Clinical Learning Australia

Training Guide

Clinical LEARNING Australia

The ePortfolio for **prevocational doctors**

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

HOW TO IMPORT USERS IN BULK

This quick reference guide provides information on how to import users into Clinical Learning Australia (CLA) in bulk. This guide will explain what information is required and optional data that can be associated with a user account.

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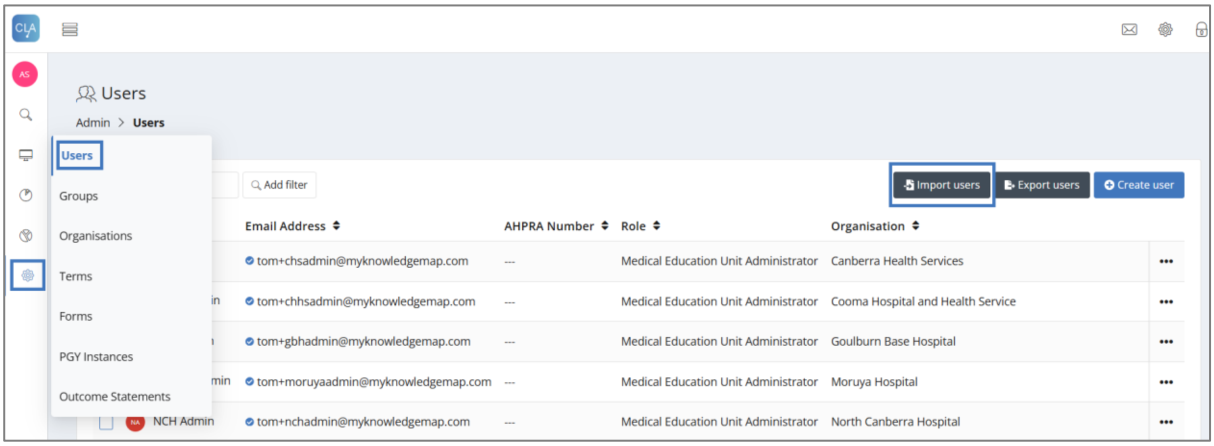
1 Creating users in bulk

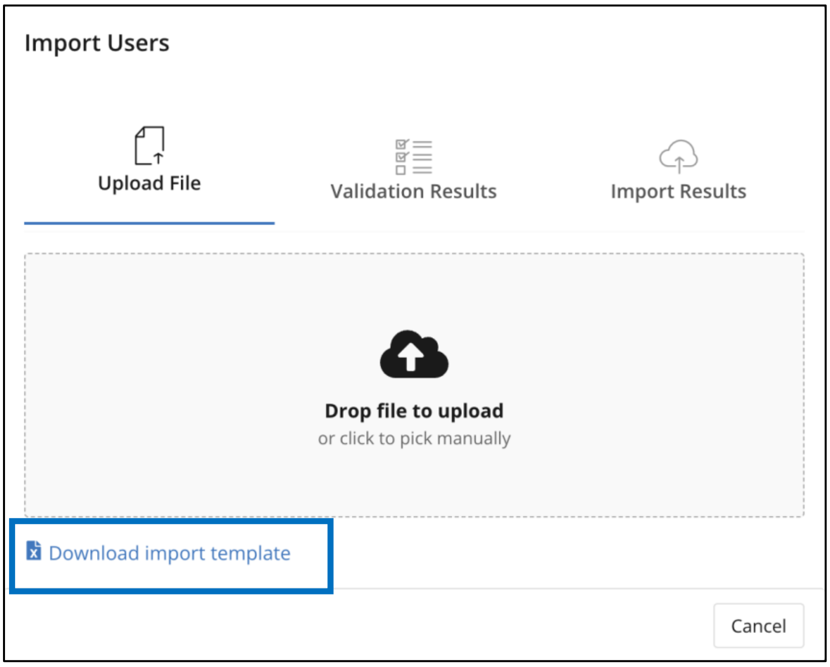
Medical Education Unit / Administrator users of CLA can create users in bulk via a **user import spreadsheet**.

1.1 Where to import users in bulk

- Navigate to the ‘cog’ icon on the left-hand menu bar and click **‘Users’**
- Click the ‘**Import users**’ button



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



This will download an excel spreadsheet to your device which you can use to enter user details in bulk.

1.2 Completing the User Import Spreadsheet

Complete the below fields in the spreadsheet, ensuring you enter each user on a different row.

A	B	C	D	E	F	G	H	I
UserIdentifier	**FirstName(en-GB)**	**LastName(en-GB)**	**Email**	**OrgReference**	**MainRole**	UserStatusName	AHPRA Number	Reference

J	K	L	M	N	O	P	Q
Phone(en-GB)	Jurisdiction(en-GB)	Hospital and Health Service(en-GB)	Facility(en-GB)	SendVerification	Username (SSO Identifier)	GroupReference1	GroupRole1

Field Name	Field Description	Field Type
UserIdentifier	• This field is only required if you are updating a user account that already exists, it can remain blank if you are creating a new user. • Where you are updating a user account that already exists, include the existing users email address in this field.	Optional
FirstName*	• Enter the user's first name. • If a user doesn't have a legal first name, enter a dash '-' in the first name field. • If entering a prefix and/or middle names, include these in the FirstName field.	**Mandatory**
LastName *	• Enter the user's last name.	**Mandatory**
Email *	• Enter the user's email address. • There can only be one user profile with a unique email address. • This should be their professional email address. • Email addresses can be updated later and will not impact the continuity of the trainee's assessment profile or other user's access to the system.	**Mandatory**
OrgReference *	• This reference links a user to a specific organisation in CLA. • The organisation a user is linked to should be relevant to their role and be an organisation that they have permission to have to access to information for. • You will need to enter the relevant CLA reference number for the organisation that you want to link the user to. **Note**. The OrgReference in the spreadsheet must match that in CLA for the upload to work correctly and for the users to be linked to the correct organisation. • This OrgReference can be found within the '*Organisations*' area of CLA. ○ Navigate to the 'cog' icon on the side toolbar bar and click **'Organisations'**.	**Mandatory**

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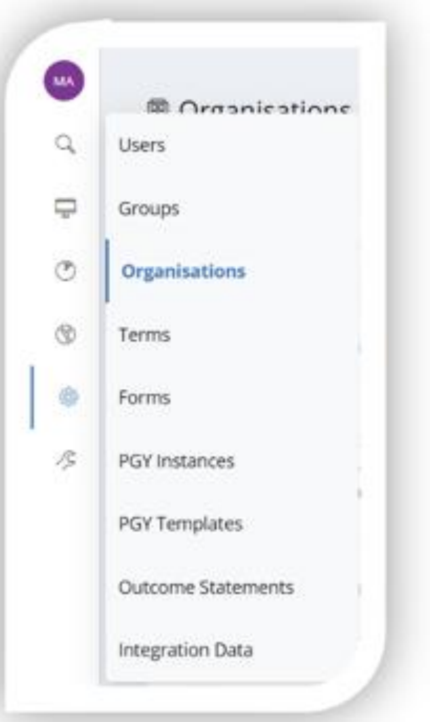
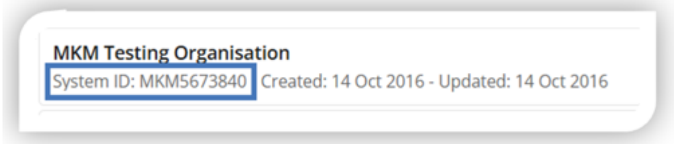
- Find the organisation that you want to link the users to.
- Below the heading of each organisation is a '*System ID*', copy this reference and enter it into the '*OrgReference*' column in the upload spreadsheet (see screen shot below).





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MainRole *

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- This is the role that will be associated with a user. Different roles have different permissions to perform functions within CLA.
- The following roles are available to assign users to:
  - Medical Education Unit Administrator
  - Director of Clinical Training
  - Executive Director of Medical Services
  - Medical Education Officer
  - Trainee
  - Supervisor (Term or Clinical)
- See the Role Types section at the end of this document for more information on what each role can do in CLA**.**
- **Note: Role names must be written into the spreadsheet using the exact names above.**

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Mandatory

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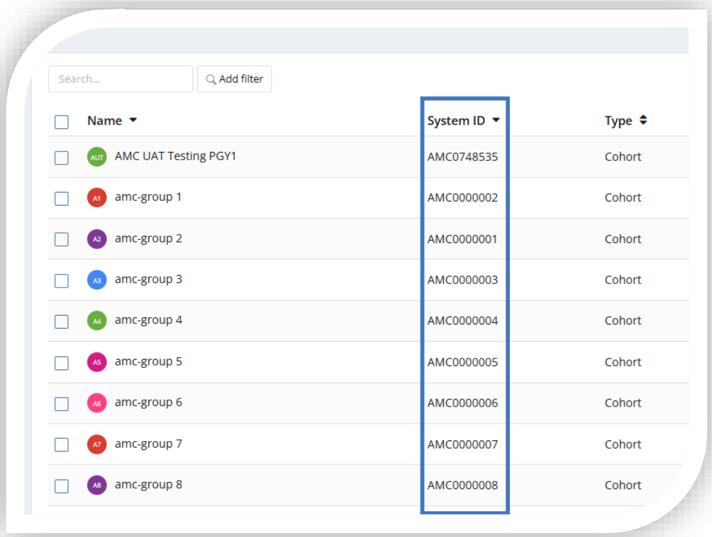
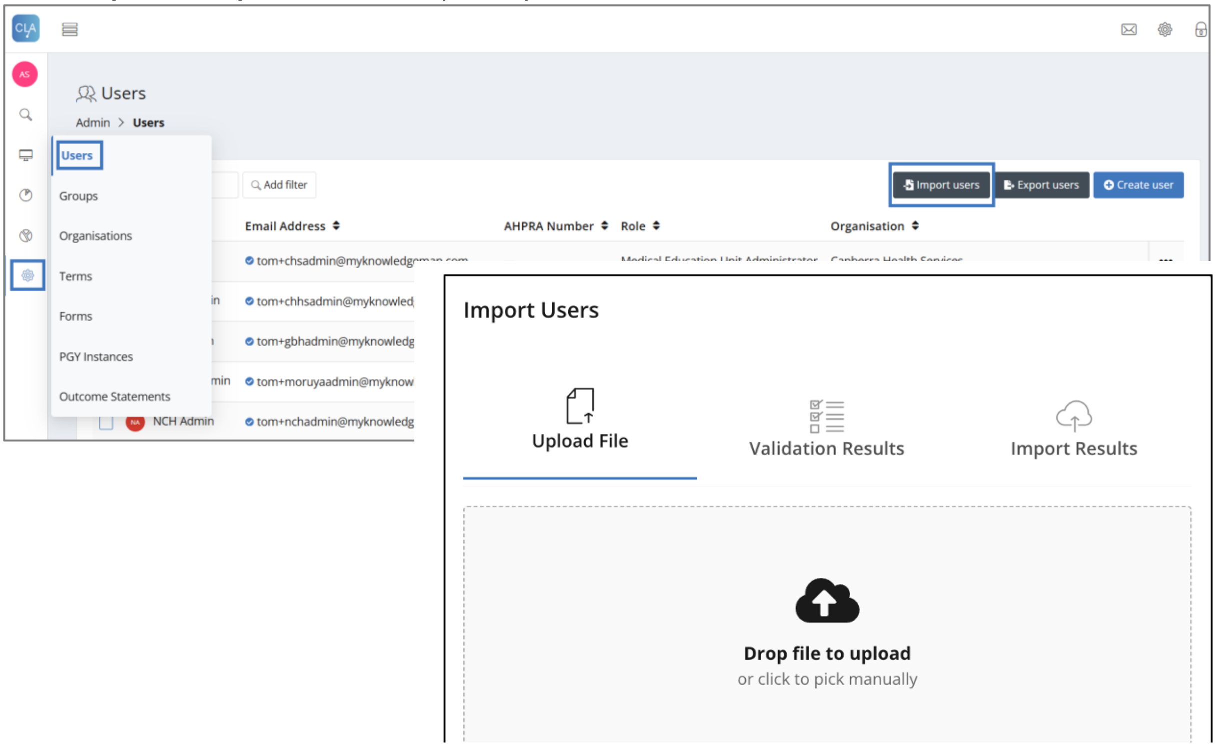
UserStatusName	• This field can be left blank.	Not Required
Ahpra Number	• This is the Ahpra Registration Number that is for any healthcare practitioner who is registered to practice in Australia. • This is not a mandatory field however this is used as the key identifier for Term Allocation uploads and should be entered for all PGY doctors at minimum. It should also be included for other medical professionals using the system (i.e. supervisors, Directors of Clinical Training etc.).	Optional but highly recommended
Reference	• This field is not relevant to CLA and can be left blank.	Not Required
Phone	• A phone number can be provided for a user if required. • The preferred format for phone numbers is 0x xxxx xxxx for landlines and 04xx xxx xxx for mobiles. • This field is not mandatory.	Optional
Facility **Hospital and Health Service** **Jurisdiction**	• These fields are only relevant if you wish to include further information in a user's profile to help identify that user, e.g. states who manage Administrator users centrally, may want a quick reference to the hospital, facility, health service they reside within. • Note that the jurisdiction should be formatted as the state/territory abbreviation, e.g. NSW, WA etc.	Optional
SendVerification	• This field is to identify if you want a welcome email to be sent to new users immediately upon setting up their account via bulk upload. • By default, this is set to ***'false'***, meaning a welcome email won't be sent at the point of importing the users if the field is left blank. • Any users who don't have a welcome email sent straight away can be sent it in the future when required. • If you wish to send welcome emails at the point of importing users, put ***'true'*** in this column.	Optional
Username (SSO Identifier)	• This field is not relevant to CLA and can be left blank.	Not Required

GroupReference 1	• This is a specific identifier for a group that already exists within the system that you want to add users to. • This is not a mandatory field and can be left blank but users created through this process will need to be added to a group later within the system. • **Note:** A group must exist before you can add users to it. It is recommended when uploading users in bulk to first create the relevant group in the *'Groups'* area of the system and then use the bulk upload process to assign users to that group. Administrator users can create groups as required to manage trainees within their hospital or health service. • The GroupReference to be included in the upload spreadsheet can be found within the *'Groups'* area of the side-bar menu. Find the relevant group, copy the *'System ID'* and paste this into the GroupReference field of the spreadsheet.  • If a user needs to be a DCT or EDMS as well as an administrator, then ensure you add them to the same Groups as you have created for the Trainees and assign the role needed in the next column. If they need to be linked to more than one Group, e.g. PGY1 and PGY2, add an additional column to the Import Spreadsheet GroupReference1, and so on, and enter the additional group System IDs. • See the quick reference guides **Creating and managing groups** for more information about groups.	Optional
GroupRole1	• If the user requires a different role in a Group than their Main Role, add the role name in this field. For example, an MEU Administrator who needs to be assigned as a Director of Clinical Training in relation to the cohort group being added in the previous column.	Optional

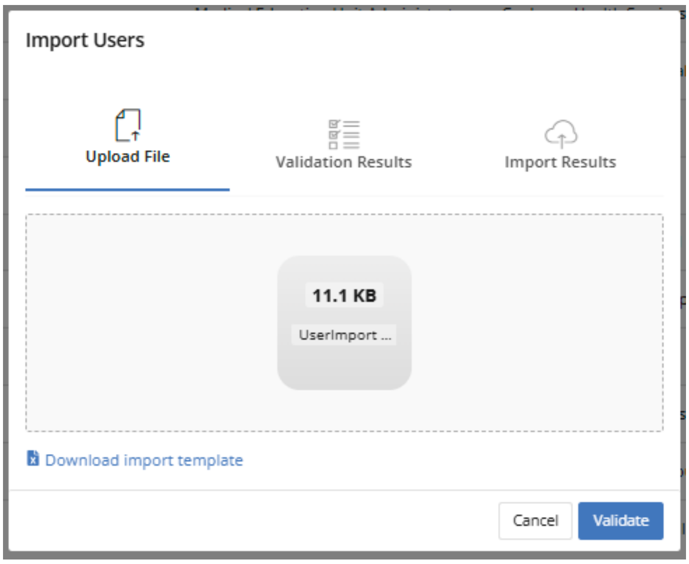
Important: In situations where the DCT or EDMS have an additional role in CLA, for instance primarily an MEU Administrator, after importing the User spreadsheet, go to Groups, locate that user and use Assign Role to make their role DCT or EDMS within that group.

1.3 Uploading the User Import Spreadsheet

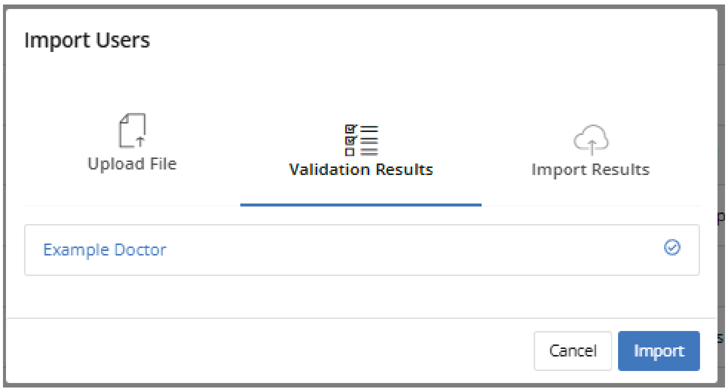
Once you have completed the user import spreadsheet, save it to your desktop or another local file location. Navigate back to the **Users** screen in CLA, select '**Import users**' and click the '**Drop file to upload**' icon to upload your file.



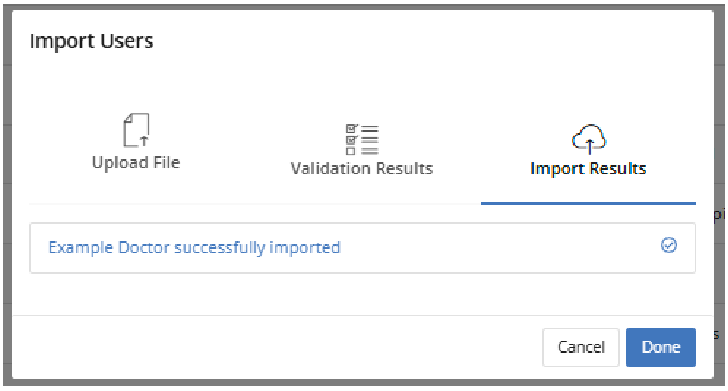
The screen will display the size and name of the file you are importing. Click **Validate**.



If there are no issues with the data, the names of the users being imported will be displayed with a blue tick. Click **Import**.

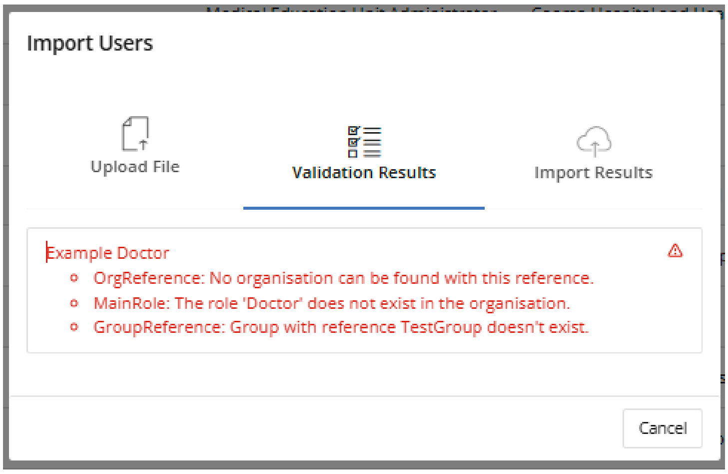


You will see a notification that the data has been successfully imported. Click **Done**.



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 duplicate Ahpra numbers or email addresses, OrgReference not matching an existing one in the system, MainRole not matching an existing role, invalid GroupReference, these will be flagged on the screen for review.



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

2 Role Types

Role	Definition
Trainee	A Trainee is a prevocational doctor in their first or second year, also known as a PGY1 or PGY2 doctor. This role allows the user to access CLA as a trainee, complete self-assessment forms, view mid/ end of term assessments, EPAs completed for themselves and email assessment forms to supervisors to complete later Trainees will have access to an ePortfolio when assigned to a group and instance – see the quick reference guides **Creating and managing groups** and **Creating and managing PGY instances.**
Supervisor (Term or Clinical)	This role is designed for Supervisors who are responsible for oversight of trainees during a particular term. It allows these users to complete mid and end of term assessments, EPAs, track and monitor progress of training for trainees they are assigned to. You should select this role for both Term and Clinical Supervisors. Within the Term Allocations process, administrator users can assign these users a 'relationship' to a trainee. This will determine whether the user can perform the functions of a Term or Clinical Supervisor for each trainee that they are linked to. See the quick reference guide for **Creating and managing term allocations.**
Director of Clinical Training / Executive Director of Medical Services	This role provides access to view all trainees where they are added to the same cohort group to track and monitor training progress and assessments. DCTs and EDMS' need to be added to the same Cohort Groups as their trainees to be able to access their ePortfolios. This also applies in instances where the DCTs also have an MEU Administrator role. See the **Creating and managing groups** quick reference guide for additional information.
Medical Education Unit Administrator	This role provides access to all administration functions for the organisation to which the user is assigned. This includes the ability to create and manage user accounts, create and manage groups and instances, create and manage term allocations, view and track training progress and assessments for trainees assigned to that organisation or any organisations below (where applicable). For situations where a user requires both the MEU Admin role for an organisation and a DCT role in relation to a group of Trainees, set their Main role as MEU Admin and add them to the trainee group, assigning them the role of DCT within the group.
Medical Education Officer	This role can perform the same functions as a Medical Education Unit Administrator with the exception of creating and managing user accounts.
Statewide Administrator	This role can only be assigned by Administrator users that already have statewide access. It provides administration access to all organisations within a particular state or territory.

Note: All roles can only view information within the organisational entity to which they are assigned and any organisational entities below (where applicable) or, in the case of term and clinical supervisors, for the duration of the term in which they are supervising the trainee (note supervisors have a grace period of 7 days after the end date of the term to complete any outstanding assessments.)

*EPAs can also be completed by guest assessors.

Note: Any responses done by an unapproved guest assessor will be flagged until an administrator approves the guest assessor as being a valid person.

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.