Clinical Learning Australia

Training Guide

QUICK REFERENCE GUIDE FOR

CLA ADMINISTRATORS

INITIAL / ANNUAL SETUP OF CLINICAL

LEARNING AUSTRALIA

This training guide describes the process that administrator users of Clinical Learning Australia (CLA) will need to follow for the initial setup of the system. administrator users will need to follow these steps each year when a new cohort of Postgraduate Year (PGY) 1 doctors commences training and as the prior cohort of PGY1 doctors transitions to PGY2.
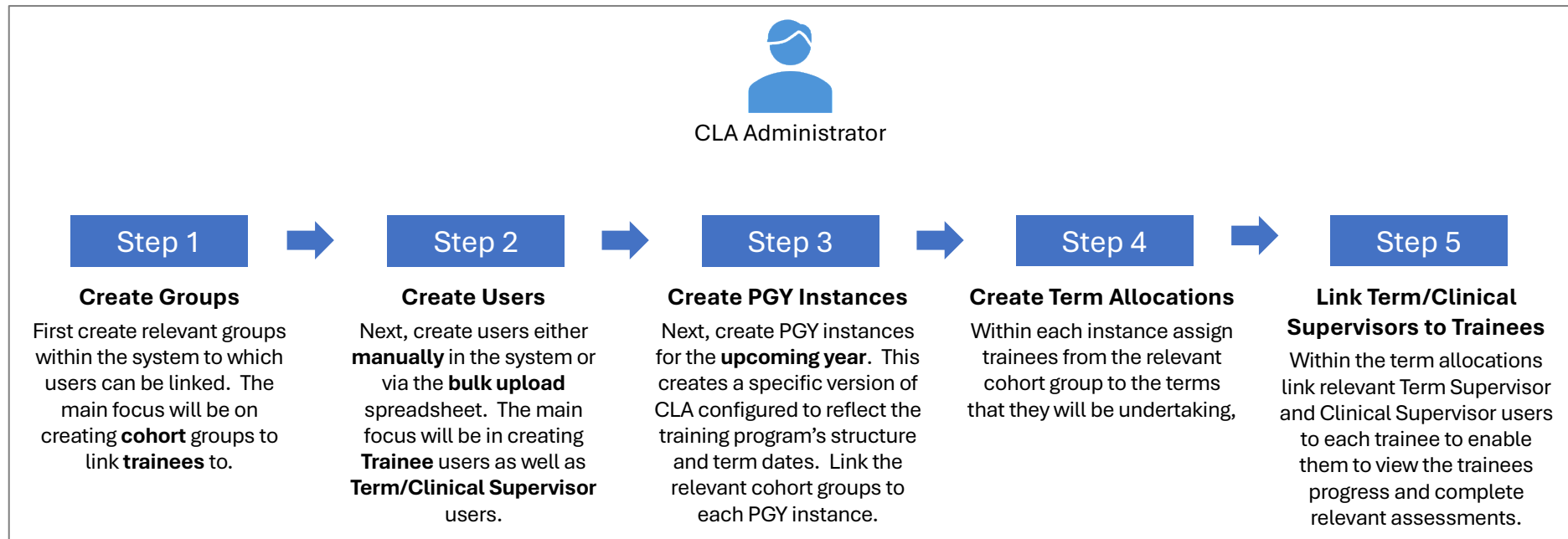
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1   Glossary of Key Terms

Group	- A 'group' associates a number of individual user accounts together. This allows the 'group' to be assigned to an 'instance' which identifies the particular process and forms that the group will have access to. - Groups can be set up to associate users in any way that supports local training delivery. However, the most common approach to grouping users is by the post graduate year group – this is known as a 'cohort' group, i.e. PGY1 2025 / PGY2 2025 etc.
Instance	- An instance within CLA is created to establish a 'version' of CLA to support a specific training program and/or cohort group. - Within an instance administrator users can assign a group of trainees to a relevant template within the system (such as a 4-term or a 5-term template), identify term dates relevant to their training program and assign trainees to term allocations. - Administrator users must create an 'instance' and assign a group of users to that instance in order for those users to be able to access the correct forms and assessments. - An instance would usually be setup for each PGY cohort group in each training program (i.e. Hospital A - PGY1 2025, Hospital A - PGY2 2025)
Term Allocation	- Term allocations link a prevocational doctor to the relevant terms that they will be undertaking throughout the training year. - Within the term allocation, administrator users can assign Term Supervisors and other Clinical Supervisors which ensures these users have access to the relevant trainees to complete their assessments.

2   Overview of initial / annual setup process

The initial setup of Clinical Learning Australia is done by following the steps below. These steps must be repeated annually at the start of each clinical year.

Further detail about each step is included in subsequent sections of this guide. Accompanying videos are also available via the CLA website.

CLA Administrator

Step 1	Step 2	Step 3	Step 4	Step 5
Create Groups	**Create Users**	**Create PGY Instances**	**Create Term Allocations**	**Link Term/Clinical Supervisors to Trainees**
First create relevant groups within the system to which users can be linked. The main focus will be on creating **cohort** groups to link **trainees** to.	Next, create users either **manually** in the system or via the **bulk upload** spreadsheet. The main focus will be in creating **Trainee** users as well as **Term/Clinical Supervisor** users.	Next, create PGY instances for the **upcoming year**. This creates a specific version of CLA configured to reflect the training program's structure and term dates. Link the relevant cohort groups to each PGY instance.	Within each instance assign trainees from the relevant cohort group to the terms that they will be undertaking,	Within the term allocations link relevant Term Supervisor and Clinical Supervisor users to each trainee to enable them to view the trainees progress and complete relevant assessments.

2.1.   Step 1 - Create Groups

In this step, you will focus on creating groups to associate prevocational doctor users together. As a minimum, groups should be set up to associate cohorts of PGY1 and PGY2 doctors separately. This is because PGY1 and PGY2 doctors are assigned different templates in the system to reflect the process and assessments forms to be completed. You also have the option of bundling or keeping separate your 4-term and 5-term PGYs.

The groups should be created and managed by the administration team responsible for managing CLA users in a particular training program/facility but can also be created by statewide or national administrator depending on agreed arrangements.

Examples of groups to be created include:

- State/Organisation - PGY1 – 2025
- State/Organisation - PGY2 – 2025

Where groups are being created and managed by an administration team that oversees training across a number of training programs/facilities, they might also want to group users by the program or primary facility. For example:

- Hospital A – PGY1 – 2025
- Hospital A – PGY2 – 2025
- Hospital B – PGY1 – 2025
- Hospital B – PGY2 – 2025

If your site runs both 4-term and 5-term clinical years and you create separate groups (recommended), include the term type in the name of the group for easy identification.

How groups are set up will depend on how training is managed in your particular circumstance. CLA is designed to provide flexibility to allow groups to be set up in a way that best suits local practice.

Groups can be created in CLA either one-by-one **manually** or via the **bulk group import spreadsheet**.

Please refer to the **Creating and managing groups** quick reference guide and video for further information.

2.2.   Step 2 - Create Users

In this step, you will focus on creating all relevant users either **manually** or via the **bulk upload spreadsheet**. You may want to focus on creating **Trainees** and **Term/Clinical Supervisors** first, however you have the ability to add all user types at the same time if preferred.

As part of the user creation process, you can add users to groups. For Trainees, this is particularly important because Trainees need to be linked to a Group before you can move onto step 3.

Please refer to the **Creating and managing users** quick reference guide and video for further information.

2.3.   Step 3 - Create PGY Instances

In this step, you will focus on creating an **instance** for each cohort of **Trainees** for the **upcoming year** (i.e. a PGY1 instance and a PGY2 instance).

An 'instance' associates PGY1 or PGY2 groups to the relevant templates/forms in the system and is where the start and end dates of the training year are identified. The number of instances required to be set up will depend on what groups you created in Step 1 and whether you run 4 or 5 terms in your clinical year. If you run both, you will need to create an instance for each as well as by PGY. If you've grouped your trainees into a single PGY year group, assign the same Group to both the 4 and 5 term instances, e.g. ACT – PGY1 – 2025.

Please refer to the **Creating and managing PGY instances** quick reference guide and video for further information.

2.4.   Step 4 - Create Term Allocations

In this step, you will focus on creating or uploading the **term allocations** for all **Trainees**. Term allocations occur within the **PGY instance** that you created in Step 3. You don't have to upload or create term allocations for all terms at once if the information for future terms is not yet ready, however, you will need to create term allocation data for at least one term. Once created, term allocations can be updated or amended in the system as required.

You will need to do this step for each instance that you created. That is, for PGY1 and for PGY2, or for PGY1 - 4 Terms, PGY1 - 5 Terms, and so on (if applicable).

Please refer to the **Creating and managing term allocations** quick reference guide and video for further information.

2.5.   Step 5 – Link Term/Clinical Supervisors to Trainees

When creating term allocations, you can link **Term/Clinical Supervisors** to a **Trainee**. This will provide the relevant Supervisors with access to the Trainees assessments and will allow them to monitor and track progress of training throughout that term.

Please refer to the **Creating and managing term allocations** quick reference guide and video for further information.

Once the above steps have been completed, trainees and their supervisors will be able to start using the system to work through training and assessment requirements.

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.