Student Placement Coordination Tool Health Provider Portal

Settings How to select accounts, view notifications, manage user access, facilities and clinical areas

Health New Zealand Te Whatu Ora



How to select accounts, view notifications, manage user access, facilities and clinical areas

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How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage accounts, user access, facilities and clinical areas

Please see the <u>Key terms</u> section at the end of the document for the definitions of terms used in this guide.

Within the **Settings** menu, the following can be accessed:

- Select account
- Manage access
- Manage facilities
- Manage clinical areas

Health New Zealand Student Placement e Whatu Ora Coordination Tool	
Home Planning - Liaise and match - Confirmed placements - Dashboard	<u>Settings</u> -
	Settings
Home	Select account
	Manage access
Welcome to the Student Placement Coordination Tool	Manage facilities
	Manage clinical areas
This nationwide digital coordination tool aims to enable more effective planning, coordination and visibility of student pl Zealand.	a <mark>sements across health settin</mark> gs in New
The tool is being delivered in an agile way, meaning functionality is added in phases and the tool will be iteratively refine line. The initial roll out will continue until the middle of 2025, with full roll out of the tool to all the professions in scope over	d to provide maximum value to the front the next few years.

From here, you can:

- View and select your Health Provider account(s)
- · Manage access for your organisation by adding and removing users
 - if you have an Administrator portal role
- · Manage facilities by adding, editing or removing facilities
- Manage clinical areas by adding or editing clinical areas.
 - To remove a clinical area, the Health Placement Hub needs to be contacted



View and select your account

> To view and select your account, click on the Settings tab and click Select account



To select a Health Provider account, click Select next the account you want to access

Welcome to the Health Provi Select which Health Provider a	ider Portal for the Stu ccount you would like	dent Placement Co to access	pordination Tool	
Account 🛧	Portal role	Job title	Account type	
Health NZ Waitaha Canterbury UAT	Administrator - Health Portal	External Learning Environment Access	Health Provider	Select



View notifications

To view a notification, you can select from the Latest notifications list or click View all

Velcome to the Student Placement Coordination	Tool
is nationwide digital coordination tool aims to enable more effective planning, coordination a aland.	and visibility of student placements across health settings in Nev
e tool is being delivered in an agile way, meaning functionality is added in phases and the too	ool will be iteratively refined to provide maximum value to the from
e. The roll out will continue through 2025 to all professions in scope.	
atest notifications	
atest notifications	
atest notifications	Date created Status
Subject Placement offer details POD-001141 has been updated for request ERQ-001133	Date created Status 09-04-2025 9:05 AM Read
Subject Placement offer details POD-001141 has been updated for request ERQ-001133 Placement offer details POD-001141 has been updated for request ERQ-001143	Date created Status 09-04-2025 9:05 AM Read 09-04-2025 9:04 AM Read
Subject Placement offer details POD-001141 has been updated for request ERQ-001133 Placement offer details POD-001141 has been updated for request ERQ-001143 Your Placement Request ERQ-001143 is approved	Date created Status 09-04-2025 9:05 AM Read 09-04-2025 9:04 AM Read 09-04-2025 9:04 AM Read
Subject Placement offer details POD-001141 has been updated for request ERQ-001133 Placement offer details POD-001141 has been updated for request ERQ-001143 Your Placement Request ERQ-001143 is approved Placement Request ERQ-001145 has been withdrawn	Date created Status 09-04-2025 9:05 AM Read 09-04-2025 9:04 AM Read 09-04-2025 9:04 AM Read 09-04-2025 9:04 AM Read 09-04-2025 9:04 AM Unread



How to select accounts, view notifications, manage user access, facilities and clinical areas

View notifications

View all takes you to the full list of notifications.

The status column tells you whether the notification has already been read.

NOTE: If there are multiple people in your organisation with an account, the status will show as 'read' if another person has read the notification. If you have a parent organisation, all notifications for your organisation will be visible. The newest notifications appear at the top of the list.

To view a notification either click on the subject line or click on the _____ button and click View

Subject Placement offer details POD-001141 has been updated for request ERQ-001133	Date created 🔸	Status Read	~
Placement offer details POD-001141 has been updated for request ERQ-001143	09-04-2025 9:04 AM	Read	View
Your Placement Request ERQ-001143 is approved	09-04-2025 9:04 AM	Read	~
Placement Request ERQ-001145 has been withdrawn	01-04-2025 9:27 AM	Unread	~
Clinical area is updated by Health NZ Bay of Plenty UAT for placement request ERQ-001089	20-02-2025 3:43 PM	Read	~
Clinical area is updated by Health NZ Bay of Plenty UAT for placement request ERQ-001138	20-02-2025 3:42 PM	Unread	~
Clinical area is updated by Health NZ Bay of Plenty UAT for placement request ERQ-001141	20-02-2025 3:42 PM	Unread	~
Clinical area is updated by Health NZ Bay of Plenty UAT for placement request ERQ-001139	20-02-2025 3:42 PM	Unread	~
Clinical area is updated by Health NZ Bay of Plenty UAT for placement request ERQ-001126	20-02-2025 3:42 PM	Unread	~
Clinical area is updated by Health NZ Lakes UAT for placement request ERQ-001117	20-02-2025 3:38 PM	Unread	~
Clinical area is updated by Health NZ Lakes UAT for placement request ERQ-001116	20-02-2025 3:38 PM	Unread	~
Your Placement Request ERQ-001140 is declined	19-02-2025 11:24 AM	Unread	~
Placement offer SPO-001115 is updated	18-02-2025 1:53 PM	Read	~
Placement offer SPO-001115 is updated	18-02-2025 1:53 PM	Read	~



How to select accounts, view notifications, manage user access, facilities and clinical areas

View notifications

When you click into a notification, more information is provided.

When you have finished viewing a notification, click **Return** to go back to the main list.

me / Notifications / Notification details		
Notification details		
Subject		
Your Placement Request ERQ-001143 is approved		
Date created		
09-04-2025 9:04 AM		
Description		
This placement request with ERQ-001143 has been approve	ŧ	
		Return



Manage access by adding and removing users

You can view and manage users in your organisation by inviting and removing users associated with the Health Provider account (Administrator portal role only).

> To view users, click on the **Settings** tab and click **Manage access**

Home	Settings
Home	
	Select account
	Manage access
Welcome to the Student Placement Coordination T	OO Manage tacilities
	Manage clinical areas
This nationwide digital coordination tool aims to enable more effective planning, coordination and	d visibility of student placements across health setti
Zealand.	

> To invite a new user, click **Invite a user**

Home / Manage acce	SS				
Account Sur	n NZ Waitaha Canterbu	ry UAT			
Manage acc	CESS Iministrator can invite c	and remove staff me	embers in their organisation, as we	ell as edit their portal roles.	
·			-		Invite a user
Name	Portal role 🛧	Job title	Email	Phone	Edit Remove
Mark Vanderklei	Administrator - Health Portal	Admin 2	mark.vanderklei@tewhatu	Jora.govt.nz 044444444	~

You will be taken to the **Add user** page. Fill in the details specified to add a user.



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage access by adding and removing users

Fields followed by a * (star) are required.

- To select a user's role in the Health Portal, select from the different options under Portal role
- The different roles are Administrator; Coordinator; and Read-only (See Glossary for explanations)
- Once you have completed filling in all fields, click Invite user



Read only is not currently an available portal role. Please select Administrator or Coordinator.

dd User		
Given name(s) *		
Family name *		
Portal role *		
Administrator - Health Portal		
Job title		
Email address *]
Phone number		
Provide a telephone number		

Manage access by adding and removing users

The following pop-up message will be displayed, click OK to confirm. You will return to the Manage access page



Note:

- If you click **Cancel**, you will return to the Add User page and the invitation won't be sent.
- You will only be able to view the new user in the Manage access page once they have accepted the invitation and set up their account.



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage access by adding and removing users

To remove a	a user, click or	n the 🛛 🗸	button and click Rem	ove	
Home / Manage access	S				
Account sur	NT Lakes UAT				
Manage acc	cess				
A health provider adn	ninistrator can invite an	d remove staff memb	ers in their organisation, as well as edit tl	heir portal roles.	Invite a user
Name	Portal role 🛧	Job title	Email	Phone	
Sascha Bailey	Administrator - Health Portal		Sascha.Bailey@TeWhatuOra.govt.nz	4444444	
Mark Farrer	Administrator - Health Portal		mark.farrer@tewhatuora.govt.nz	04 444 4444	~
Keira Chadwick	Administrator - Health Portal	TEST	iam235@nyu.edu		Edit Remove

The following pop-up message will be displayed, click **Remove user** to confirm. You will return to the **Manage access** page.





Manage facilities by adding, editing and removing facilities

Creating a facility

A facility is where your organisation provides health services (e.g. a hospital, community pharmacy or out-patient clinic). There could be many facilities within a parent organisation (account).

With Health NZ as an example, the parent account for Waitematā would be Health NZ Waitematā and the facilities would be North Shore Hospital and Waitakere Hospital.

Parent Account:	Facilities:
Health NZ Waitematā	North Shore Hospital
	Waitakere Hospital

With Southern Cross as an example, the parent account would be Southern Cross Healthcare and some of the facilities would be Southern Cross North Harbour Hospital and Southern Cross Auckland Surgical Centre.

Parent Account:	Facilities:
Southern Cross Healthcare	Southern Cross North Harbour Hospital
	Southern Cross Auckland Surgical Centre



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage facilities by adding, editing and removing facilities

> To view facilities, click on the **Settings** tab and click **Manage facilities**



> To add a new facility, click Add a facility

Account summary			
Account Name: Health NZ Waikato UAT			
Manage facilities			
Your facilities are where your organis	ation provides health services (e.g. a hos	ital community pharmacy or out-patient (linic) A facility may contain one or
more clinical area (e.g. an Oncology)	Ward or Physiotherapy Department) . Plac	ment offers can be created later against th	Add a facility
more clinical area (e.g. an Oncology 1 Facility name	Nard or Physiotherapy Department) . Plac	ment offers can be created later against the Physical address	Add a facility
more clinical area (e.g. an Oncology 1 Facility name There are no records to display.	Ward or Physiotherapy Department) . Plac	Physical address	Add a facility
more clinical area (e.g. an Oncology Facility name There are no records to display.	Ward or Physiotherapy Department) . Plac	Physical address	Add a facility



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage facilities by adding, editing and removing facilities

The following pop-up form will be displayed. Fill in the details specified to add a facility.

- Fields that are followed by a * (star) are required. You will not be able to submit an added facility if you do not enter required details.
- Some selections will be drop-down menus, such as Region.
- > Please note that as you make selections, more options may become available.

Account name	
Health NZ Waikato UAT	
Do you have an existing H	PI facility? *
Select	·
Physical Address	
Street 1	
[
Street 2	
Street 3	
[
Town/City	
Town/City	



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage facilities by adding, editing and removing facilities

Select No, when you come to Do you have an existing HPI facility? if it is not already selected.

Details
Account name
Multiplefac Organisation
Do you have an existing HPI facility? *
Select v
Select
No

- Complete your facility details including address and Health NZ region (view map <u>HERE</u>)
- > Facility type provides a list to select from.

[
Facility type		
Physical Addres	S	
Street 1		
Street 2		
Street 3		
Town/City		
ZIP/Post Code		



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage facilities by adding, editing and removing facilities

> When all facility details have been entered, click **Submit** at the bottom of the form.

Region	
Te Waipounamu	
Submit	

- To edit and update details for a facility, click the _____ button next to the facility and click Edit
- > Once all updates are complete, click **Submit** at the bottom of the form.

ome / Manage facilities			
Account summary Account Name: Health NZ Te Toka Tumai Auck	land UAT		
Manage facilities			
		a second s	
Your facilities are where your organisation more clinical area (e.g. an Oncology Ward o. Facility name	provides health services (e.g. a hospita r Physiotherapy Department) . Placem Facility type	al, community pharmacy or out-patient clinic). A fa ent offers can be created later against these clinic Physical address	cility may contain one or al areas. Add a facility



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage facilities by adding, editing and removing facilities

- > To remove a facility, click on the velocity button next to the facility and click **Remove**
- Remove will only be available as an option when the facility does not have a clinical area linked to it.
- You can see how many clinical areas are linked to a facility in the Number of clinical areas column.

Home / Manage facilities				
Account summar	y			
Account Name: Health NZ Lakes UA	т			
Manage facilities				
Your facilities are where your org contain one or more clinical arec clinical areas.	anisation provides health services (1 (e.g. an Oncology Ward or Physioth	e.g. a hospital, community pharmacy or a nerapy Department). Placement offers ca	out-patient clinic). A fa In be created later aga	cility may inst these
A facility cannot be removed whe facility they are linked to.	en a clinical area is linked to it. To re	move a facility, the linked clinical area(s)	need to be updated by	y changing the
				Add a facility
Facility name	Facility type	Address	Number of clinical areas	
Health NZ Lakes UAT Testing Clin	cSB	Corner Arawa Street and Pukeroa Road Rotorua 3046	10	·
Health NZ Lakes UAT Testing Clin	cSB2	Corner Arawa Street and Pukeroa Road Rotorua 3023	1	~

A facility cannot be removed when a clinical area is linked to it. To remove a facility, the linked clinical area(s) need to be updated by changing the facility they are linked to.
 For more information, see the managing clinical areas section of this guide.



Manage facilities by adding, editing and removing facilities

When remove has been selected, the following pop-up message will display. Click Remove to confirm.



When a facility has successfully been removed, you will see the following confirmation message.

e Whatu Ora	Coordination Tool
Home	Planning · Liaise and match · Confirmed placements · Dashboard · Settings · Jean-Michel Burgess
Home / M	Aanage facilities
The location	has been successfully removed from the Student Placement System 🛛 🗙
Accou	nt summary
Account I	Name: Multiplefac Organisation
Mana	ge facilities
Mana Your fac may con against	ge facilities :ilities are where your organisation provides health services (e.g. a hospital, community pharmacy or out-patient clinic). A facility ntain one or more clinical area (e.g. an Oncology Ward or Physiotherapy Department). Placement offers can be created later these clinical areas.



Manage clinical areas by adding, editing and removing clinical areas

Creating a clinical area

A clinical area refers to the setting at which a student placement can occur. This could be either a physical space, team or person. When setting up a clinical area, you will be determining the name and corresponding descriptor.

As an example, for a clinical area that would host Anaesthetic Technician trainees, the name could be Operating Theatre and the descriptor could be circulating speciality / elective and acute surgery etc. The Post Anaesthetic Care Unit (PACU) is another clinical area example and depending on your service the descriptor could include elective post-operative patients from orthopaedics, plastics, general, gynaecology and ENT scopes etc.



Manage clinical areas by adding, editing and removing clinical areas

> To view clinical areas, click on the Settings tab and click Manage clinical areas



> To add a new clinical area, click Add a clinical area





How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage clinical areas by adding, editing and removing clinical areas

- > You will be taken to the **Create a clinical area** page. Fill in the details specified.
- Fields that are followed by a * (star) are required. You will not be able to submit the form if you do not enter required details.
- Some selections will be drop-down menus.

United Area Datable			
linical Area Details			
Account			
Health N2 le loka lumai Auc	cand UAI		
Facility			
Select			
Clinical area type			
Select			
Clinical area name *			
L			
Clinical area descriptor			
Describe the services provid	ed in a few words e.g. renal inpatient services		
Primary contact *			
Primary contact *			
Primary contact *			
Primary contact * Select Services at this location sup	port significant numbers of people in the foll	wing communities	
Primary contact • Select Services at this location sup Māori	port significant numbers of people in the foll	wing communities	
Primary contact * Select Services at this location sup Māori ® No O Yes	port significant numbers of people in the foll	wing communities	
Primary contact * Select Services at this location sup Māori * No O Yes Pacific	port significant numbers of people in the foll	wing communities	
Primary contact * Select Services at this location sup Mãori * No O Yes Pacific * No O Yes	port significant numbers of people in the foll	wing communities	
Primary contact * Select Services at this location sug Măori NO Yes Pacific NO Yes	port significant numbers of people in the fol	wing communities	
Primary contact * Select Services at this location sug Māori NO Yes Pacific NO Yes hysical address	port significant numbers of people in the fol	wing communities	
Primary contact * Select Services at this location sup Măori NO Ves Pacific NO Yes hysical address Street 1	port significant numbers of people in the foll	wing communities	



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage clinical areas by adding, editing and removing clinical areas

> When all details have been entered, click **Submit** at the bottom of the page.

Town/City		
Норе		
Region	 	
Te waipounaniu		



Manage clinical areas by adding, editing and removing clinical areas

The page will reload and become **Edit a clinical area**. You can now add the profession(s) that placements are available for in/with the clinical area.

> To add a profession(s), click Add a profession

Profession(s)			
If you need to remove a p	rofession, please contact the He	ealth Placement Hub.	
			Add a profession

Select a profession from the list, then click Add profession

Complete this process for each profession to be added.

Profession *	
Select Addiction Practitioners Anaesthetic Technicians Audiology Dietitians Medical Imaging Technology Medical Laboratory Scientists Midwifery Nursing Occupational Therapy Oral Health Paramedicine Pharmacy Physiotherapy Radiation Therapy Social Work	
Speech Language Therapy	Profession *
If you need to remove a profession, please contact the Health Placement Hub	Dietitians Add profession



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage clinical areas by adding, editing and removing clinical areas

- To change the primary contact, click on the box where the existing primary contact is and select the new primary contact.
- > Only contacts linked to the Health Provider account will be available to select from.

-					
Bridget Jones					
Polated Contacts					
Related Contacts					
					Add cont
Contact	Portal role 🛧	Job title	Email	Phone	
Contact	Portal role 🛧	Job title	Email	Phone	

To add additional contacts to clinical area, under Contact details, select Add contact

ontact details					
Primary Contact *					
Select					
Related Contacts					
					Add cont
Contact	Portal role 🛧	Job title	Email	Phone	

You will be taken to a pop-up form.



Manage clinical areas by adding, editing and removing clinical areas

- To search a contact, type a name in the search box, then click the magnifying glass or select from the available list of contacts.
- > To add the contact, click on the checkbox by the name, then click Add

			× Search Q
~	Contact 🛧	Job Role	Portal Role
	Keira Chadwick	TEST	Administrator - Health Portal
	Mark Farrer		Administrator - Health Portal
	Sascha Bailey		Administrator - Health Portal
	UAT-50 (HP) tbd	UAT-Test email	Administrator - Health Portal
	UAT-52 (HP) tbd		Administrator - Health Portal
	Willem van den Bosch		Coordinator - Health Portal
Sele	ected contacts		*
		Add	Cancel

The added contact will appear in the Related contacts list.

ontact details					
Primary Contact *					
Sascha Bailey					
Related Contacts					Add cont
Contact	Portal role 🛧	Job title	Email	Phone	
Mark Farrer	Administrator - Healt Portal	h	mark.farrer@tewhatu	lora.govt.nz 04 444 4444	~



How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage clinical areas by adding, editing and removing clinical areas

To remove a related contact, click on the v button and select Remove

Primary Contact *					
Wendy McKinstry					
Contact	Portal role 🛧	Job title	Email	Phone	Add contact
	Administrator - Health	Placement Supervisor	nikki.carmichael@tewhatuora.govt.nz	04444444	

When remove has been selected, the following pop-up message will display. Click Remove to confirm.





How to select accounts, view notifications, manage user access, facilities and clinical areas

Manage clinical areas by adding, editing and removing clinical areas

A confirmation message will be displayed at the top of the Edit a clinical area page

Health New Zealand Student Placement Te Whatu Ora Coordination Tool
Home Planning • Liaise and match • Confirmed placements • Dashboard • Settings •
Home / Manage clinical areas / Edit clinical area
Contact has successfully been removed.
Edit a clinical area
Clinical area details

When all details in the form have been entered/updated, click **Update** at the bottom of the page. You will then return to the **Manage clinical areas** page.

Wellington Central	
Region	
Central	
	Update



Key terms

Account	This is the mater account or in some instances where there are multiple facilities, a parent account. e.g. Health NZ Waikato and Southern Cross Healthcare
Account type	There are two account types: Education Provider Account and Health Provider Account.
Clinical area	A clinical area refers to the setting at which a student placement can occur. This could be either a physical space, team or person. Placement offers must be created against a clinical area.
Clinical area name	A specific type of placement setting. This could be a place e.g. a specific ward, or a team/person.
Clinical area descriptor	Describes the services provided in a few words e.g. renal inpatient services. This may repeat the clinical area name.
Clinical area type	Location, clinical or team
Facility	Facilities are where an organisation provides health services (e.g. a hospital, community pharmacy or out-patient clinic). A facility may contain one or more clinical area (e.g. an Oncology Ward or Physiotherapy Department). Placement offers can be created against these clinical areas.
Facility name	this is the name the facility is known by. e.g. Waikato Hospital (linked to Health NZ Waikato and Southern Cross Rotorua Hospital linked to Southern Cross healthcare.
Facility type	When creating a facility, there will be a list to selection from. As an example: Hospital – Public and Hospital - Private



Key terms

Profession	This is the area of health the person is training in / that clinical placements are being provided for			
	 A non-comprehensive list of Allied, Scientific and Technical Health education programmes that will be included are: Anaesthetic Technicians, Addiction Practitioners, Audiologists, Dieticians, Medical Imaging Technologists, Medical Laboratory Scientists, Occupational Therapists, Oral Health Therapists, Paramedics, Pharmacists, Physiotherapists, Radiation Therapists, Social workers and Speech Language Therapists. 			
Portal role	Every user is assigned one of the following portal roles. This determines your level of access within the specified portal.			
	Administrator: Every organisation will need an Administrator. The Administrator can do everything the other roles can do. In addition, the Administrator can set up their organisation details and invite colleagues.			
	Coordinator: a Coordinator can view, create, manage and remove placement details. They can also view the dashboard and use it for planning placements and ask the Hub to do functions on their behalf.			
	Read Only: There will be read only access available in future iterations of the tool.			
	Note: your portal role is not the same as your job title.			
Region	The tool uses the four Health NZ regions (Northern, Te Manawa Taki, Central, Te Waipounamu)			