

Clinical Learning Australia

User Guide

for Term and Clinical Supervisors, Assessors,  
Director of Clinical Training (DCT) and Executive  
Directors of Medical Services (EDMS)



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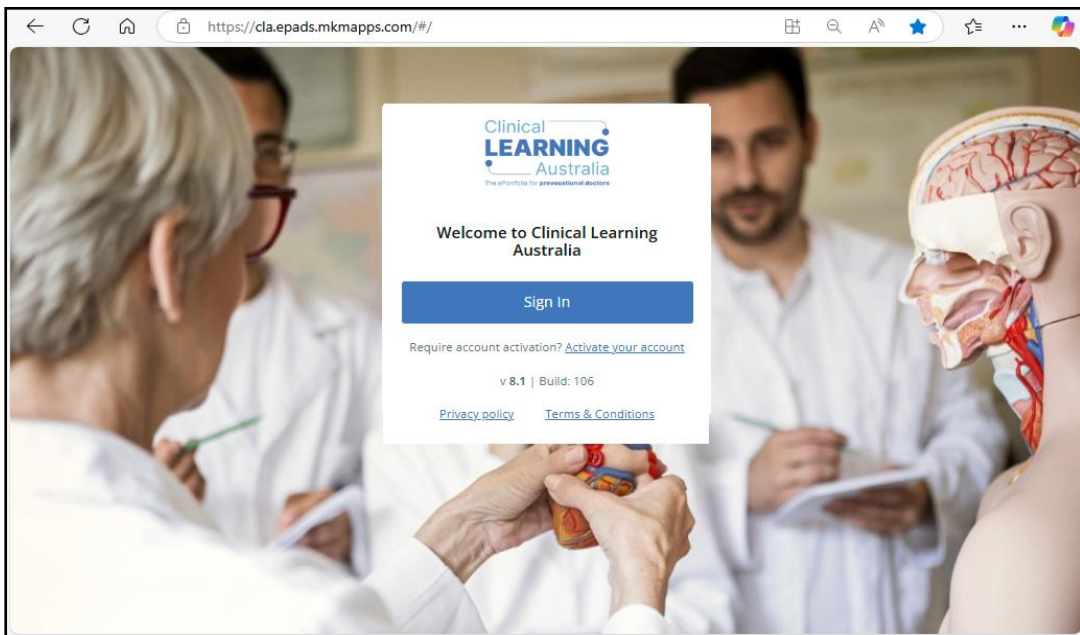
# 1 Navigating CLA

## 1.1 How to login

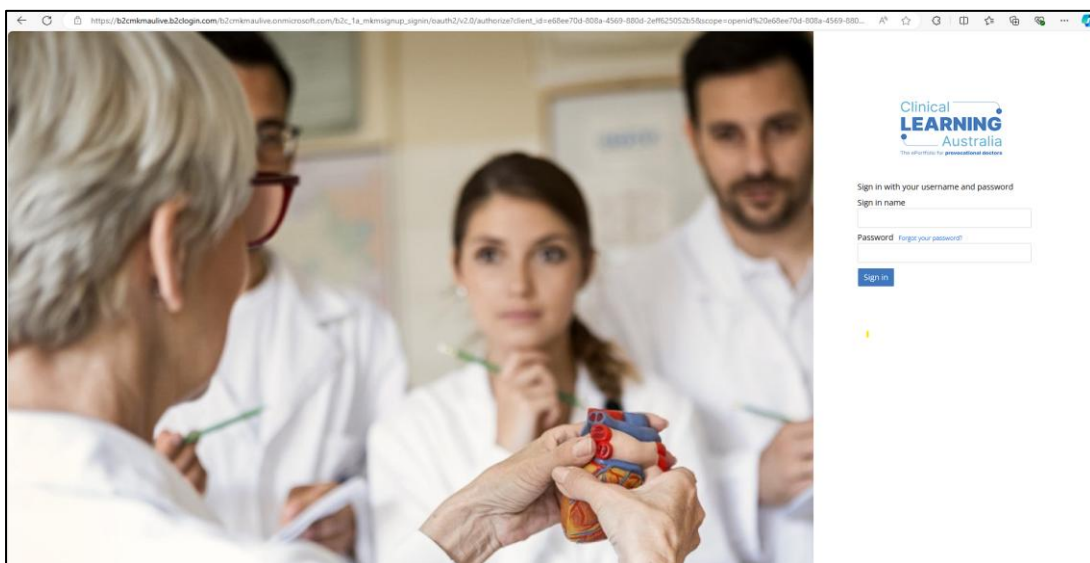
Navigate to the Clinical Learning Australia login page at:

<https://cla.epads.mkmapps.com>

Click the **Sign in** button.



Enter in your login credentials, and click **Sign in**.



The **Sign in name** is your email address.

## 1.2 Forgotten password

If you have forgotten your password, you can reset your password on the login page.

Click on **Sign in** and then select **Forgot your password?** This will prompt you to enter your username/email and will send you a verification code to your email.



Clinical  
**LEARNING**  
Australia  
The ePortfolio for prevocational doctors

Sign in with your username and password

Sign in name

Password **Forgot your password?**


Sign in

Enter the verification on the CLA verification screen and follow the prompts to reset your password. **Note.** You may need to check your Junk/Spam folder for the email.

To find out more information, please refer to the [How to reset your password](#) quick reference guide.

## 1.3 The side navigation toolbar

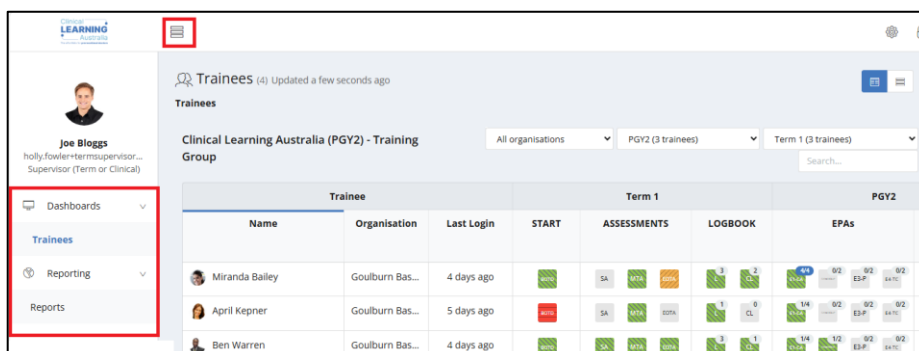
Moving between screens in CLA is done using the side navigation toolbar which is the vertical menu bar located on the left-side of the CLA screen.

The navigation toolbar can be expanded by clicking on the burger menu icon  at the top left of the screen in the white banner bar, or you can hover your mouse over the icons to see their full names. The options you see in the navigation toolbar will depend on your user role.

### *Term and Clinical Supervisors*

Term and Clinical Supervisors see:

- **Dashboards > Trainees** See Section 2.1 for more information.
- **Reporting > Reports** Where you can access and run reports available in the system. See Section 4 for more information.

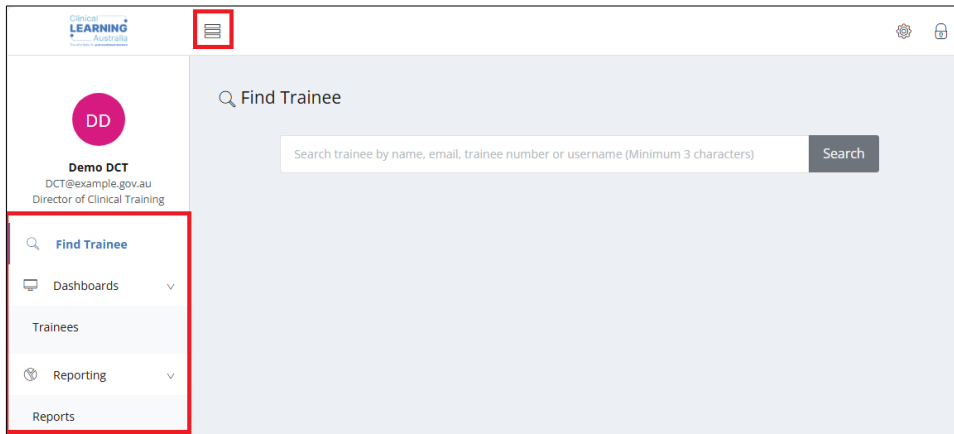


Trainee		Term 1			PGY2	
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	EPAs
Miranda Bailey	Goulburn Bas...	4 days ago	SA	SA M2A M2B	SA M2A M2B	SA M2A M2B M2C M2D M2E M2F M2G M2H M2I M2J M2K M2L M2M M2N M2O M2P M2Q M2R M2S M2T M2U M2V M2W M2X M2Y M2Z
April Kepner	Goulburn Bas...	5 days ago	SA	SA M2A M2B	SA M2A M2B	SA M2A M2B M2C M2D M2E M2F M2G M2H M2I M2J M2K M2L M2M M2N M2O M2P M2Q M2R M2S M2T M2U M2V M2W M2X M2Y M2Z
Ben Warren	Goulburn Bas...	4 days ago	SA	SA M2A M2B	SA M2A M2B	SA M2A M2B M2C M2D M2E M2F M2G M2H M2I M2J M2K M2L M2M M2N M2O M2P M2Q M2R M2S M2T M2U M2V M2W M2X M2Y M2Z

## Directors of Clinical Training (DCT) and Executive Directors of Medical Services (EDMS)

DCTs and EDMS' see:

- **Find Trainee** Where you can search for individual prevocational doctors that you have been allocated to and access their ePortfolio.
- **Dashboards > Trainees** See Section 2.1 for more information.
- **Reporting > Reports** Where you can access and run reports available in the system. See Section 4 for more information.



### 1.4 CLA home screen

The home screen or landing page that users see when logging into CLA varies by role.

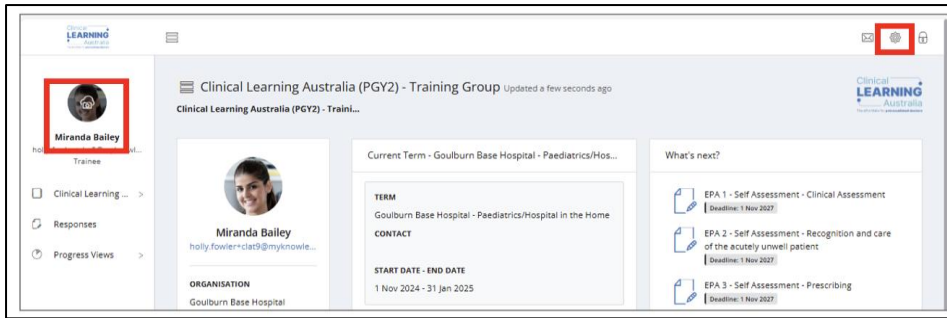
The Term and Clinical Supervisor home page is the **Trainee Dashboard** whereas the DCT and EDMS home screen is the **Find Trainee** search page.

To return to your home screen, click on the CLA image in the top left of any screen.

### 1.5 Managing your profile

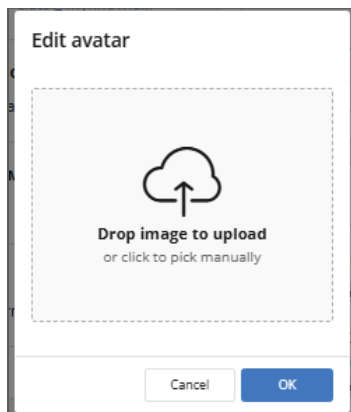
Users can manage their profiles in CLA, including adding/changing your profile picture, adding a contact phone number and changing their password.

To add or update your profile picture, click on the circle or image at the top left of the Navigation Bar to open the **Edit avatar** window. To add a contact phone number or to change your password, click on the Settings cog icon at the top right of the screen.



In the Edit Avatar window, drop an image in the window or click on the window to navigate to an image to upload and click **OK**.

**Note:** You may need to refresh your page to see the profile picture appear.



To enter your contact phone number, enter this into the Phone field and select **Save Profile**.

**Note:** your contact phone number is optional and is only used as a reference for your local Medical Education Unit (MEU) / Junior Medical Officer (JMO) Management team should they want to contact you. It is not used for any system generated messages/calls. A phone number can be a mobile or landline number.

To change your password, select **Change Password** and follow the prompts. Click **Continue** to save your new password.

## 1.6 Logging out of CLA

It is recommended that users log out of CLA, particularly if using a public or shared computer.

To log out of CLA when you have finished your session, click on the lock icon in the top right-side corner of the screen.

**Note:** The system will automatically log you out after 30 minutes of inactivity.



## 2 Using CLA

### 2.1 Trainee dashboard

The **Trainee<sup>1</sup> Dashboard** shows Supervisors, DCTs and EDMS' the prevocational doctors that they are assigned to, separated into relevant groups. Term and Clinical Supervisors are assigned to prevocational doctors through the term allocations process whereas DCTs and EDMS' are included in the Trainee Cohort Groups and see all Trainees in their allocated Groups.

If you do not see prevocational doctors that you are supervising/overseeing in your dashboard, speak to your local Medical Education Unit in the first instance.

The Dashboard shows the prevocational doctors, listed in alphabetical order by surname, the organisation they are assigned to, when they last logged into CLA and their current Term and form completions.

**Note:** If you are overseeing PGY doctors in different clinical years, e.g. PGY 1 and 2's, or different clinical year types, e.g. 4-term and 5-term clinical years, you may see multiple dashboards and need to scroll down.

#### Trainee dashboard example

Trainee			Term 1			PGY2			
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	EPAS			ASSESSMENT REVIEW PANEL
Miranda Bailey	Goulburn Bas...	3 days ago		SA  MTA  EDTA	3  2	4/4  0/2  0/2  0/2	ABPA		
April Kepner	Goulburn Bas...	5 days ago		SA  MTA  EDTA	1  0	1/4  0/2  0/2  0/2	ABPA		
Ben Warren	Goulburn Bas...	4 days ago		SA  MTA  EDTA	3  1	1/4  1/2  0/2  0/2	ABPA		

The Dashboard provides a quick indication of how prevocational doctors are progressing.

- Red icons indicate that a deadline has passed and that a specific form has not yet been completed.
- Green icons indicate that a form has been completed and submitted.

<sup>1</sup> Note that the CLA system uses the term 'Trainee' for a Prevocational Doctor. In all CLA training materials the terms 'Trainee' and 'Prevocational Doctor' mean the same thing and refer to the same role.



- For End of Term Assessments, green indicates that a global rating of **Satisfactory** has been selected.
- For Assessment Review Panel (ARP) forms, green indicates that the prevocational doctor's terms/outcomes of assessment have been discussed, and they have been recommended as ready for registration.
- Grey icons mean that a form that is due in the future has not yet been completed.
- Amber icons indicate that a threshold has not been met. This is only relevant for the End of Term Assessment and Assessment Review Panel (ARP) forms.
  - End of Term Assessments will only appear in amber where a global rating of **Conditional Pass** or **Unsatisfactory** has been selected.
  - ARPs will appear amber where the form has not been completed by the deadline, or either of the following two questions haven't been selected as Yes:
    - the prevocational doctor's terms/outcomes of assessment have been discussed
    - the prevocational doctor is recommended as ready for registration.
- The numbers in the top corner of a form indicate the number of forms that have been completed, e.g. logbook entries. For the EPAs, the number will also include how many of that type are required as the denominator.

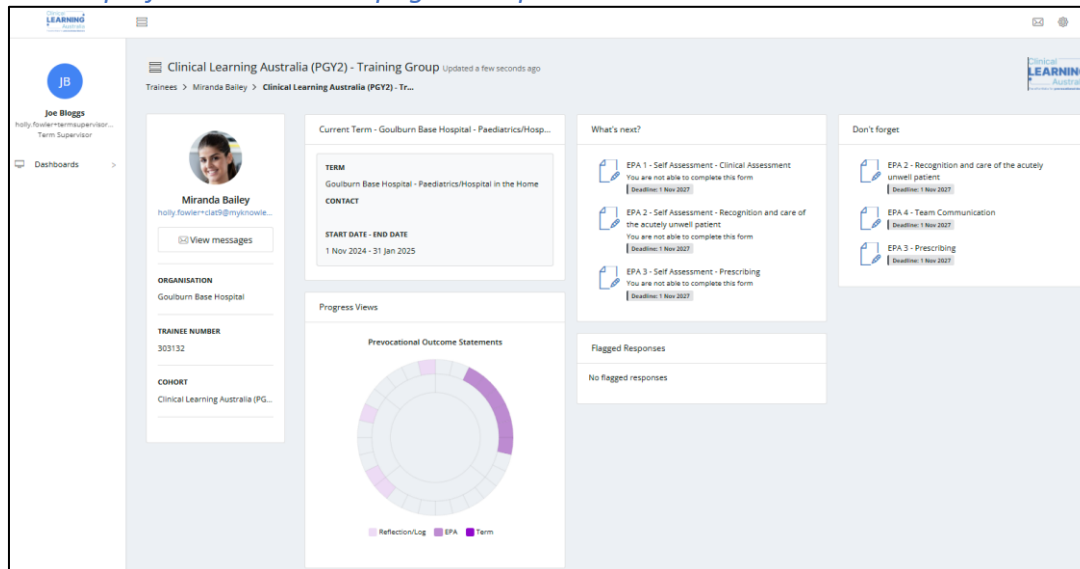
Amber icons for End of Term Assessment and Assessment Review Panel forms are intended to flag to Directors of Clinical Training and other managers of training any prevocational doctors that may require additional attention.

Hovering over any of the icons shows you information about the status of that assessment. For instance, when it was due or when an assessment was last completed.

Clicking on any of the icons will open the form in Preview mode and allow you to view blank or completed forms. Where the selected form is available for your role to complete, a **Complete new** button will be visible to the right of the form name. See Section 3 for more information about Forms.

Click on a prevocational doctor's name in the dashboard to open their **Trainee Profile and Overview** page. Here you can review their ePortfolio and progress individually and complete forms as required for your role.

## Trainee profile and overview page example



### 2.1.1 Dashboard controls

The dashboard shows 10 prevocational doctors by default or reduces to five if displaying multiple dashboards.

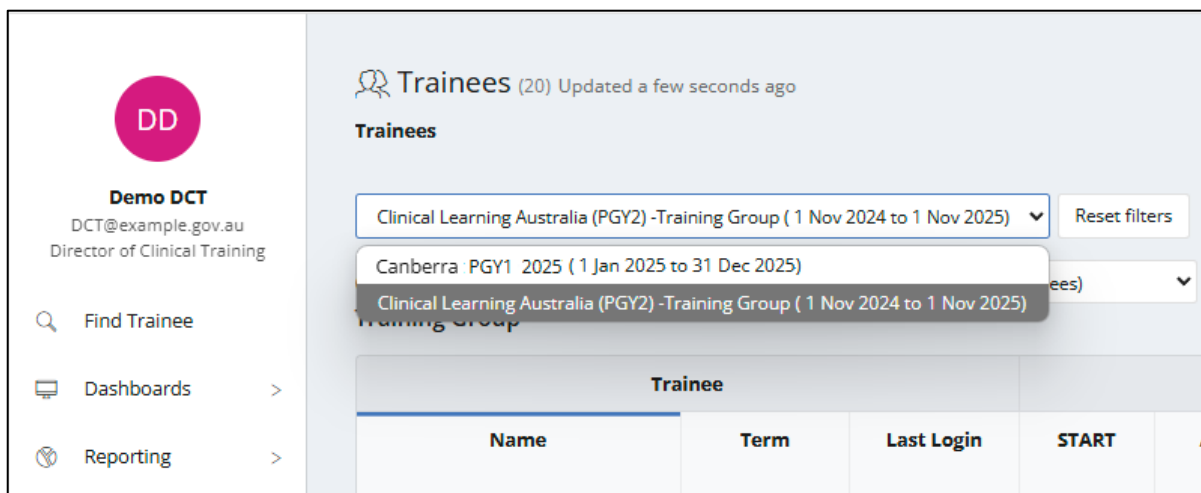
Move to the next page of prevocational doctors using **Previous** and **Next** buttons at the bottom of the dashboard or type in the page number you want to go to.



To increase the number of results you see, click on the **(X) rows** dropdown box at the bottom of the dashboard and select from the options.

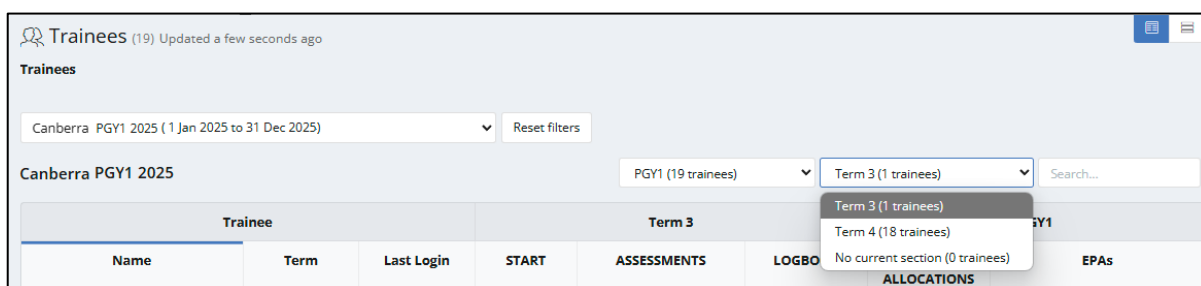


Users can change which groups they are looking at by using the dropdowns at the top of the dashboards. For instance, a DCT user that has been assigned to multiple PGY cohort groups can click on the dropdown to change the group being viewed.



To **filter** the current group, use the additional dropdown options located on the right-hand side of the dashboard.

These filters are only used if you have Trainees within this one group who are on different terms to one another, for instance several Trainees having a later end date in one term than the prescribed term finish date for the majority of Trainees.

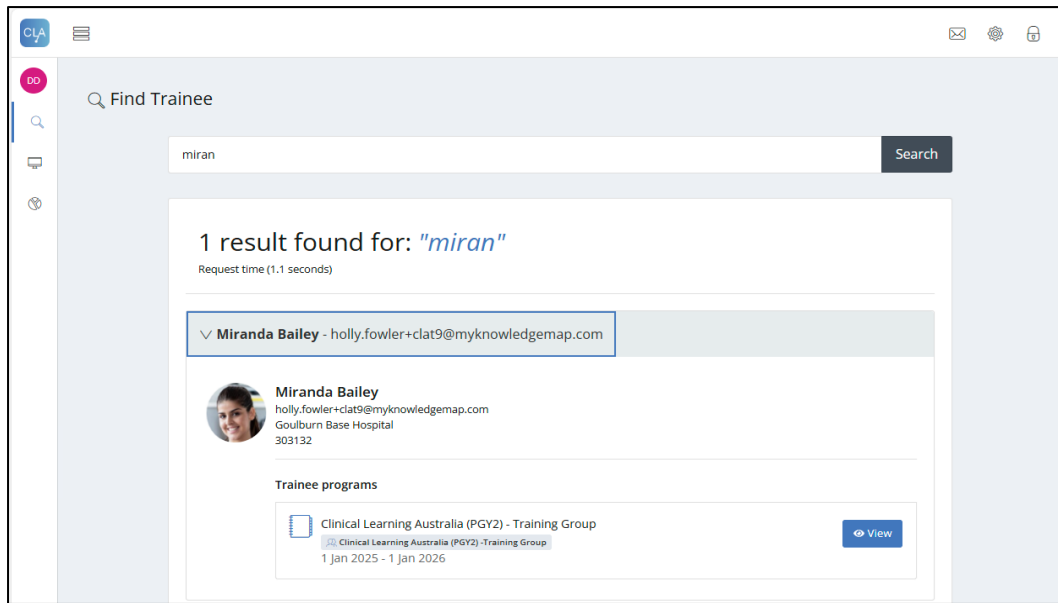


## 2.2 Find trainee

The Find Trainee screen is available to DCTs and EDMS' to search for individual prevocational doctors within the groups that they are allocated to and access their ePortfolio.

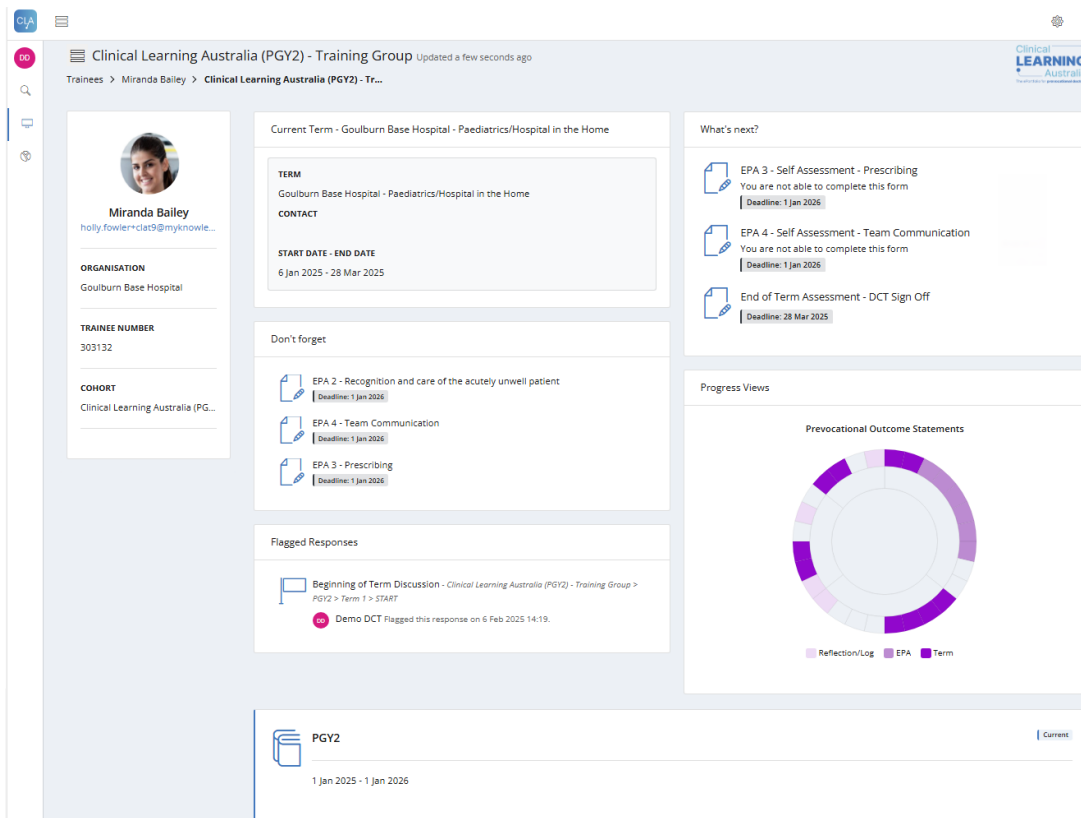
Enter at least 3 characters of the prevocational doctor's name, email or Ahpra number into the Search field and click **Search**.

Click in the chevron next to the name of the prevocational doctor you are looking for to expand the box. Click on **View** to see their **Trainee Profile and Overview**.



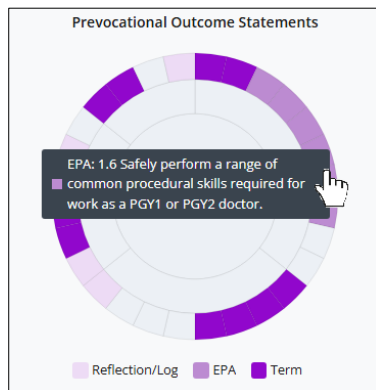
## 2.3 ePortfolio – Trainee Overview and Profile

The **Trainee Overview and Profile** page is the front page of a prevocational doctor’s ePortfolio. It shows details about the prevocational doctor on the left as well as their current term, any upcoming forms that require completion based on a deadline (**Note:** Deadlines are only there as a guidance), any flagged responses, and their progress against the Prevocational Outcome Statements. It also provides access to see their Learning Plan and overview of their full clinical year by clicking on the PGY block at the bottom of the page.



Clicking in the **Current Term** box opens the full profile of forms to be completed for the current term, as well as Logbooks and EPAs. Alternatively, Supervisors can click on any forms showing in the **What's next?** and **Don't Forget** sections to open a new editable version of that form.

The **Prevocational Outcome Statements** section is an interactive visual representation of progress towards demonstrating evidence for each of the outcome statements in the [National Framework for Prevocational \(PGY1 and PGY2\) Medical Training](#). Hover over the segments in the visual to see the Statement each represents.



The shading of the segments shows if the statement was evidenced as part of a logbook entry, evidenced and validated as part of an approved EPA assessment, or fulfilled as part of the completion of a term. Click on the visual to drill into the progress of the prevocational doctor in more detail – see Section 3.4 Progress Views for more information.

Clicking on the **PGY block** at the bottom of the screen, authorised CLA users can access the prevocational doctor's Learning Plan for the full clinical year, if the full clinical year has been loaded into CLA (see note below). The Learning Plan lists each allocated term, and it is possible to drill into each term to see term overviews, descriptions and forms associated with that term.

**Note:** Terms for the full clinical year may be loaded into CLA all at once, or terms may be loaded into CLA progressively by site administrators over the course of the year just prior to the start of upcoming terms. If the full year hasn't been loaded, CLA will only display the current term and any past terms.

Any forms not completed by prevocational doctors by the end of term will no longer be accessible to them to complete, unless a grace period has been set against the term to allow more time for forms to be completed. The decision on if a grace period is set and for how long is decided locally, so please contact your local MEU administrator to find out the details for your state/territory.

**Note (Term and Clinical Supervisors Only):** By default, all Term and Clinical Supervisors have 7 days following the end of a term to complete any outstanding forms.

## 3 Forms

### 3.1 Overview of forms

CLA has been designed in accordance with the [National Framework for Prevocational \(PGY1 and PGY2\) Medical Training](#).

The forms in CLA capture learning goals, beginning of term discussions, mid and end of term assessments, logbook entries and case/procedure logs, and Entrustable Professional Activities' – EPAs (including self-assessments). The existence of an Improving Performance Action Plan (IPAP) can also be captured in CLA however the IPAP itself is not part of CLA.

Prevocational doctors use CLA over the course of each term and throughout the clinical year to complete self-assessments and log training activities that they undertake.

Term Supervisors, Clinical Supervisors, DCTs, EDMS', and/or Guest Assessors use CLA to assess the progress of their assigned prevocational doctors in meeting the requirements of the National Framework by completing mid and end of term assessments and EPAs.

DCTs and EDMS' use CLA to review forms completed by other users and to complete the End of Term Assessment – DCT Sign Off form.

Clicking on **Current Term** in the **Trainee Profile and Overview** page opens to the Current Term landing page. The Current Term landing page provides an overview of the term, including progress to date for form completion as well as Terms Content and a Term Description on the right-hand side. Tabs across the top separate the forms into their types.

The screenshot displays the CLA interface for 'Term 1'. The top navigation bar shows 'Term 1 Updated 8 minutes ago' and a breadcrumb trail: 'Trainees > Miranda Bailey > Clinical Learning Australia (PGY2) - Train... > PGY2 > Term 1'. The main content area is divided into two columns. The left column, titled 'TERM', contains three sections: 'TERM' (Goulburn Base Hospital - Paediatrics/Hospital in the Home), 'TERM' (Goulburn Base Hospital - Paediatrics/Hospital in the Home), and 'CONTACT'. The right column, titled 'TERM CONTENT', contains a table with the following data:

Term Name	Paediatrics / HITH
Term Specialty	Paediatrics
Term Supervisor Name	Dr Joe Bloggs
Term Supervisor Email	joe.bloggs@example.com
Classification of clinical experience in term	<ul style="list-style-type: none"><li>Chronic illness patient care</li><li>Acute critical illness patient care</li></ul>
Is this a service term?	No
Term accredited for	PGY2
Accreditation Status	Accredited
Term Description	<b>Commencing the term</b>

Forms can be commenced and saved as drafts for later completion, emailed to others for completion as required, and be linked to Prevocational Outcome Statements.

**Note:** CLA does not send push notification emails to remind prevocational doctors or Supervisors that forms are nearing their submission date or passed the due date.

### **3.1.1 Completing forms using the CLA Mobile App for prevocational doctors**

An app has been developed for prevocational doctors to complete assessment forms in the clinical setting. Whilst this app is not available to Supervisors or other users of CLA, Supervisors and other Assessors may use a prevocational doctor's device to complete some forms via their downloaded app.

CLA can also be accessed on mobile devices for all user accounts using the web version by typing in the URL <https://cla.epads.mkmapps.com> in your preferred web browser. CLA will adjust the display to the size of the device being used.

### **3.1.2 Form permissions**

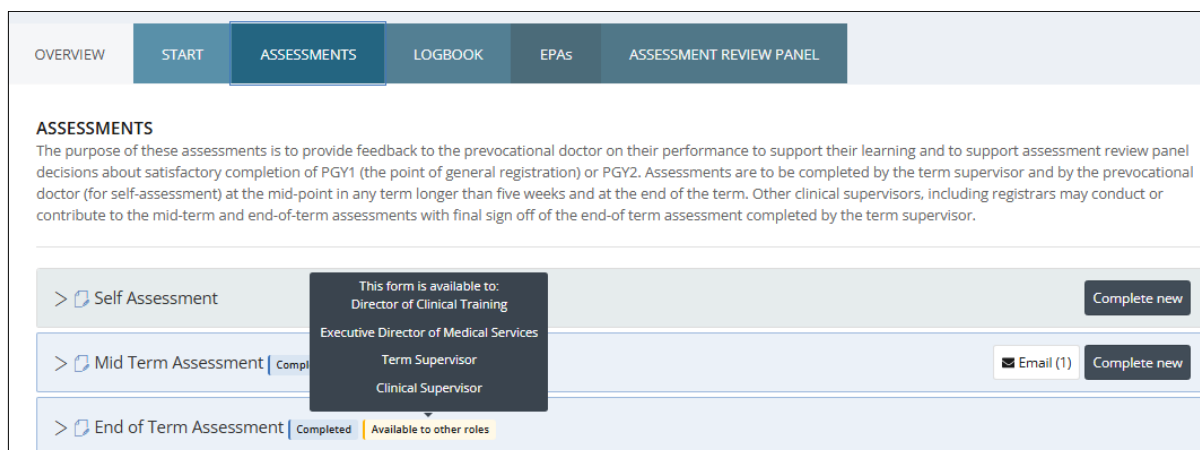
Different roles in CLA have different permissions and form completion restrictions. For instance, self-assessments and logbook entries can only be completed by prevocational doctors, whereas End of Term assessments can only be completed by Term or Clinical Supervisors, DCTs or EDMS', not prevocational doctors. In situations where an End of Term Assessment has been completed by a Clinical Supervisor, this should be signed off by a Term Supervisor and/or DCT or EDMS.

Some forms require both the prevocational doctor and a supervisor, or other assessor, to complete portions of the form. The prevocational doctor can complete their portion(s) and use the email function in the system to send the form to their supervisor for them to complete their portion(s). **Note:** Only forms that have the white **Email** box next to the **Complete new** button can be sent to someone for completion later.

Alternatively, the system has been designed in such a way that these entire forms can be completed on a prevocational doctor's login, for instance using the app installed on their mobile device to complete an EPA in the clinical setting, and the supervisor and/or assessor's name and email are entered in the form as part of the sign-off process. The forms are emailed to those individuals for their records and validation of participation.

Where a 'Guest Assessor' completes a form, an email is sent to the Administrator(s) for that organisation to ensure that individual is a valid Assessor. Any responses completed by an unverified guest assessor will be flagged until an Administrator has approved the guest assessor.

Where a form is not available to a role, a yellow label will appear to the right of the form name stating 'Available to other roles'. Hover over the label to see which roles this form is available to.



## 3.2 Navigating to forms


To complete a form, you need to navigate to the form you want to complete. This can be done in several ways:

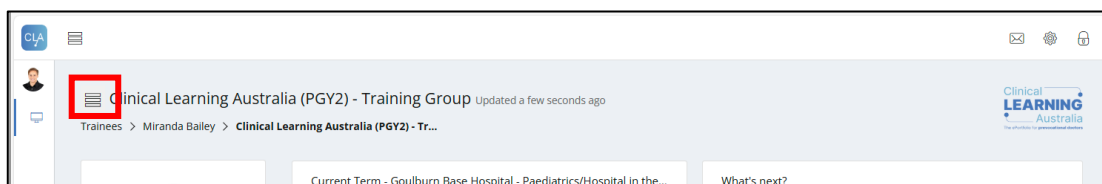
- 1) **Trainee Dashboard** – Click on the form icon on the Trainee dashboard for the specific prevocational doctor to open their form.

Trainee			Term 1			PGY2			
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	EPAs			ASSESSMENT REVIEW PANEL
Miranda Bailey	Goulburn Bas...	3 days ago	START	SA MTA <b>LOTA</b>	LOGBOOK	EPAs	ASSESSMENT REVIEW PANEL		

- 2) **Trainee Profile and Overview page** – Navigate to this page by clicking on the prevocational doctor's name on the Trainee Dashboard or if using Find Trainee, click View when you have found the correct person.

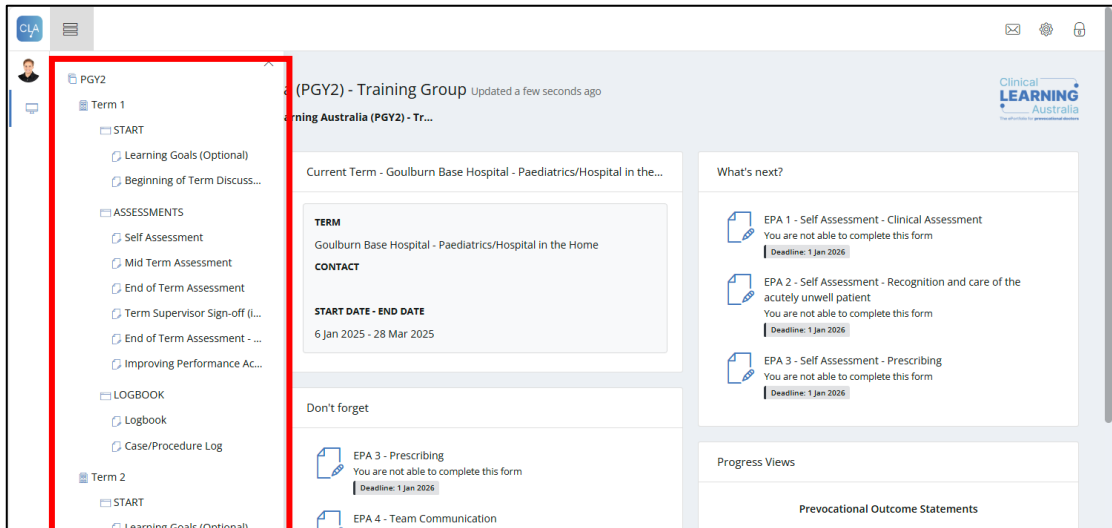
Once on the Trainee Profile and Overview page, use:

- a) **Burger Icon**  – Click the secondary burger icon in the grey shaded portion of the screen to view the ePortfolio. This opens as a side menu listing all available forms within each term. **Note:** here you will see all forms for all of the terms.

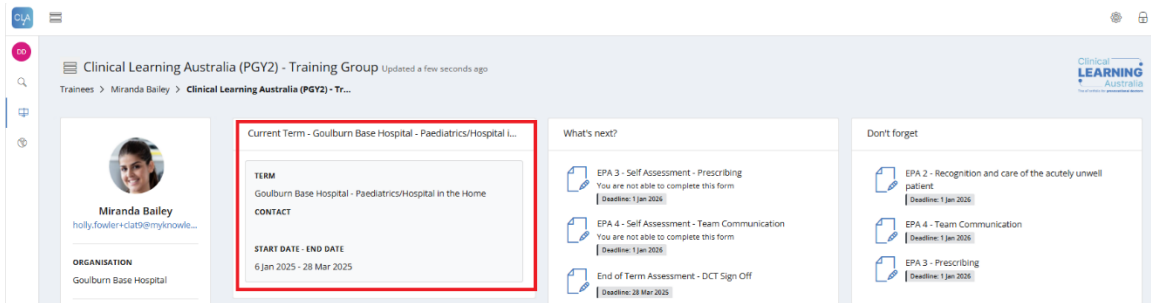


In the ePortfolio forms menu, select the form you want to complete. **Note:** You will need to scroll down the menu to find each set of term forms.

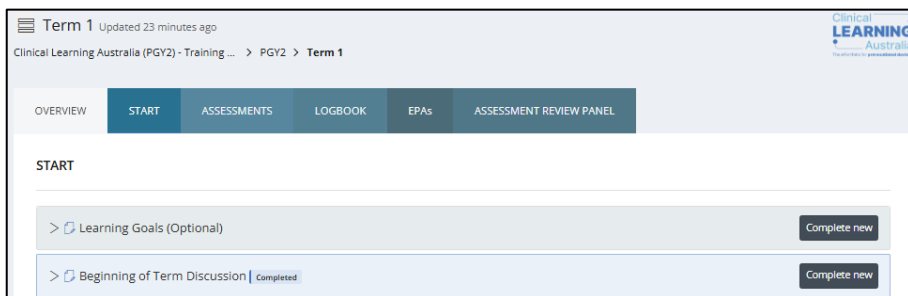




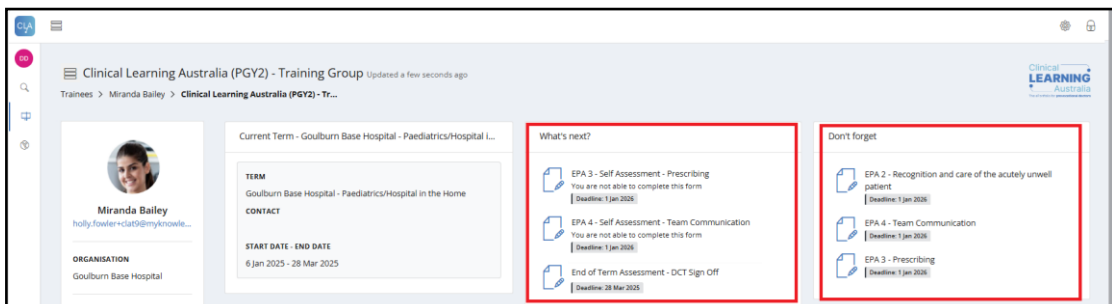
b) **Current Term** – Click in the 'Current term' box to open the Trainee Profile and Overview containing forms for the current term.



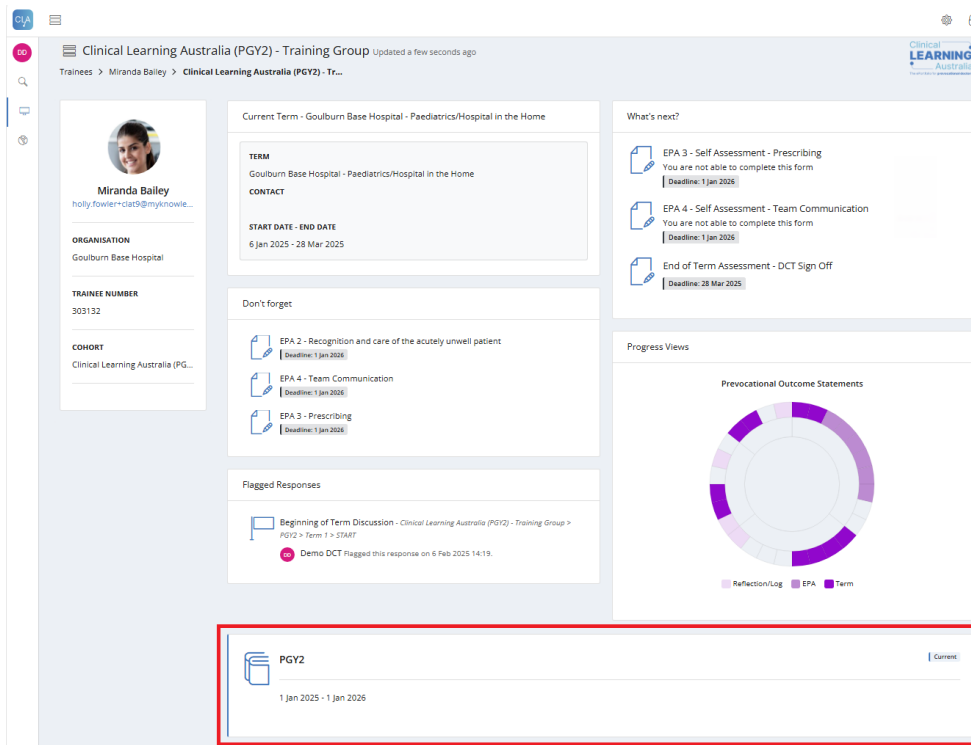
Locate the form by using either the Overview or specific tabs available within the current term. Click **Complete new** to the right of the form title.





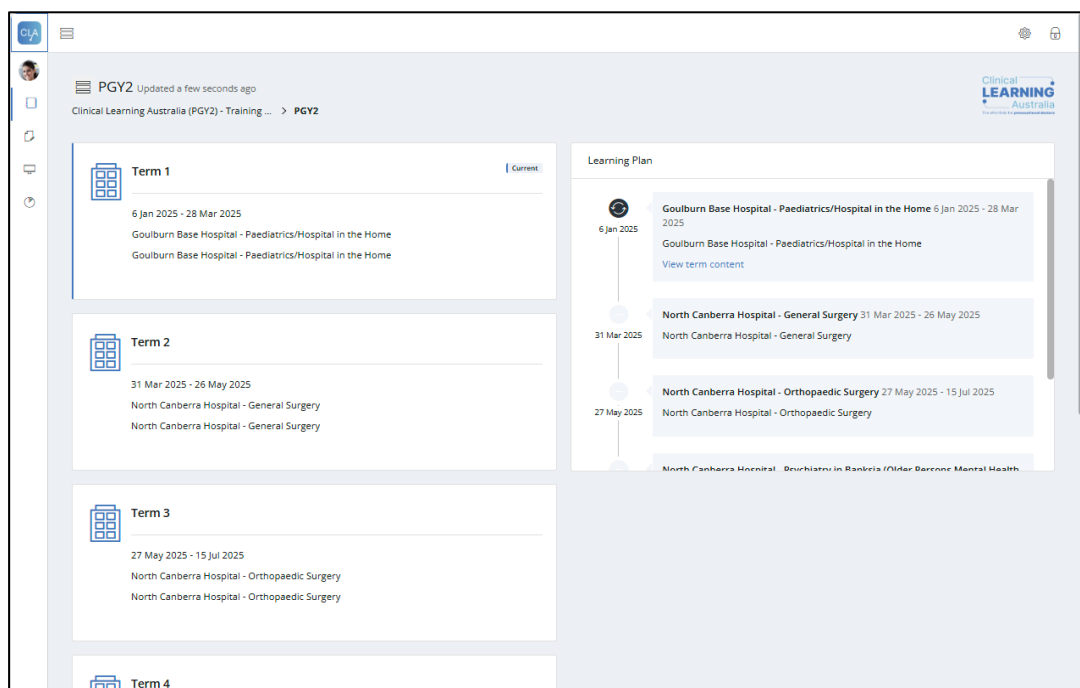
c) **What's next / Don't forget** – If the form you want to complete is showing in the 'What's next?' or 'Don't Forget' boxes, you can select the form here to complete it.



d) **PGY Block** – Click on the PGY block at the bottom of the Trainee Profile and Overview page to see all of term allocations and Learning Plan for the full clinical year. If the full year hasn't been loaded into CLA, you'll only see the current and past terms.

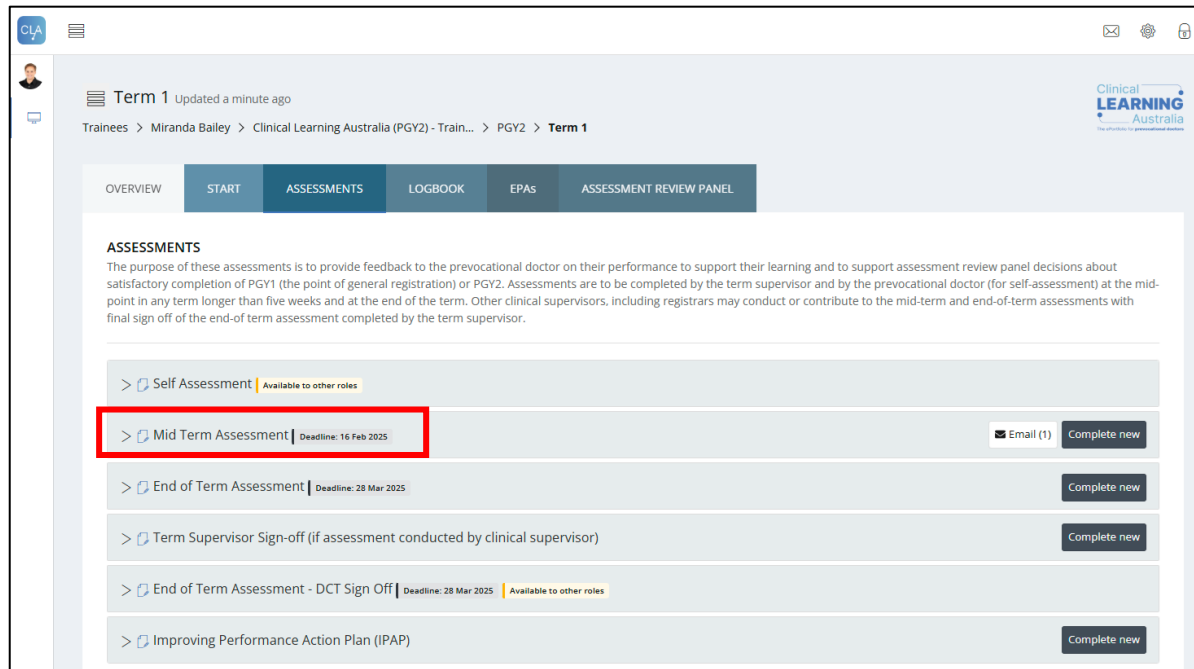


The current term in the Learning Plan on the right is denoted by a black circle with two arrows  and completed terms have a blue tick . Click on the current term to open this and view forms. Alternatively, click on any of the term allocations on the left to see the term overviews and associated forms for any past or upcoming terms.

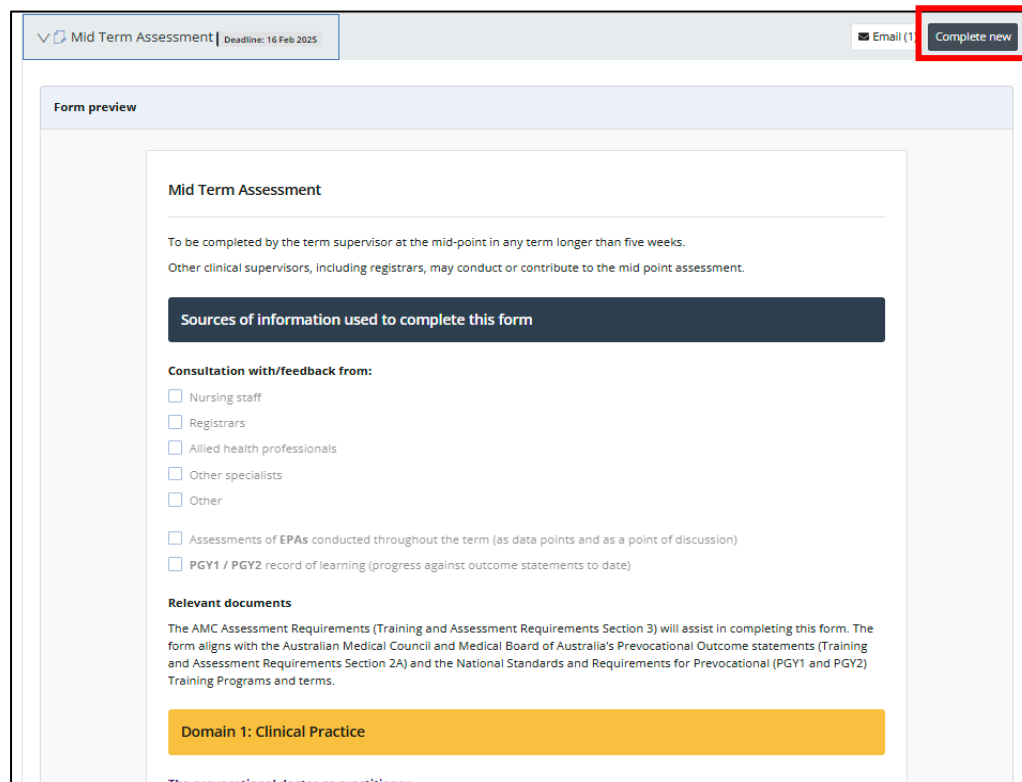


### 3.2.1 Previewing forms

Forms that have not previously been submitted can be previewed without opening a new editable version of the form. To preview a form, go to the Current Term page, select the tab respective the forms you want to view (e.g. Start, Assessment, Logbook or EPAs) and click on the name of the form.



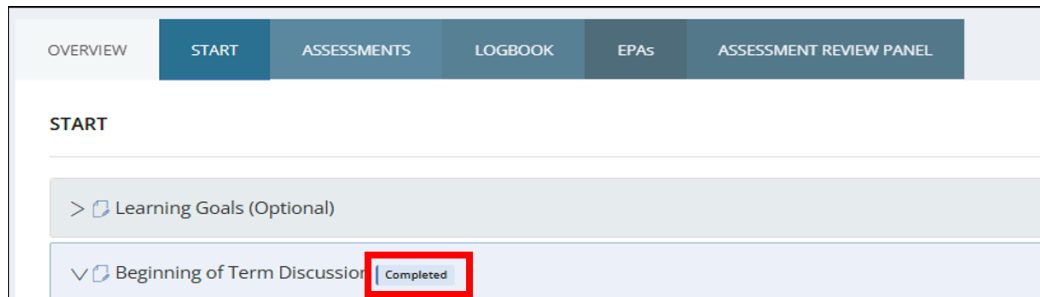
A blank read only version of the form will display below the name of the form you have selected. To complete a form, click on **Complete new** or navigate to a draft to continue editing.



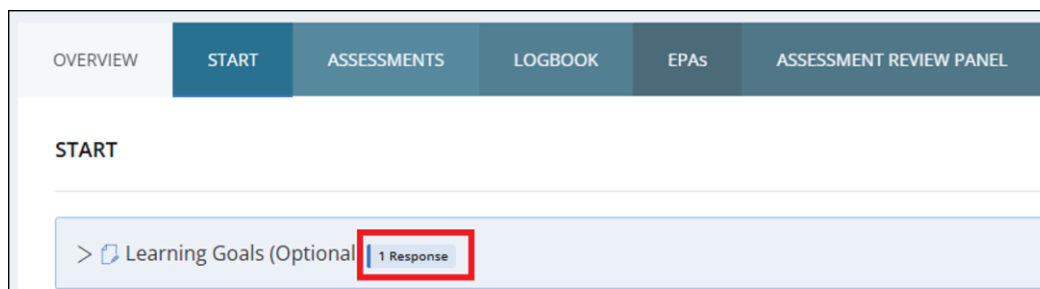
### 3.2.2 Viewing submitted forms

After forms have been submitted, the completed forms can be viewed either from the Trainee Dashboard by clicking on the green form icon, or from the prevocational doctor's Current Term page on their respective tabs. Depending on the form, you may see different tags against completed forms.

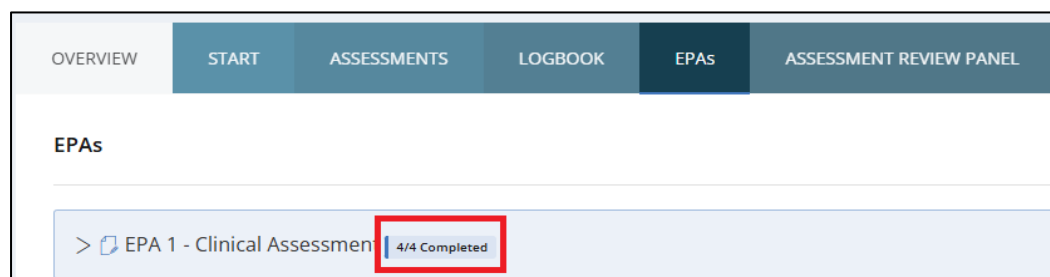
A 'Completed' label will appear to the right of the form name for submitted forms.



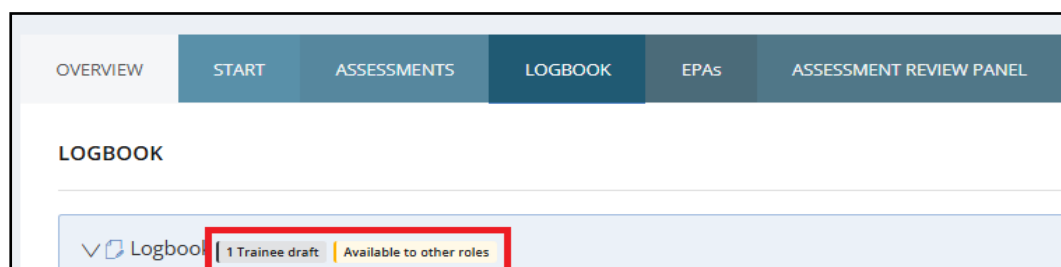
The number of responses may appear to the right of the form name.



A target number of completions may display, depending on the form type. The target will be on the right, with the number of completions done on the left.



Forms may also have tags if there are unsubmitted drafts or if a form is not available to your role to complete. Where a form is not available for your role, hover over the tag to see the roles it is available to.



Click on the form name to open a read only version of the completed form.

The screenshot shows the 'START' section of the 'ASSESSMENT REVIEW PANEL'. It displays a 'Completed by Miranda Bailey on 3 Dec 2024 15:51' status. The form title is 'Beginning of Term Discussion'. Below the title, there is a text area with the instruction: 'The prevocational doctor should use this form to record the conversation they have with their term supervisor.' A 'Date the discussion took place' field is filled with '3 Dec 2024'. The form is categorized under 'Introduction'.

For Logbooks, Case/Procedure Logs and EPAs, a summary table of the responses is shown when you click on the form name. Where there may be questions with lots of text, you can hover over that question in the table to review the full text.

You can also review the completed forms in full below the table. Click on the completed form name below the summary table to expand the full form.

The screenshot shows the 'EPAs' section with a summary table of completed forms. The table has the following columns: Date Completed, Assessor, Consultation with input from, Case Details, Self assessment, Based on this case, what will you do to develop your learning further?, Patient type, Brief description, Assessor's declaration, Complexity of the case(s) for the level of training, Entrustability scale, What went well?, What could be done to improve?, and Agreed learning goals arising from the experience.

Date Completed	Assessor	Consultation with input from	Case Details	Self assessment	Based on this case, what will you do to develop your learning further?	Patient type	Brief description	Assessor's declaration	Complexity of the case(s) for the level of training:	Entrustability scale	What went well?	What could be done to improve?	Agreed learning goals arising from the experience
3 Dec 2024 23:54	Specialist or ...	Registrar	1. If clinical a...	text	text	Adult	text	The patient...	Low	Requires dir...	Yes	text	text
3 Dec 2024 23:45	Nurse/ nurse...	Nurse/ nurse...	7. develop pr...	TEXT	TEXT	Adult	TEXT	The patient...	Medium	Requires pro...	Yes	TEXT	TEXT
3 Dec 2024 23:36	Nurse/ nurse...	Registrar	4. obtain a hl...	TEXT	TEXT	Adult	TEXT	The patient...	Medium	Requires pro...	Yes	TEXT	TEXT
3 Dec 2024 16:01	Registrar	Registrar, Pa...	4. obtain a hl...	kjhg nj gk	asf sfd	asf as f							

Below the table, there is a 'RESPONSES (4)' section with a list of responses:

- > Approved by Joe Bloggs (holly.fowler+termsupervisor1@myknowledgemap.com) on 3 Dec 2024 23:54
- > Approved by Joe Bloggs (holly.fowler+termsupervisor1@myknowledgemap.com) on 3 Dec 2024 23:45
- > Approved by Joe Bloggs (holly.fowler+termsupervisor1@myknowledgemap.com) on 3 Dec 2024 23:36
- > Approved by Tom Holland (tom@tholland.com) on 3 Dec 2024 16:01

**Note:** Forms cannot be edited after they have been submitted, except in circumstances where personal or patient identifying information has been included and needs to be removed – this can be done by an MEU Administrator or National Administrator only. If you need a form Deleted, contact your MEU Administrator.

After forms have been submitted, users can do the following:

- Add **Comments** to and **Reply** to comments on forms – see section 3.3.8
- **Flag** forms – see section 3.3.9
- **Print** or **download** forms – see section 3.3.10
- **Map outcome statements** to forms – see section 3.3.11

### 3.3 Completing forms

To begin completing forms, open a new form using one of the methods described in section 3.2 Navigating Forms.

**Important:**

**Do NOT include personal or identifying information in forms.** If included by PGY doctors, Supervisors or other users, the responses may be edited by an Administrator to remove.

Inside each form there will be several question types.

Question Type	Definition
Multiple Choice Checklist	This can be in the form of a drop-down box or listed view. It can also have mandatory interaction, as well as either needing one selection (shown by circle radio buttons), or multiple selections (shown by square check boxes).
File Upload	This allows you to upload a file to the response. <b>Note:</b> Only one file can be uploaded per response, and there is a file upload limit of 8MB.
Text response	This supports Rich Text Formatting and can exceed the space allocated in the question if necessary. You can click the <b>Save changes</b> button in the top right corner as you type your answer or copy and paste from another document if you prefer.
Likert/Rubric Scale	This provides the option to grade opinions, attitudes, or behaviours. You can unclick radio buttons on a question if you mis-click. <b>Note:</b> If you select a score of 1 (Rarely met) or 2 (Inconsistently met) in the Likert scales, a mandatory 'Provide a justification' text will display.
Signature	This allows you to draw a signature. This can be completed on a mobile device by using the touch screen, or on the web browser by using the mouse. <b>Note:</b> Ensure you click the green <b>Save</b> button to the right of the signature box after inputting your signature.
Date/Time picker	This allows you to select a date and/or time. This can be current, or in the past.

Scroll through the forms and complete all relevant sections.

Forms have a number of functions across the top of the window:



From left to right, the form functions are:

- **Rename a response draft:** Use this to give the response draft a different name. By default, the name of the form is 'Draft', followed by the date and time the response was started. To rename the form, click into the text box to the left of the Delete button and change the name. It is recommended to include a date and sufficient defining text to make it easy to identify the correct form in the future if you have multiple drafts. When reopening the draft, the last updated date will display to the right of the name you have given it.
- **Delete:** Use this to abandon the form. Delete will remove the form as a draft copy. This includes partially completed previously saved drafts as well as new forms. Deleting a form cannot be reversed.
- **Save changes:** Use this to save the current form as a draft and keep it open to continue entering information.

**Note.** Forms automatically save as you enter information, after 10 seconds of inactivity. When the auto-save completes, the **Save changes** button changes to **Saved** until you restart editing.

- **Save & close:** Use this to save the form as a draft and exit the form. See section 3.3.1 for more information about editing draft forms.
- **Email for later:** This is used to email forms to a Supervisor or Assessor. This is not available for all forms, only those that have the white **Email** box next to the **Complete new** button. Forms sent via this workflow are not classed as fully complete in the prevocational doctor's portfolio until the person it was sent to fully completes and submits the form. See section 3.3.3 for more information about emailing forms.
- **Submit:** Use this to submit the form when you have finished entering information. See section 3.3.2 for more information about submitting forms.

The screenshot below shows an EPA 1 – Clinical Assessment form.

EPAs, Logbooks and Case/Procedure entries have a second tab with the **Prevocational Outcome Statements** available to tick as part of the completion of the form. Clicking the Prevocational Outcomes Statements tab next to the form allows for any relevant Prevocational Outcome Statements to be mapped as evidence against that particular form response.

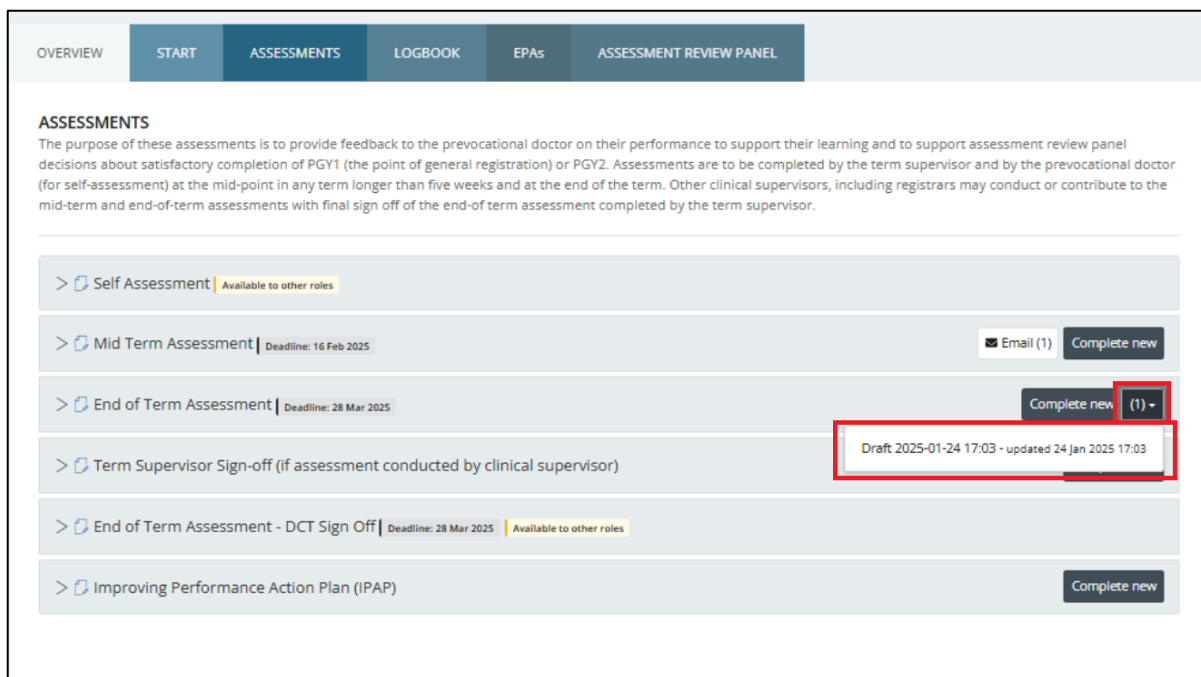
All EPAs have a shaded blue box at the top with hyperlinks out to relevant sections of the National Framework for Prevocational Medical Training to assist with the completion of the form (see image above). When you click these links, they will open in new tabs in your web browser.

### 3.3.1 *Editing previously saved forms*

If you have previously partially completed a form using the **Save and close** function, you can continue to edit it by opening it from the relevant tab on the Current Term screen.

You will see in the right side of the row for the required form **(V)** beside the **Complete new** button. Click onto the **(V)** to see a dropdown box with the draft(s) available for that form and when they were last updated.





Click on the draft you want to open in the dropdown to open that form.

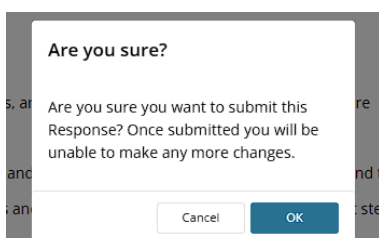
Continue to enter information into the form.

**Note:** Only drafts started in your account can be reopened to continue completing. Additionally, drafts completed on the desktop version of CLA are not visible in the mobile app and vice versa. To view a draft you have previously initiated, you will need to view it in the version of CLA in which it was created (i.e. web or app).

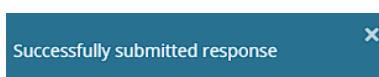
As examples, an End of Term Assessment started by one Supervisor cannot be finished by another and an EPA form commenced and saved as a draft using the CLA app on the prevocational doctor's tablet will not be visible in the web view but must be completed and submitted via the prevocational doctor's app to save in CLA.

### 3.3.2 Submitting forms

When you have completed your form, click **Submit** in the top right corner to save your form as final. You will be asked to confirm that you are ready to submit the form.



If you are sure, click **OK** and a small progress bar will pop up as the form is submitted.

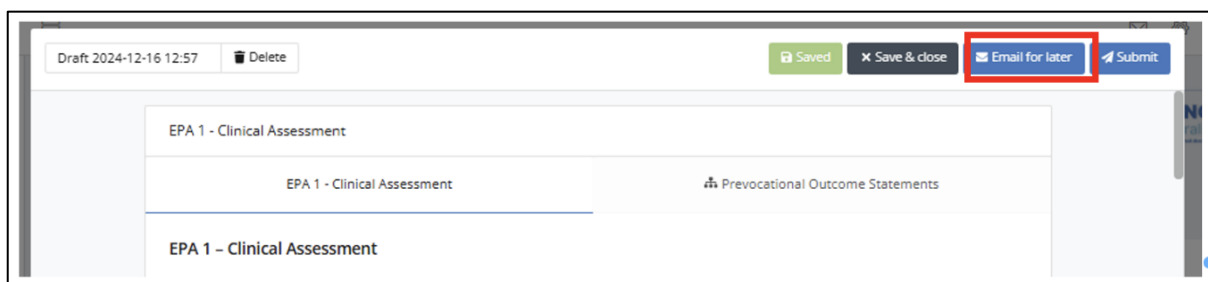


### 3.3.3 Emailing forms

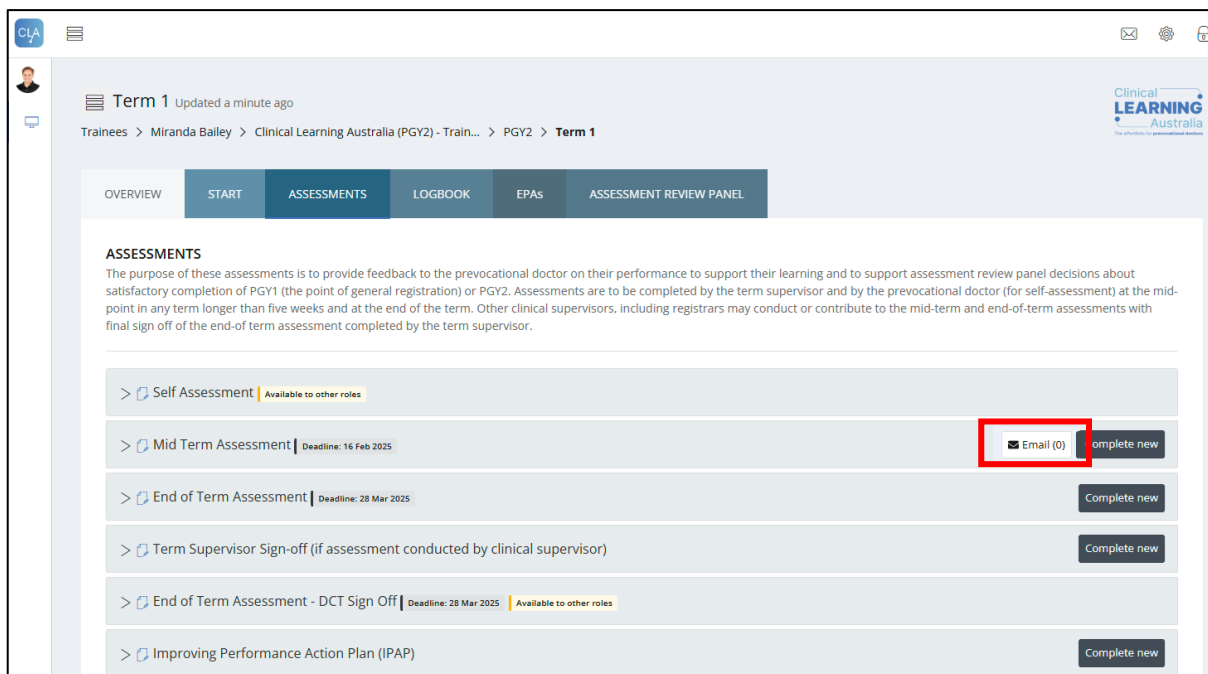
Blank and partially completed forms can be emailed by prevocational doctors, Supervisors, DCTs and EDMS' to other users, such as 'Guest Assessors' to complete later. For example, a prevocational doctor can email a partially completed mid term assessment to a Supervisor to complete, or they can send an EPA to their Registrar.

The **Email for later** button is located in the top right corner of the forms that are in the process of being completed or using the **Email** button directly from the overview screen on the Assessment or EPA tabs will email a blank copy of the form to an assessor for them to complete.

Example: **Email for later** when in the process of completing a form.



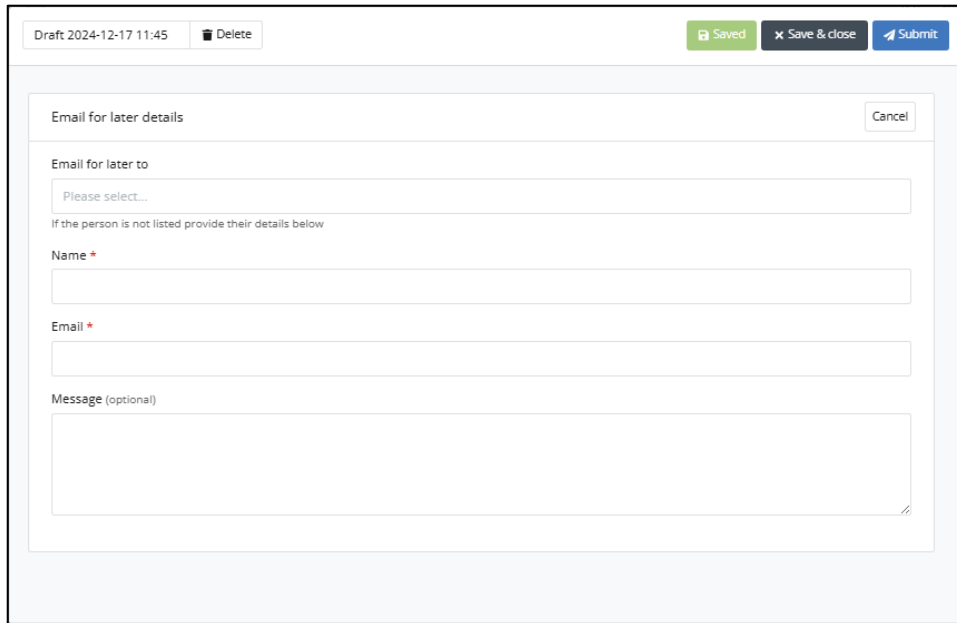
Example: **Email** button to send a blank form.



Using either email function sends an email to the relevant Supervisor or Assessor with a URL link to the form for completion.

If the recipient of the form is an existing user in CLA, their name and email will auto-populate as you begin typing either of these. If the recipient does not exist in CLA, the form can still be emailed to them, and they can complete it as a 'Guest Assessor' - type their name and email address into the required fields.

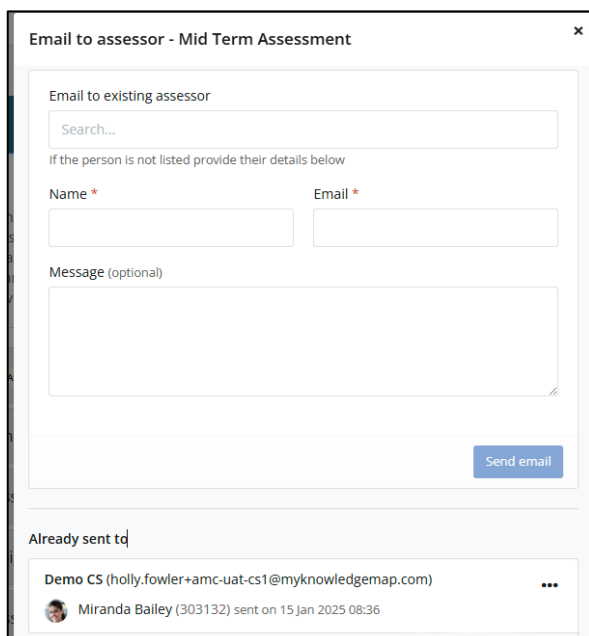
It is optional to add a short message to the email.



The screenshot shows a web form titled "Email for later details" with a "Cancel" button in the top right. At the top of the page, there are buttons for "Saved", "Save & close", and "Submit". The form contains the following fields:

- "Email for later to": A dropdown menu with "Please select..." as the placeholder.
- "If the person is not listed provide their details below": A note below the dropdown.
- "Name \*": A required text input field.
- "Email \*": A required text input field.
- "Message (optional)": A large text area for an optional message.

When using the **Email** function to send a blank form from the Assessment or EPA tabs, the system will note if the form has already been emailed to any Supervisors or Assessors and display a list at the bottom of the window.



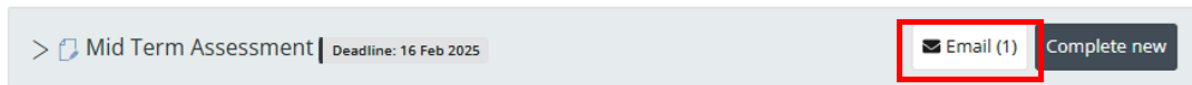
The screenshot shows a window titled "Email to assessor - Mid Term Assessment" with a close button (x) in the top right. The form contains the following fields:

- "Email to existing assessor": A search input field with "Search..." as the placeholder.
- "If the person is not listed provide their details below": A note below the search field.
- "Name \*": A required text input field.
- "Email \*": A required text input field.
- "Message (optional)": A large text area for an optional message.
- "Send email": A blue button at the bottom right of the form area.

Below the form, there is a section titled "Already sent to" containing a list of recipients:

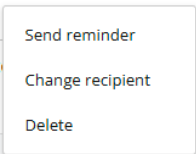
- "Demo CS (holly.fowler+amc-uat-cs1@myknowledgemap.com)" with a three-dot menu icon to its right.
- "Miranda Bailey (303132) sent on 15 Jan 2025 08:36" with a small profile picture icon to its left.

You can view which forms you have sent using **Email** or **Email for later** on the Term Overview screen in the Assessments and EPAs tabs by looking at the **Email (V)** button to the right of the forms. The **(V)** denotes the number of people the form has been emailed to.



Additional actions are available if you click the 3-dots to the right of an email recipient:

- Reminder emails can be sent every 24 hours.
- You can edit the recipient if you have made a mistake with the email address or need to send it to someone else. This deactivates the URL for the incorrect recipient.
- You can delete the email if it is no longer needed.

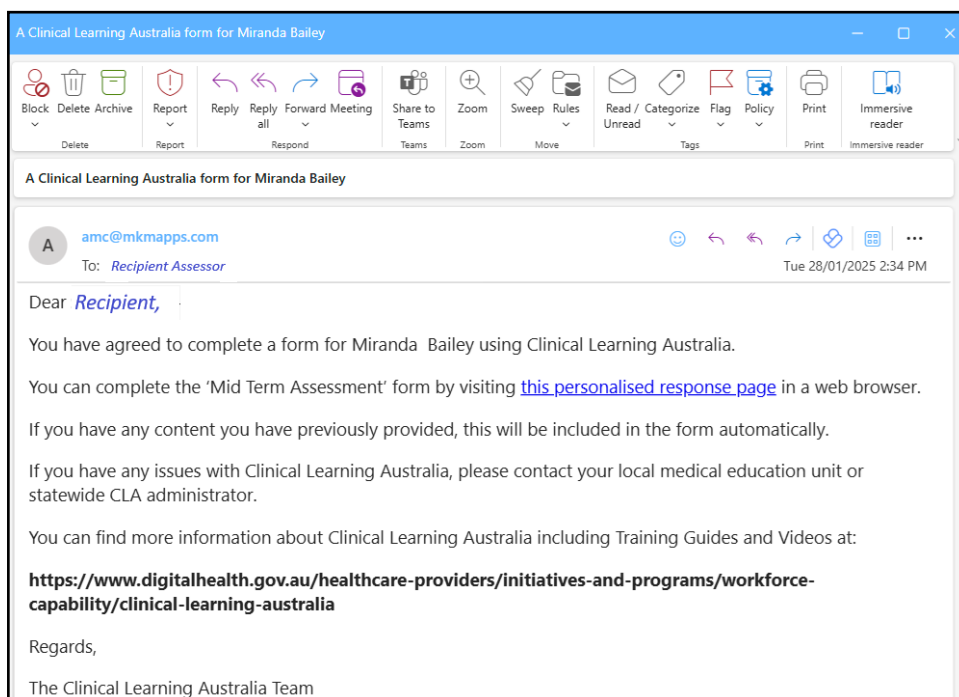


### 3.3.4 Completing an emailed form

If Supervisors, DCTs, or EDMS' have been emailed a form to complete, they will receive this in their primary email address saved in the system (i.e. your login name for existing CLA users). Guest Assessors will receive the email to the email address that was entered by the sender at the time emailing the form.

To complete a form that has been emailed:

- Open the email containing the CLA form
- Click on the 'personalised response page' link to open the form.



- The link will automatically open the assessment form. **Note:** It is good practice upon opening the form to check that you are completing it for the correct prevocational doctor. The name of the prevocational doctor is displayed at the top of the screen.
- Complete the form, clicking **Save changes** as you work through.

Completing - Mid Term Assessment for Miranda Bailey

Mid Term Assessment - Completing for Miranda Bailey

**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**

**Consultation with/feedback from:**

- Nursing staff
- Registrars
- Allied health professionals
- Other specialists
- Other
- Assessments of EPAs conducted throughout the term (as data points and as a point of discussion)
- PGY1 / PGY2 record of learning (progress against outcome statements to date)

**Relevant documents**

The AMC Assessment Requirements (Training and Assessment Requirements Section 3) will assist in completing this form. The form aligns with the Australian Medical Council and Medical Board of Australia's Prevocational Outcome statements (Training and Assessment Requirements Section 2A) and the National Standards and Requirements for Prevocational (PGY1 and PGY2) Training Programs and terms.

- When you have completed the form, click **Submit**.

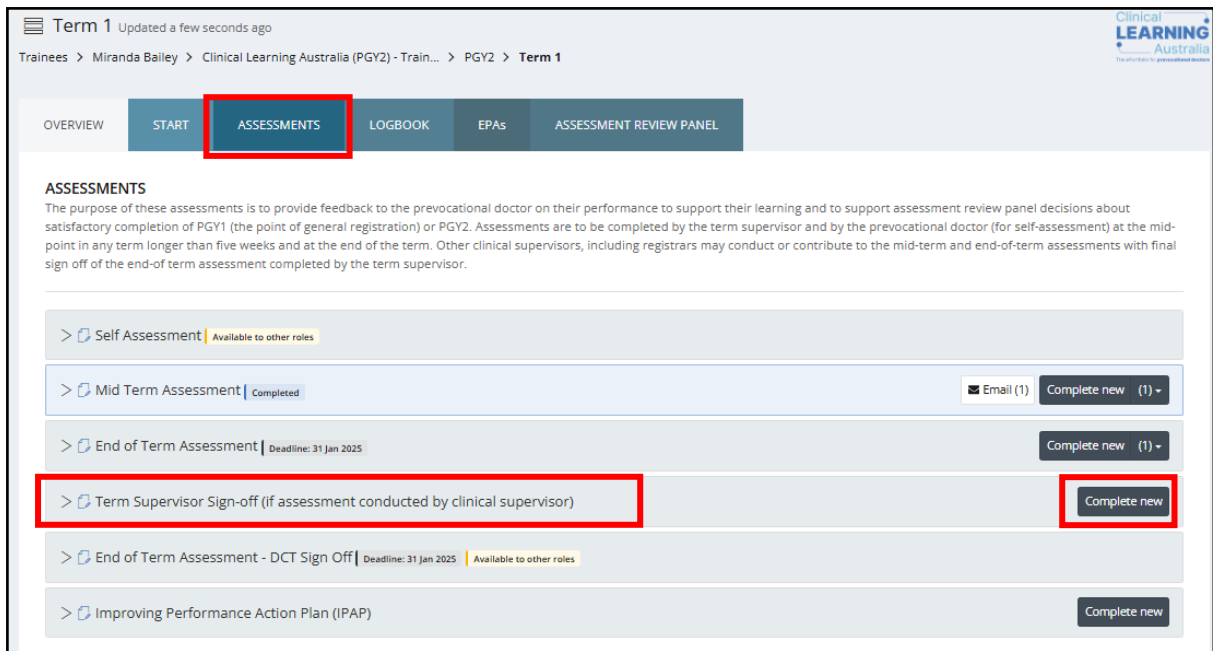
If you cannot complete the form in one session, close the browser window to close the form. Make sure you **Save changes** before closing. To continue completing the form, reopen the form using the link in the email and continue filling in.

Once you submit the form, the link in your email will deactivate.

### 3.3.5 Term Supervisor signing-off End of Term assessment

Where an End of-term assessment form has been completed by a Clinical Supervisor who is not the nominated Term Supervisor, the Term Supervisor may be required to sign-off, depending on local business rules.

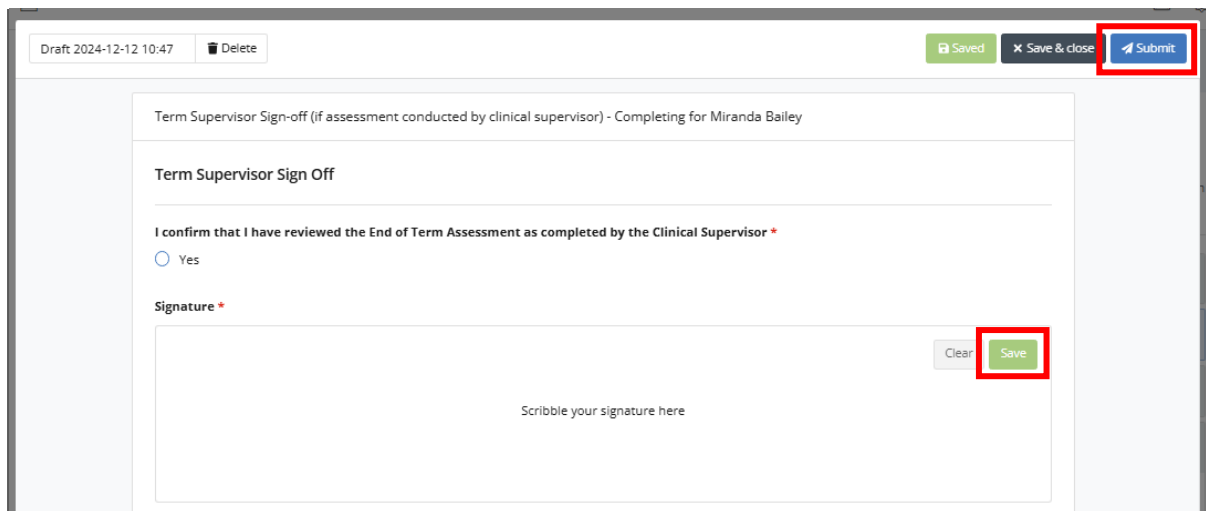
To sign-off as a Term Supervisor, navigate to the **Term Supervisor Sign-off** form for the specific prevocational doctor by either going to their Trainee Profile and Overview page and using either the burger icon method, or click on Current Term and go to the Assessments tab.



Click **Complete new**.

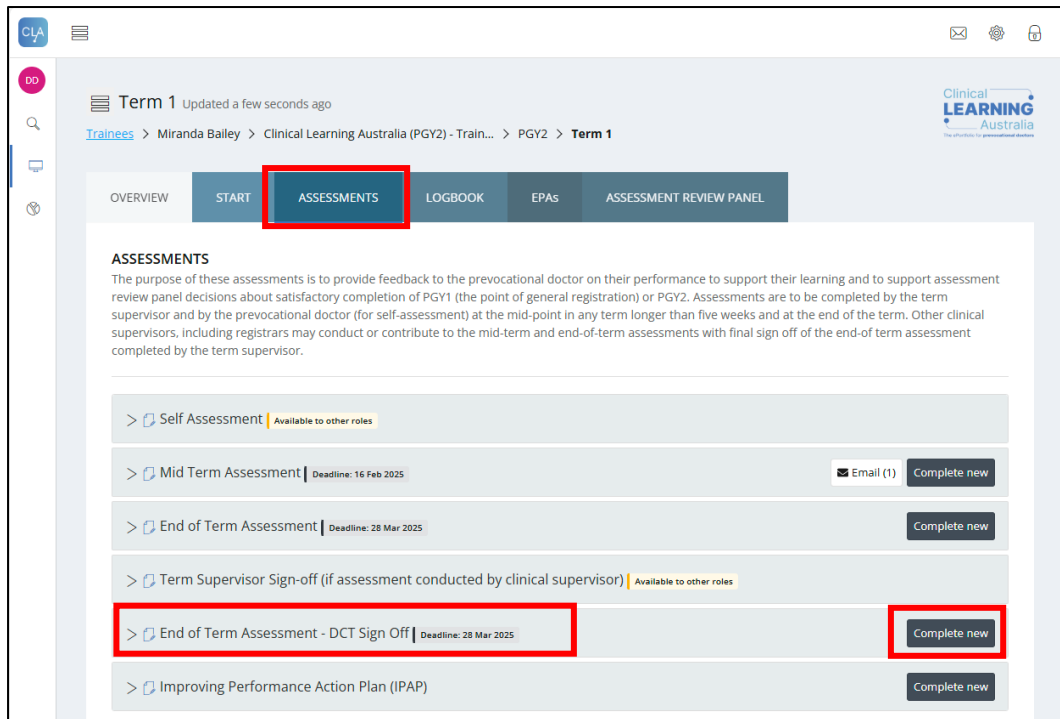
Tick the round radio button to confirm you have reviewed the End of Term Assessment and use your finger (if on a tablet or phone), or mouse to scribble a signature.

Click **Save** in the Signature window and **Submit**.



### 3.3.6 DCT signing-off End of Term assessment

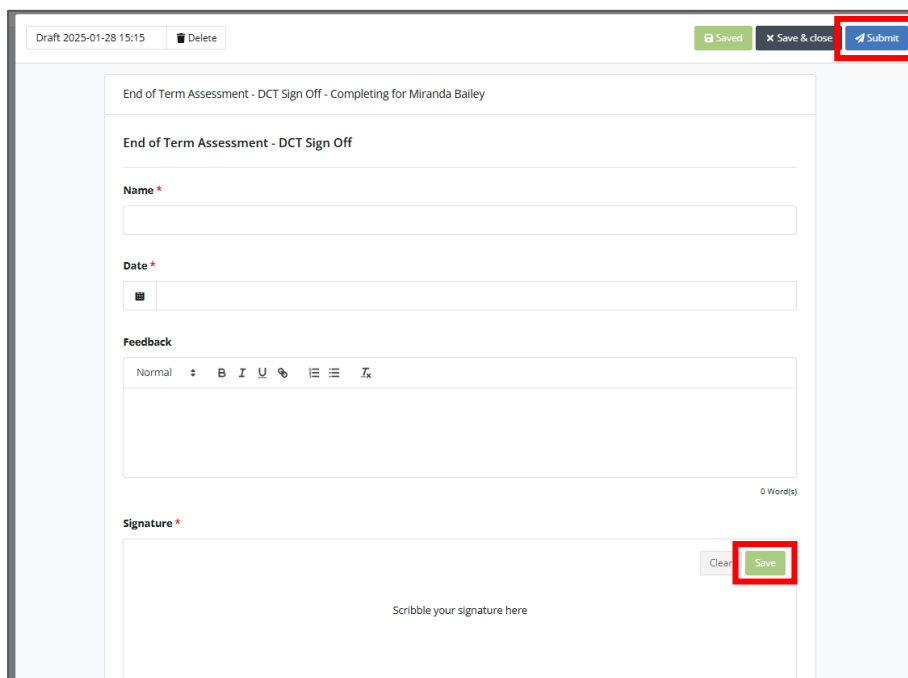
Where a DCT needs to sign off an End of Term assessment, navigate to the **End of Term Assessment - DCT Sign-off** form for the specific prevocational doctor by either going to their Trainee Profile and Overview page and using either the burger icon method, or click on Current Term and go to the Assessments tab.



Click **Complete new**.

Complete the required fields, enter any feedback if necessary, and use your finger (if on a tablet or phone), or mouse to scribble a signature.

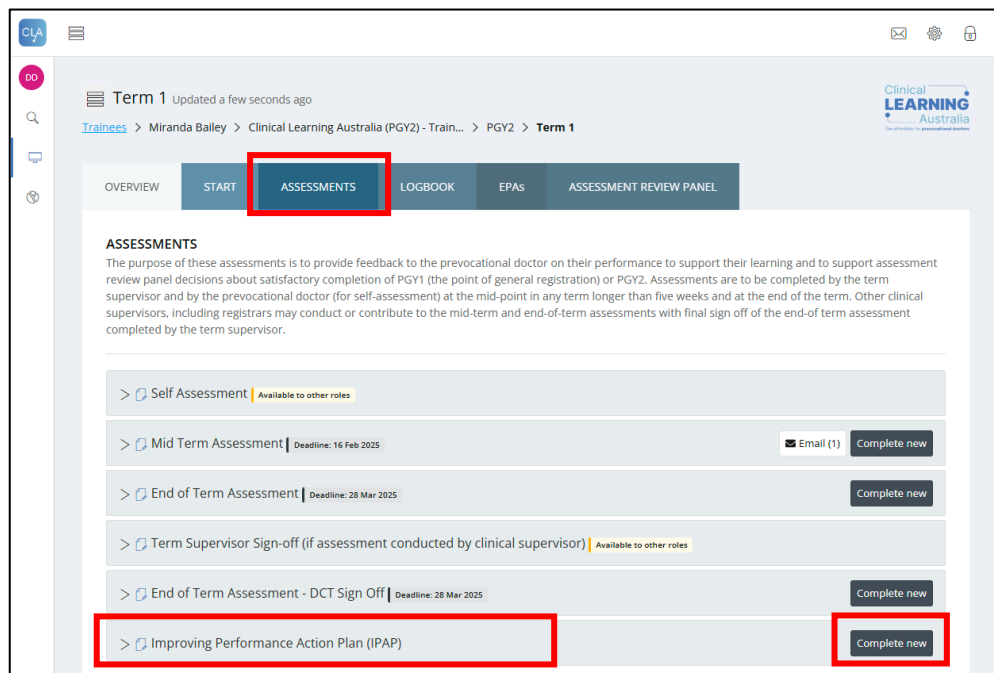
Click **Save** in the Signature window and **Submit**. You can also save as a draft and submit later.



### 3.3.7 Documenting the existence of an IPAP

Term Supervisors, DCTs and EDMS' can document that an Improving Performance Action Plan (IPAP) exists for a prevocational doctor. Note that the IPAP itself is not captured and stored in CLA.

To document that an IPAP exists for a prevocational doctor, complete the **Improving Performance Action Plan** form by going to the Trainee Profile and Overview page and using either the burger icon method, or click on Current Term and go to the Assessments tab.



Click **Complete new**.

Select the **Yes** radio button to confirm that an IPAP has been created.

The form shows the title 'Improving Performance Action Plan (IPAP) - Completing for Miranda Bailey'. Below this, there is a section for 'I confirm that an IPAP has been created \*' with a radio button for 'Yes' selected.

Click **Submit**.

An IPAP alert will display on the row of the prevocational doctor on the Dashboard.

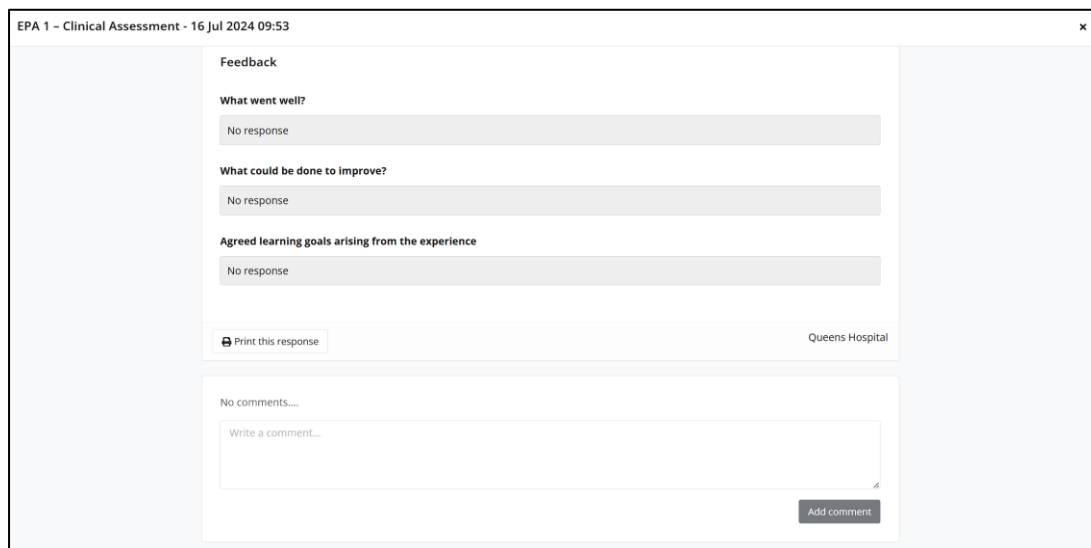
Trainee			Term 1			PGY2			
Name	Organisation	Last Login	START	ASSESSMENTS	LOGBOOK	EPAs		ASSESSMENT REVIEW PANEL	
Miranda Bailey	Goulburn Bas...	3 days ago		SA MTA EOTA				ARPA	

If you need to remove an IPAP form, contact your MEU Administrator.



### 3.3.8 Providing comments on a form

At the bottom of each submitted response, there is the opportunity to add comments. These can be from anyone who has access to complete that form, including prevocational doctors, supervisors and admins. It is also possible to reply to comments entered against forms.



The screenshot shows a web browser window titled "EPA 1 - Clinical Assessment - 16 Jul 2024 09:53". The main content area is a feedback form. It has three sections, each with a text input field containing "No response":

- Feedback**
- What went well?**
- What could be done to improve?**
- Agreed learning goals arising from the experience**

Below these sections is a "Print this response" button and the text "Queens Hospital". At the bottom, there is a "No comments..." section with a text input field containing "Write a comment..." and an "Add comment" button.

To add a comment:

- Open submitted form in the preview format by clicking on the form name
- Scroll to the end of the form to locate the Comments box
- Type in the comment
- Click **Add comment**

To reply to comments:

- Find the comment using the steps above and click **Reply** function
- Type a comment
- Click **Send Reply**

Comments added will be visible to other users that have access to that form. Comments cannot be edited, but they can be retracted by the user who put the comment in if required. If a comment needs to be retracted that was entered by another user, contact your MEU administrator to remove.

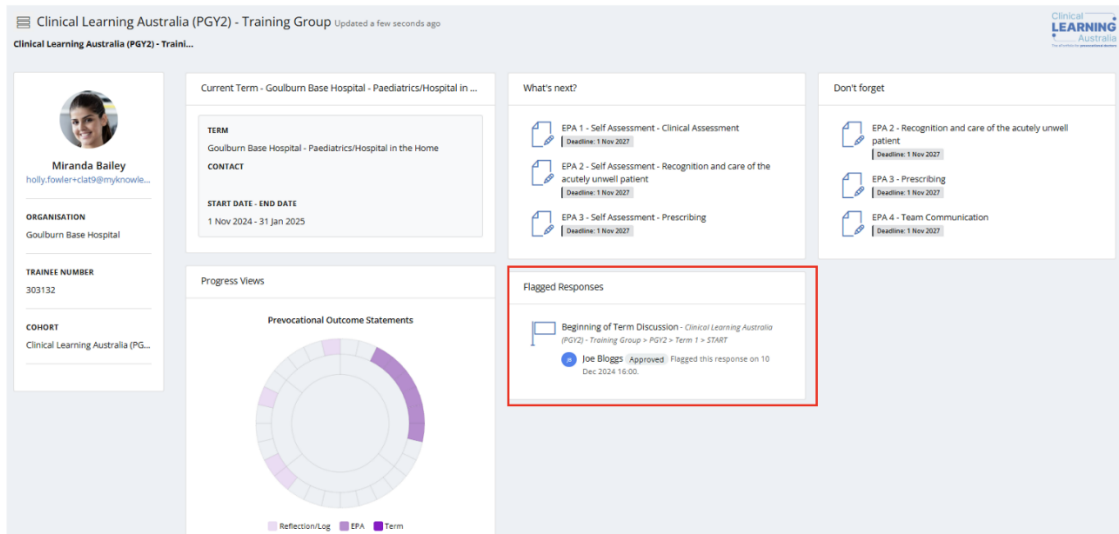
**Note:** Adding a comment will **not** notify users, therefore it is highly recommended to also 'flag' the response to bring the changes to the user's attention.

For more information on how to flag a response, please visit section 3.3.9 of this guide.

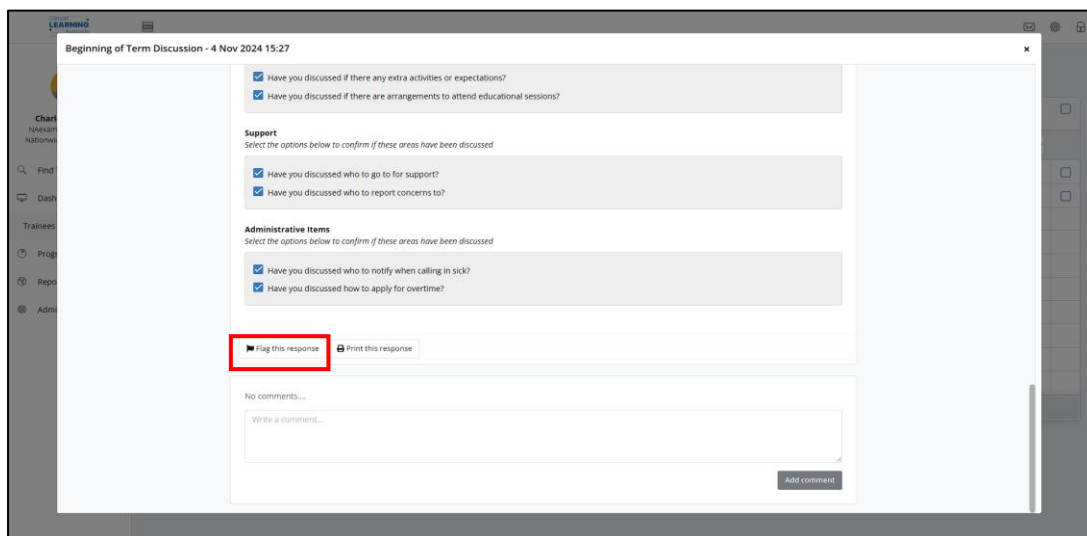
### 3.3.9 Flagging a form

Forms can be flagged. This means when reviewing, users will observe this form has been flagged for attention.

The flagged forms will appear on the prevocational doctor's homepage in the **Flagged response** section. Click on the form in the Flagged Responses section to open the form.

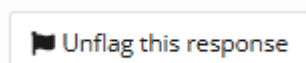


To flag a form, open the form you want to flag, scroll down to the end and click **Flag this response**.

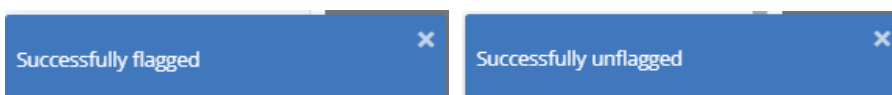


**Note:** It is recommended to leave a comment explaining why the form has been flagged.

To unflag a form, repeat the steps above, open the form, scroll to the bottom and select **Unflag this response**. This removes the form from the Flagged Responses section of the Trainee Profile and Overview page.



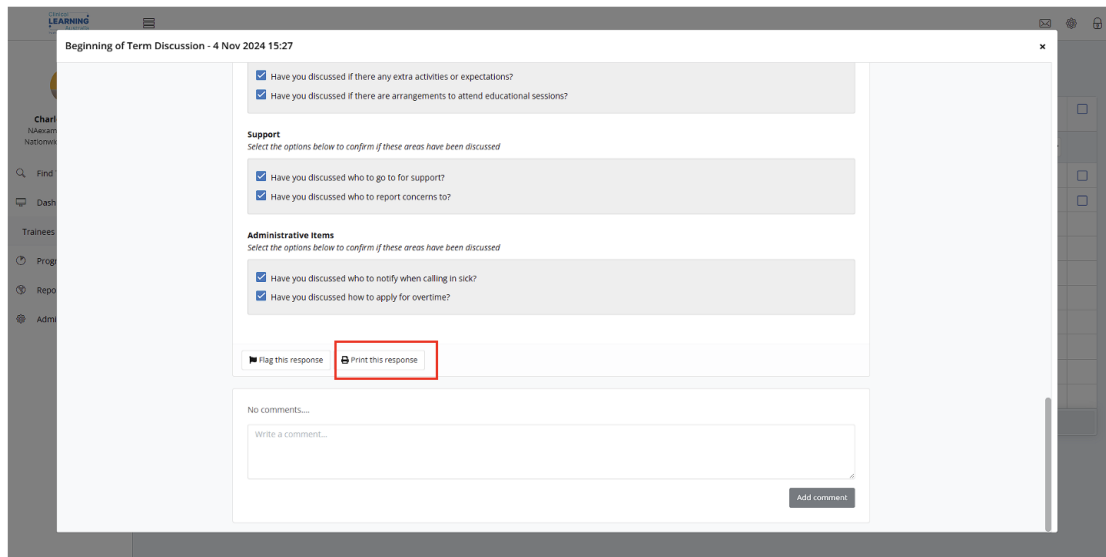
As you flag and unflag forms, a notification message will appear on the right side of the screen indicating that you have successfully flagged or unflagged a form.



### 3.3.10 Printing/Downloading a form

Forms can be printed or downloaded by saving as PDF.

To print or download a form, locate the form response, scroll down to the end and click **Print this response**.

A screenshot of a web-based form titled "Beginning of Term Discussion - 4 Nov 2024 15:27". The form is displayed in a window with a dark grey sidebar on the left containing navigation icons and labels like "Charl", "Nakam", "Nzichw", "Find", "Dash", "Trainees", "Prog", "Repo", and "Adm". The form content includes several sections with checkboxes: "Have you discussed if there are any extra activities or expectations?", "Have you discussed if there are arrangements to attend educational sessions?", "Support" section with "Have you discussed who to go to for support?" and "Have you discussed who to report concerns to?", and "Administrative Items" section with "Have you discussed who to notify when calling in sick?" and "Have you discussed how to apply for overtime?". At the bottom of the form, there are two buttons: "Flag this response" and "Print this response", with the latter highlighted by a red rectangular box. Below the buttons is a comment section with the text "No comments...", a text input field labeled "Write a comment...", and an "Add comment" button.

**Note:** Form responses can only be printed or downloaded individually.

### 3.3.11 Mapping outcome statements to forms

For Logbook, Case/Procedure Log, and EPA entries, it is possible to map the responses to Prevocational Outcome Statements.

This can be done in two ways:

- 1) When completing this form, before submitting, you can navigate to the Prevocational Outcome Statements tab at the top of the form page, selecting any outcomes you feel the Trainee has evidenced as part of the form response.

Logbook

Logbook

Prevocational Outcome Statements

CHOOSE OUTCOME STATEMENTS

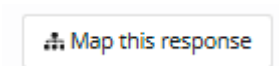
▼ PRACTITIONER

- 1.1 Place the needs and safety of patients at the centre of the care process, working within statutory and regulatory requirements and guidelines. Demonstrate skills including effective clinical handover, graded assertiveness, delegation and escalation, infection control, and adverse event reporting.
- 1.2 Communicate sensitively and effectively with patients, their family and carers, and health professionals, applying the principles of shared decision-making and informed consent.
- 1.3 Demonstrate effective, culturally safe interpersonal skills, empathetic communication and respect within an ethical framework inclusive of Indigenous knowledges of wellbeing and health models to support Aboriginal and Torres Strait Islander patient care.
- 1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues.
- 1.5 Request and accurately interpret common and relevant investigations using evidence-informed knowledge and principles of sustainability and cost-effectiveness.
- 1.6 Safely perform a range of common procedural skills required for work as a PGY1 or PGY2 doctor.
- 1.7 Make evidence-informed management decisions and referrals using principles of shared decision-making with patients, carers and the health care team.
- 1.8 Prescribe therapies and other products including drugs, fluids, electrolytes, and blood products safely, effectively and economically.
- 1.9 Recognise, assess, communicate and escalate as required, and provide immediate management to deteriorating and critically unwell patients.
- 1.10 Appropriately use and adapt to dynamic systems and technology to facilitate practice, including for documentation, communication, information management and supporting decision-making.

SELECTED OUTCOME STATEMENTS

No outcome statements selected

2) Or, if you either forget to map at the time of completion or after further thought (post submitting a response), you can map Outcome Statements to a completed form by opening a form, scrolling to the bottom of the form and clicking on **Map this response**.



Please refer to the steps in section 3.2.2 Viewing submitted forms for more information about accessing completed forms.

Clicking on **Map this response** opens a mappings window. In the Select Outcome Statements dropdown box, select Prevocational Outcome Statements.

Case/Procedure Log mappings

SELECT OUTCOME STATEMENTS

Select Outcome Statements

Prevocational Outcome Statements

Tick or untick the Prevocational Outcome Statements as needed.

**EPA 1 - Clinical Assessment mappings** ✕

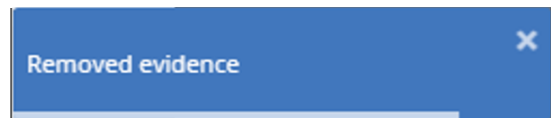
SELECT OUTCOME STATEMENTS

Prevocational Outcome Statements ▼

▼ PRACTITIONER

- 1.1 Place the needs and safety of patients at the centre of the care process, working within statutory and regulatory requirements and guidelines. Demonstrate skills including effective clinical handover, graded assertiveness, delegation and escalation, infection control, and adverse event reporting.
- 1.2 Communicate sensitively and effectively with patients, their family and carers, and health professionals, applying the principles of shared decision-making and informed consent.
- 1.3 Demonstrate effective, culturally safe interpersonal skills, empathetic communication and respect within an ethical framework inclusive of Indigenous knowledges of wellbeing and health models to support Aboriginal and Torres Strait Islander patient care.
- 1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues.
- 1.5 Request and accurately interpret common and relevant investigations using evidence-informed knowledge and principles of sustainability and cost-effectiveness.

As changes are made, a notification message will appear on the right side of the screen indicating that evidence has been added if you ticked a box or evidence has been removed if you unticked a box.



**Note:** Manual grading allows an appropriate user to confirm if the prevocational outcomes linked to a piece of evidence (e.g. an assessment or EPA) have been demonstrated.

To manually grade any evidence, follow the steps below:

1. Go to the **Trainee Profile and Overview** page
2. Click on the Prevocational Outcome Statements **Progress View** wheel

The screenshot shows the Clinical Learning Australia (PGA2) - Training Group interface. The main content area is titled "Current Term - Goulburn Base Hospital - Paediatrics/Hospital in the Home". It displays a "Progress Views" section with a circular "Prevocational Outcome Statements" wheel. The wheel is divided into segments representing different outcome statements, with a legend below it: Reflection/Log (light purple), EPA (medium purple), and Term (dark purple). The wheel shows progress for each statement, with some segments highlighted in dark purple. To the right of the wheel, there are sections for "What's next?" and "Don't forget", each listing upcoming tasks with deadlines. The "What's next?" section lists four tasks: EPA 2 - Self Assessment - Recognition and care of the acutely unwell patient, EPA 3 - Self Assessment - Prescribing, and EPA 4 - Self Assessment - Team Communication. The "Don't forget" section lists three tasks: EPA 2 - Recognition and care of the acutely unwell patient, EPA 4 - Team Communication, and EPA 3 - Prescribing. The interface also includes a sidebar with trainee information for Ben Warren, including his profile picture, name, email, and contact details. The top right corner features the Clinical Learning Australia logo.

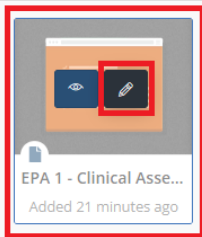
3. Locate the Outcome Statement/s where the evidence has been mapped after submission. This is easily identified as the evidence icon will show a number and there will be no grade against that Outcome Statement.

1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues. 1 0 0   
No description.

4. Select the Outcome Statement to display the evidence.
5. Hover over the piece of evidence you want to grade and select the pencil icon.

1.4 Perform and document patient assessments, incorporating a problem-focused medical history with a relevant physical examination, and generate a valid differential diagnosis and/or summary of the patient's health and other relevant issues. 1 0 0   
No description.

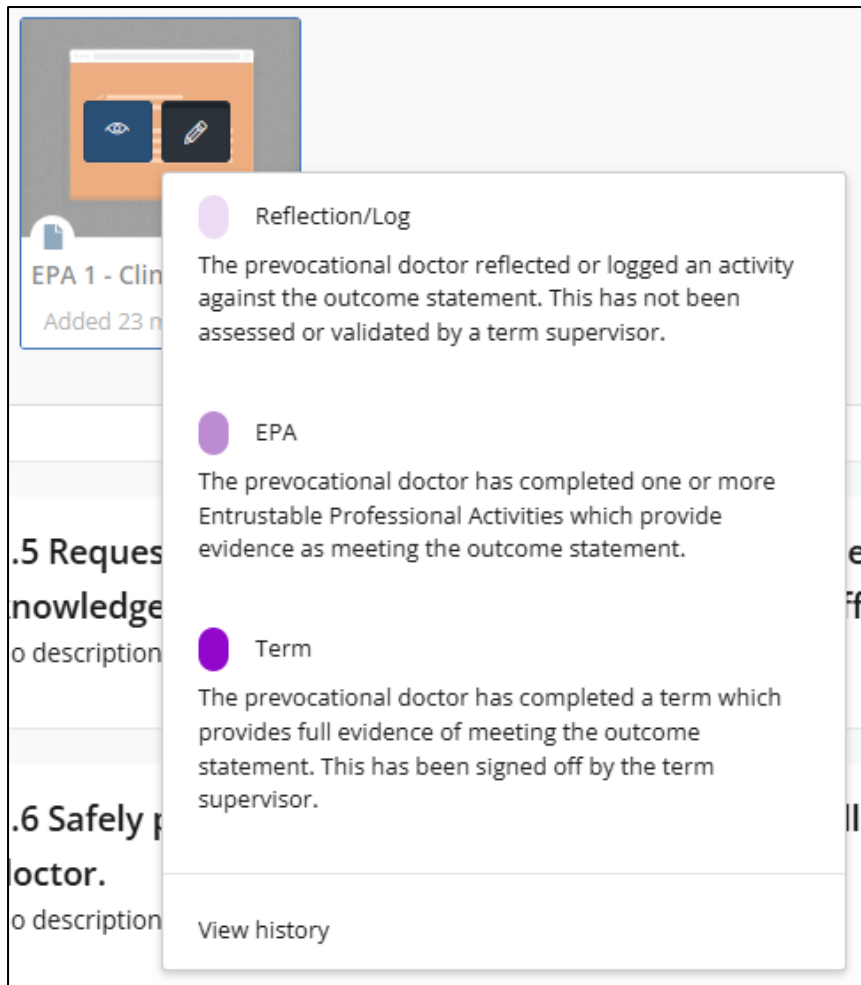
Evidences (1)  Comments (0)  Internal Comments (0)



EPA 1 - Clinical Asse...  
Added 21 minutes ago

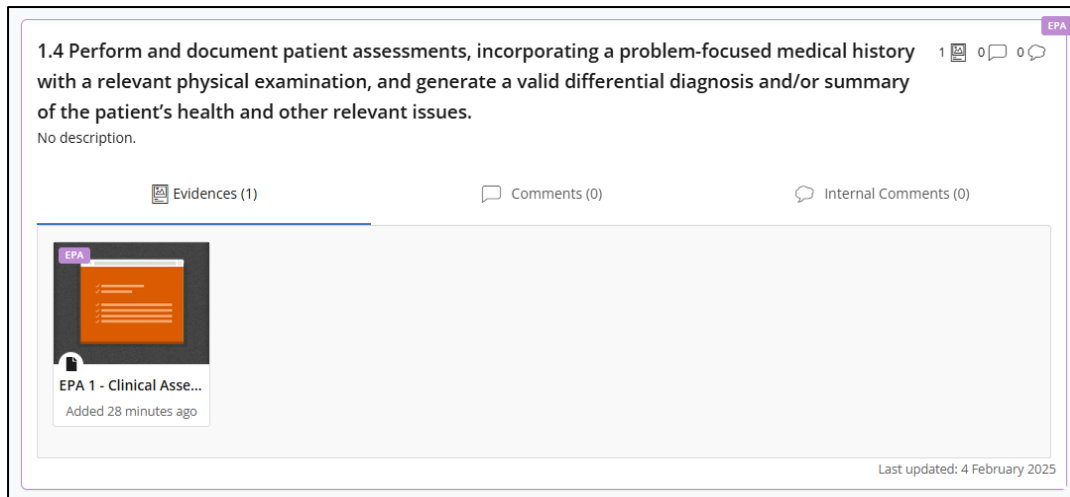
Last updated: 4 February 2025

6. This will display the grading options for you to select. Ensure you select the one relevant to the evidence you're grading, e.g. For this EPA 1 piece of evidence, you would select the EPA grading option.



7. You can optionally then provide comments regarding the 'grade' you're giving that piece of evidence. If you don't wish to provide comments, select **OK** and that will then apply the grade to that evidence, as well as the overall Outcome Statement.

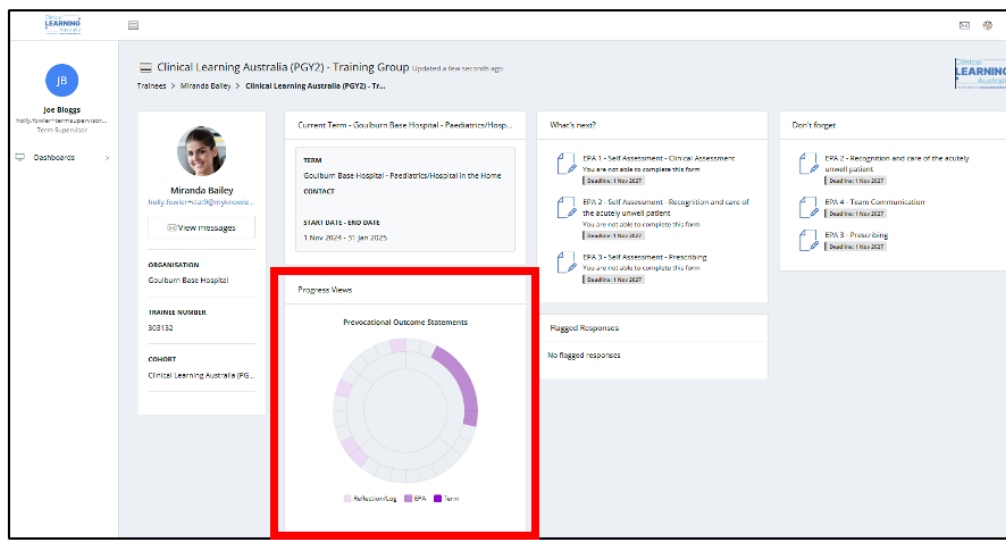
The dialog box is titled "Apply Grade EPA 1 - Clinical Assessment as EPA?". It contains the following text: "You can add an optional comment to support this grade." Below this text is a text input field with the placeholder text "Your comment...". At the bottom right of the dialog box, there are two buttons: "Cancel" and "OK".



### 3.4 Progress Views

Using the **Progress Views** screen, it is possible to see in greater detail how individual prevocational doctors are progressing in documenting evidence against each of the Prevocational Outcome Statements.

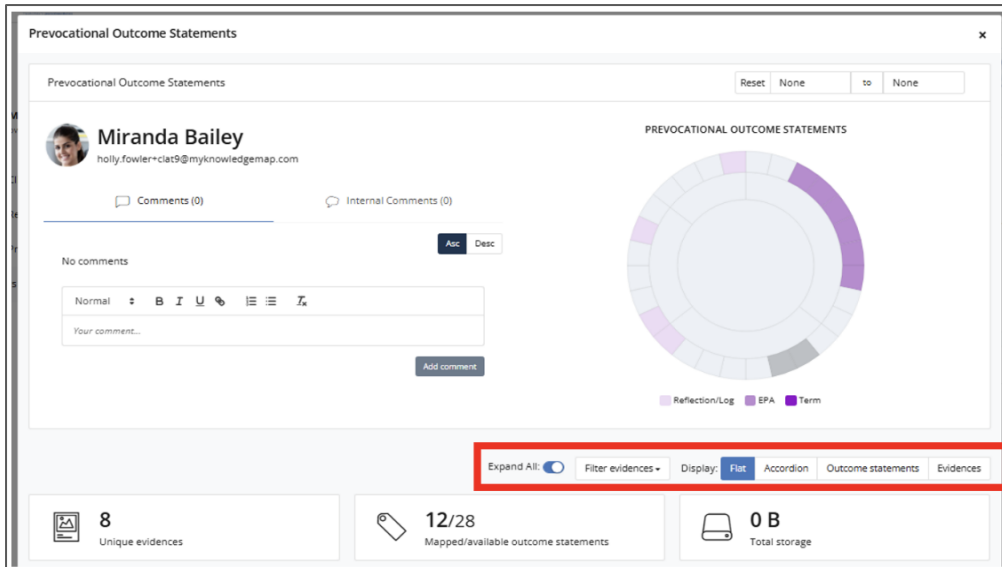
Open Progress Views for a prevocational doctor by opening their **Trainee Profile and Overview**, either by clicking their name on the **Trainee Dashboard** or finding them in **Find Trainees** and clicking **View**, then click on the Prevocational Outcome Statements graphic in the **Progress Views** box.



The **Prevocational Outcome Statements** screen allows you to drill into the statements and evidence that has been provided against each.

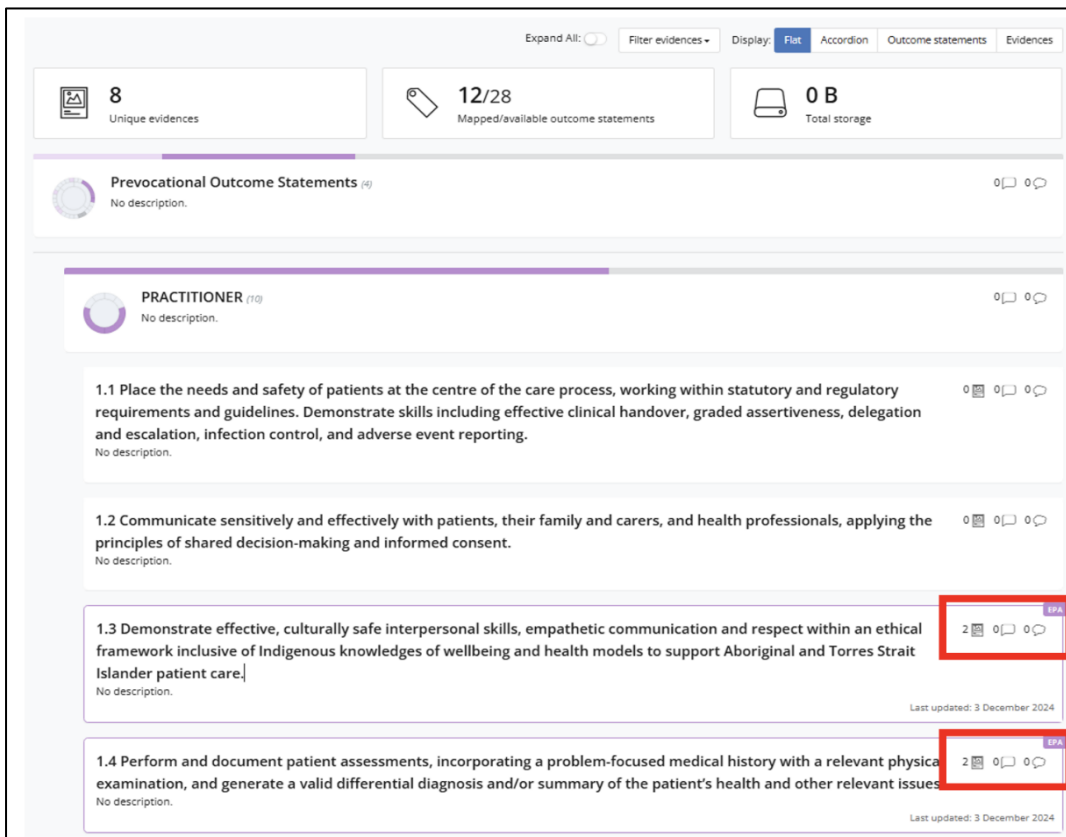
You can expand or collapse all the statements, filter evidence, and change the display to suit how you want to view this. Based on the display selected, additional filtering options may become available.





Depending on the filters and display selected, the Prevocational Outcome Statements will be displayed in the lower portion of the screen.

For each Statement, it will show if any evidence has been linked to it, via EPAs, Reflections/Logbooks or End of Term Assessment, and if there are any comments associated with that evidence or Outcome Statement. The example below shows that two pieces of evidence have been linked to Statements 1.3 and 1.4 versus none for 1.1 and 1.2. If the Statement was evidenced as part of an EPA, EPA will display in the top right corner of the Statement.



Click on any of the Statements to expand the view and see the evidence that has been attached. Hover over the evidence image and click on the eye button to see a read-only version of the form.

The screenshot shows a user interface for a Statement. At the top, the Statement text reads: "1.3 Demonstrate effective, culturally safe interpersonal skills, empathetic communication and respect within an ethical framework inclusive of Indigenous knowledges of wellbeing and health models to support Aboriginal and Torres Strait Islander patient care." Below this, it says "No description." There are three tabs: "Evidences (2)", "Comments (0)", and "Internal Comments (0)". The "Evidences (2)" tab is active, showing two evidence items: "EPA 1 - Clinical Assess..." (Added 2 months ago) and "Logbook" (Added 2 months ago). At the bottom right, it says "Last updated: 3 December 2024".

Where no evidence has been attached to a Statement, it will state No evidences.

The screenshot shows a user interface for a Statement. At the top, the Statement text reads: "1.2 Communicate sensitively and effectively with patients, their family and carers, and health professionals, applying the principles of shared decision-making and informed consent." Below this, it says "No description." There are three tabs: "Evidences (0)", "Comments (0)", and "Internal Comments (0)". The "Evidences (0)" tab is active, and the main content area displays "No evidences."

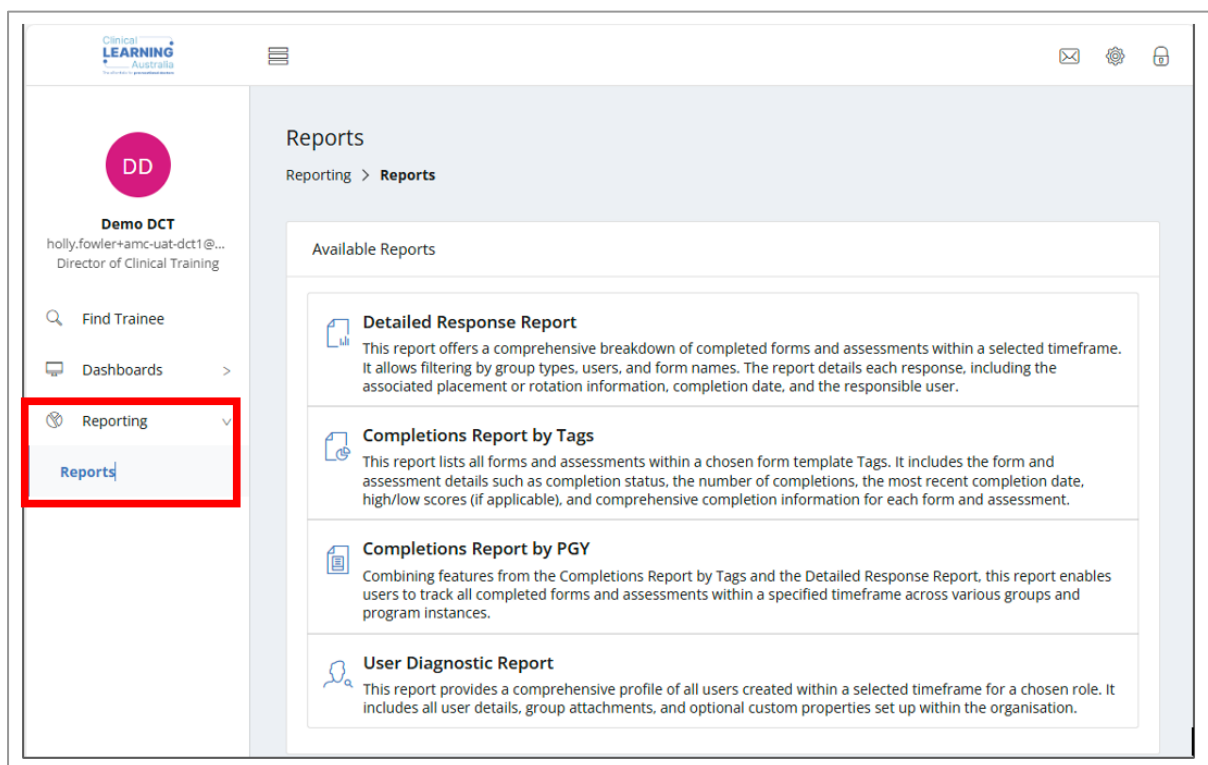
## 4 Reports

### 4.1 Reporting – Reports Overview

A set of reports are available to run in CLA which can be run across all groups available to you.

Below is a list of all available, standard reports that can be run.

To run reports, click on **Reporting** in the side navigation toolbar and select **Reports**.



#### 4.1.1 Report permissions

Different roles have varying permissions to view and run reports. Based on your role, you may not see all the reports.

Report Name	Available to	
	Supervisors	DCTs & EDMS'
• Detailed Response Report	✓	✓
• Completions Report by Program	✓	✓
• Completions Report by Tags	✓	✓
• User Diagnostic Report		✓

### 4.1.2 Viewing reports

When the reports have been produced, they can be viewed and exported on the same screen. A number of functions are available to users.



Each of the functions is described in the table below.

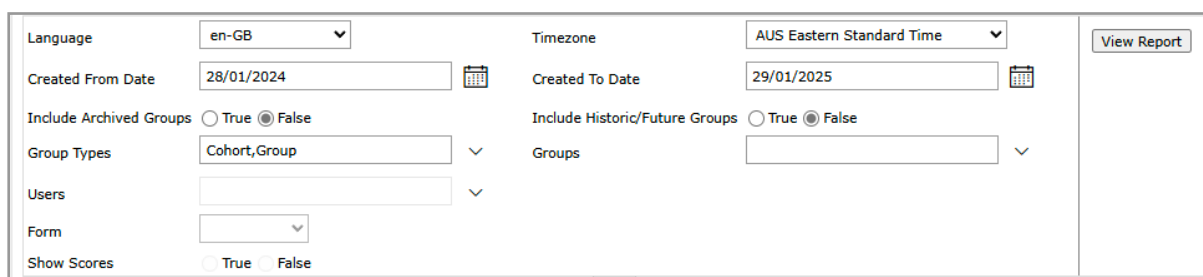
	<p>The reports will be viewable from page 1 and information about the specifications on the report will be viewable on the last page.</p> <p>Click the <b>arrows</b> to toggle between the pages.</p>
	<p>Click the <b>refresh</b> icon to refresh the results.</p>
	<p>Click the <b>zoom</b> drop down to change the zoom level.</p>
	<p>Click the <b>disc</b> icon to export results. A list of options is available in the drop-down menu.</p> <p>Excel is the most recommended format for exporting report data.</p>
	<p>Click the <b>print</b> icon to print the report.</p>
	<p>To search for a particular text, type in the desired text in the <b>find</b> search bar.</p>

## 4.2 Detailed Response Report

This report offers a comprehensive breakdown of completed forms and assessments within a selected timeframe. It allows filtering by group types, users, and form names. The report details each response, including the associated Term or rotation information, completion date, and the responsible user.

### Setting up a Detailed Response Report

- Select the **language – en-GB**
- Select the **created from date** and **created to date** to specify the timeframe.
- To **include archived groups**, select **true** otherwise select **false**. For example, you may want to report on previous groups that have finished.
- To **include historic/future groups**, select **true** otherwise select **false**.
- Select **group type**. There is the option to select multiple group types or select all.
- Select the **group**. There is the option to select multiple groups or select all. **Note:** As you will be only using the **Cohort** group type currently, you only need to select this group type.
- If you would like to view particular users, select the required **users**, or select all.
- Select the **form**. There is the option to select multiple forms or select all. **Note:** Only forms that have completed responses against them will appear, the parameters set will impact this list, e.g. if you put a date range where no EPA 1 forms were completed, this will not be seen as an option in the dropdown to report on.
- To include the **scores** associated with submitted forms select **true** otherwise select **false**. **Note:** Currently, scores are not being used in CLA, so this can be left false.



The screenshot shows a form for configuring a report. It includes the following fields and options:

- Language:** en-GB (dropdown)
- Timezone:** AUS Eastern Standard Time (dropdown)
- Created From Date:** 28/01/2024 (calendar icon)
- Created To Date:** 29/01/2025 (calendar icon)
- Include Archived Groups:**  True  False
- Include Historic/Future Groups:**  True  False
- Group Types:** Cohort,Group (dropdown)
- Groups:** (empty dropdown)
- Users:** (empty dropdown)
- Form:** (empty dropdown)
- Show Scores:**  True  False
- View Report:** (button)

- To run the report, click **View Report** on the right-hand side of the data options.

The report will be available to view in the screen below your search criteria. Export the report if needed by clicking on the disc icon at the top of the report and selecting the Excel export format.

*If any changes are made to the report setup after running the report, the report will need to be run again by clicking view report to display the new changes.*

## 4.3 Completions Report by Tags

This report lists all forms and assessments within a chosen form template Tag. It includes the form and assessment details such as completion status, the number of completions, the most recent completion date, high/low scores (if applicable), and comprehensive completion information for each form and assessment.

### Setting up a Completions Report by Tags

- Select the **language – en-GB**.
- Select the **completions from** date and **completions to** date to specify the timeframe.
- Select the **category** from the drop-down list.
- Select the **format** from the drop-down list.
- To **include invalid groups**, select **true** otherwise select **false**.
- To **include archived groups**, select **true** otherwise select **false**.
- Select the **group**. There is the option to select multiple groups or select all. **Note:** As you will be only using the **Cohort** group type currently, you only need to select this group type.

The screenshot shows a form with the following fields and values:

Language	en-GB	Completions From	29/01/2024	Completions To	29/01/2025	View Report
Category	<Select a Value>	Format	Number of completions	Include Invalid Groups	True	
Include Archived Groups	False	Group Types	Cohort,Group	Groups		

- To run the report, click **View Report** on the right-hand side of the data options.

The report will be available to view in the screen below your search criteria. To export the report, click on the disc icon at the top of the report and select the Excel export format.

*If any changes are made to the report setup after running the report, the report will need to be run again by clicking view report to display the new changes.*

## 4.4 Completions Report by Program

Combining features from the Completions Report by Tags and the Detailed Response Report, this report enables users to track all completed forms and assessments within a specified timeframe across various groups and PGY instances.

### Setting up a Completions Report by Program

- Select the **language – en-GB**.
- Select the **completions from** date and **completions to** date to specify the timeframe.

- To include invalid groups, select **true** otherwise select **false**.
- To include archived groups, select **true** otherwise select **false**.
- Select **group type**. There is the option to select multiple group types or select all.  
**Note:** As you will be only using the **Cohort** group type currently, you only need to select this group type.
- Select the **group**. There is the option to select multiple groups or select all.
- To **include invalid PGY instances** select **true** otherwise select **false**.
- To **include archived PGY instances** select **true** otherwise select **false**.
- Select the **PGY instance** from the drop-down list.
- Select the **report format** from the drop-down list.

The screenshot shows a configuration panel for a report. It is organized into two columns of settings. The left column includes: Language (en-GB), Completions From (29/01/2024), Include Invalid Groups (radio buttons for True and False, with False selected), Group Types (a dropdown menu), Include Invalid ePAD Instances (radio buttons for True and False, with False selected), and ePAD Instance (a dropdown menu). The right column includes: Completions To (29/01/2025), Include Archived Groups (radio buttons for True and False, with False selected), Groups (a dropdown menu), Include Archived ePAD Instances (radio buttons for True and False, with False selected), and Report Format (Number of Completions). A 'View Report' button is located on the far right of the panel.

- To run the report, click **View Report** on the right-hand side of the data options.

The report will be available to view in the screen below your search criteria. To export the report, click on the disc icon at the top of the report and select the Excel export format.

*If any changes are made to the report setup after running the report, the report will need to be run again by clicking view report to display the new changes.*

## 4.5 User Diagnostic Report



This report provides a comprehensive profile of all users created within a selected timeframe for a chosen role. It includes all user details, group attachments, and optional custom properties set up within the organisation.

**Note:** Term and Clinical Supervisors do not have access to this report.

### Setting up a User Diagnostic Report

- Select the **language** – **en-GB**.
- Select the **created from date** and **created to date** to specify the timeframe.
- Select **role**. There is the option to select multiple roles or select all.
- Select **format** from the drop-down list.

- To include deleted groups, select **true** otherwise select **false**.
- To **show organisation** select **true** otherwise select **false**.
- To show all custom properties select **true** otherwise select **false**.

Language	en-GB					<a href="#">View Report</a>
Created From Date	29/01/2024		Created To Date	29/01/2025		
Roles	Term Supervisor (remove),State Ad	▼	Format	Row per user and group	▼	
Include Deleted Groups	<input type="radio"/> True <input checked="" type="radio"/> False		Show Organisation	<input checked="" type="radio"/> True <input type="radio"/> False		
Show all custom properties	<input type="radio"/> True <input checked="" type="radio"/> False					

- To run the report, click **View Report** on the right-hand side of the data options.

The report will be available to view in the screen below your search criteria. To export the report, click on the disc icon at the top of the report and select the Excel export format.

*If any changes are made to the report setup after running the report, the report will need to be run again by clicking view report to display the new changes.*



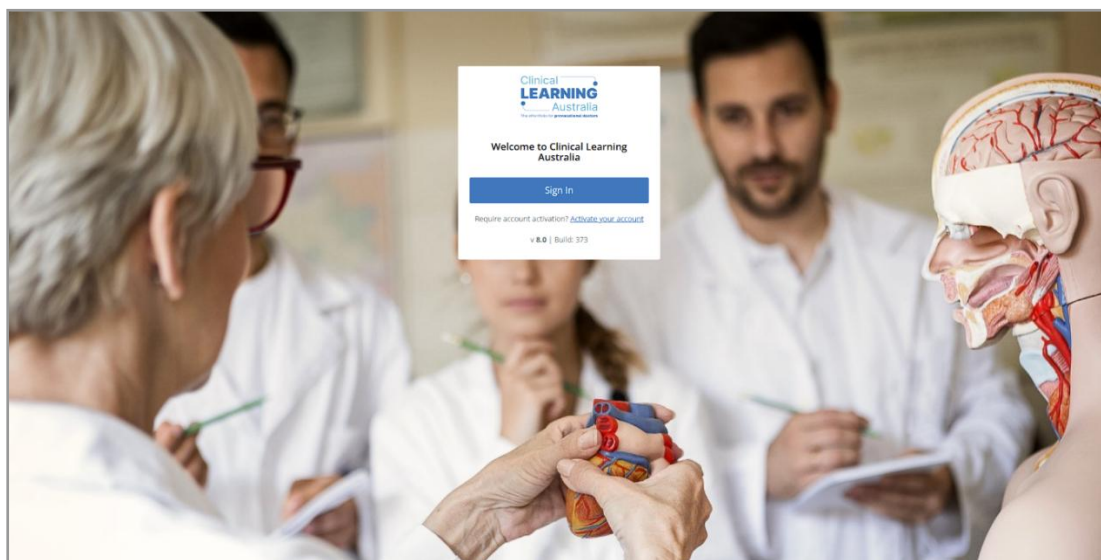
## 5 Scenario

### *Completing a Mid Term Assessment*

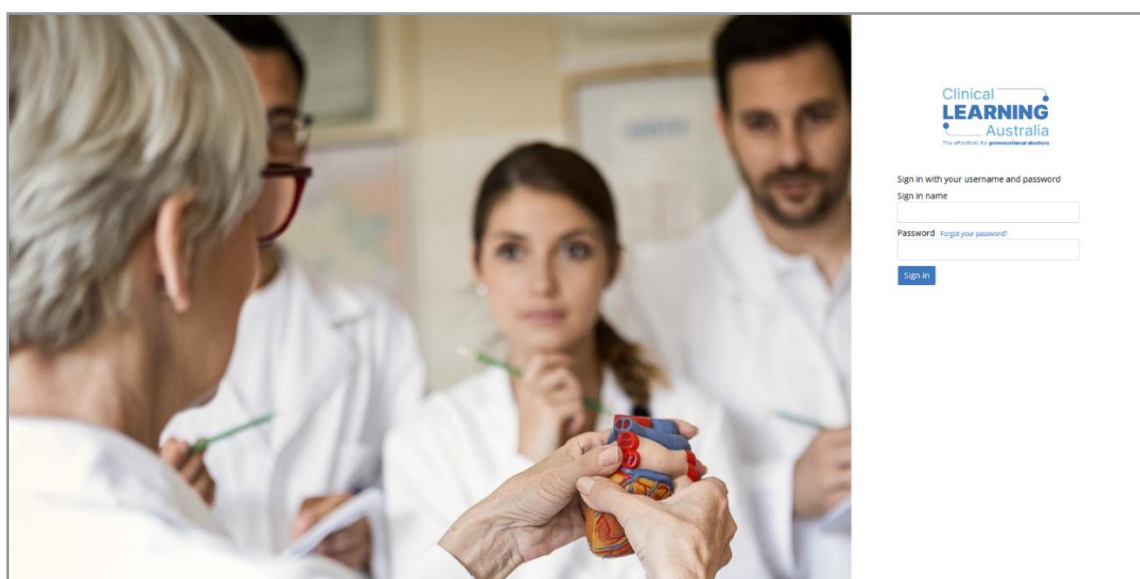
It is time to complete a mid-term assessment for Ellie, a PGY 1 prevocational doctor. The mid-term assessment is meant to be completed by a Clinical Supervisor or a Term Supervisor, however, this can be done either on their device/login, or they can complete this together on Ellie's login and the Supervisor signs off the assessment at the end.

Ellie and her Supervisor have decided to complete the assessment using Ellie's login.

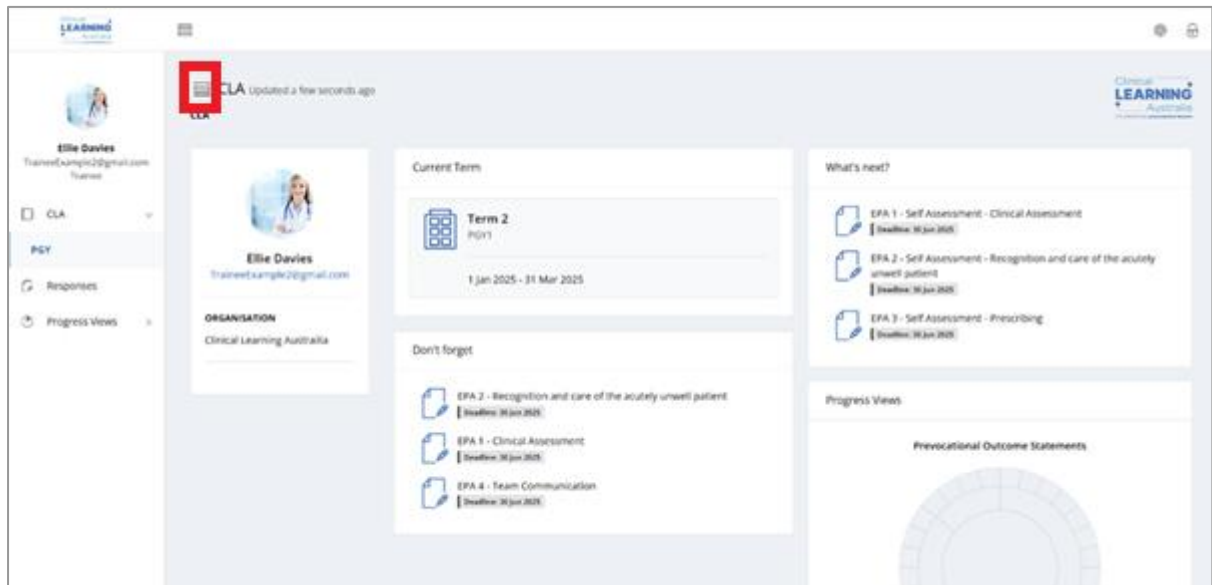
First Ellie goes to the CLA website, and puts in the URL - <https://cla.epads.mkmapps.com/> and clicks on **Sign in**.



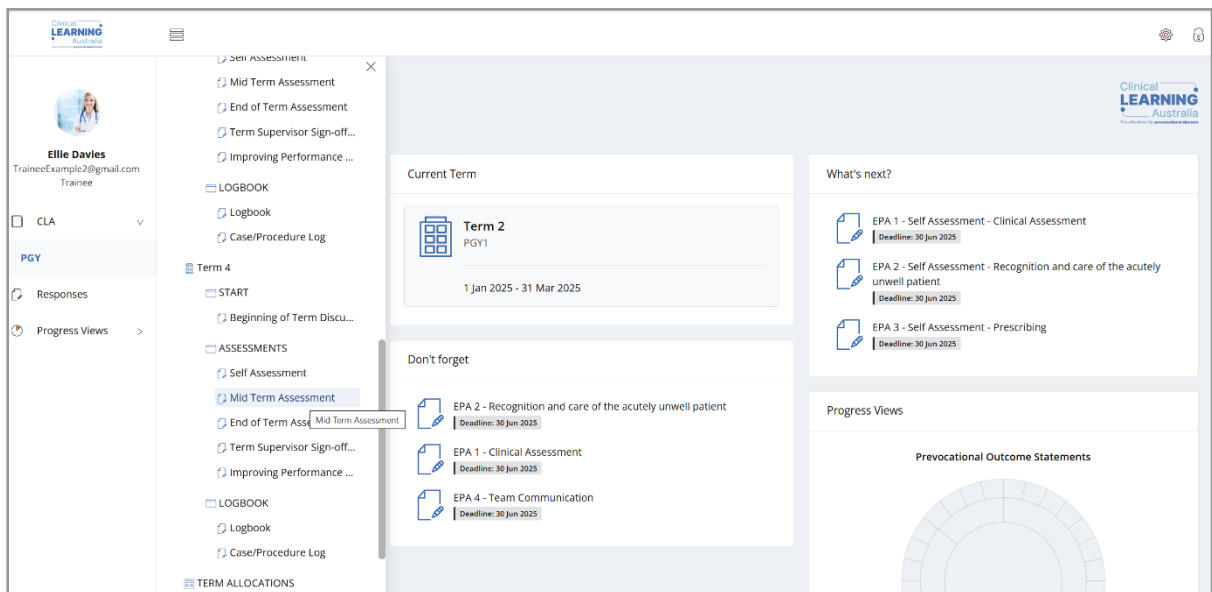
Ellie enters her email address and password before clicking the **Sign in** button.



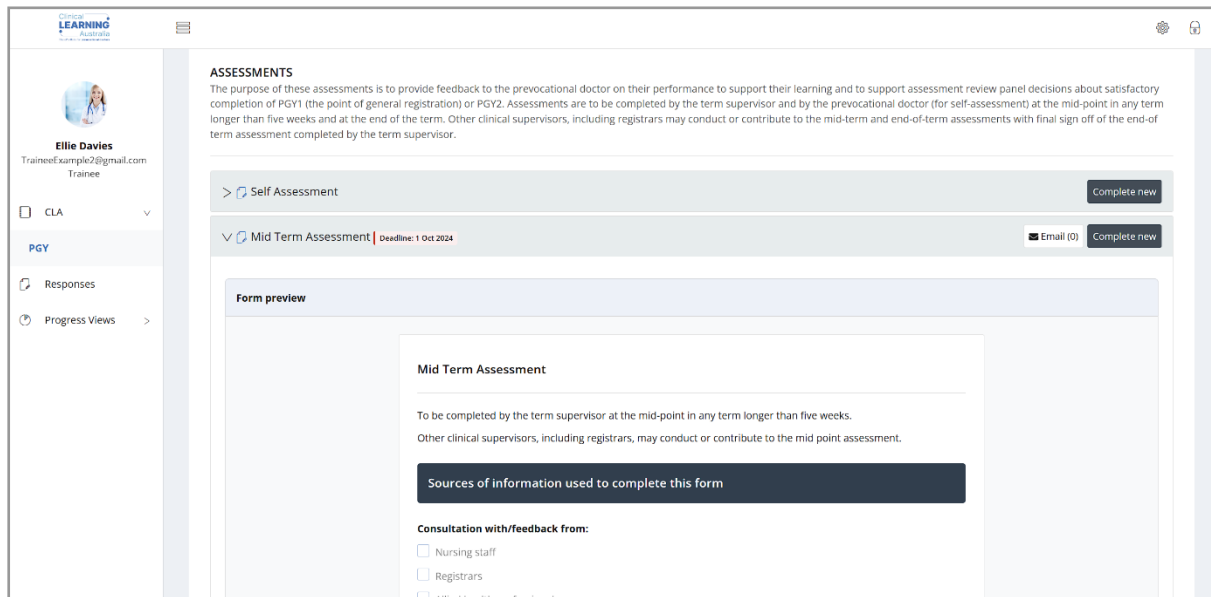
Starting from the home page, Ellie opens the ePortfolio using the secondary burger icon to see the forms listing menu.



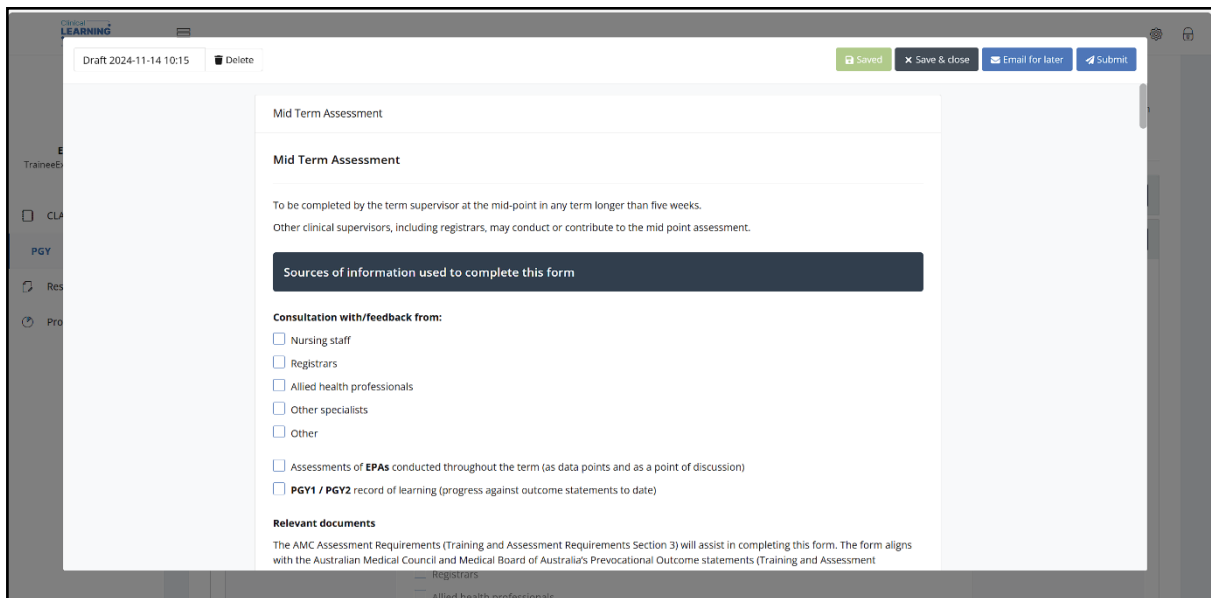
Ellie scrolls through the forms list until she finds the correct Mid Term Assessment (relevant to the current term she is on) that she and her Supervisor want to complete. She clicks on the form name to open.



Ellie can see a preview of the form and that a mid term assessment has not yet been completed for her. She selects **Complete new** which opens a new form for her and her Supervisor to complete.



Ellie and her Supervisor can now see an editable version of the form. Although the form states that it is to be completed by a Term Supervisor, Ellie can be logged into CLA and work through completing her form along with her Supervisor using her login.



Ellie renames the assessment in the text box at the top left of the window to Mid Term Assessment and the current date. This is not a necessary step, but Ellie has found it to be good practice. She clicks **Save changes** to make sure she does not risk losing her work.

Mid Term Assessment 14 [Delete] [Save changes] [Save & close] [Email for later] [Submit]

Mid Term Assessment

**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**

**Consultation with/feedback from:**

- Nursing staff
- Registrars
- Allied health professionals
- Other specialists
- Other
- Assessments of **EPAs** conducted throughout the term (as data points and as a point of discussion)
- PGY1 / PGY2** record of learning (progress against outcome statements to date)

**Relevant documents**

The AMC Assessment Requirements (Training and Assessment Requirements Section 3) will assist in completing this form. The form aligns with the Australian Medical Council and Medical Board of Australia's Prevocational Outcome statements (Training and Assessment

Ellie and her Supervisor begin to scroll down through the form. They see that they need to tick who they consulted and what feedback sources have been used with as part of undertaking the Mid Term Assessment, for instance EPAs or PGY records of learning. They can click one or more roles as required and click on them again to remove them if they selected any in error.

They also note the information provided about relevant documents or requirements that will assist in completing the form.

Mid Term Assessment 14 [Delete] [Save changes] [Save & close] [Email for later] [Submit]

Mid Term Assessment

**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**

**Consultation with/feedback from:**

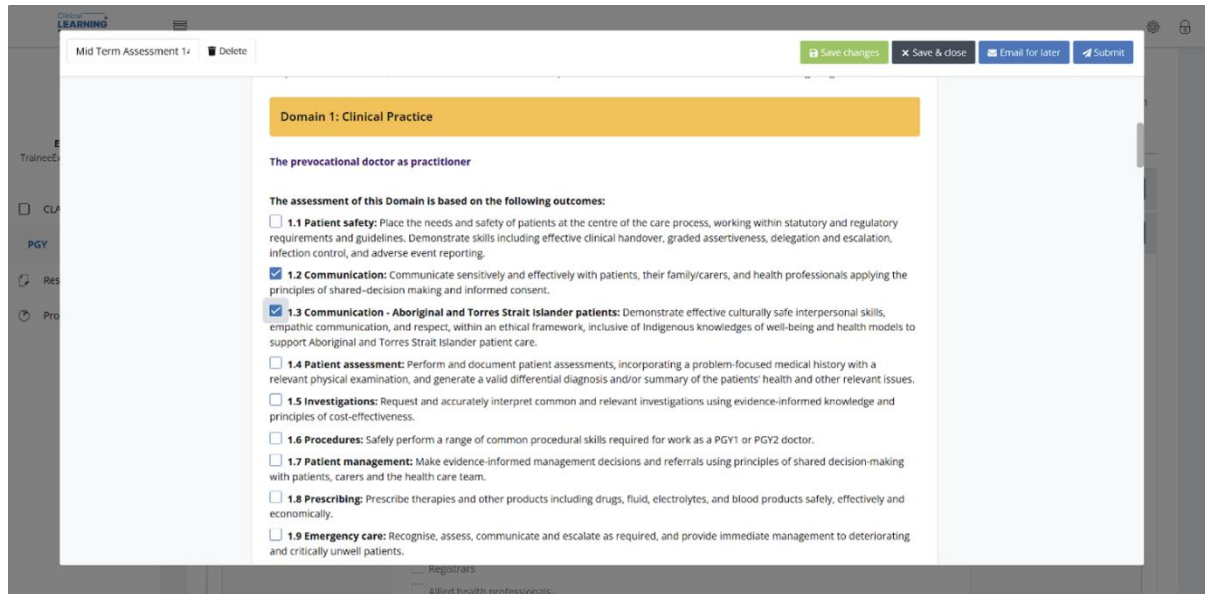
- Nursing staff
- Registrars
- Allied health professionals
- Other specialists
- Other
- Assessments of **EPAs** conducted throughout the term (as data points and as a point of discussion)
- PGY1 / PGY2** record of learning (progress against outcome statements to date)

**Relevant documents**

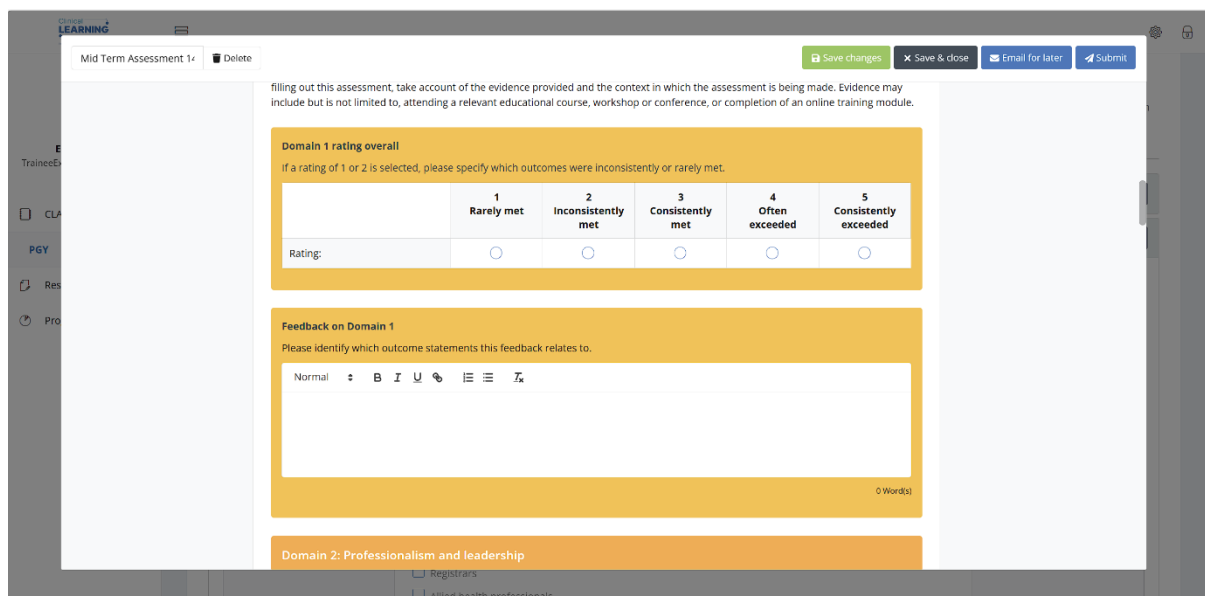
The AMC Assessment Requirements (Training and Assessment Requirements Section 3) will assist in completing this form. The form aligns with the Australian Medical Council and Medical Board of Australia's Prevocational Outcome statements (Training and Assessment

For each Domain, Ellie’s Supervisor will need to select the Outcomes that the assessment is based on. They do this by clicking on the tick boxes to select the outcomes and clicking again to untick if they selected any in error.

They start with Domain 1: Clinical Practice, and Ellie’s Supervisor selects two statements.

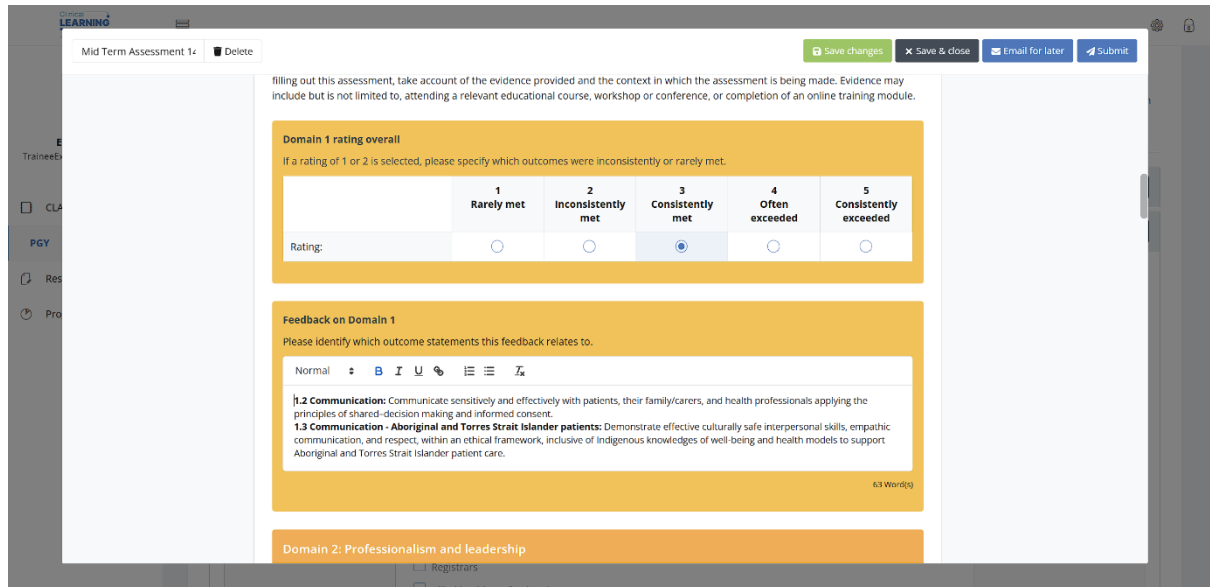


Continuing to work through the Mid Term Assessment, Ellie and her Supervisor scroll down to the overall rating section for the Domain they have been working through – Domain 1: Clinical Practice.

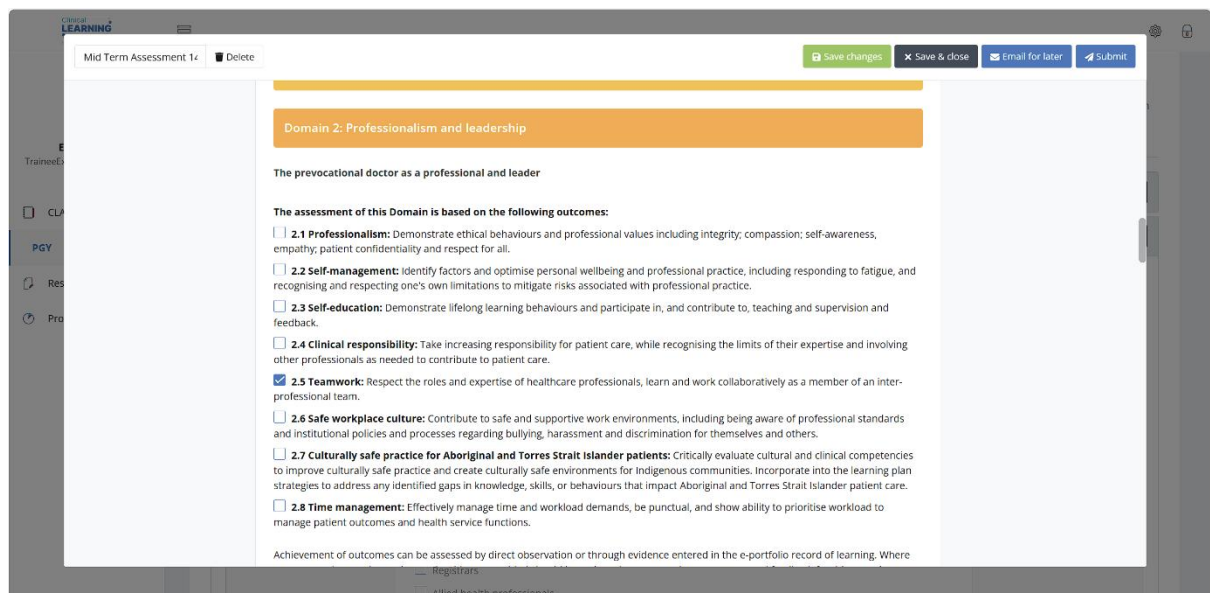


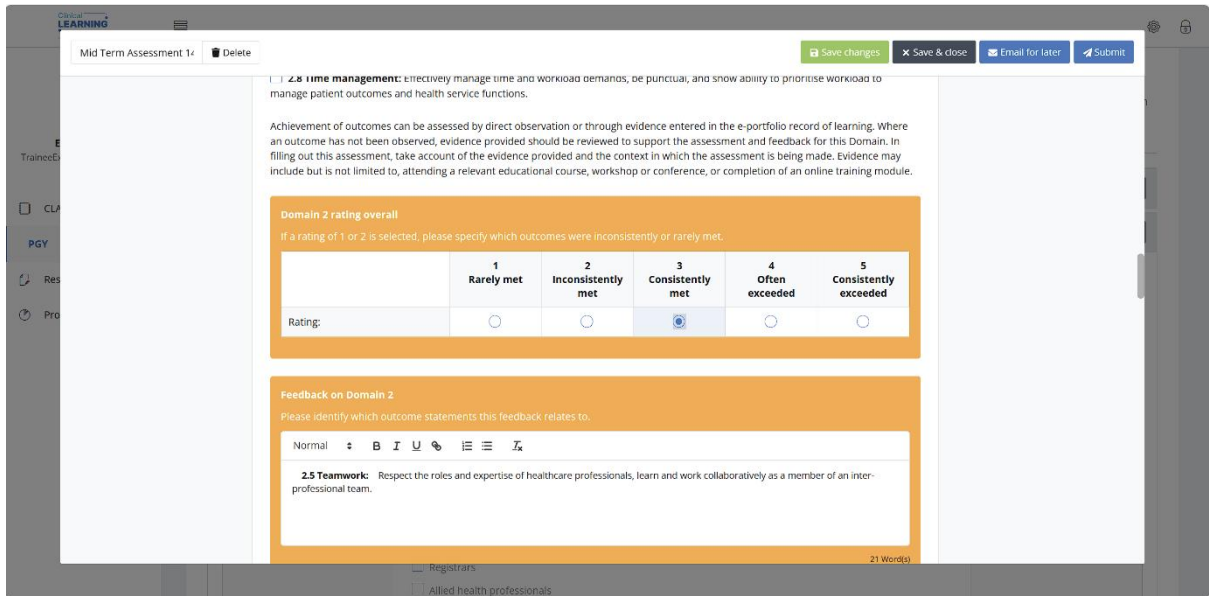
Ellie's Supervisor selects a radio button aligning with their rating.

The Supervisor also notes in the comments which outcome statements the rating is in relation to and any other feedback. The Supervisor can use word formatting to make the text easier to read, e.g. bold headings or bullets.

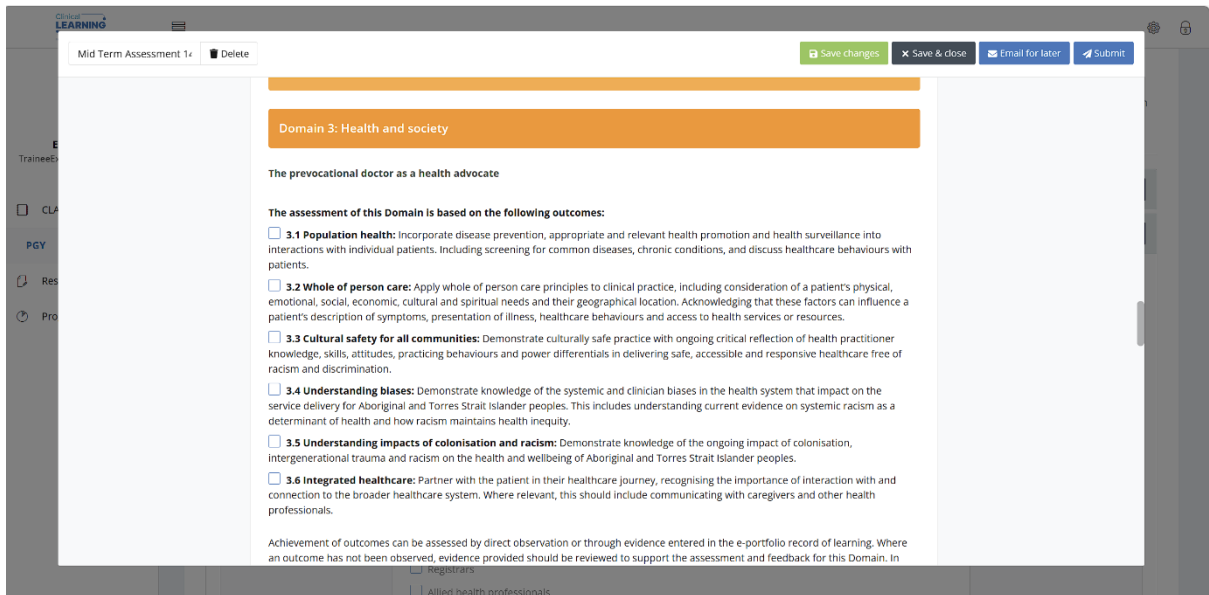


Ellie and her Supervisor continue to scroll through the assessment repeating the above for the subsequent Domains. The Supervisor selects the outcomes that the assessment is based on, selects a rating and enters associated feedback.

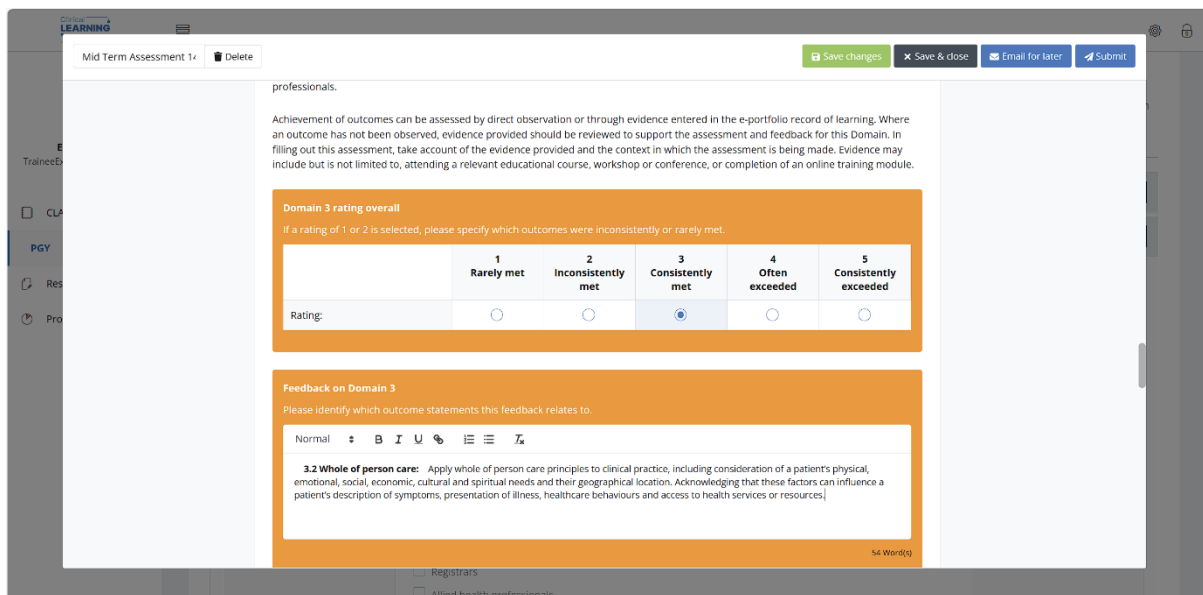




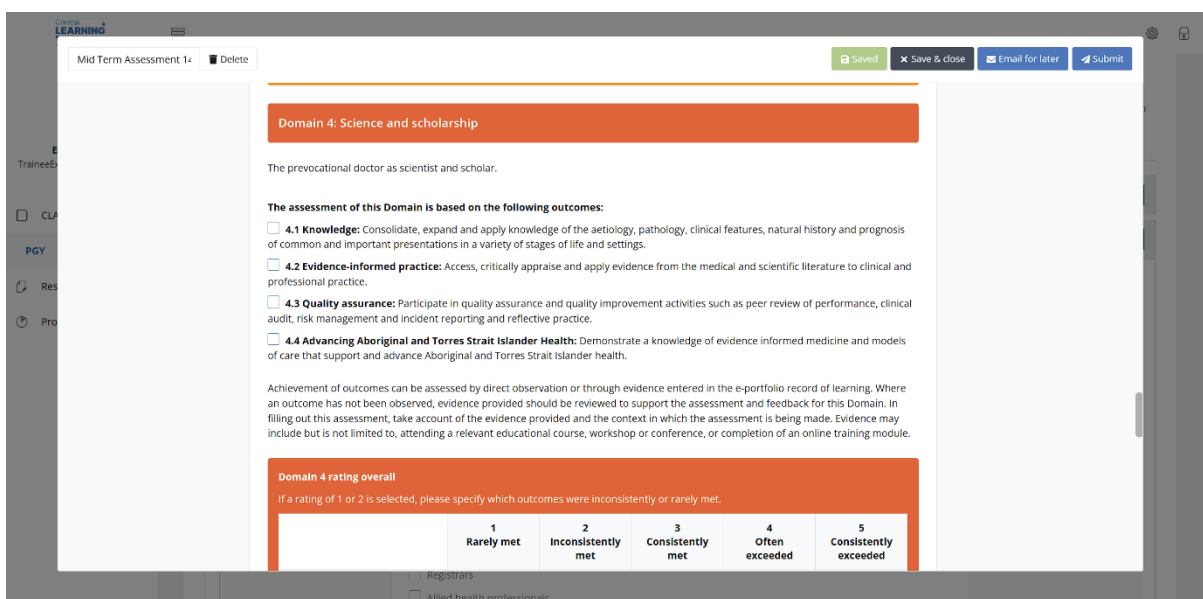
This is repeated for Domain 3: Health and Safety



Ellie's Supervisor enters a rating and comments.

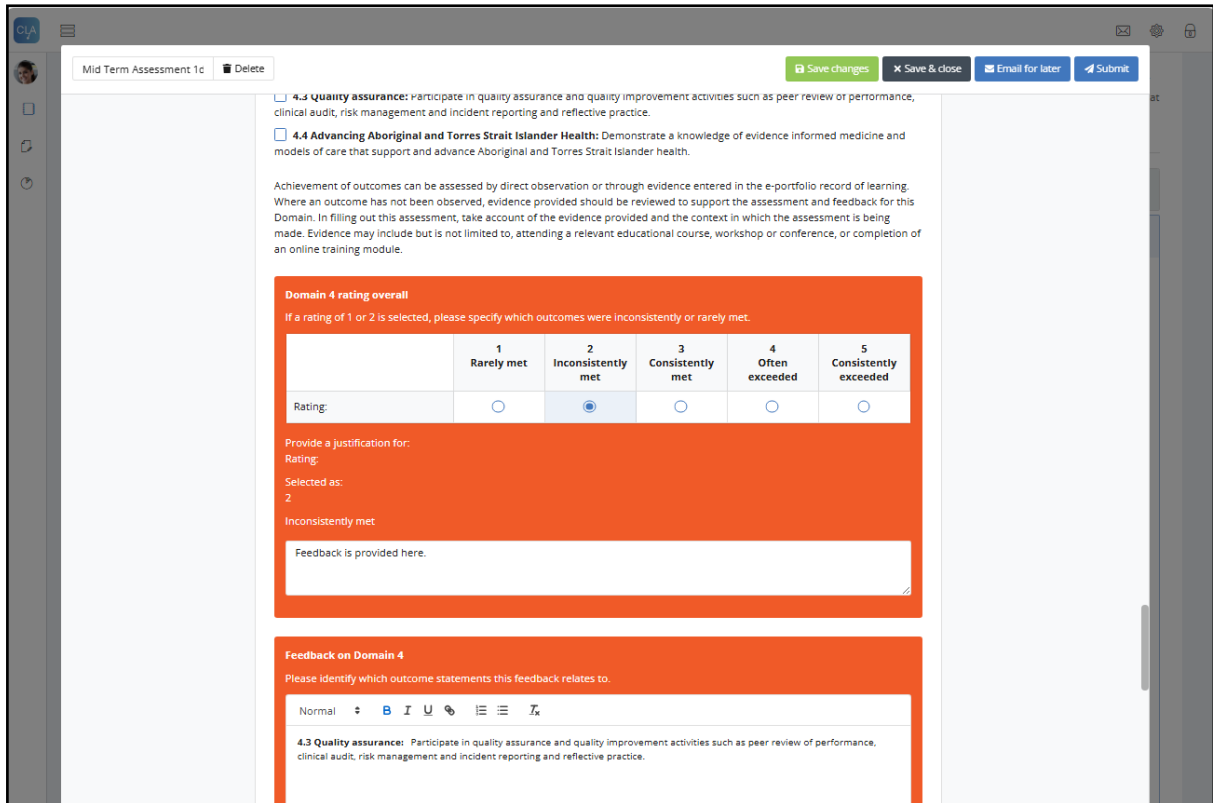


They proceed to Domain 4: Science and scholarship and repeat.

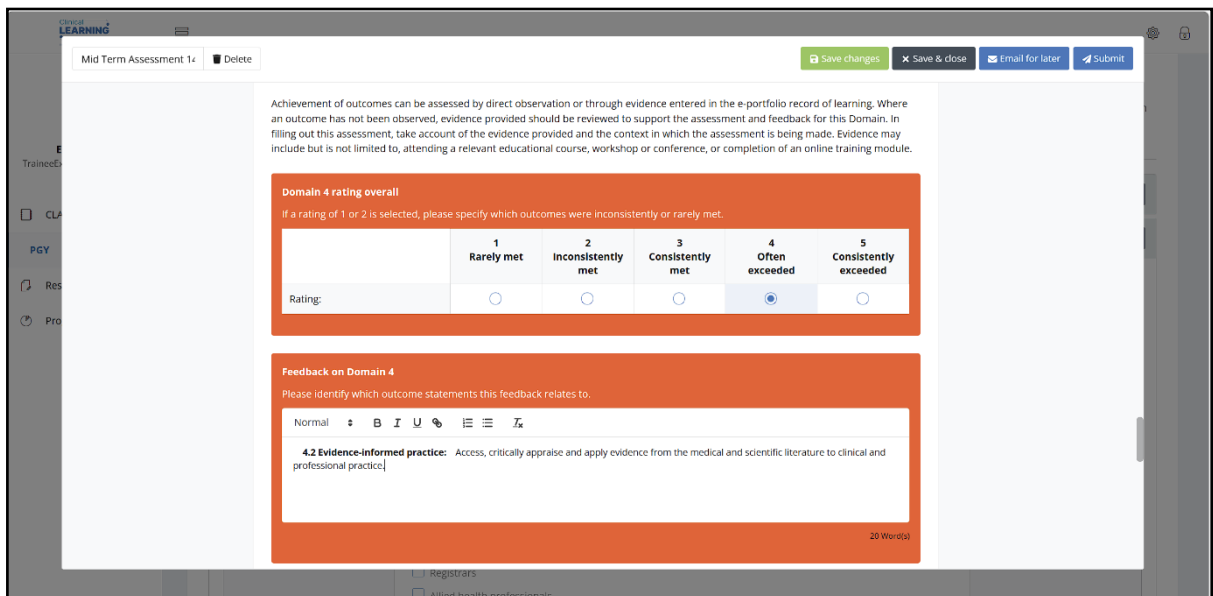




Ellie’s Supervisor accidentally selects a 2 – ‘Inconsistently met’ Likert score for this domain. When this is selected, a new section appears with the heading ‘Provide a justification for Rating’ and a mandatory text box. This section appears when a rating of 1 – Rarely met or 2 – Inconsistently met is selected.



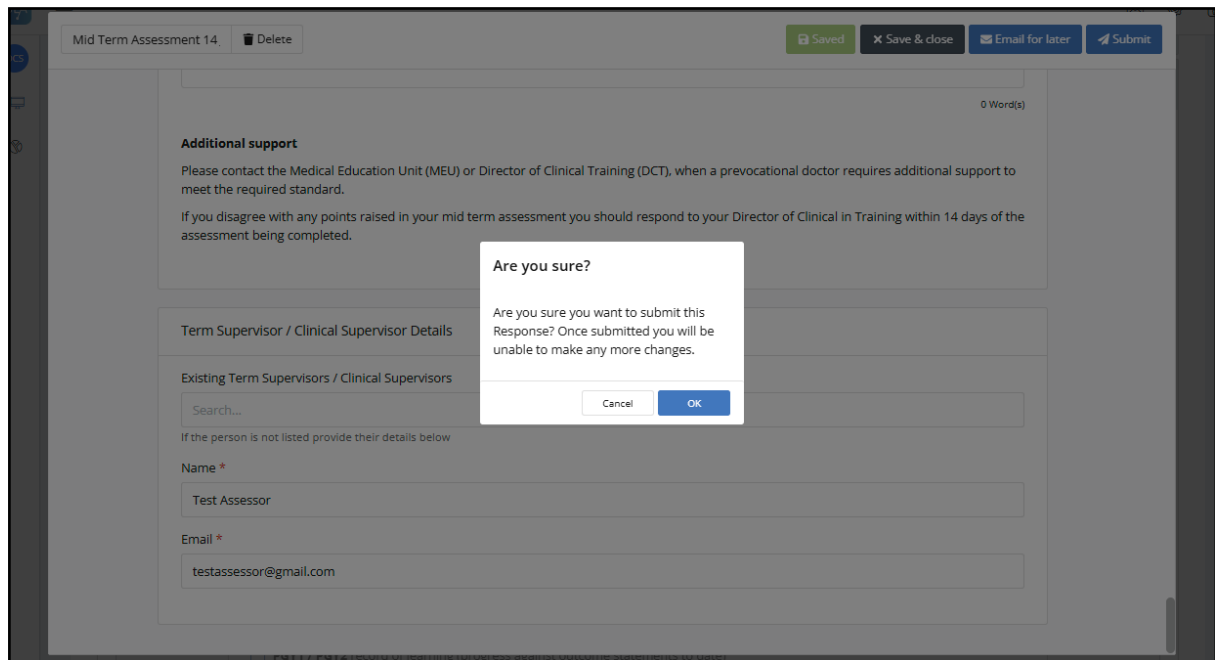
Ellie’s Supervisor realises that they made an error selecting the rating and changes their rating. The new section that was showing a moment ago now hides away again.



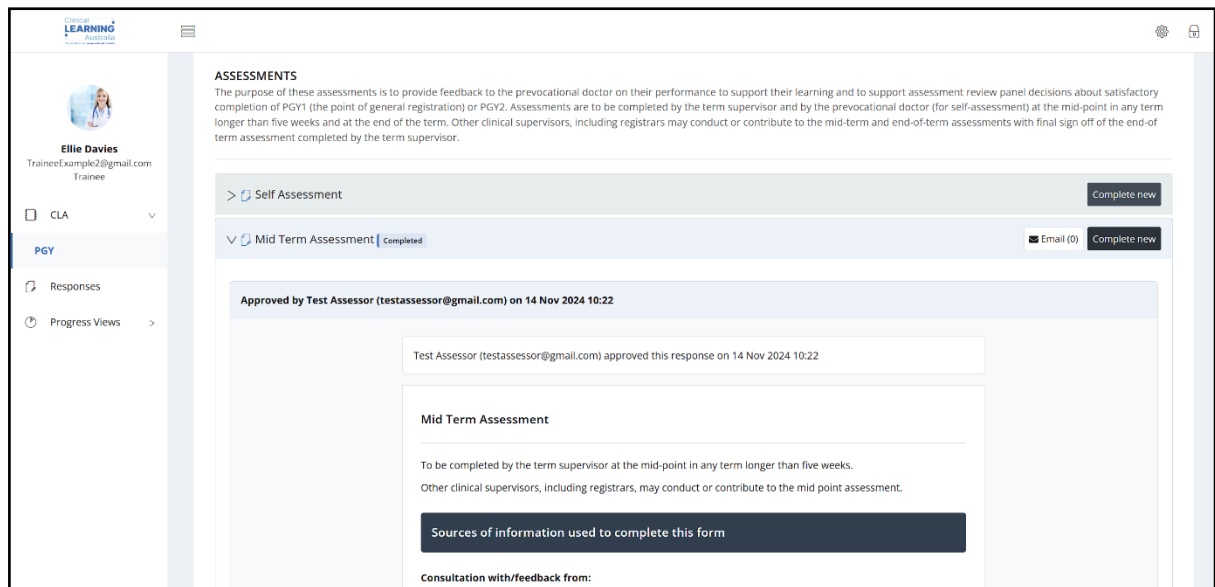
Once the Domain sections are completed, Ellie’s Supervisor enters feedback about Ellie’s strengths and areas for improvement. They click **Save changes**.

At the end of the form, Ellie’s Supervisor enters in her name in the search field. If she cannot find her name, she will manually enter her name and email address in the fields below.

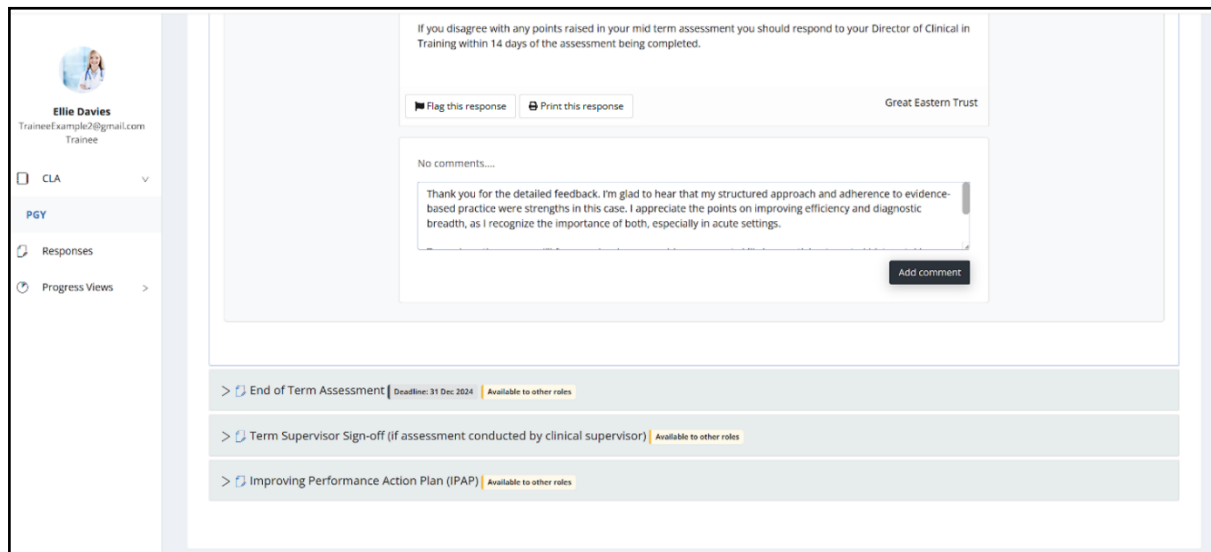
Ellie clicks **Submit** from the top right corner of the form. The computer asks if she is sure, as she and her Supervisor won't be able to make any more changes. She clicks on **OK** and the form is submitted as complete



Ellie and her Supervisor can see that Ellie now has a response under Mid Term Assessment, and clicking on the chevron icon will show the completed form.

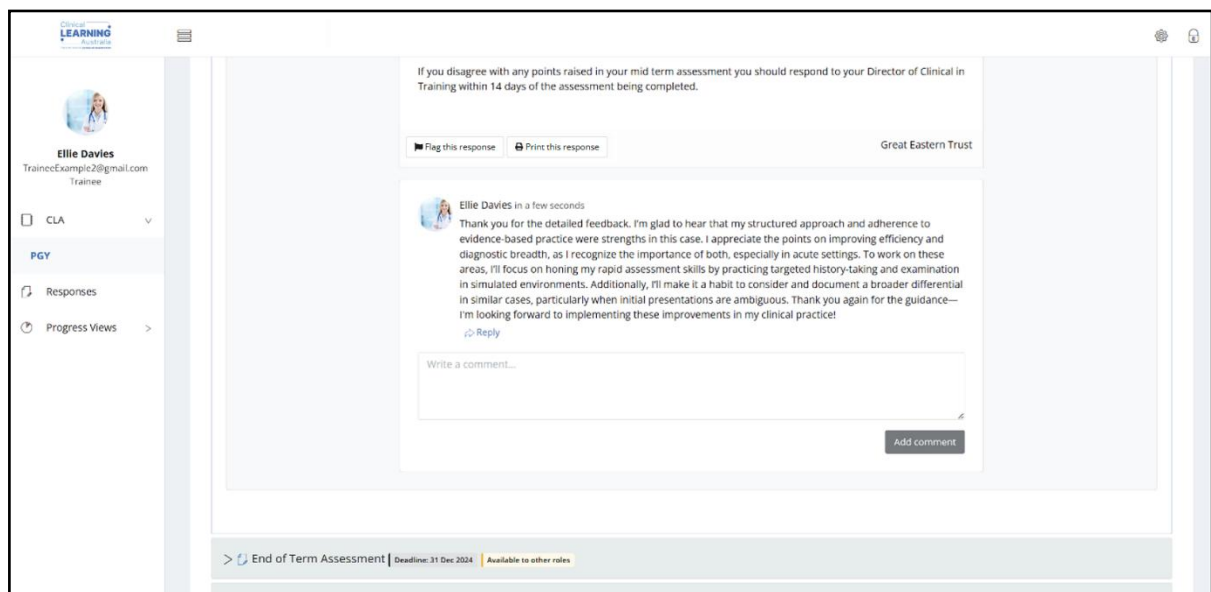


Ellie scrolls to the bottom of the completed form and enters a comment. When she has finished typing, she clicks **Add comment**.

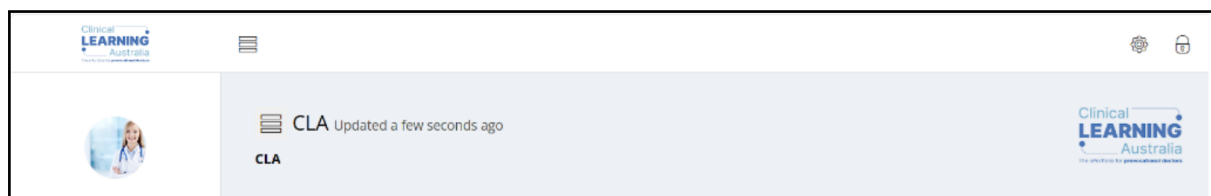


The comment is added to the end of the form.

She also opts to flag the response so that other authorised users, including Supervisors and DCTs that navigate to her Trainee Profile and Overview are notified that this form has a comment. She clicks on **Flag this response**.



When finished using CLA, Ellie clicks on the lock icon in the top right to log out.



## 6 Support

If you require any support, please contact your local Medical Education Unit in the first instance. You can find additional information including training videos on the [CLA website](#).