

Clinical Learning Australia
Training Guide



QUICK REFERENCE GUIDE FOR
CLA ADMINISTRATORS

CREATING TERM AND MANAGING ALLOCATIONS

This quick reference guide provides information on how to create term allocations in Clinical Learning Australia (CLA). This guide will explain the process to follow for allocating terms to a trainee including linking term and clinical supervisors and how term allocations can be managed.

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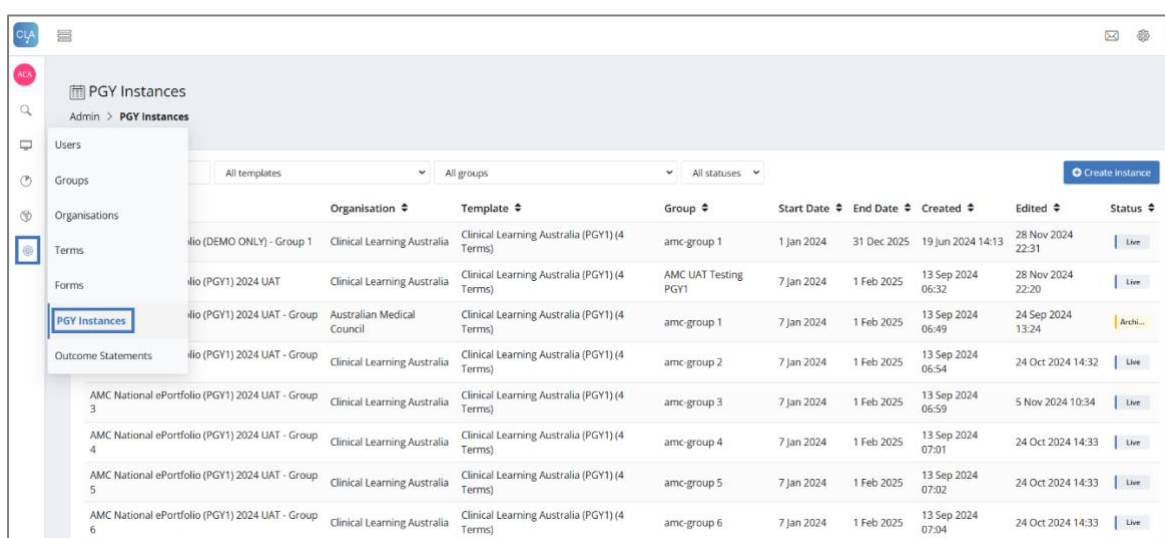
1 Creating term allocations

Medical Education Unit / Administrator users of CLA can create term allocations either manually (one by one) in the system or in bulk via the **term allocations import spreadsheet**.

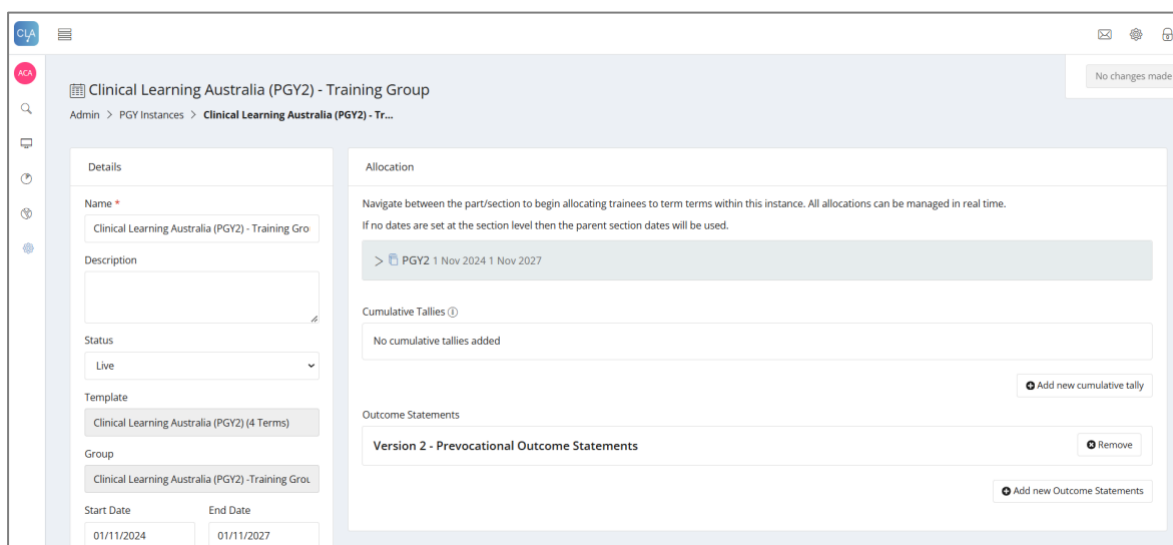
The following steps are done once a cohort group, trainee user accounts and PGY instance are created. You do not need enter term allocations for the full clinical year at once if you do not have this information and can add/upload on an ongoing basis if needed.

1.1 Where to create term allocations

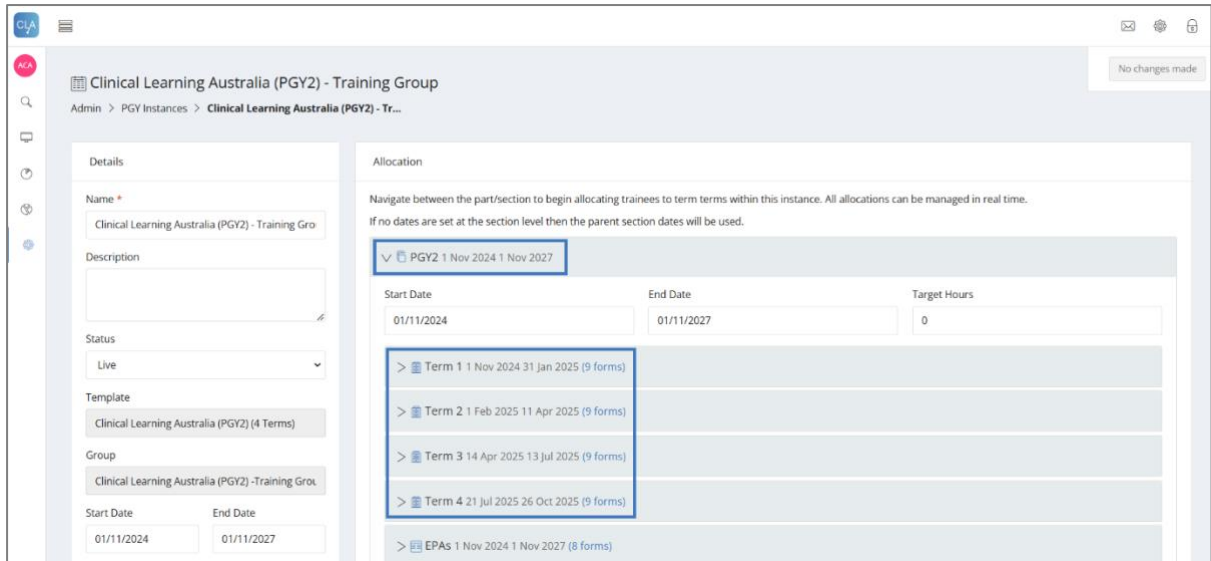
- Navigate to the 'cog' icon on the left-hand menu bar and click 'PGY Instances'.
- Search for and click on the PGY instance you want to add term allocations to.



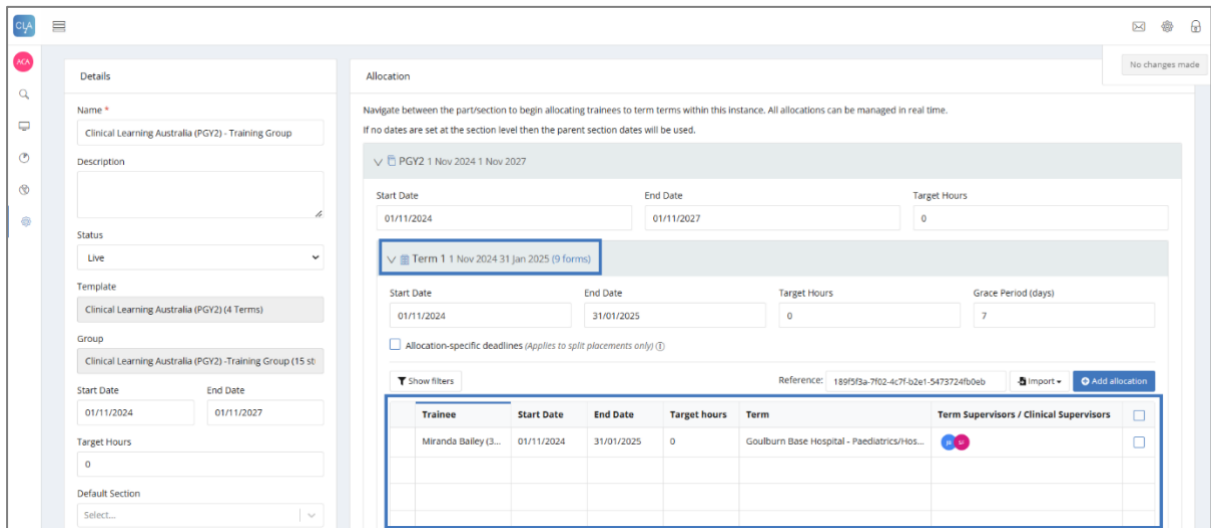
You will then be taken into that PGY instance.



- Click on the PGY block in to expand and display the terms.



- Click on the relevant **Term** to expand and display the **term allocations** table.



Note: If any term allocations have been created previously, these will be visible in the table. If no term allocations have been created previously, the table will be empty.

1.2 Creating term allocations manually in the system

You can create term allocations manually (one by one) in the system or in bulk (see section below). To create term allocations manually:

- Navigate to the relevant term you wish to create term allocations for within the PGY Instance
- Click on **'Add allocation'**

- This will open the 'Create allocation' window.

Add trainee

- Select a trainee from the drop-down list or start to type the trainee's name to find the trainee you want to add a term allocation for.

- **Note:** Only trainees that are assigned to the Group associated with this instance will be available to select from.

Assign term allocation

- In the 'Term' field, start to type the name of the term you wish to allocate this trainee to.
- **Note:** All accredited terms have already been created in the system, if the term you wish to allocate the trainee to is not available, please contact CLA Support.

Create allocation

Trainee *

Fergus Jackson - (holly.fowler+amcs11@myknowledgemap.com) | v

Term

goul | v

- Goulburn Base Hospital - General Medicine
Goulburn Base Hospital - General Medicine (Canberra Region Medical Education Council)
- Goulburn Base Hospital - General Surgery
Goulburn Base Hospital - General Surgery (Canberra Region Medical Education Council)
- Goulburn Base Hospital - Obstetrics & Gynaecology
Goulburn Base Hospital - Obstetrics & Gynaecology (Canberra Region Medical Education Council)
- Goulburn Base Hospital - Orthopaedic Surgery
Goulburn Base Hospital - Orthopaedic Surgery (Canberra Region Medical Education Council)

Close Create

Add start and end dates for this term allocation

- Enter the term start and end date for this term allocation
- **Note:** The start and end date of a term allocation for a particular trainee can be different to the overall term start and end dates. In this way, trainees could have different start and end dates for term allocations within a term. Trainees can also be put on split terms where required, meaning two allocations are given for a term.
- See 2.4 Managing term allocations for specific scenarios section for more information about setting up split/blended terms or split contracts.
- **Note:** Leave the Target Hours field blank – this is not relevant for CLA.

Link a trainee to a Term and Clinical Supervisor(s)

- Next, add the Term Supervisor and Clinical Supervisor(s). This links the trainee and Term/Clinical Supervisors together so that Term/Clinical Supervisors have access to the relevant Trainee's portfolio and are able to complete relevant assessments for them.
- You add Term and Clinical Supervisors to a Trainee by selecting the 'relationship' between them and the Trainee. There are two options; Term Supervisor and Clinical Supervisor.
- Start typing the name of the Term or Clinical Supervisor in the Term Supervisors / Clinical Supervisors field.
- Select the relevant user, this will add it to the term allocation.
- You can then select Term Supervisor or Clinical Supervisor for each supervisor role added.
- **Note:** There can be only **one Term Supervisor per Trainee** per term allocation but **multiple Clinical Supervisors**. Both Term and Clinical Supervisors can complete mid and end of term assessments as well as EPAs. Individuals assigned as the Term Supervisors are able to complete an additional sign off form to confirm they have read and agree with an assessment where this has been completed by a Clinical Supervisor.
- Where you have multiple Term Supervisors for a term, you can either
 - Enter all Supervisors as Clinical Supervisors and review the End of Term assessments through Reporting to ensure correct level of approval has been achieved
 - Allocate each Term Supervisor to several Trainees and enter the rest as Clinical Supervisors so that each Term Supervisor has some trainees that they are overseeing in that role
- **Note:** Term and Clinical Supervisors must already be set up as users in the system to be added to a term allocation. Please see the [Creating and managing users](#) quick reference guide. Term and Clinical Supervisors can be added or removed from a term allocation at any time (see section below on managing term allocations).

Create allocation

Trainee *
 Fergus Jackson - (holly.fowler+amcs11@myknowledgemap.com) | v

Term
 Goulburn Base Hospital - General Medicine | v

Start Date * 01/01/2025 End Date * 28/03/2025

Target Hours
 0

Term Supervisors / Clinical Supervisors
 Add a new user...

Alana Prendigast
 tom+term2@myknowledgemap.com Clinical Supervisor | v | x

Joe Bloggs
 holly.fowler+termssupervisor1@myknowle Term Supervisor | v | x

Close Create

- Once you have completed all relevant fields click **Create** to create the term allocation.
- The term allocation will then show in the term allocation table for the relevant term.

PGY1 1 Jan 2024 31 Dec 2024 Save changes

Start Date 01/01/2024 End Date 31/12/2024 Target Hours 0

Term 1 1 Jan 2024 28 Feb 2024 (8 forms)

Start Date 01/01/2024 End Date 28/02/2024 Target Hours 0 Grace Period (days) 7

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

Show filters Reference: e76f8f0e-a0b6-41f7-88a4-83f6e996279f Import Add allocation

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	
Fergus Jacks...	01/01/2025	28/03/2025	0	Goulburn Base Hospital - Gen...	Alana Prendigast, Joe Bloggs	<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

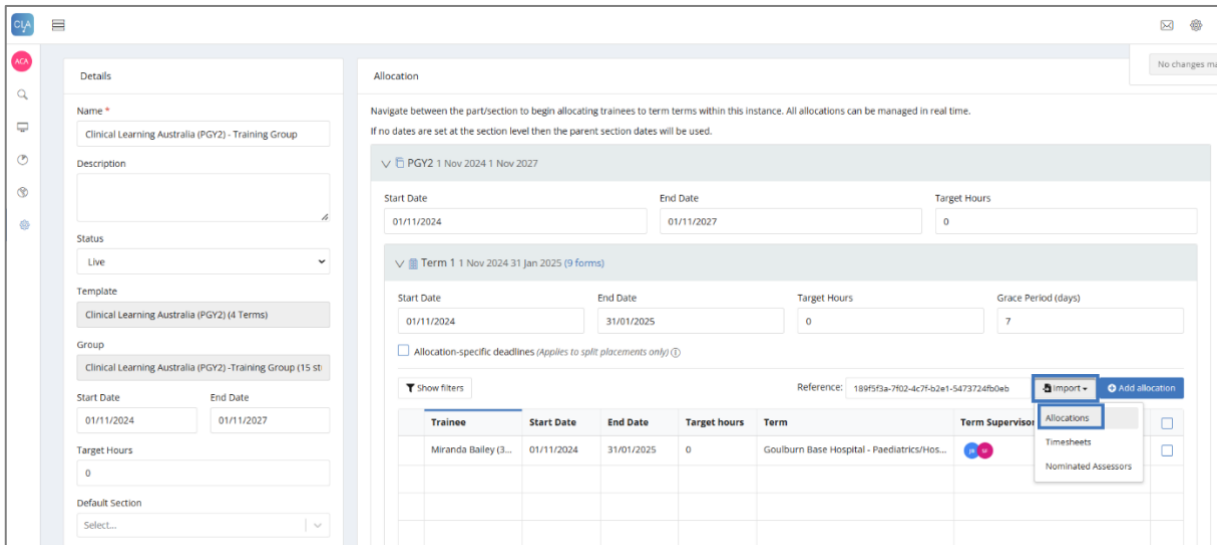
- If creating term allocations manually within the system, you will need to repeat the above steps for each Trainee and for each term allocation you wish to assign them to.

1.3 Importing term allocations in bulk

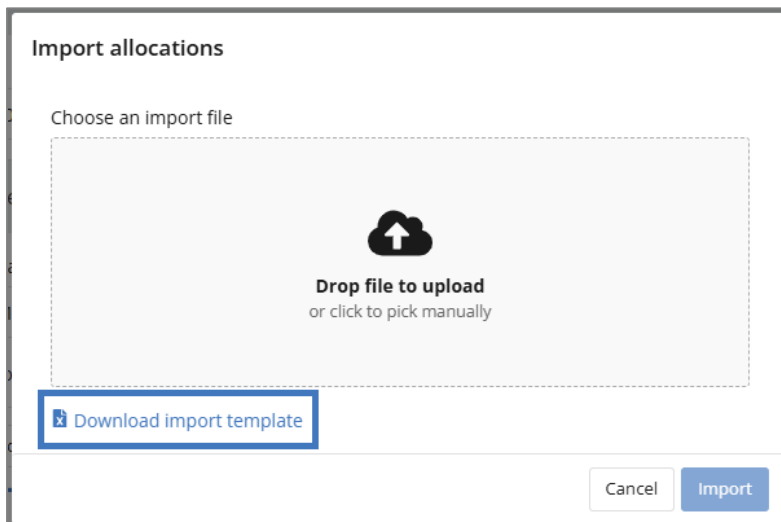
To import term allocations in bulk, you can download and complete a **term allocations upload spreadsheet**.

Note: A separate spreadsheet will need to be completed and uploaded for each term.

- Click on **Import** and then **Allocations** button



A pop-up box will appear with the option to **Download import template** – click on this.



This will download an excel spreadsheet in which you can enter term allocations details in bulk.

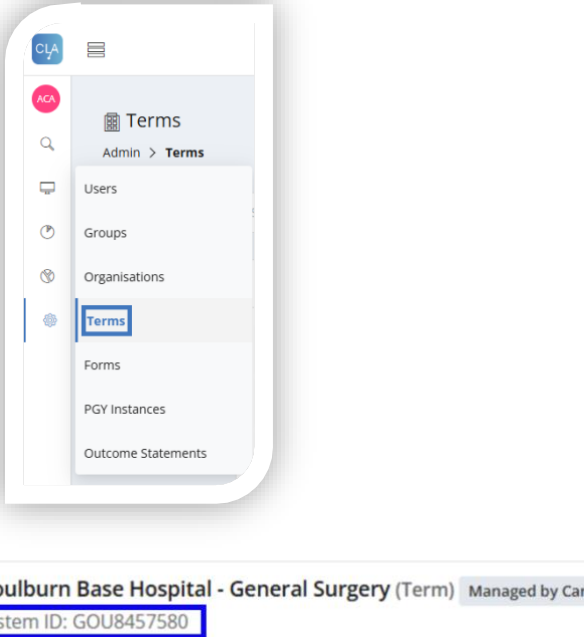
Completing the Term Allocations Spreadsheet

Complete the below fields in the spreadsheet.

A	B	C	D
StudentId	Provider SystemId or Short Code	StartDate	EndDate

E	F	G
Target Hours	AssessorEmail1	AssessorRelationship1

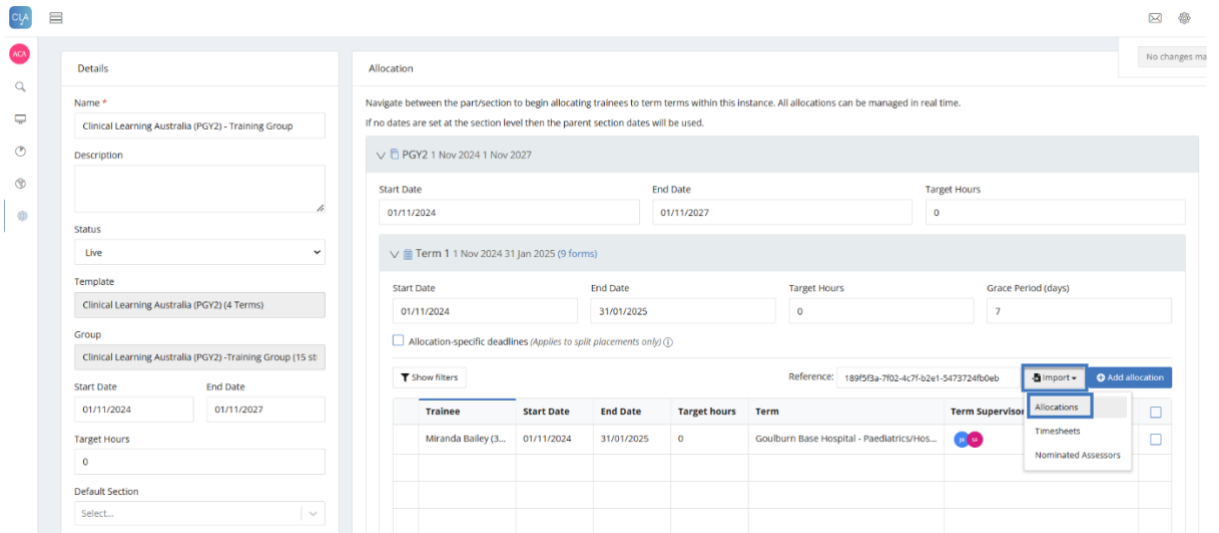
Field name	Description	Field Type
------------	-------------	------------

StudentID*	<ul style="list-style-type: none"> This is the Trainee’s Ahpra number associated with their account You can find the Ahpra number by navigating the relevant user in the Users section of the administrator panel and searching for the relevant Trainee’s user profile. 	Mandatory
Provider SystemID or Short Code *	<ul style="list-style-type: none"> This ID links a Trainee to a specific term. The System ID reference must be used in this field on the upload spreadsheet The term System ID is found within the ‘Terms’ area of the administration panel. Navigate to the ‘cog’ icon on the administrator side menu bar and click ‘Terms’. Find the term that you want to link the trainee to. Below the heading of each term is a ‘System ID’. Copy the System ID reference and enter this into the ‘Provider SystemID or Short Code’ column in the upload spreadsheet (see screen shot below). 	Mandatory
StartDate*	<ul style="list-style-type: none"> This is the start date of the term. Note: The start and end date of a term allocation for a particular trainee can be different to the overall term start and end date. In this way, trainees could have different start and end dates for term allocations within a Term. 	Mandatory
EndDate*	<ul style="list-style-type: none"> This is the end date of the term. 	Mandatory

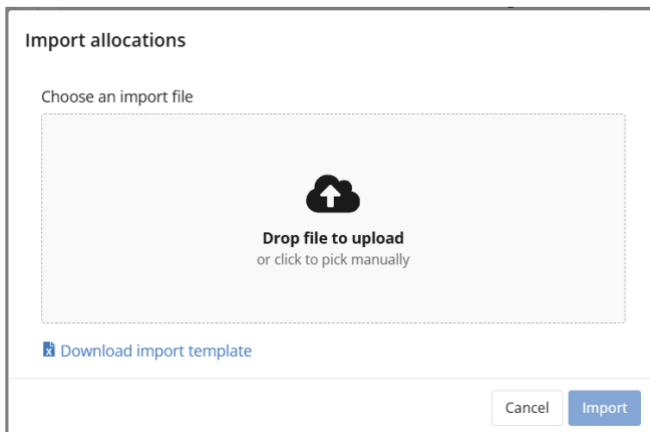
TargetHours	<ul style="list-style-type: none"> This field isn't relevant for Clinical Learning Australia, you can leave this field blank. 	Leave blank				
AssessorEmail1	<ul style="list-style-type: none"> This is how Term/Clinical Supervisors can be linked to Trainees. Enter the Term/Clinical Supervisor's email address that is linked to their account. Note: Term/Clinical Supervisors must have been created as users in the system before you can link them to trainees via the term allocations process. Note: If you want to add more than one Clinical Supervisor during the allocation process, you can add additional columns at the end of the spreadsheet noting Assessor Email2/Relationship2 and so on depending how many you need to add for a Trainee (see example below). Please ensure you follow the same naming convention and order as below for any additional columns you add. <div data-bbox="592 1021 1214 1111" style="border: 1px solid black; margin: 10px auto; width: fit-content;"> <table border="1"> <thead> <tr> <th style="width: 50%;">H</th> <th style="width: 50%;">I</th> </tr> </thead> <tbody> <tr> <td>AssessorEmail2</td> <td>AssessorRelationship2</td> </tr> </tbody> </table> </div>	H	I	AssessorEmail2	AssessorRelationship2	Optional
H	I					
AssessorEmail2	AssessorRelationship2					
AssessorRelationship1	<ul style="list-style-type: none"> Enter the Term/Clinical Supervisor's relationship to the Trainee – this should be Term Supervisor or Clinical Supervisor. Note: A Trainee can only have one Term Supervisor linked to them per term. The Term Supervisor can be replaced at any point if required, e.g. the original Term Supervisor went off on long term sick leave. Note: A Trainee can have multiple Clinical Supervisors. Add additional columns for additional Clinical Supervisors as above. 	Optional				

1.4 Uploading the Term Allocation Spreadsheet

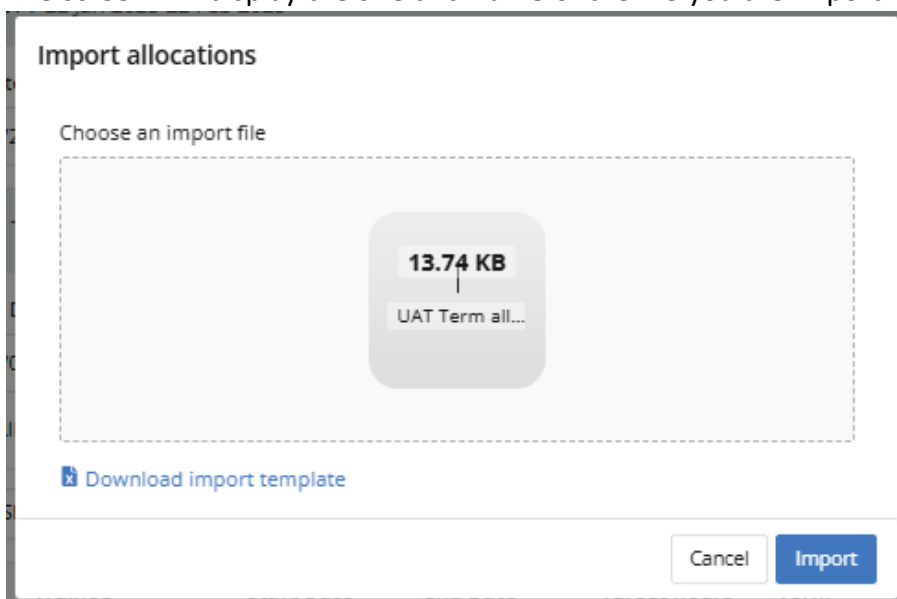
- Once you have completed the user term allocation spreadsheet, save it to your desktop or another local file location.
- Navigate back to the term allocation table and click **Import / Allocations**.



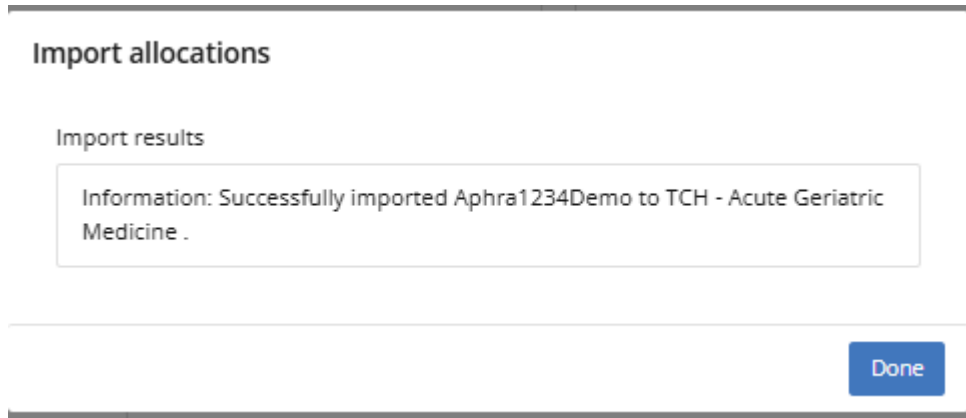
- Click on the **'Drop file to upload'** icon to select the file you created with the term allocations and then **'Upload'** to upload the file.



- The screen will display the size and name of the file you are importing. Click **Import**.



- If there are no issues with the data, you will see a notification that the data has been successfully imported. Click **Done**.



- Once you file has been successfully uploaded, the relevant term allocations will be visible in the table.

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 22 Jan 2025 22 Feb 2025

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0

Term 1 22 Jan 2025 22 Feb 2025 (10 forms)

Start Date: 22/01/2025 End Date: 22/02/2025 Target Hours: 0 Grace Period (days): 0

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

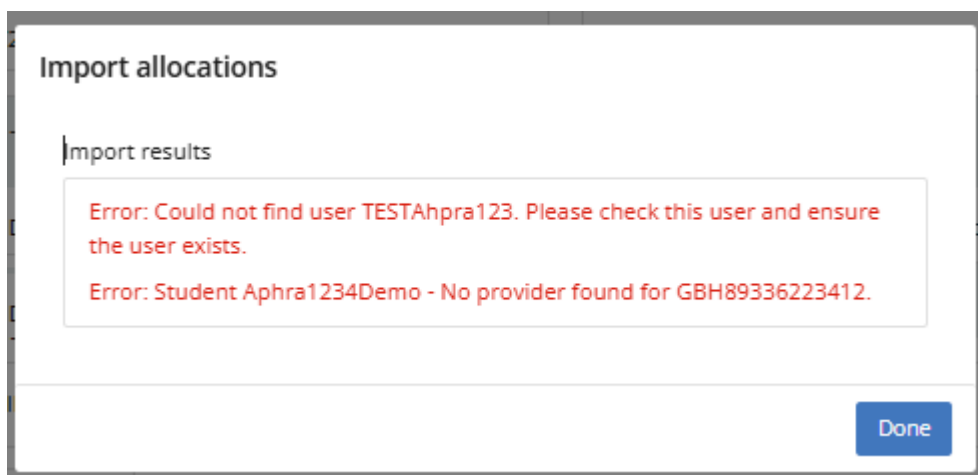
Show filters Reference: 318ef38e-85fd-4d70-8315-52dee02a9b6c Import Add allocation

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	
Example Doctor (A...	22/01/2025	22/02/2025	0	TCH - Acute Geriatric Medicine	Demo Term Supervisor	<input type="checkbox"/>

Previous Page 1 of 1 5 rows Next

Data validation

The data in your spreadsheet undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded, for instance incorrect Ahpra number for a Trainee, invalid Term System ID reference codes, or a Term/Clinical Supervisor doesn't exist in the system yet, or multiple supervisors with the Term Supervisor role for a trainee allocation, these will be flagged on the screen for review and correction.

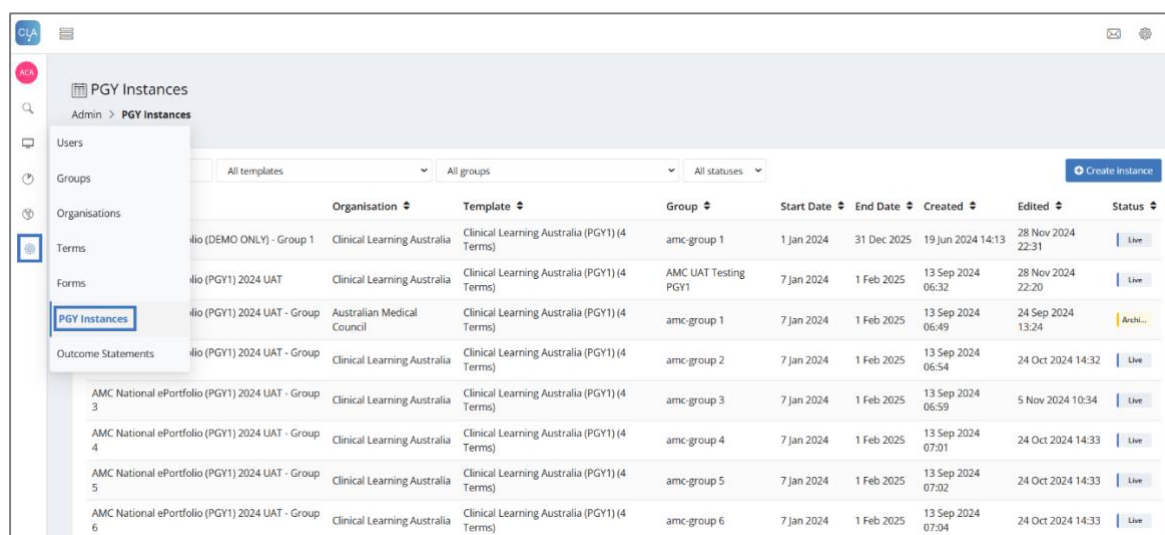


Review your term allocation import spreadsheet, make necessary corrections, save the latest version and try to upload again.

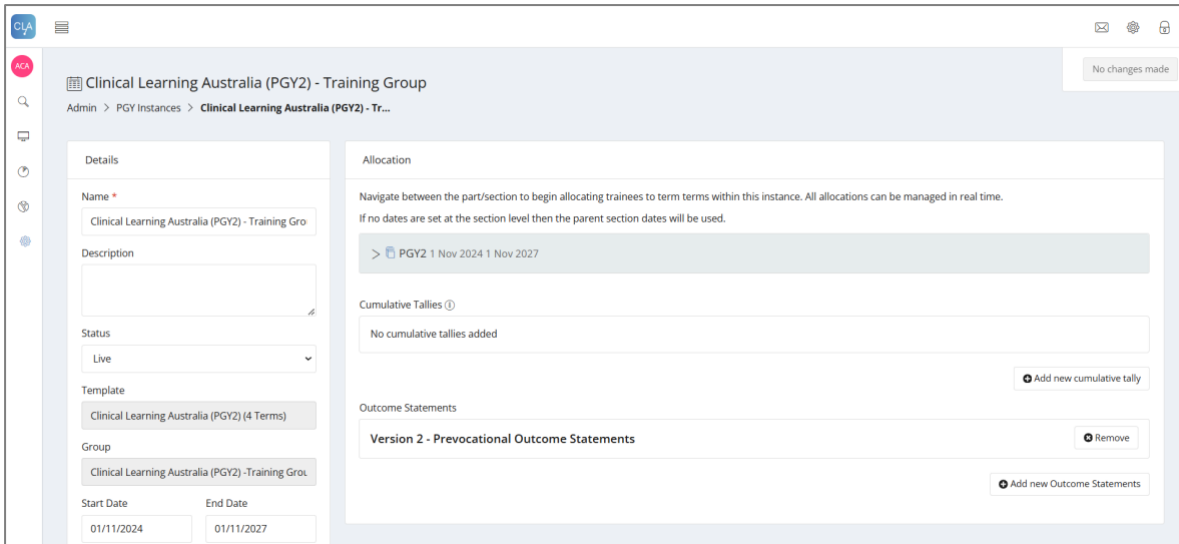
2 Managing term allocations

2.1 Where to manage term allocations

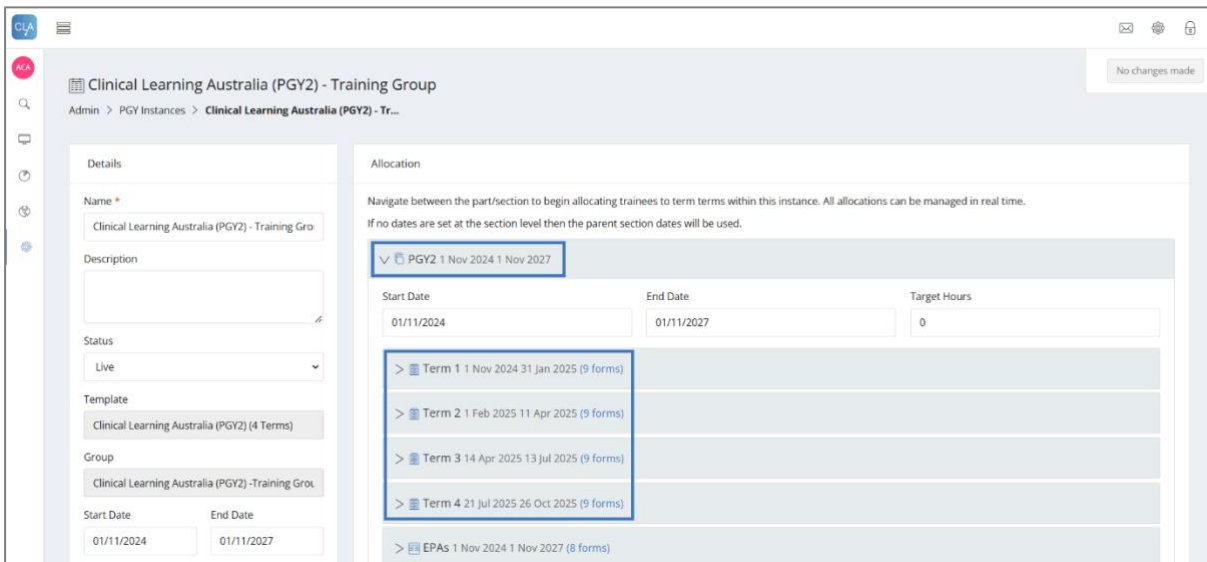
- Term allocations can be updated as and when needed by administrator users with relevant permissions.
- To manage term allocations, navigate to the ‘cog’ icon on the left-hand menu bar and click ‘**PGY Instances**’.
- Search for and click on the PGY instance you want to manage term allocations for.



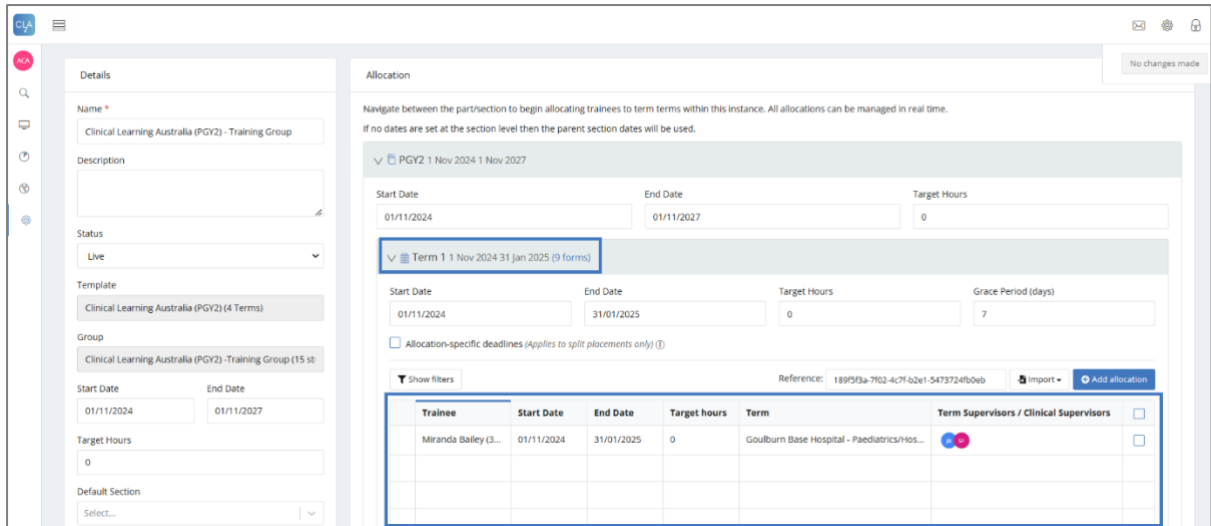
- You will then be taken into that PGY instance.



- Click on the PGY block to expand and display the terms.



- Click on the relevant **Term** to expand and display the allocations table.



- Any updates that need to be made to a term allocation can be done either manually (one by one) by clicking on the term allocation to be changed or in bulk.

2.2 Manual updates

- Click on the Trainee / Term Allocation you wish to make changes to.
- A pop-up box will appear with the current information for that Trainee's term.

Update allocation - Miranda Bailey

Term

Start Date * End Date *

Target Hours

Term Supervisors / Clinical Supervisors

Joe Bloggs
 holly.fowler+termsupervisor1@myknowle Clinical Supervisor

Nominated Assessors
 Please ensure the forms you want nominated assessors to access are fully set up **before** adding nominated assessors.

You have yet to assign any nominated assessors.

Delete Close Update

- You can then make any required changes to that Trainee's allocation by selecting any of the fields available.
 - **Term** – Clicking into this field will allow you to type and search for the term you may want to update this Trainee to.
 - **Start/End Date** – Clicking into this field will pop up a calendar to allow you to select a start/end date you may need to amend.
Note: These date fields can also have the dates typed into them.

- **Term Supervisors / Clinical Supervisors** – Clicking into this field will allow you to type and search for Term Supervisors and Clinical Supervisors that you may want to add to this Trainee’s term. After you select the Supervisor, select their relationship relevant to that Trainee.
- You can edit existing Term Supervisors and Clinical Supervisors that are attached by changing the relationship they have to the trainee/allocation by clicking the dropdown that notes their role and updating it to be something else. Or you can delete existing Term Supervisors and Clinical Supervisors by clicking the bin icon to the right of the role dropdown.
- **Nominated Assessors** - This field can be ignored. This is not being used by CLA.

2.3 Bulk updates

Note: Bulk actions make modifying term allocations simpler when you’re making the same change to more than one Trainee.

- Click on the boxes to the right of Trainee’s term allocations that you wish to make changes to.

The screenshot shows the 'Allocation' management interface. At the top, there's a 'No changes made' button. Below that, instructions state: '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.'

The interface is organized into sections:

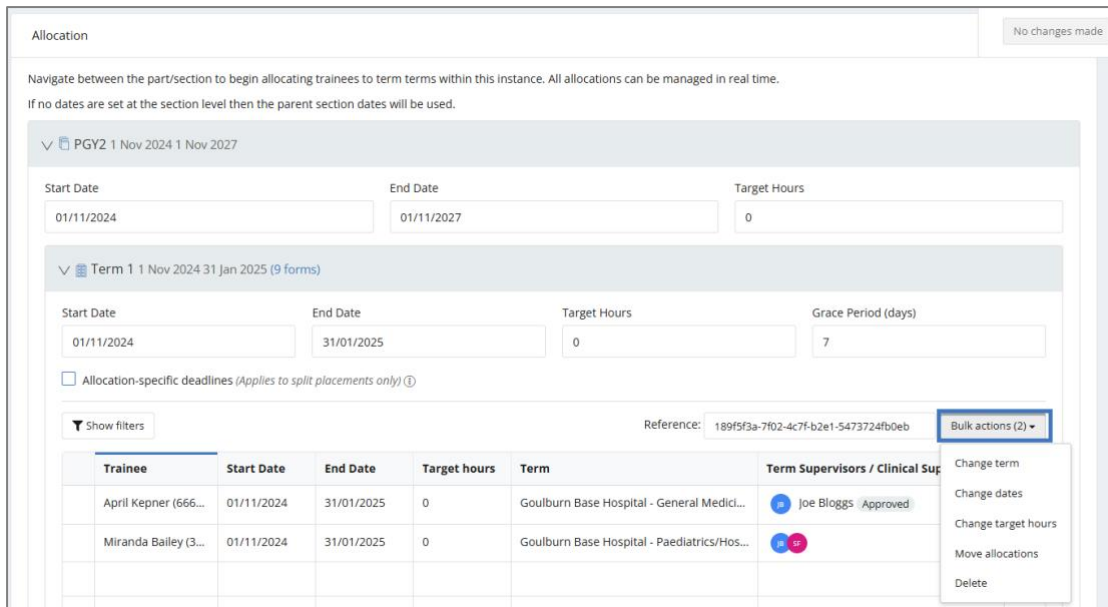
- PGY2 1 Nov 2024 1 Nov 2027**: Includes fields for Start Date (01/11/2024), End Date (01/11/2027), and Target Hours (0).
- Term 1 1 Nov 2024 31 Jan 2025 (9 forms)**: Includes fields for Start Date (01/11/2024), End Date (31/01/2025), Target Hours (0), and Grace Period (days) (7). There is also a checkbox for 'Allocation-specific deadlines (Applies to split placements only)'.

Below these sections, there's a 'Show filters' button, a 'Reference' field with the value '189f5f3a-7f02-4c7f-b2e1-5473724fb0eb', and a 'Bulk actions (2)' dropdown menu.

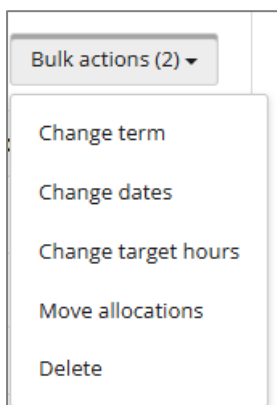
The main part of the interface is a table with the following columns: Trainee, Start Date, End Date, Target hours, Term, Term Supervisors / Clinical Supervisors, and a checkbox. Two rows are visible:

Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	
April Kepner (666...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - General Medici...	Joe Bloggs Approved	<input checked="" type="checkbox"/>
Miranda Bailey (3...	01/11/2024	31/01/2025	0	Goulburn Base Hospital - Paediatrics/Hos...		<input checked="" type="checkbox"/>

- Click on the **Bulk actions** button above.



This will display a list of options that you can perform with the bulk actions.



- **Change term** – This will allow you to type and search for the term you may want to update the selected Trainees to.
- **Change dates** – This will allow you to update the start and end dates for the terms for those selected Trainees.
- **Change target hours** – This field can be ignored. This is not being used by CLA.
- **Move allocations** – This would only be used if you happen to create term allocations in an incorrect term and you need to move them to the correct term.
- **Delete** – This will allow you to delete the term allocations for those selected Trainees.

2.4 Managing term allocations for specific scenarios

Split terms:

CLA is able to accommodate situations where a PGY doctor has multiple allocations within a single term. This includes situations where they have one allocation for part of the term and another for the remainder (e.g. ED for 5 weeks and Gen Med for 5 weeks).

Term allocation display of a split term:

	Trainee	Start Date	End Date	Target hours	Term	Term Supervisors / Clinical Supervisors	<input type="checkbox"/>
▼	Miranda B...	03/02/2025	03/05/2026	0	Multiple (2)		
		03/02/2025	28/03/2025	0	Goulburn Base Hospital - ...		<input type="checkbox"/>
		29/03/2025	03/05/2026	0	Goulburn Base Hospital - ...		<input type="checkbox"/>

Include the multiple allocations to the Term Allocation Upload spreadsheet with the reflective start and end dates, or you can manually add the allocations using the **Add Allocations** function.

Note: If bulk uploading more than one term allocation for a Trainee, you will need to create a new line for the same Trainee for the other term allocations they may require, see example below.

A	B	C	D	E	F	G	H	I
StudentId	Provider SystemId or Short Code	StartDate	EndDate	Target Hours	AssessorEmail1	AssessorRelationship1	AssessorEmail2	AssessorRelationship2
123456	ABC1234	03/02/2025	07/03/2025	0	ioebloggs@example.com	Term Supervisor	tinaturner@example.com	Clinical Supervisor
123456	CAN5678	10/03/2025	06/04/2025	0	kellysummers@example.com	Term Supervisor	paulsmith@example.com	Clinical Supervisor

Split contracts:

Where a Trainee works across two organisations during a clinical year, there are two scenarios that can take place.

- If the PGY doctor continues to be 'employed' by Health Site A but rotates to Health Site B on secondment for a specific term, then Site A continues to maintain 'ownership' of the PGY doctor and will have access to their record across all sites that they are assigned to. Other sites that they rotate to will only have access to the PGY doctor's record for the duration that they are 'seconded' or within their term.
 - Add this PGY doctor to your term allocations as per usual for all terms and allocate the trainee to Site B for the required term.
- If the PGY doctor's employment / contract transfers from one site to another, it would be necessary to transfer them to the new site's organisation within CLA (i.e. change the Organisation to which they are attached in the Users profiles – see the [Creating and managing users](#) quick reference guide) so that the new site becomes their primary 'owning' organisation. If the PGY doctor is moving to a new organisation within the same state/territory, then a state administrator user with relevant permissions across both sites can manage the change in 'ownership'. If moving inter-state, then this change needs to be made by the Nationwide System Administrator, i.e. contact CLA Support. You will need to provide local DMS/EDMS approval at the new site for the trainee's account to be transferred to the new organisation.
- If you have PGY doctors on split contracts:
 - Site A: Allocate the trainee to the terms for your organisation as per usual.
 - Statewide or Nationwide Administrator (must be notified by the sites): When the trainee transfers Site B, update the PGY doctor's Organisation in Users to the new site.

- Site B: Add the trainee to the relevant cohort Group and assign the trainee Term Allocations for their site in PGY Instance.
- **Note:** The trainees record will transfer with them to the new site and users with relevant permissions (administrator users, DCTs etc.) in the new site will be able to view prior assessments for that trainee even where these have been completed in a previous site.

3 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](#).