

Clinical Learning Australia  
Training Guide



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.

## Table of Contents

<b>1</b>	<b>WHAT IS A PGY INSTANCE?</b> .....	<b>3</b>
<b>2</b>	<b>CREATING A PGY INSTANCE</b> .....	<b>3</b>
2.1	WHERE TO CREATE A PGY INSTANCE.....	3
2.2	INITIAL CREATION OF A PGY INSTANCE.....	3
2.3	ADDING DATES .....	5
	PGY Start and End dates .....	5
	Term dates .....	6
2.4	ADDING TERM ALLOCATIONS.....	6
2.5	SET THE PGY INSTANCE TO 'LIVE' .....	7
2.6	ATTACH THE OUTCOME STATEMENT FRAMEWORK.....	8
<b>3</b>	<b>MANAGING PGY INSTANCES</b> .....	<b>11</b>
3.1	WHERE TO MANAGE PGY INSTANCES.....	11
<b>4</b>	<b>SUPPORT</b> .....	<b>12</b>

# 1 What is a PGY Instance?

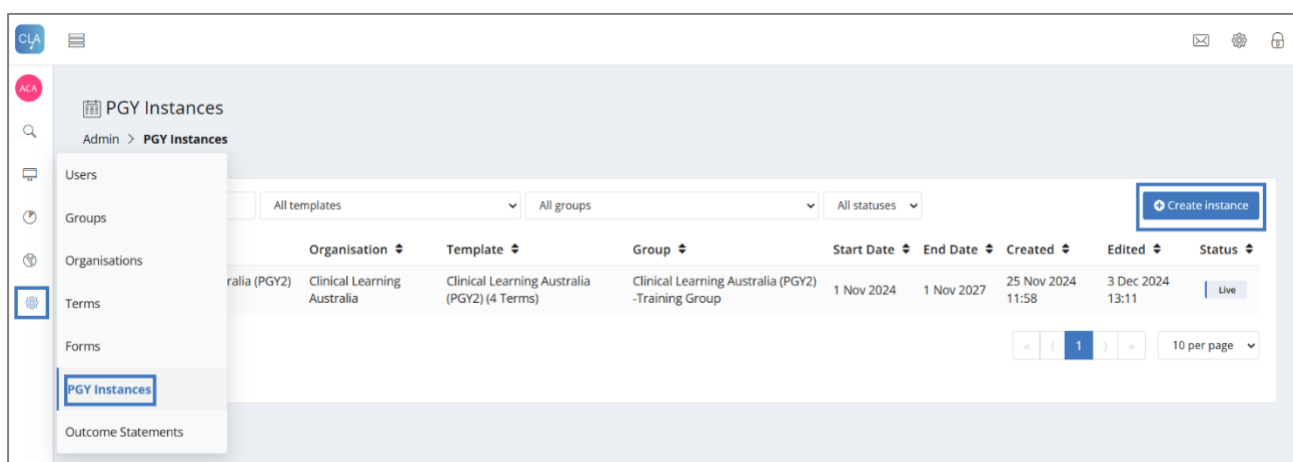
An **instance** creates a 'version' of CLA to support a specific training program/cohort group. Within an instance, administrator users can assign a group of trainees to a relevant PGY template within the system (such as a 4-term or a 5-term template), identify PGY and term dates relevant to their training 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**'
- 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
<b>Name*</b>	<p>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.</p> <p>E.g. ACT – PGY2 (4-Term) – 2025 Hospital X – PGY1 (5-Term) – 2025</p>	<b>Mandatory</b>
<b>Template*</b>	<p>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.</p> <p>There are 4 templates to select from:</p> <ul style="list-style-type: none"> <li>PGY1 (4 Terms)</li> <li>PGY1 (5 Terms)</li> <li>PGY2 (4 Terms)</li> <li>PGY2 (5 Terms)</li> </ul>	<b>Mandatory</b>
<b>Group*</b>	<p>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</p>	<b>Mandatory</b>

	<p>guide <a href="#">Creating and managing groups</a> for more information.</p> <p>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 program.</p>	
--	--	--

## 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

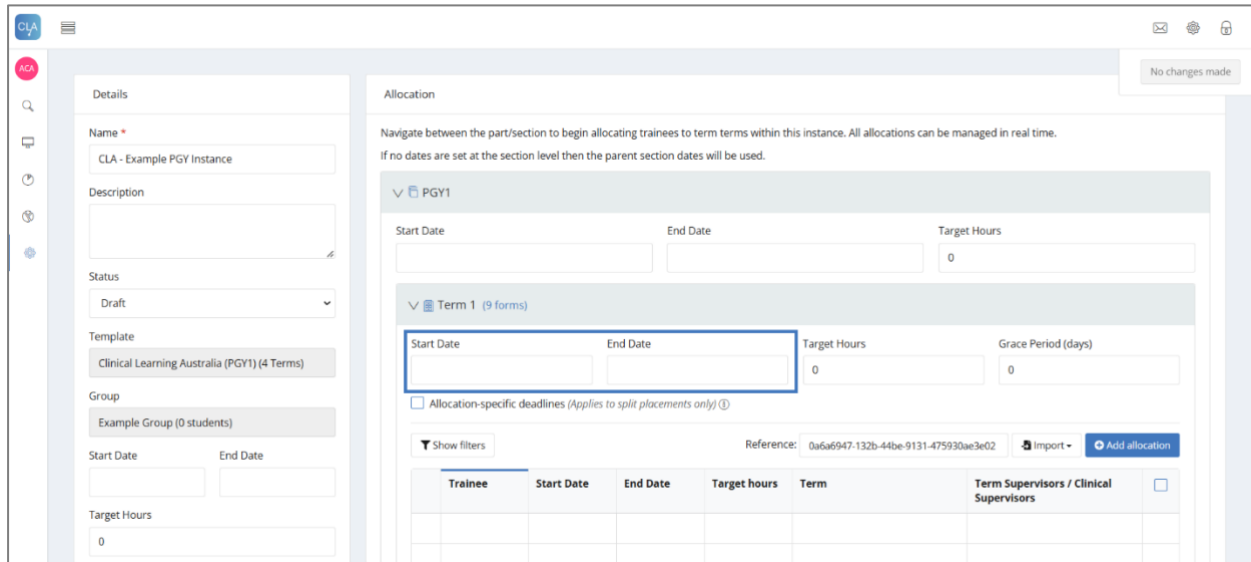
**Note:** To enter the dates for the PGY, EPAs, Assessment Review Panel blocks, click on that section to expand it, and the start and end date fields will be located within that block.

**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.



**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.

Term 1 (9 forms)

Start Date:  End Date:  Target Hours:  Grace Period (days):

Allocation-specific deadlines (Applies to split placements only) ⓘ

Show filters Reference: 0a6a6947-132b-44be-9131-475930ae3e02 Import Add allocation

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	<input type="checkbox"/>
No rows 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**.

CLA - Example PGY Instance

Admin > PGY Instances > CLA - Example PGY Instance

Save changes

Details

Name \*  
CLA - Example PGY Instance

Description

Status

Group  
Example Group (0 students)

Start Date: 01/01/2025 End Date: 01/01/2025

Allocation

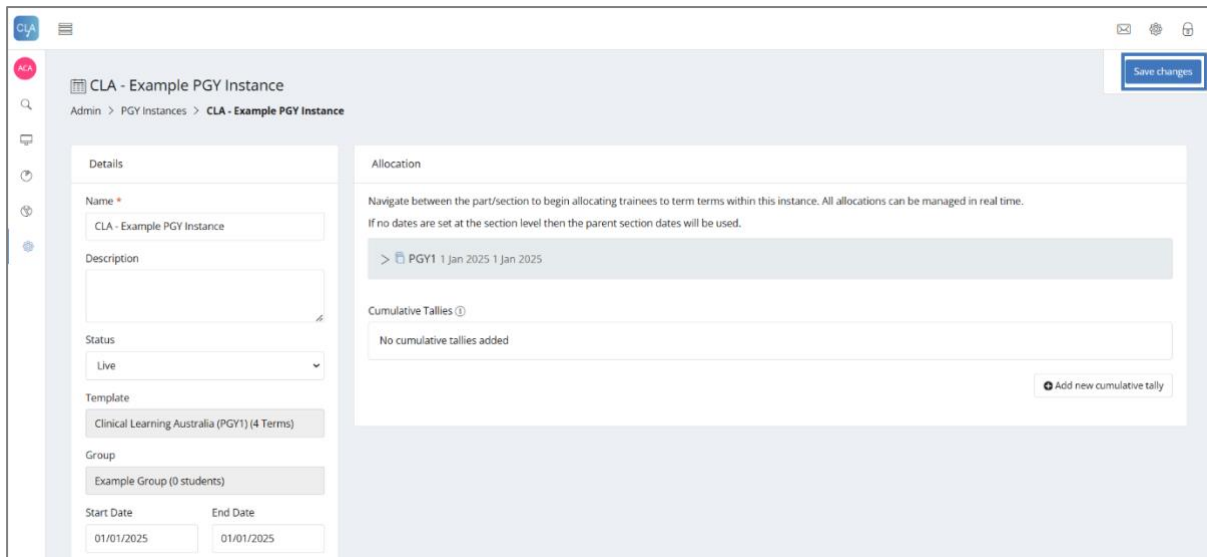
Navigate between the part/section to begin allocating trainees to term terms within this instance. All allocations can be managed in real time.  
If no dates are set at the section level then the parent section dates will be used.

> PGY1 1 Jan 2025 1 Jan 2025

Cumulative Tallies ⓘ  
No cumulative tallies added

Add new cumulative tally

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

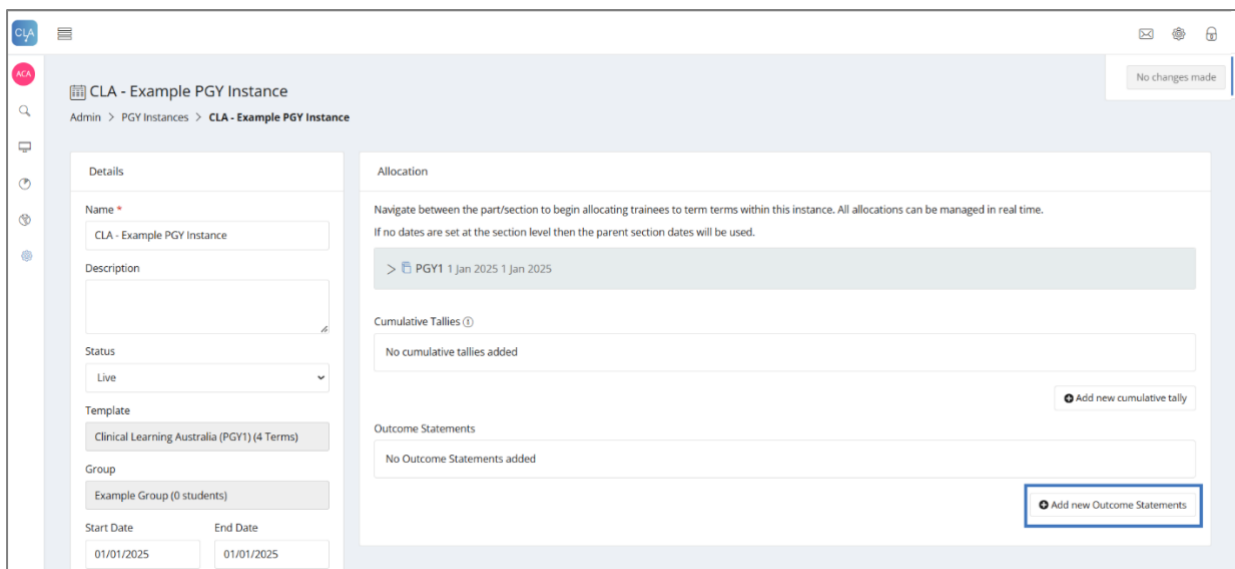


## 2.6 Attach the Outcome Statement Framework

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.



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 OK

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

Evidence Grading System  
None

Deployment Grading System  
None

Cancel OK

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 ▼

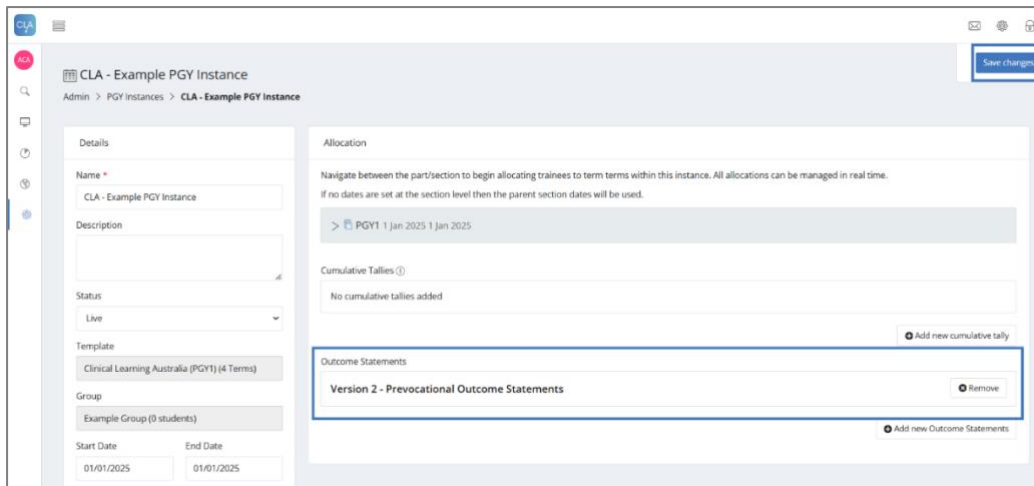
Grading System  
None ▼

Evidence Grading System  
Prevocational Outcome Statements ▼

Deployment Grading System  
None ▼

Cancel OK

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



Click **Save changes** before exiting.

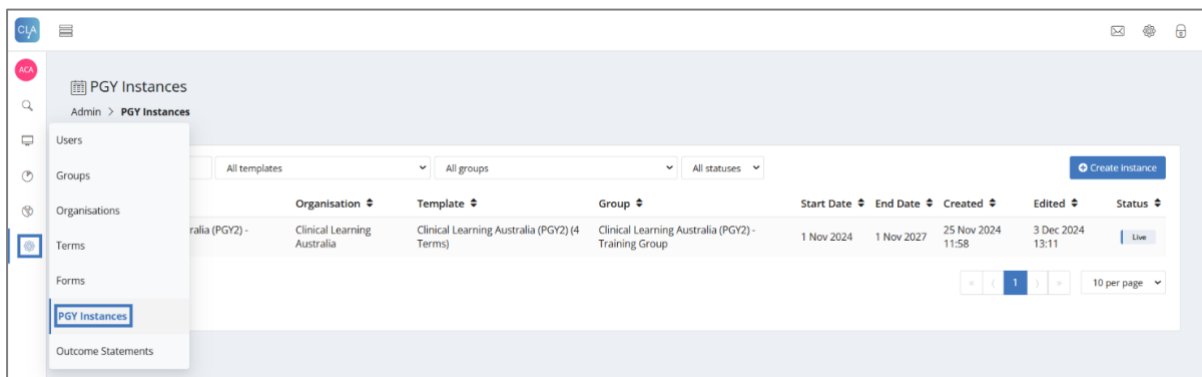
The PGY instance is now and ready to use.

### 3 Managing PGY Instances

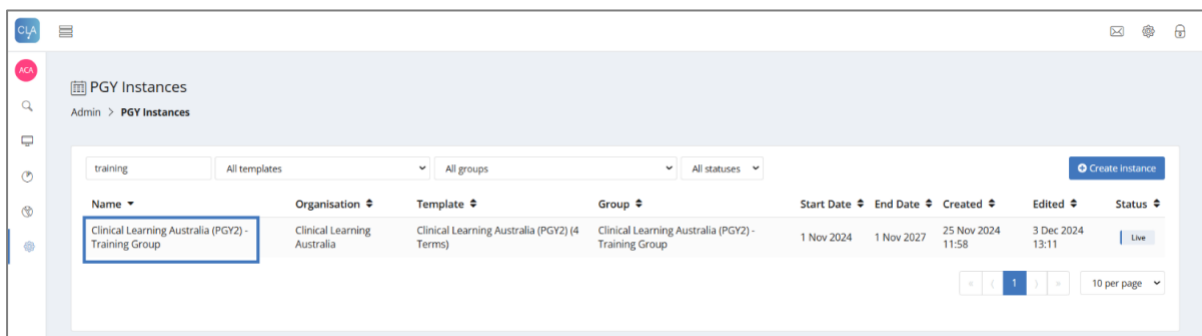
Once you have created a PGY instance, administrators can view, edit or update as required.

#### 3.1 Where to manage PGY Instances

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



- Click any instance you wish to update, edit or view



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.

The screenshot shows the 'Clinical Learning Australia (PGA2) - Training Group' management page. The page is divided into two main sections: 'Details' on the left and 'Allocation' on the right. The 'Details' section includes fields for Name, Description, Status (set to 'Live'), Template, Group, Start Date (01/11/2024), and End Date (01/11/2027). The 'Allocation' section provides instructions on navigating between parts/sections for allocating trainees, a list of sections (e.g., 'PGA2 1 Nov 2024 1 Nov 2027'), and options to add or remove cumulative tallies and outcome statements. A 'No changes made' notification is visible in the top right corner.

## 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 [CLA website](#).