for new term allocations. Once the update takes place, any new term allocations made after this will automatically link these supervisors to trainees and any other changes made to the Term Description will be visible to trainees in their ePortfolios.

Updates to existing allocations:

Changes made to Term Descriptions, excluding linking of supervisors, are applied to any existing allocations once a week on a Friday evening.

Changes to supervisors linked to Term Description do not flow through to current or future term allocations already entered in the system. It is possible to update existing term allocations to add the new supervisors that have been linked to the term.

To update supervisors for existing allocations, you can:

- Add the supervisors manually to each trainees allocation
- Create a new allocation for the trainee for the same term to link in supervisors and delete the previous allocation
- Reimport your Term Allocation spreadsheet that you previously imported to create the allocations. For any allocations that are still the same, CLA will ignore the allocation but process the new supervisors and link them to the allocations.

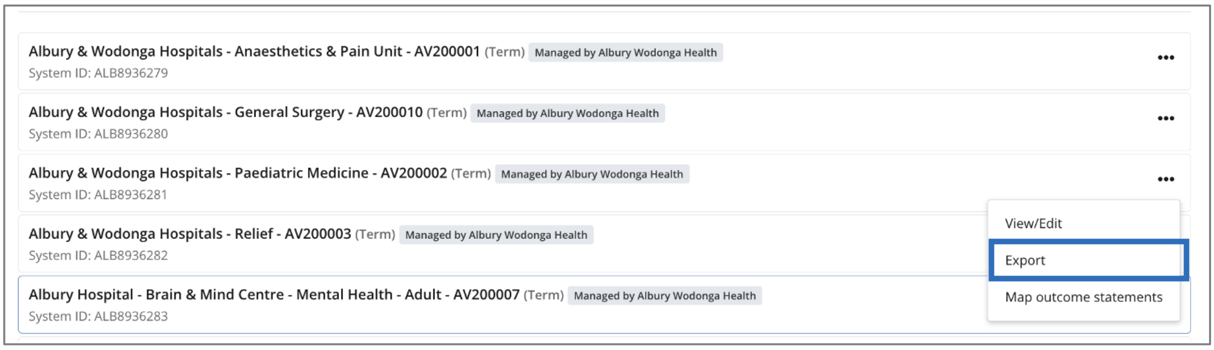
For more information, see the **Quick Reference Guide Creating and Managing Term Allocations**.

5 Exporting Term Information

You can export information about individual terms or all terms in CLA in bulk.

To export individual terms:

- Go to the Admin 'cog' and select **Terms**
- Search for your term(s) using the Search box at the top of the page
- Click on the three dots to the right-hand side of the term to export
- Click **Export**



This will export an excel spreadsheet of the information for the selected term.

To export all terms in CLA:

- Go to the Admin ‘cog’ and select **Terms**
- Click on the **Export terms** button above the list of all terms.

- In Excel, use Filtering to find terms for your health service to see their contents.

Supervisors linked to a term are not included in the individual or bulk term exports, however any supervisor names and emails entered in the Supervisor and Email text field will be included.

6 Mapping Outcome Statements

You can map prevocational outcome statements to a Term Description. Where outcome statements have been mapped to a term, they will automatically be ‘ticked’ as having been demonstrated by the Trainee in their End of Term Assessment for that term. The supervisor completing the End of Term Assessment can untick any outcome statements that have not been demonstrated and include others should they wish to.

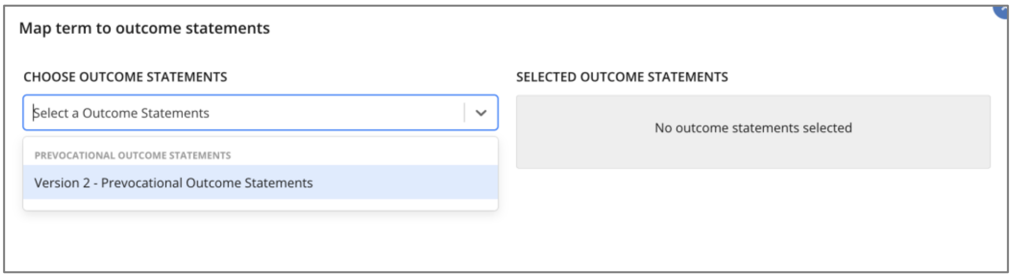
To see if outcome statements have been linked to a term, scroll down in the list of terms to the term you are looking for – a label will display to the right of the term indicating the number of outcome statements have been linked to it, if any.

To map outcome statements or to change the outcome statements mapped to a term:

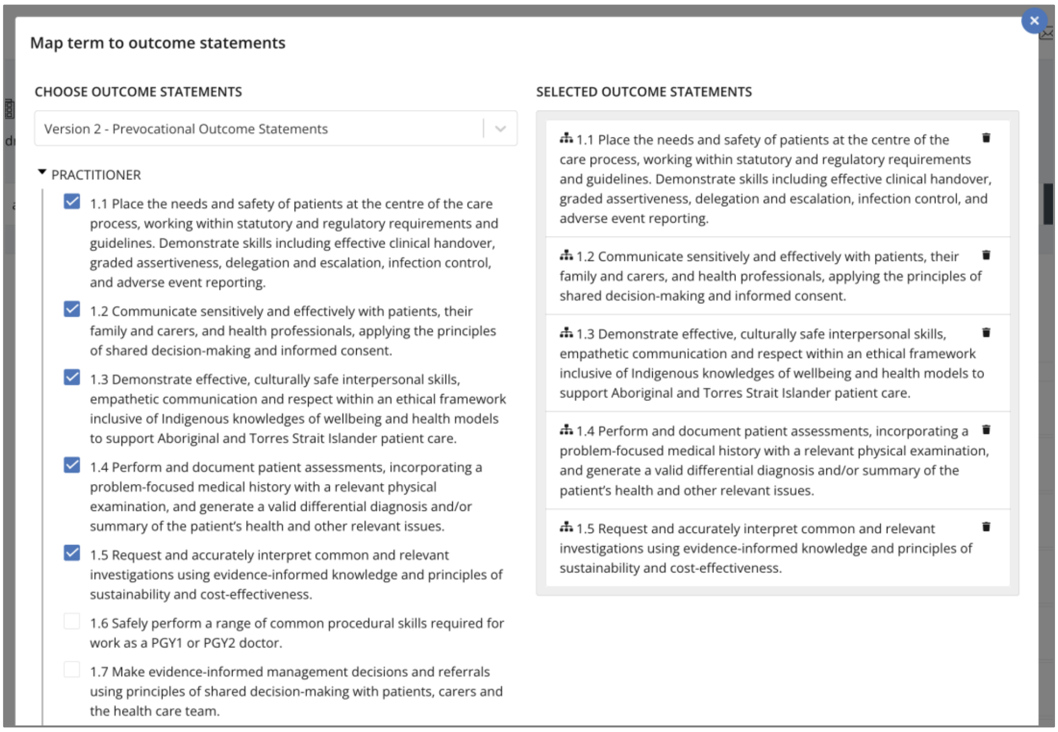
- Click on the three dots to the right-hand side of the term

- Click ‘Map outcome statements’

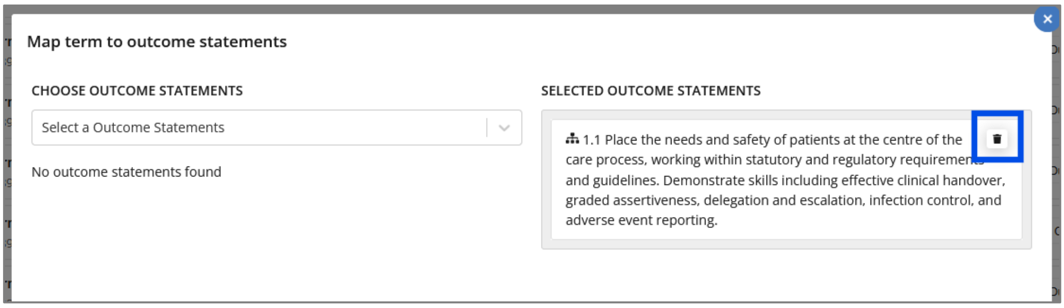
- Select the most recent version of the Prevocational Outcome Statements available from the drop-down box on the left-hand side



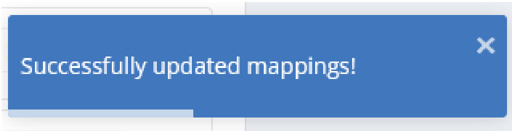
- You will then be able to select the relevant Prevocational Outcome Statements to be mapped to the term – these will populate in the Selected Outcome Statements column on the right side of the window.



- To unmap previously selected statements, click on the bin icon to the right of the relevant statements in the Selected Outcome Statements column to remove them.



- When you have finished click the 'X' in the top right-hand side of the form and a notification of success will flash up in the bottom right corner of the CLA screen.



<u>Important</u>: When you make changes to the mapped outcome statements, these will apply to new term allocations entered in CLA following the nightly CLA update. For already allocated terms, these changes will be applied following an automatic update that runs every Friday night.

7 Creating, archiving, and bulk updating terms

MEU Admins and MEOs do not have permission to create terms, archive terms, or to make changes to terms in bulk. This access is restricted to the Nationwide Administrator role.

For accredited PGY1 and PGY2 terms, depending on business rules in your state, Prevocational Medical Councils or Health Services can provide a spreadsheet of new terms or term changes to the Nationwide Administrators. For unaccredited and PGY3+ terms, Health Services can provide lists to the Nationwide Administrators directly.

The simplest way to add new terms, remove terms, or to make changes to existing terms in bulk, is to export the existing terms list from CLA and to use this 'Export-Providers' spreadsheet as the template for how terms for your health service have been and should be created.

You can then use this exported spreadsheet to provide term changes to the Nationwide Administrator.

How to identify changes in the exported spreadsheet:

In the exported 'Export-Providers' spreadsheet, filter to terms for your health service and then:

- Copy the contents of the spreadsheet, including the header row (Row 1), into a new spreadsheet
- Terms to be **removed**:
  - shade columns A and B red
  - change the term name to include '(Archived)' at the front of the term name

- Terms to be **updated**:
    - shade columns A and B amber
    - make your changes in the term row(s) and change the colour of any fields updated to amber to make it clear what is changing
- New terms to be **added**:
    - add the details of the terms as new rows at the bottom of the spreadsheet
    - shade Columns A and B green
    - leave column A blank
    - It’s recommended to follow the conventions of the existing terms above as a guide for how to enter in the data for your new terms.

A	B	C	D	E	
Existing System ID	Provider org Name	Parent org Short Code or System ID	Provider contact information for the student (free text)	Org Type (free text)	Pc
TCH301342	(Archived) TCH - Dermatology			Term	
TCH8933577	TCH - Acute Medical Unit			Term	
	TCH - Radiology			Term	

- Remove any term rows that are not changing
- Save this spreadsheet and send it to the Nationwide Administrator

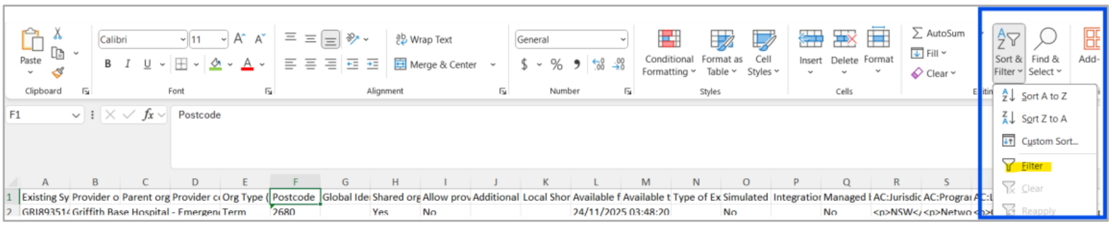
The Nationwide Administrator will then be able to import this spreadsheet and make the changes for you in bulk.

Completing the Term Import Spreadsheet, step by step:

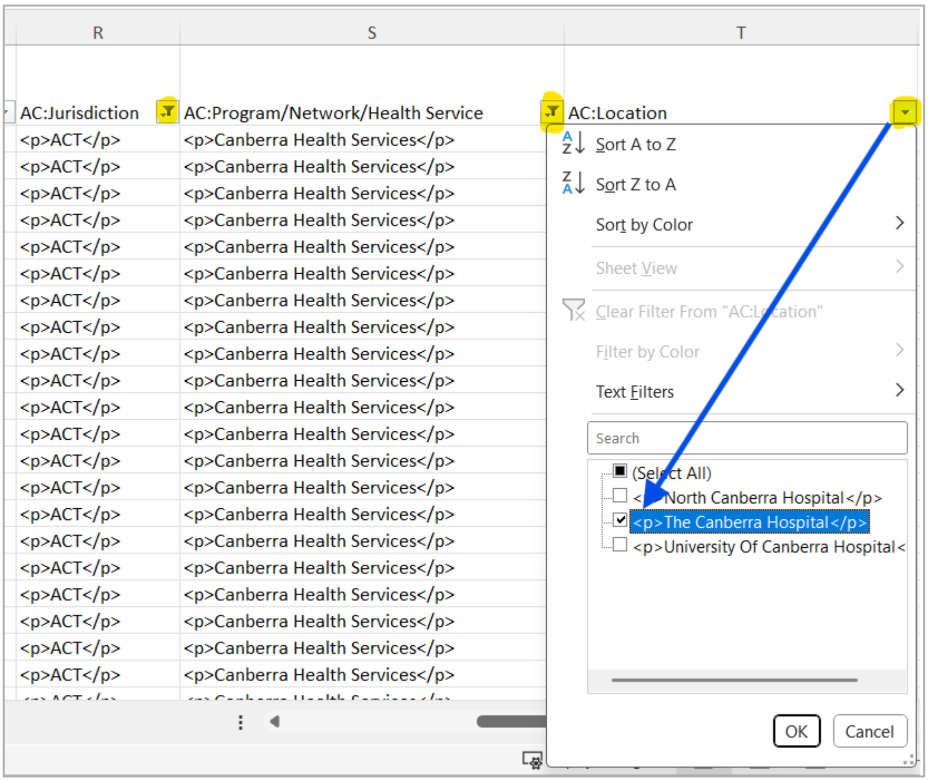
To export the spreadsheet with existing terms:

- Click on the Admin ‘cog’ icon in the left-hand menu and click **Terms**
- Select **Export Terms**

- In the Excel spreadsheet, add **Filter** to the top row.



- Filter to your State and/or Health Service in Columns R, S, T to find your existing terms.



- Copy and paste your terms along with the Header row (row 1) into a new spreadsheet and save this locally.

To add new terms:

- Add in the new terms to the bottom of the spreadsheet, leaving Column A, Existing System ID, blank.
- Fill in the fields, specifically in the columns that start with AC (Additional Content), in a similar way to how they have been completed for the existing terms
    - *Provider org Name* - the term name in CLA. Include the PGY in the Term name for PGY3+ or where terms are for PGY1 or PGY2, not both
    - *Jurisdiction* - State/Territory abbreviation
    - *Program/Network/Health Service*
    - *Location*
    - *Specialty / Subspecialty*
    - *Supervisor(s)* - Ahpra is not needed
    - *Supervisor email(s)*
    - *Prevocational Outcome Statements* – add if applicable
    - *EPAs* - add if applicable
    - *Clinical Exposures* - Yes/No or blank. NOTE, these are not listed in ABCD order, but Acute, Chronic, Periprocedural, Undifferentiated; expand the column headers to see these to ensure you enter this data correctly. Leave blank for PGY3+ terms.

- *Is this a non-clinical term?* - Yes/No or blank
- *Is this a service term?* - Yes/No or blank
- *Working in a dedicated clinical team?* - Yes/No or blank
- *Accreditation Status* - Accredited / Provisionally Accredited, other text or blank
- *Is this a PGY1, PGY2 or PGY1 and PGY2 term?* - PGY1 / PGY2 / PGY1 and PGY2 / PGY3+
- *Term Description* - this is a text field. You can leave this blank, enter a block of text, and/or add a link to a Word or PDF term description on your Intranet or published online. For example:

  If putting blocks of text in the Term Description, it is recommended you put the text through an HTML converter to add in the HTML markup so that the text includes word formatting. Otherwise, it will appear as a single block of text. You can look up a text to HTML converter online. Example: Online Text to HTML Converter.
- *AssessorEmail1* & *AssessorRelationship1* – to link supervisors as part of the import. Enter in the email address of the supervisor to link in the AssessorEmail column, and a relationship of either Term Supervisor or Clinical Supervisor in the AssessorRelationship column. Add in additional columns with iterative numbering to link multiple supervisors, noting only one can have the Term Supervisor relationship.
  If these columns are not in your exported spreadsheet, add these column headings manually after the Term Description column.
  Note, an account for the supervisor with the matching email address must exist in CLA for them to be linked.

You don't need to put in the <p> and </p> for any columns where you are adding text, other than the Term Description column if you want text here to be formatted in a particular style (i.e. to add bold, italic, bullet points etc).

However, if any fields are blank in the AC: columns section (Jurisdiction to Term Description), we recommend that you add **<p></p>** as a placeholder so that the field gets created in CLA.

Email the completed spreadsheet to the Nationwide Administrator for import.

Sample of a completed spreadsheet:

Columns A – H:

	A	B	C	D	E	F	G	H
1	Existing System ID	Provider org Name	Parent org Short Code or System ID	Provider contact information for the student (free text)	Org Type (free text)	Postcode	Global Identifier	Shared org? (Yes/No)
2	TCH301342	(Archived) TCH - Dermatology			Term			Yes
3	TCH8933577	TCH - Acute Medical Unit			Term			Yes
4		TCH - Radiology			Term			Yes

Columns I – Q:

I	J	K	L	M	N	O	P	Q
Allow provider access? (Yes/No)	Additional information (free text)	Local Short Code	Available from	Available to	Type of Experience (free text)	Simulated Practice (Yes/No)	Integration Id	AC:Jurisdiction
No			24/11/2025 03:48:20			No		ACT
No			24/11/2025 03:48:20			No		ACT
No						No		ACT

Columns R – X:

R	S	T	U	V	W	X
AC:Program/Network/Health Service	AC:Location	AC:Specialty	AC:Subspecialty	AC:Specialty 2	AC:Subspecialty 2	AC:TermSupervisorName
Canberra Health Services	The Canberra Hospital	Medicine	Dermatology			Dr. Andrew Example
Canberra Health Services	The Canberra Hospital	Medicine	General medicine			Dr. Anna Demonstration
Canberra Health Services	The Canberra Hospital	Medicine	Radiology			Dr. Sean NewTerm

Columns Y – AF:

Y	Z	AA	AB	AC	AD	AE	AF
AC:AHPRA Number	AC:Email	AC:Prevocational Outcome Statements	AC:EPAs	AC:Clinical Exposure - Acute and Critical	AC:Clinical Exposure - Chronic	AC:Clinical Exposure - Periprocedural	AC:Clinical Exposure - Undifferentiated Care
	AExample!@Hospital.com.au	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,	1, 2, 3, 4	Yes	Yes	No	No
	Anna.Demo@Hospital.com.au	Refer to PDF	1, 2, 3, 4	Yes	No	No	Yes
	snewterm@hospital.com.au	1.1, 1.3, 1.6, 1.7, 2.2, 2.5	1, 2, 3, 4	No	No	No	No

Columns AG - AN

AG	AH	AI	AJ	AK	AL	AM	AN
AC:Is this a non-clinical term? (PGY2 only)	AC:Is this a ServiceTerm?	AC:Working in a Dedicated Clinical Team?	AC:AccreditationStatus	PGY1, PGY2 or PGY1 and PGY2 term?	AC:Term Description	AssessorEmail1	AssessorRelationship1
No	Yes	Yes	Not Accredited	PGY2+	https://www.crmec.net/term-descriptions		
No	No	No	Accredited	PGY2	https://www.crmec.net/s/CHS-AMU-Nov-2023.pdf		
No	Yes	Yes	Not Accredited	PGY2+	<p><a href="https://www.crmec.net/term-descriptions">h	snewterm@hospital.com.au	Term Supervisor

8 Support

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