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Agency Overview

Agencies provide the placements that students attend. Agencies are known outside InPlace as ‘Placement Sites’ or ‘Placement Providers’. Agencies may be loaded in bulk using the Data Migration Tool or set up individually via the Agency List.

After they have been set up, any changes to Agencies or their associated Agency Personnel must be maintained via the Agency List (Manage menu > Agency).

Disciplines are associated with an Agency on creation to allow visibility of Agency details to relevant users (Students, Placement Coordinators, etc.). An Agency can be associated to more than one Discipline.

Search/View Agency

1. Go to Manage > Agency

2. Enter search criteria and click Filter

3. In the View column click on the Detail link

4. Click on tabs to view/update details as associated with the agency

Create New Agency

1. Go to Manage > Agency

2. Search using the Filter to check the Agency does not already exist. (Refer to steps above in Search/View Agency section)

   **Important Note:** Only search using the Agency Name, not Discipline – the agency may already be created in InPlace but not associated with the discipline you are working with.

3. Click Add a new item.
4. In the **Add Details** section, add the following (* = mandatory fields).

![Add Details](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Agency Name</td>
<td>Enter the name of the Agency.</td>
</tr>
<tr>
<td>Agency Code</td>
<td>Unique code identifying the Agency.</td>
</tr>
<tr>
<td>* Agency Type</td>
<td>Selection Agency type (e.g. Adoptions, Court, etc.).</td>
</tr>
<tr>
<td>Agency Level Template</td>
<td>Selection of level groupings.</td>
</tr>
<tr>
<td>* Agency Level</td>
<td>Selection of Agency Level (e.g. Facility, Department, Ward).</td>
</tr>
<tr>
<td>Parent Agency</td>
<td>Select the parent Agency from this menu if applicable.</td>
</tr>
<tr>
<td>ABN</td>
<td>Agency’s Australian Business Number.</td>
</tr>
<tr>
<td>Business Phone</td>
<td>Agency’s phone number.</td>
</tr>
<tr>
<td>Fax</td>
<td>Agency’s fax number.</td>
</tr>
<tr>
<td>Internet</td>
<td>Agency’s website address (URL).</td>
</tr>
<tr>
<td>Email</td>
<td>Agency’s email address.</td>
</tr>
<tr>
<td>Placement Capacity (Number)</td>
<td>The maximum number of placements that the Agency can provide for a given time.</td>
</tr>
<tr>
<td>Active</td>
<td>This check-box determines whether or not the Agency is currently able to provide placements. An Agency may be made inactive (but not deleted) for historical record keeping.</td>
</tr>
</tbody>
</table>

2. Select the relevant Disciplines for the Agency. The Disciplines will be associated with the Agency.
After you have associated a Discipline to an Agency, the Extended Attributes (XAs) are displayed under the main Agency Details on the Details tab. These attributes allow you to specify details for each aspect of the Discipline.

3. Click Save.
   The Agency record is created and the following tabs are made available:

4. Add Agency Address, Click Add Address.
5. Enter Address details.

   ![Add Address](image)

   The address details are displayed.

   ![Add Address Form](image)

   Tip: Press your tab key on your keyboard to the ‘ASCG-RA:’ field. This automatically generates the RA Code based on the address information provided.

5. Click Save.
6. Add Agency Personnel, Click Add Personnel.
7. Enter Personnel details.
8. Click Save.

9. Add Agency Contact Methods.

10. Select at least one of the following methods of contacts for the Agency.

11. Click Save.

12. Add Discipline, click Add Disciplines.

13. Tick the discipline/s that are relevant for the agency.

14. Click Save.

**Note** – Liaisons and Invoice categories are not currently used.
Edit Existing Agency

1. Go to Manage > Agency
2. Search using the filter.
3. Click on Detail to open Agency.
4. Click on tabs to edit details as associated with the agency.

Details

1. Click on Details tab
2. Update Agency information as required.
3. Click Save.

4. To add a Specialism, click Select Specialisms.
5. Use the Filter to search for a Specialism.
6. Click Filter.
7. Click **Select** and it will appear in **Specialisms to be added**.

8. Click **Add Specialisms** to add to the agency.
9. Click **Save**.
10. To remove a Specialism, in the **Details** tab Click **X** beside the Specialism.
11. Click **Save**.

*Departments / Wards*

Any **Departments / Wards** associated with the Agency will be listed.

To access the individual Department / Ward, click **Detail**.

*Edit / Delete Addresses*

1. Click **Detail** to view the selected address.
2. Update the required fields.
3. Relevant Country and RA Codes must be completed.
4. Click **Save**
5. To delete an address, click **Delete**.
6. Click **Ok** to confirm deletion.

**View/ Edit Personnel**

1. Tick the box to Show All Personnel.

2. Click on the name of the chosen Personnel member to view the Personnel Details.
3. Click on tabs to view/update details as associated with the Personnel.

4. Click **Save**
5. To delete Personnel member, click **Delete**.
6. Click **Ok** to confirm deletion.

**Edit Contact Methods**

1. Add Agency **Contact Methods**
2. Select at least one of the following methods of contacts for the Agency

3. Click **Save**
**Edit Disciplines**

1. To Edit Discipline, click **Edit Disciplines**
2. Tick the discipline/s that are relevant for the agency
3. Click **Save**

**Note** – Liaisons and Categories are not currently used.

**Placement**

All placement history associated with this facility will be listed.

**Edit a placement**

1. Click on **Placement** tab.
2. Locate the placement in the list and click **Detail**
3. **Edit Placement** tab will open at the bottom of the page.
4. Edit the required fields
5. Click **Save**
Add a placement

1. Click on Placement tab.
2. Scroll to the bottom of the list and click Add Placement to expand the tab.

3. Enter the Allocation Group

4. To enter the Student, click ...

5. Search for the student using the Filter for Surname and/or Student Code
6. Click Detail to select the student.
7. Enter the Duration and change Unit of Measure to ‘HOUR’
8. Enter Start Date
9. Enter End Date
10. Select Status
11. Click Save

Delete a placement

1. Click on Placement tab.
2. Locate the placement in the list and click Detail
3. Edit placement tab will open at the bottom of the page.
4. Click Delete
5. Click Ok to confirm deletion
Request

All request history associated with this facility will be listed.

1. Locate the request in the list
2. Click Detail to view the individual placement request.

Agreements

All Agreements and Letters of Exchange associated with this facility will be listed.

1. Click on Agreements tab.

Add Letter of Exchange

1. Click Add Letter of Exchange
2. Enter Start Date and End Date
3. Enter Discipline, Personnel and Address
4. Click Save

Edit Letter of Exchange

1. Click Detail.
2. Update required fields.
3. Click Save.

Delete Letter of Exchange

1. Click Detail.
2. Click Delete.
3. Click Ok to confirm deletion.
Notes/Docs

The Notes/Docs tab lists the Notes and Documents associated with the Agency.

1. Click on Notes/Docs tab.

Add Note

1. Click Add Note

2. Enter Date.
3. Enter Title.
4. Enter Text. Formatting capabilities are available.
5. Enter Reminder Date (if applicable).
6. Enter Reminder Text (if applicable).
7. Tick Private Note (if applicable).
8. Click Save.

Edit Note

1. Click Detail.

2. Update the required information.
3. Click Save.
Delete Note

1. Click **Detail**
2. Click **Delete**
3. Click **Ok** to confirm deletion

Add Document

1. Click **Add Document**
2. Enter **Title**.
3. Enter **Description**.
4. Click **Select File**.
5. Locate file.
6. Click **Open**.
7. Click **Save**.

Edit Document

1. Click **Detail**.
2. Update the required information.
3. To replace the document, click **Select File**.
5. Click **Open**.
6. Click **Save**.
Delete Document

1. Click **Detail**.
2. Click **Delete**.
3. Click **Ok** to confirm deletion.

**Note** – Invoice tab is not currently used.

Incidents

The Incidents tab lists the **Incidents** associated with the Agency.

1. Click on **Incidents** tab.

Add Agency Incident

1. Click on **Add new record**

2. Update the required information
3. Click **Update**.

Edit Agency Incident

1. Click on **Edit**.

2. Edit the information required.
3. Click **Update**.
Delete Agency Incident

1. Click on Delete.

2. Click Ok.

**Note** – Process tab is not currently used.

Documents Access Log

1. Click to open the Filter.
2. Enter either the Title or Name of the document to search a list of students who have accessed it.
3. Search for a Student to view the documents they have accessed.

Document History

<table>
<thead>
<tr>
<th>Author</th>
<th>Date</th>
<th>Version</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Katrina Beauchamp</td>
<td>22nd March 2018</td>
<td>1.0</td>
<td>Create</td>
<td>Based on QIT Help Documentation</td>
</tr>
<tr>
<td>Christine Rollo</td>
<td>19th June 2018</td>
<td>1.1</td>
<td>Updated</td>
<td>Reviewed and updated.</td>
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</table>