



INPLACE USER GUIDE

Agency Management

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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**

The screenshot shows the 'Agency List' interface. At the top, there is a 'Filter' section with several input fields: Agency Name, Agency Legal Name, Agency Code, Agency Type (dropdown), and Agency Level (dropdown). Below these are 'Discipline' (dropdown), 'Active Agencies only' (checkbox), 'Categories' (input with 'X Q-' button), 'Match All' and 'Match Any' radio buttons, 'Specialisms' (input with 'X' button), and 'Show Agencies partially satisfying' checkbox. There is also a 'Groups' section with an input field and an 'Add Group' button. At the bottom of the filter section are 'Filter' and 'Reset' buttons. Below the filter is a table with columns: View, Agency Code, Agency Name, Agency Legal Name, Email, Agency Type, Agency Level, # of Specialisms, and Active. The table contains five rows of agency data.

View	Agency Code	Agency Name	Agency Legal Name	Email	Agency Type	Agency Level	# of Specialisms	Active
Detail	F29100	118 Hill End Road		g...@...com	Private Farm	Facility	0	true
Detail		121 Childcare - Rainforest Centre		s...@...om.au	Early Childhood Education	Facility	0	true
Detail		121 Medical Centre		r...@...hotmail.	General Medical Practice	Facility	0	true
Detail	F29606	1225 Island Road		p...@...d.net.au	Private Farm	Facility	0	true
Detail	N00021	1300SMILES			Private Oral Health	Network	0	true

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

The screenshot shows a row of tabs for an agency detail view: Details, Placement, Request, Agreements, Notes/Docs, Invoice, Process, and Document Access. The 'Placement' tab is currently selected and highlighted in blue.

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**.

View	Agency Code	Agency Name	Agency Level	# of Specialisms	Active
Detail	5	A COURT JACARA		0	true
Detail	department1	A department Eastern Health		0	true
Detail	facility1	A Facility A Network		0	true
Detail	5182	A HEAD MELBO		0	true
Detail	1172	A HEAD CENTRE		0	true

4. In the **Add Details** section, add the following (* = mandatory fields).

Add Details

(* required field)

Agency Name:*

Agency Code:

Agency Type:*

Agency Level Template: Default

Agency Level:*

Parent Agency:

ABN:

Business Phone:

Fax:

Internet:

Email:

Placement Capacity (Number):

Active:

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

2. Select the relevant Disciplines for the Agency. The Disciplines will be associated with the Agency.

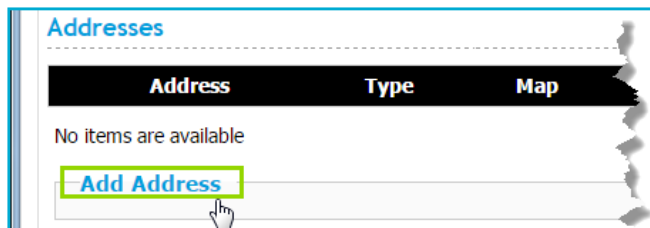
After you have associated a Discipline to an Agency, the Extended Attributes (XAs) are displayed under the main Agency Details on the **Details** tab. These attributes allow you to specify details for each aspect of the Discipline.

3. Click **Save**.

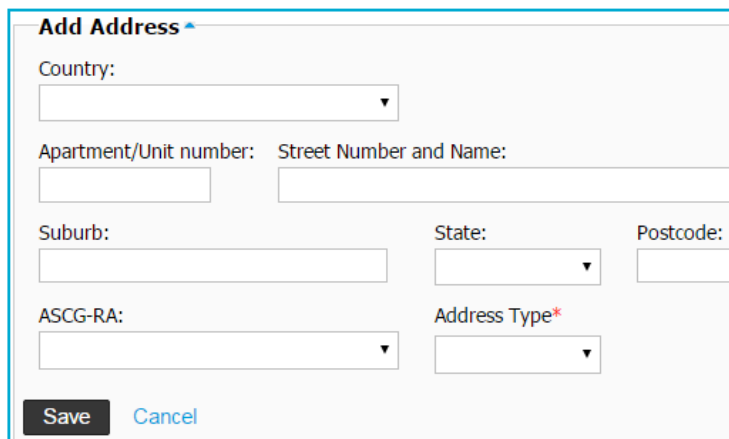
The Agency record is created and the following tabs are made available:



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



The address details are displayed.

A screenshot of the 'Add Address' form. The form contains the following fields: 'Country:' (dropdown), 'Apartment/Unit number:' (text), 'Street Number and Name:' (text), 'Suburb:' (text), 'State:' (dropdown), 'Postcode:' (text), 'ASCG-RA:' (dropdown), and 'Address Type*' (dropdown). At the bottom, there are 'Save' and 'Cancel' buttons.

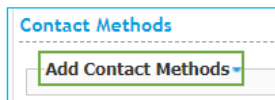
Tip: Press your tab key on your keyboard to the 'ASCG-RA:' field. This automatically generates the RA Code based on the address information provided.

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



The personnel details are displayed.

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.

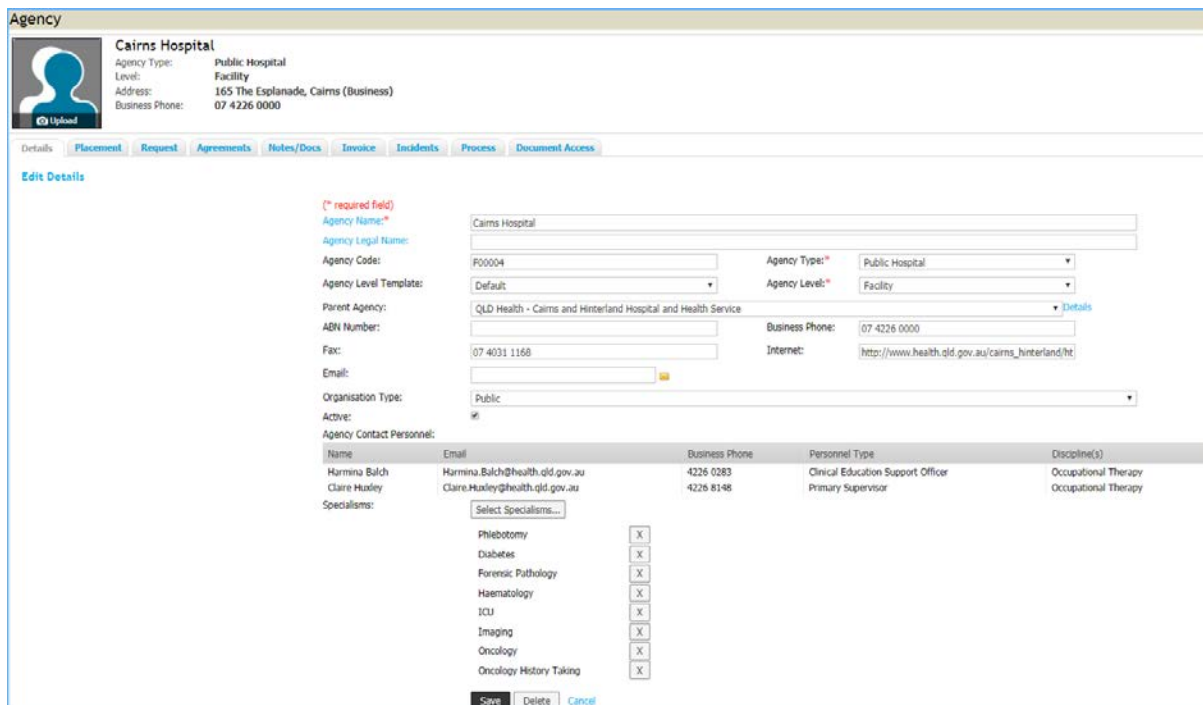
Edit Existing Agency

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**.



Agency

Cairns Hospital
Agency Type: Public Hospital
Level: Facility
Address: 165 The Esplanade, Cairns (Business)
Business Phone: 07 4226 0000

Details Placement Request Agreements Notes/Docs Invoice Incidents Process Document Access

Edit Details

(* required field)

Agency Name: Cairns Hospital

Agency Legal Name:

Agency Code: F00004

Agency Level Template: Default

Parent Agency: QLD Health - Cairns and Hinterland Hospital and Health Service

ABN Number:

Fax: 07 4031 1166

Email:

Organisation Type: Public

Active:

Agency Contact Personnel:

Name	Email	Business Phone	Personnel Type	Discipline(s)
Harmina Balch	Harmina.Balch@health.qld.gov.au	4226 0283	Clinical Education Support Officer	Occupational Therapy
Claire Husley	Claire.Husley@health.qld.gov.au	4226 8148	Primary Supervisor	Occupational Therapy

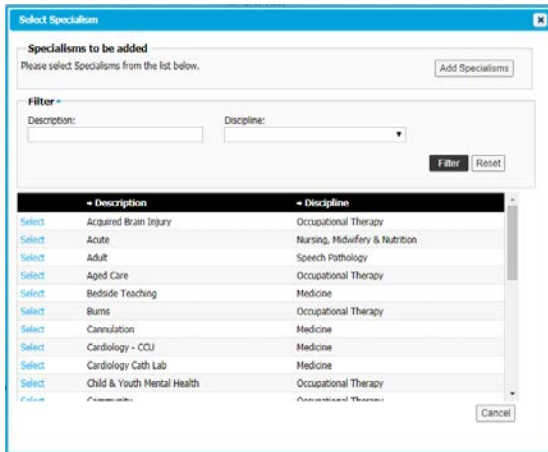
Specialisms:

Select Specialisms...

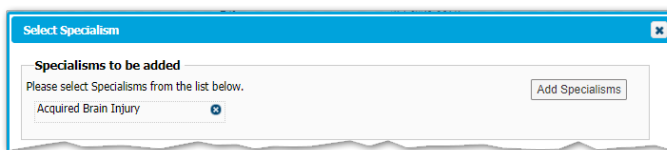
- Phlebotomy
- Diabetes
- Forensic Pathology
- Haematology
- ICU
- Imaging
- Oncology
- Oncology History Taking

Save Delete Cancel

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**.

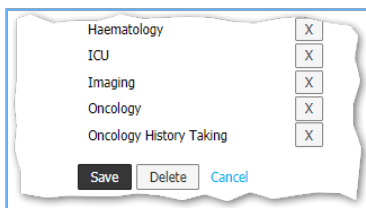


8. Click **Add Specialisms** to add to the agency.

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**

Addresses

Address

Detail PO Box 902, Cairns, QLD, 4870, AUSTRALIA

Detail 165 The Esplanade, Cairns, QLD, 4870, AUSTRALIA

Edit Address

Country: AUSTRALIA

Apartment/Unit number: Street Number and Name: PO Box 902

Suburb: Cairns State: QLD Post Code: 4870

ASCG-RA: RA3 - Outer Regional Australia Address Type: Postal

Save Delete Cancel

5. To delete an address, click **Delete**.
6. Click **Ok** to confirm deletion.

View/ Edit Personnel

1. Tick the box to Show All Personnel.

Personnel

Show All Personnel

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.

Personnel Details Qualifications Personnel Notes/ Docs

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

Contact Methods

Add Contact Methods

Contact Methods

Add Contact Methods

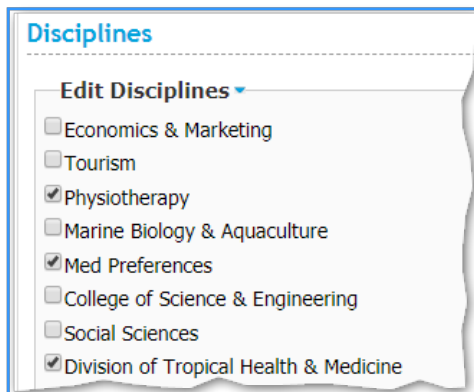
Email Fax Mail SMS Telephone

Save Cancel

3. Click **Save**

Edit Disciplines

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



Disciplines

Edit Disciplines ▼

- Economics & Marketing
- Tourism
- Physiotherapy
- Marine Biology & Aquaculture
- Med Preferences
- College of Science & Engineering
- Social Sciences
- Division of Tropical Health & Medicine

3. Click **Save**

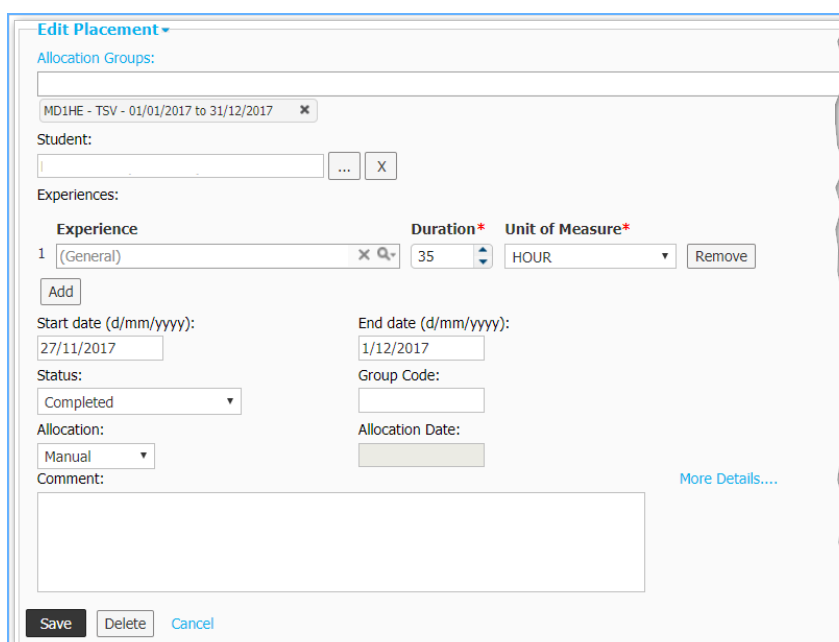
Note – Liaisons and Categories are not currently used.

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**



Edit Placement ▼

Allocation Groups:

MD1HE - TSV - 01/01/2017 to 31/12/2017 ✕

Student:

Experiences:

Experience	Duration*	Unit of Measure*	
1 (General) ✕ Q	35	HOUR	Remove

Add

Start date (d/mm/yyyy): 27/11/2017

End date (d/mm/yyyy): 1/12/2017

Status: Completed

Group Code:

Allocation: Manual

Allocation Date:

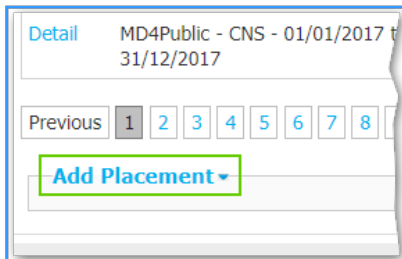
Comment:

[More Details...](#)

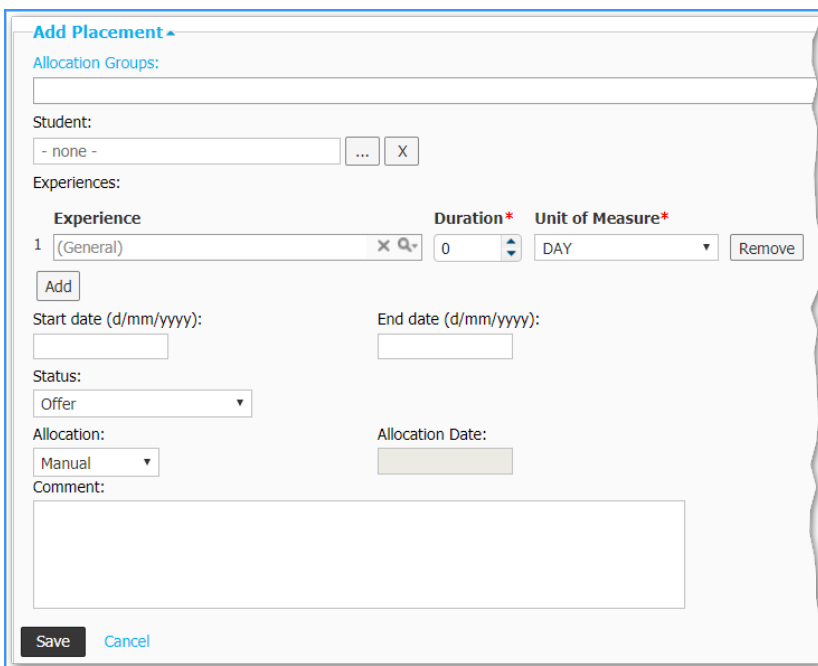
Save Delete Cancel

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**

A screenshot of the 'Add Placement' dialog box. The title is 'Add Placement'. It contains several fields: 'Allocation Groups:' (empty), 'Student:' (dropdown menu with '- none -' and buttons for '...' and 'X'), 'Experiences:' (table with columns 'Experience', 'Duration*', and 'Unit of Measure*'), 'Start date (d/mm/yyyy):', 'End date (d/mm/yyyy):', 'Status:' (dropdown menu with 'Offer'), 'Allocation:' (dropdown menu with 'Manual'), 'Allocation Date:' (text field), and 'Comment:' (text area). At the bottom, there are 'Save' and 'Cancel' buttons.

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.

Select Student

Filter

Surname: Student Code:

→ Student Code	→ Surname	→ Given Name
Detail		
Detail		

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

Edit Placement

Allocation Groups:

MD1HE - TSV - 01/01/2017 to 31/12/2017

Student:

Experiences:

Experience	Duration	Unit of Measure
1 (General)	35	HOUR

Start date (d/mm/yyyy): End date (d/mm/yyyy):

Status:

Allocation:

Comment:

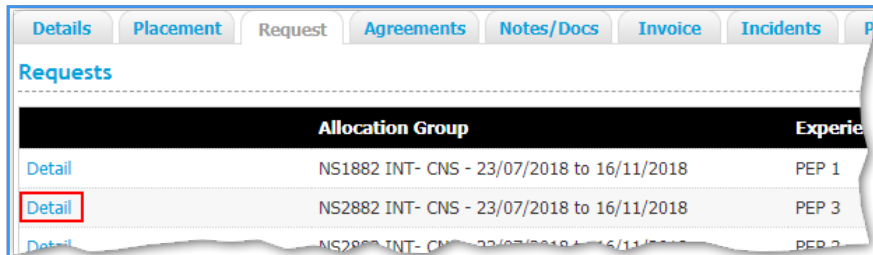
Confirm

Delete this item?

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.



	Allocation Group	Experience
Detail	NS1882 INT- CNS - 23/07/2018 to 16/11/2018	PEP 1
Detail	NS2882 INT- CNS - 23/07/2018 to 16/11/2018	PEP 3
Detail	NS2882 INT- CNS - 23/07/2018 to 16/11/2018	PEP 2

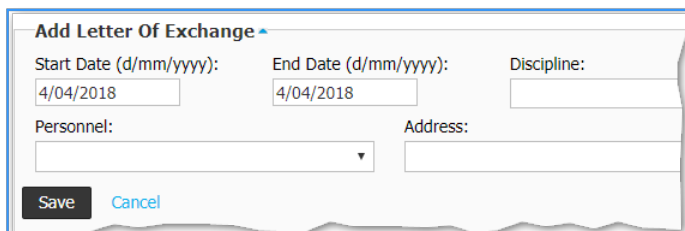
Agreements

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**



Add Letter Of Exchange

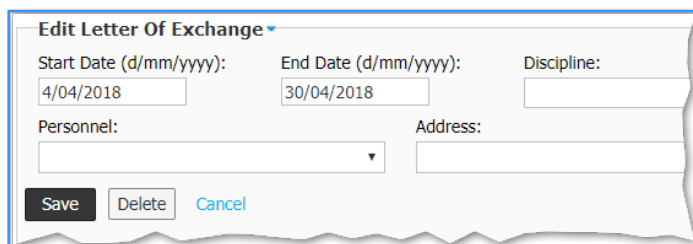
Start Date (d/mm/yyyy): 4/04/2018 End Date (d/mm/yyyy): 4/04/2018 Discipline:

Personnel: Address:

Save Cancel

Edit Letter of Exchange

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



Edit Letter Of Exchange

Start Date (d/mm/yyyy): 4/04/2018 End Date (d/mm/yyyy): 30/04/2018 Discipline:

Personnel: Address:

Save **Delete** Cancel

Delete Letter of Exchange

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

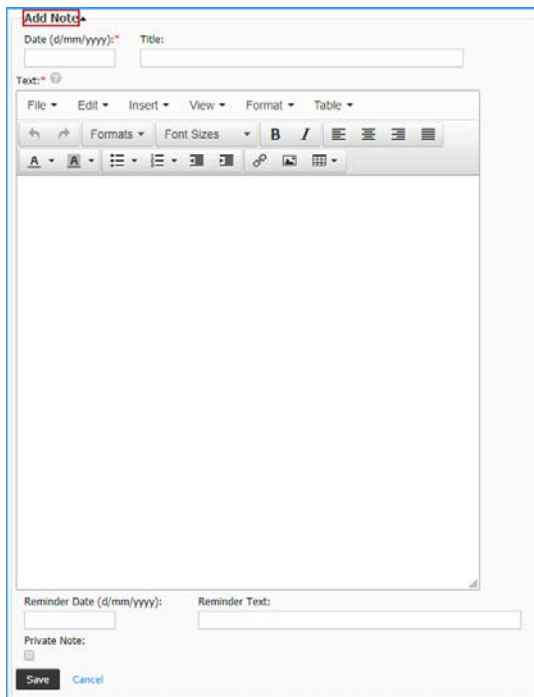
Notes/Docs

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

1. Click on **Notes/Docs** tab.

Add Note

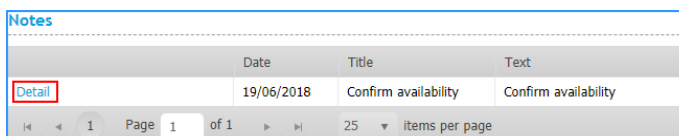
1. Click **Add Note**



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**.

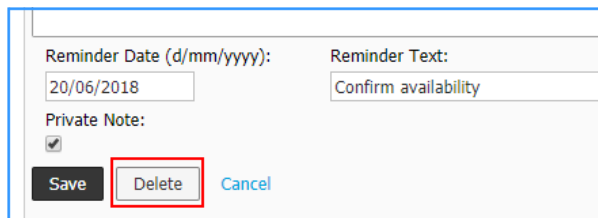


	Date	Title	Text
Detail	19/06/2018	Confirm availability	Confirm availability

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

Delete Note

1. Click **Detail**
2. Click **Delete**



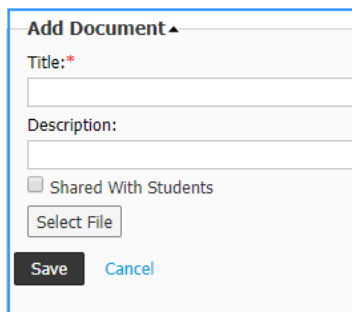
The screenshot shows a dialog box for deleting a note. It contains the following fields and controls:

- Reminder Date (d/mm/yyyy): 20/06/2018
- Reminder Text: Confirm availability
- Private Note:
- Buttons: Save, Delete (highlighted with a red box), Cancel

3. Click **Ok** to confirm deletion

Add Document

1. Click **Add Document**



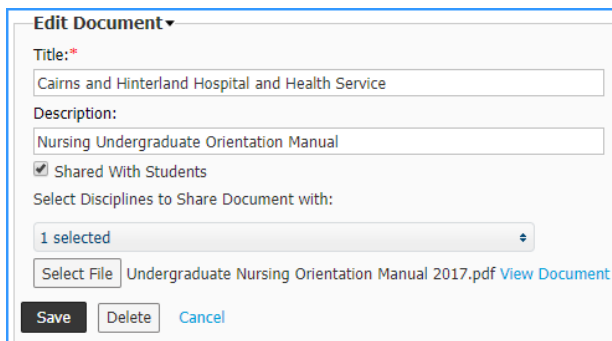
The screenshot shows the 'Add Document' dialog box with the following fields and controls:

- Title:*
- Description:
- Shared With Students:
- Select File
- Buttons: Save, Cancel

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.



The screenshot shows the 'Edit Document' dialog box with the following fields and controls:

- Title: Cairns and Hinterland Hospital and Health Service
- Description: Nursing Undergraduate Orientation Manual
- Shared With Students:
- Select Disciplines to Share Document with: 1 selected
- Select File: Undergraduate Nursing Orientation Manual 2017.pdf View Document
- Buttons: Save, Delete, Cancel

3. To replace the document, click **Select File**.
4. Locate 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.

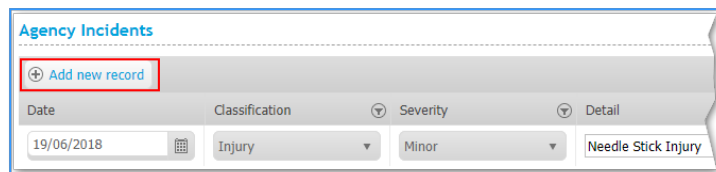
Incidents

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

1. Click on **Incidents** tab.

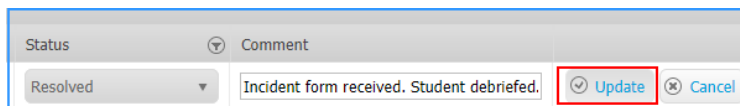
Add Agency Incident

1. Click on **Add new record**



The screenshot shows the 'Agency Incidents' form. At the top left, there is a button labeled 'Add new record' with a plus icon, which is highlighted with a red box. Below this, the form has several fields: 'Date' (19/06/2018), 'Classification' (Injury), 'Severity' (Minor), and 'Detail' (Needle Stick Injury).

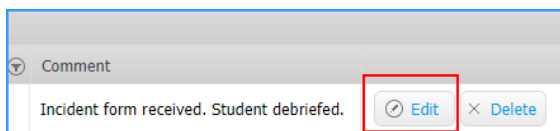
2. Update the required information
3. Click **Update**.



The screenshot shows the 'Agency Incidents' form. At the bottom, there is a 'Status' dropdown menu (Resolved) and a 'Comment' field (Incident form received. Student debriefed.). To the right of the comment field, there are two buttons: 'Update' and 'Cancel'. The 'Update' button is highlighted with a red box.

Edit Agency Incident

1. Click on **Edit**.

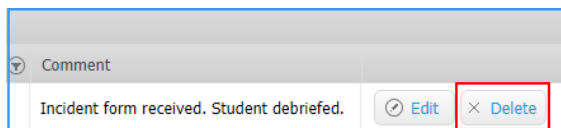


The screenshot shows the 'Agency Incidents' form. At the bottom, there is a 'Comment' field (Incident form received. Student debriefed.). To the right of the comment field, there are two buttons: 'Edit' and 'Delete'. The 'Edit' button is highlighted with a red box.

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.

Date Uploaded	Title	Name	Student Code	Student Name	Date Accessed
	Cairns and Hinterland Hospital and Health Service	Undergraduate Nursing Orientation Manual 2017.pdf	[REDACTED]	[REDACTED]	14/08/2017
	Cairns and Hinterland Hospital and Health Service	Nursing Student Placement Information (5).pdf	[REDACTED]	[REDACTED]	15/08/2017
	Cairns Hospital Map	Cairns Hospital Map 2014.pdf	[REDACTED]	[REDACTED]	15/08/2017
	Learn - how to register	register.learn.pdf	[REDACTED]	[REDACTED]	15/08/2017
	Learn userguide	learn instruction guide.pdf	[REDACTED]	[REDACTED]	15/08/2017

Document History

Author	Date	Version	Status	Comments
Katrina Beauchamp	22 nd March 2018	1.0	Create	Based on QIT Help Documentation
Christine Rollo	19 th June 2018	1.1	Updated	Reviewed and updated.