Clinical Learning Australia

Training Guide



The ePortfolio for prevocational doctors

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

CREATING AND MANAGING PGY INSTANCES

This quick reference guide provides information on how to create and manage PGY instances in Clinical Learning Australia (CLA). This guide will explain the process to follow for creating PGY instances and how to manage them once created.

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1 What is a PGY Instance?

An **instance** creates a 'version' of CLA to support a specific training program/cohort group. Within an instance, administrator users can assign a group of trainees to a relevant PGY template within the system (such as a 4-term or a 5-term template), identify PGY and term dates relevant to their training program and assign trainees to term allocations.

Creating an instance is done once per **cohort group**, after trainee **user accounts** are created and trainees are linked to their relevant cohort group.

2 Creating a PGY Instance

2.1 Where to create a PGY Instance

- Navigate to the 'cog' icon on the left-hand menu bar and click 'PGY Instances'
- СĻА ACA PGY Instances Q, Admin > PGY Instances Users All templates All groups All statuses ۲ Groups Organisation 🗢 Template 🗘 Group 🗘 Start Date 🗢 End Date 🗢 Created 🗢 Edited 🖨 Status 🖨 \otimes Organisations ralia (PGY2) Clinical Learning Clinical Learning Australia Clinical Learning Australia (PGY2) 25 Nov 2024 3 Dec 2024 1 Nov 2024 1 Nov 2027 Live -Training Group (PGY2) (4 Terms) 13:11 ۲ Australia Terms 10 per page 🗸 Forms PGY Instances Outcome Statements
- Click the 'Create instance' button

A window will pop up to allow the PGY instance details to be entered.

2.2 Initial creation of a PGY instance

- Complete the fields shown below ensuring you enter data in all mandatory fields as a minimum.
- Anything with a (*) is a mandatory field.
- Click **Create** when you have finished entering all the data. This will take you to a new screen in which you can add further details.

Create PGY	
Name *	
Template *	
Select	~
Group *	
Add a new group	
You have yet to assign any group.	
	Cancel Create

The table below explains each of the fields within the PGY creation window.

Field name	Description	Field Type
Name*	You can choose to enter any name for the instance you are creating. It is recommended, however, that the name of the PGY instance matches that of the Trainee group that will be linked to the instance for ease of management. E.g. ACT – PGY2 (4-Term) – 2025 Hospital X – PGY1 (5-Term) – 2025	Mandatory
Template*	 Select the relevant template from the drop-down list. The template selected ensures that the correct number of terms are assigned to the instance and that trainees and supervisors have access to the correct forms and assessments. There are 4 templates to select from: PGY1 (4 Terms) PGY1 (5 Terms) PGY2 (4 Terms) PGY2 (5 Terms) 	Mandatory
Group*	Select the cohort group that you wish to assign to this instance. You will need to have created a cohort group before creating an instance. See the quick reference	Mandatory

guide Creating and managing groups for more information.	
Adding the cohort group to the instance ensures that all trainees within that group have access to the correct template and forms relevant to their training	

2.3 Adding dates

Next you will need to populate relevant dates within the instance.

PGY Start and End dates

There are several places in which you will need to enter the start and end dates of the full training year as shown below. This is to set the date parameters for different aspects of the system:

- In the **Details** section enter the start and end date of the training year to identify the date parameters of the instance
- In the **Allocation** section enter the start and end of the training year to identify the start date of the first term and the end date of the last term
- In the **EPAs** section enter the start and end date of the training year this will allow EPAs to be completed at any time throughout the training year
- In the Assessment Review Panel section enter the start and end date of training year

 this will allow the ARP assessment to be undertaken at any time throughout the year
 you are able to restrict this to occur at a later time should you choose to by entering dates later in the year for this section

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Q		Details		Allocation							
Ģ		Name *		Navigate between the part/section to If no dates are set at the section level	begin allocating tra then the parent se	ainees to term terms within this ir ction dates will be used.	nstance. All allocations ca	n be managed in real time.			
C		Description		V 🖻 PGY1							
۲				Start Date		End Date		Target Hours			
٠			11					0			
		Status									
		Dratt	~	> III Term 1 (9 forms)							
		Clinical Learning Australia (PGV1) (4 Terms)		> 🗑 Term 2 (9 forms)							
		Conneal ceanning Adduate (FOTT) (4 Territs)		5 Tours 3 (6 (or or)							
		Example Group (0 students)		> M Term 3 (9 forms)							
		Start Date Fod Date	-	> 🔝 Term 4 (9 forms)							
				> EPAs (8 forms)							
		Target Hours 0		> ASSESSMENT REVIEW	PANEL (1 form)						

Note: To enter the dates for the PGY, EPAs, Assessment Review Panel blocks, click on that section to expand it, and the start and end date fields will be located within that block.

Note: Target Hours is not used in Australia - please disregard wherever you see this.

IMPORTANT. Click 'Save changes' (top right corner) regularly as you populate the instance with information and data to ensure no work is lost.

Term dates

In addition to the start and end dates for the training year, you need to enter the start and end date for each term. Click on each term block and enter the start and end date of that term.

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2									No changes
	Details	Allocation							
	Name *	Navigate between the part/se	ction to begin all	ocating trainees to	term terms within th	his instance. All allocations can	be managed in r	real time.	
	CLA - Example PGY Instance	If no dates are set at the section	on level then the	parent section dat	es will be used.				
	Description	V 🖻 PGY1							
		Start Date		End D	Date		Target Hours		
	Æ						0		
	Status								
	Translate	Dratt V Term 1 (9 forms)							
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	Group								
	Start Date End Date	T Show filters			Reference	e: 0a6a6947-132b-44be-9131-47	75930ae3e02	-å Import - 🔿 Add a	llocation
		Trainee	Start Date	End Date	Target hours	Term	Term Su Supervi	upervisors / Clinical sors	
	Target Hours						Jupern		
	0								

Note: You don't need to enter all term dates and term allocations straight away if they are not known.

Note: The term start and end date sets the overall date parameters for that term but individual trainee allocations within that term can have different dates i.e. if a certain trainee starts late, their term allocation can have a different start date to other trainees.

It is possible to manage split or blended terms in situations where a PGY doctor may require two term allocations within a single term. For instance, an ED allocation for the first 5 weeks of a term and then General Medicine for the remaining 5 weeks. See the **Creating and managing term allocations** quick reference guide for more information.

A **Grace Period** can be added to Term, EPA and Assessment Review Panel blocks. The grace period is to allow a period of time after the end date of that block to allow users to complete forms. If you do not wish to have a grace period, you can leave it as 0. After the grace period has expired, users will not be able to complete forms for that term.

2.4 Adding Term Allocations

Term allocations are added to the table within each Term block. For further information how to upload term allocations, please refer to the **Creating and managing term allocations** quick reference guide.

V 🗑 Term 1 (9 forms)							
Start Date		End Date		Target Hours	Grace Period (days)		
				0	0		
Allocation-spec	cific deadlines (Applies	to split placements or	nly) 🚯				
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Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors		
			No rou	us found			
	Previous	Page	1 of 1	5 rows 🗸	Next		

2.5 Set the PGY Instance to 'Live'

Once all the above steps have been completed, you will need to set the **Status** of the PGY instance to **Live** to allow Trainees to begin using their ePortfolio.

Navigate to the left-hand panel, click **Status** and set to **Live**.

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٣		Details		Allocation			
(9)		Name * CLA - Example PGY Insta Description	ance	Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.			
			4	Cumulative Tallies ()			
		Status		No cumulative tallies added			
		Draft	~		Add new cur	oulative t	
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		Archived					
		Group					
		Example Group (0 stude	ents)				
		Start Date	End Date				
		01/01/2025	01/01/2025				

Click Save changes on the far-right hand side of the page.

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a 🛛	CLA - Example Admin > PGY Instance	e PGY Instance s > CLA - Example PGY Insta	nce	Save changes
o	Details		Allocation	
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•	Description		> 🖥 PGY1 1 Jan 2025 1 Jan 2025	
		6	Cumulative Tallies ①	
	Status		No cumulative tallies added	
	Live	×		Add new cumulative tally
	Template			-
	Clinical Learning Au	ustralia (PGY1) (4 Terms)		
	Group			
	Example Group (0 s	students)		
	Start Date	End Date		
	01/01/2025	01/01/2025		

2.6 Attach the Outcome Statement Framework

The final step in the setup of a PGY instance is adding the **Outcome Statement framework** to the instance. This will enable Trainees to attach evidence to the Outcome Statements and track progress against these.

Note: The option to add a new Outcome Statement framework will not appear until you have set a PGY instance to Live and saved the changes.

In the **Allocation** section of the instance screen click '**Add new Outcome Statements**' located at the bottom of the screen.

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A	CLA - Example PGY Instance Admin > PGY Instance > CLA - Example PGY Instance		No changes made
O	Details	Allocation	
®	Name • CLA - Example PGY Instance Description	Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time. If no dates are set at the section level then the parent section dates will be used.	
	A	Cumulative Tallies ① No cumulative tallies added	
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	Clinical Learning Australia (PGY1) (4 Terms) Group	No Outcome Statements added	
	Example Group (0 students)	0	dd new Outcome Statements
	01/01/2025 01/01/2025		

A window will pop up to select the relevant options.

Add new		
Outcome Statements		
Select		~
Grading System		
None		~
Evidence Grading System		
None		~
Deployment Grading System		
None		~
	Cancel	ОК

Four dropdown menus display, however only the following options need to be selected:

- Outcome Statements
- Evidence Grading System

Note: Do not add the Grading System option nor the Deployment Grading System option.

Click **Outcome Statements** and select the most recent version of the Prevocational Outcome Statements.

Add new		
Outcome Statements		
Select		~
Select		
Prevocational Outcome Statements		
Version 2 - Prevocational Outcome Statements		
Version 1 - Prevocational Outcome Statements		
None		*
Deployment Grading System		
None		~
	Cancel	ОК

Click Evidence Grading System and select Prevocational Outcome Statements.

Add new	
Outcome Statements	
Version 2 - Prevocational Outcome Statements	~
Grading System	
None	~
Evidence Grading System	
None	~
None	
Prevocational Outcome Statements	
None	
	Cancel OK

Click OK.

Add new		
Outcome Statements		
Version 2 - Prevocational Outcome Statements		~
Grading System		
None		~
Evidence Grading System		
Prevocational Outcome Statements		~
Deployment Grading System		
None		~
	Cancel	ОК

You will now see the Prevocational Outcome Statement framework attached to this Instance.

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m CL	A - Exampl	e PGY Instance				ave
Admin	> PGY Instance	S > CLA - Example PGY I	istance			
Det	ails			Allocation		
Narr	ne *			Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.		
CL	A - Example PGY	Instance		if no dates are set at the section level then the parent section dates will be used.		
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Cli	nical Learning A	ustralia (PGY1) (4 Terms)		Outcome Statements		
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Ex	ample Group (0	students)		0	Add new Outcome State	mer
Start	t Date	End Date				
	01 0005	01.01.0007				

Click Save changes before exiting.

The PGY instance is now and ready to use.

3 Managing PGY Instances

Once you have created a PGY instance, administrators can view, edit or update as required.

3.1 Where to manage PGY Instances

• Navigate to the 'cog' icon on the left-hand menu bar and click 'PGY Instances'

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Q	PGY Instances Admin > PGY Instances Users										
C	Groups	All templates	Ourselastica •	All groups	✓ All statuses ✓	6 *	5-10-1- 1		• Cre	ate instance	
8	Organisations		Organisation =	Template =	Group =	Start Date 🛡	End Date 🗢	Created =	Edited =	Status	Ŧ
0	organisations										
	Terms	ralia (PGY2) -	Clinical Learning Australia	Clinical Learning Australia (PGY2) (4 Terms)	Clinical Learning Australia (PGY2) - Training Group	1 Nov 2024	1 Nov 2027	25 Nov 2024 11:58	3 Dec 2024 13:11	Live	
	Terms Forms	ralia (PGY2) -	Clinical Learning Australia	Clinical Learning Australia (PGY2) (4 Terms)	Clinical Learning Australia (PGY2) - Training Group	1 Nov 2024	1 Nov 2027	25 Nov 2024 11:58	3 Dec 2024 13:11	Live per page	•
	Terms Forms PGY Instances	ralia (PGY2) -	Clinical Learning Australia	Clinical Learning Australia (PGY2) (4 Terms)	Clinical Learning Australia (PGY2) - Training Group	1 Nov 2024	1 Nov 2027	25 Nov 2024 11:58	3 Dec 2024 13:11	Live per page	~

Click any instance you wish to update, edit or view

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۲		training	All template	15	← All groups	✓ All statuses ✓				0	reate inst	ance	
1		Name 👻		Organisation 🗘	Template 🗢	Group 🗢	Start Date 🖨	End Date 🗘	Created 🗢	Edited 🗢	Stat	us 🗢	
()		Clinical Learning Australia (Training Group	(PGY2) -	Clinical Learning Australia	Clinical Learning Australia (PGY2) (4 Terms)	Clinical Learning Australia (PGY2) - Training Group	1 Nov 2024	1 Nov 2027	25 Nov 2024 11:58	3 Dec 2024 13:11	L	lve	
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Once you click into an instance, you can edit as required, e.g. term dates, form grace periods, adjust trainee term allocations, add or remove supervisors.

Ensure to click **Save changes** if any updates are done to an instance before exiting.

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a I	Clinical Learr Admin > PGY Instance	ning Australia (PGY2) - T 25 > Clinical Learning Australia	raining Group (PGY2) - Tr	No changes mad
œ	Details		Allocation	
Ø	Name * Clinical Learning A	ustralia (PGY2) - Training Gro	Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time If no dates are set at the section level then the parent section dates will be used.	
•	Description		> 🖹 PGY2 1 Nov 2024 1 Nov 2027	
		4	Cumulative Tallies ①	
	Status		No cumulative tallies added	
	Live Template	~	Outcome Statements	
	Clinical Learning A Group	ustralia (PGY2) (4 Terms)	Version 2 - Prevocational Outcome Statements	O Remove
	Clinical Learning Australia (PGY2) -Training Grou			Add new Outcome Statements
	Start Date	End Date		
	01/11/2024	01/11/2027		

4 Support

If you require any support you can find contact details for the national CLA system administrator as well as relevant state based system administrators on the <u>CLA website</u>.