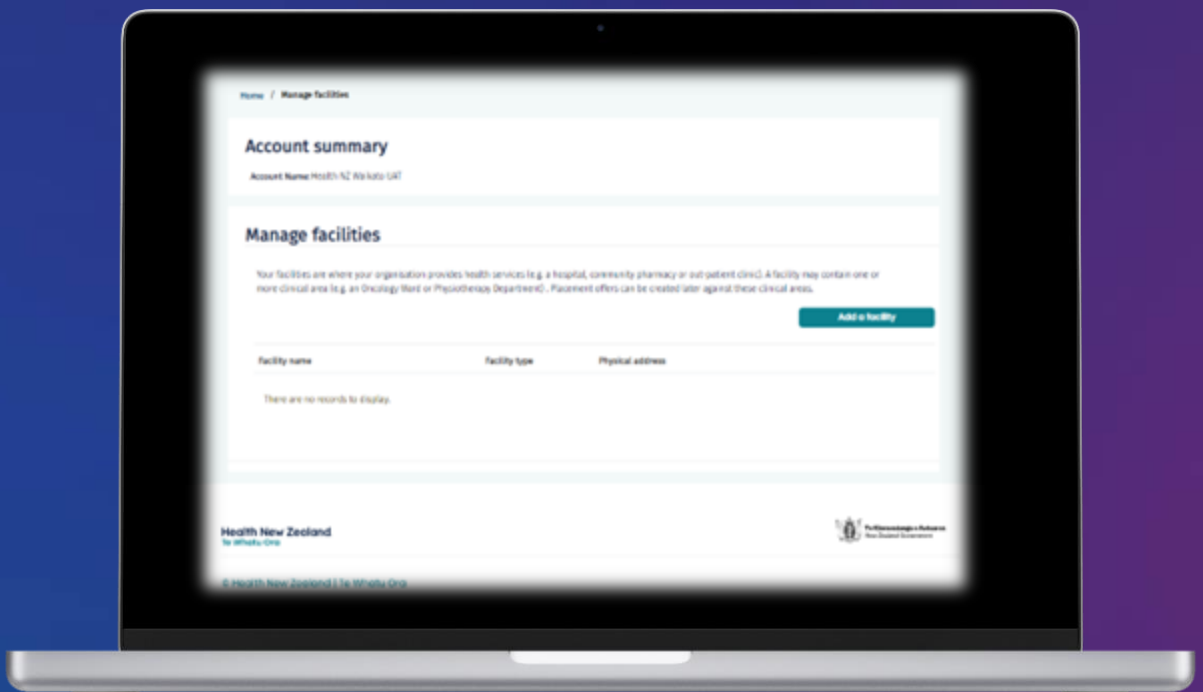


# How to manage accounts, user access, and facilities



# 1

## Managing accounts, users and facilities

View, Add, Edit, and Remove

# How to manage accounts, user access, and facilities

- Settings / Select account
- Settings / Manage access
- Settings / Manage facilities

(A definition of the terms used in this guide can be found in the [Key terms](#) at the end of this document)

The screenshot shows the top navigation bar of the Student Placement Coordination Tool. The logo for Health New Zealand (Te Whatu Ora) is on the left. The navigation menu includes: Home, Planning, Liaise and match, Confirmed placements, Dashboard, Settings, and Jean-Michel Burgess. The 'Settings' menu is open, showing options: Settings, Select account, Manage access, Manage facilities, and Manage clinical areas. The main content area displays a welcome message and a 'Portal overview' section with a 'Plan capacity' card. The card includes an icon of a wrench and a magnifying glass, and text describing how to view indicative placement requirements and create placement offers.

### From here, you can:

- View and select your Health Provider accounts
- Manage access for your organisation by adding and removing users
- Manage facilities by adding, editing or removing facilities

# 1

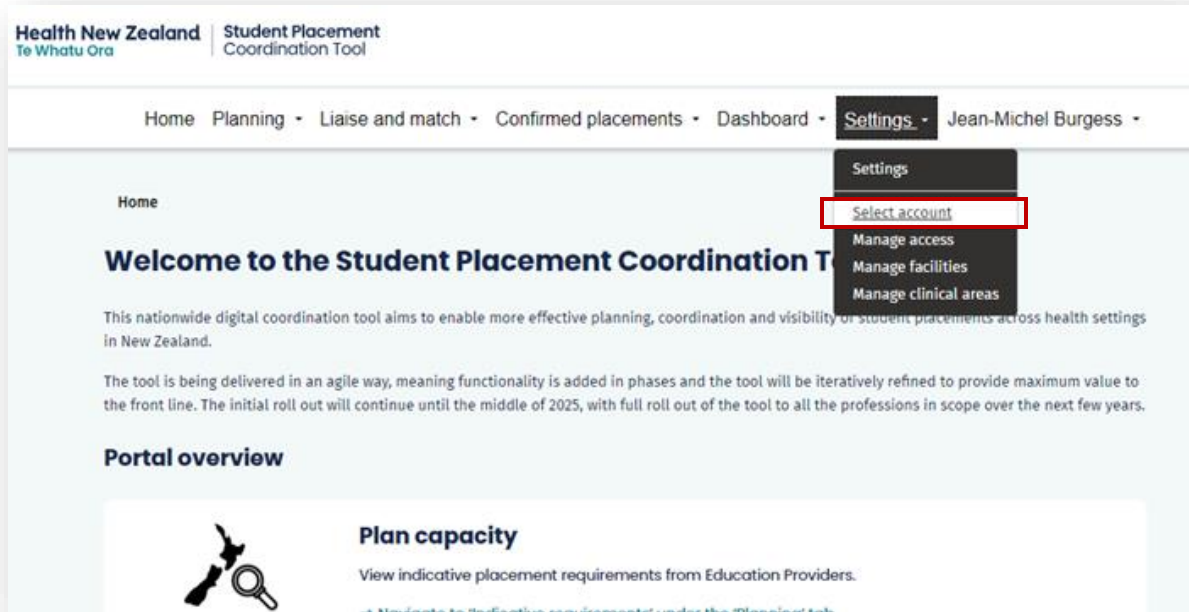
## Managing accounts, users and facilities

View, Add, Edit, and Remove

# View and select your Health Providers accounts

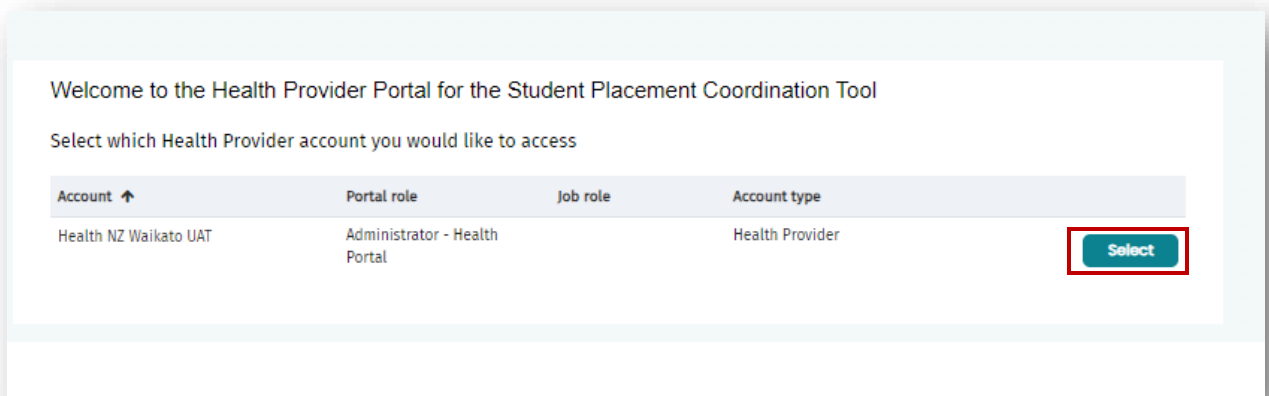
You can view and select your Health Provider accounts

- To view and select your account, click **Select account**



The screenshot shows the top navigation bar of the Student Placement Coordination Tool. The user is logged in as Jean-Michel Burgess. The 'Settings' dropdown menu is open, and the 'Select account' option is highlighted with a red box. The main content area displays a welcome message and a 'Plan capacity' section with a magnifying glass icon.

- To select a Health Provider account, click **“Select”** next the account you want to access.



The screenshot shows the Health Provider Portal interface. It displays a table of accounts with columns for Account, Portal role, Job role, and Account type. The 'Select' button next to the 'Health NZ Waikato UAT' account is highlighted with a red box.

Account ↑	Portal role	Job role	Account type
Health NZ Waikato UAT	Administrator - Health Portal		Health Provider

# 1

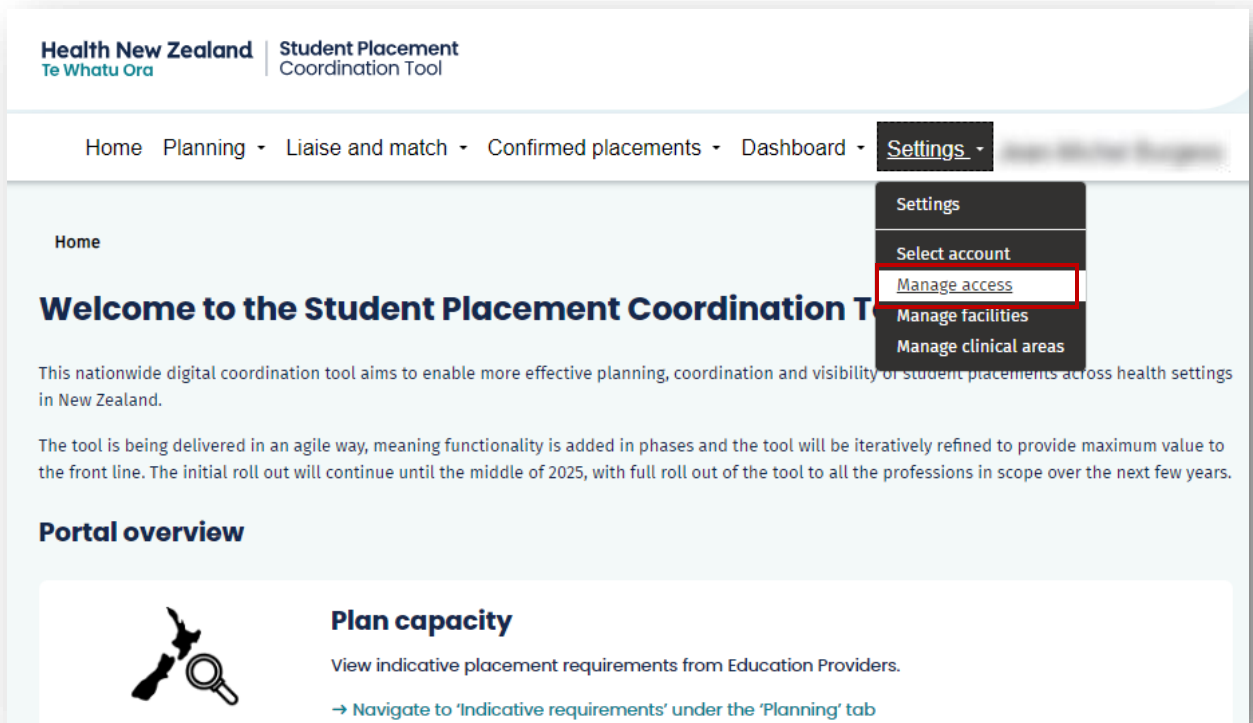
## Managing accounts, users and facilities

View, Add, Edit, and Remove

## Manage access by adding and removing users

You can view and manage users in your organisation by inviting and removing users associated with the active Health Provider account

➤ To view users, navigate to Settings and click **Manage access**



The screenshot displays the user interface of the Student Placement Coordination Tool. At the top left, the logo for Health New Zealand (Te Whatu Ora) is visible alongside the text 'Student Placement Coordination Tool'. A navigation bar contains links for Home, Planning, Liaise and match, Confirmed placements, Dashboard, and Settings. The 'Settings' menu is open, showing options for Settings, Select account, Manage access (highlighted with a red box), Manage facilities, and Manage clinical areas. The main content area features a 'Home' link, a welcome message, and a 'Portal overview' section with a 'Plan capacity' card. The card includes an icon of a map of New Zealand with a magnifying glass and text describing placement requirements from Education Providers, with a navigation instruction to 'Indicative requirements' under the 'Planning' tab.

Health New Zealand | Student Placement  
Te Whatu Ora | Coordination Tool

Home Planning - Liaise and match - Confirmed placements - Dashboard - **Settings** - [View My Profile](#)


Home

### Welcome to the Student Placement Coordination Tool

This nationwide digital coordination tool aims to enable more effective planning, coordination and visibility of student placements across health settings in New Zealand.

The tool is being delivered in an agile way, meaning functionality is added in phases and the tool will be iteratively refined to provide maximum value to the front 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 the next few years.

#### Portal overview



#### Plan capacity

View indicative placement requirements from Education Providers.

→ Navigate to 'Indicative requirements' under the 'Planning' tab

## 2

### Managing accounts, users and facilities

View, Add, Edit, and Remove

## Manage access by adding and removing users

- To invite a new user, click on **Invite a user**

Home / Manage access

### Account summary

Account Name: Health NZ Waikato UAT

### Manage access

A health provider administrator can invite and remove staff members in their organisation, as well as edit their contact details and roles.

[Invite a user](#)

Name	Portal role ↑	Job title	Email	Phone
Nikki Carmichael	Administrator - Health Portal		nikki.carmichael@tewhatauora.govt.nz	0444444444

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

# 3

## Managing accounts, users and facilities

View, Add, Edit, and Remove

# Manage access by adding and removing users

Fields that are 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)

Home / Manage access / Add user

### Add User

Given name(s) \*

Family name \*

Portal role \*

Job title

Email address \*

Phone number

[Invite user](#)

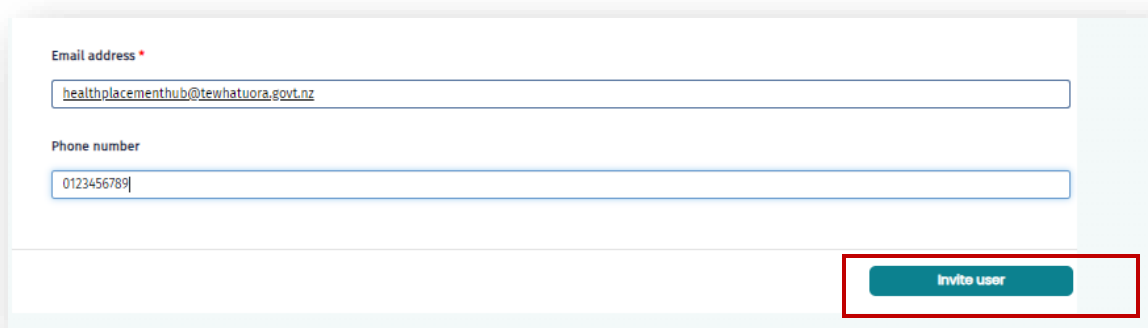
# 4

## Managing accounts, users and facilities

View, Add, Edit, and Remove

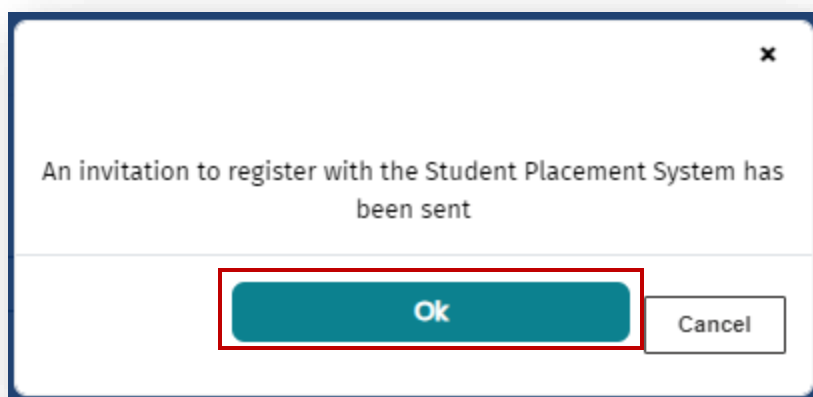
### Manage access by adding and removing users

- Once you have completed filling in all the required fields, click **Invite user**



The screenshot shows a form with two input fields. The first field is labeled "Email address" and contains the text "healthplacementhub@tewhatuora.govt.nz". The second field is labeled "Phone number" and contains the text "0123456789". A red box highlights the "Invite user" button at the bottom right of the form.

- 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
- 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

# 5

## Managing accounts, users and facilities View, Add, Edit, and Remove

### Manage access by adding and removing users

➤ To remove a user, click on  and select **Remove**

#### Account summary

Account Name: Health NZ Waikato UAT

#### Manage access

A health provider administrator can invite and remove staff members in their organisation, as well as edit their contact details and roles.

[Invite a user](#)

Name	Portal role ↑	Job title	Email	Phone	
Nikki Carmichael	Administrator - Health Portal		nikki.carmichael@tewhatuora.govt.nz	044444444	
Sascha Bailey	Administrator - Health Portal	Charge Anaesthetic Technician	Sascha.Bailey@TeWhatuOra.govt.nz	44444444	<input type="button" value="v"/>
Ben Wemyss	Coordinator - Health Portal	Placement coordinator	ben.wemyss@tewhatuora.govt.nz	44444444	<input type="button" value="v"/>



# 1

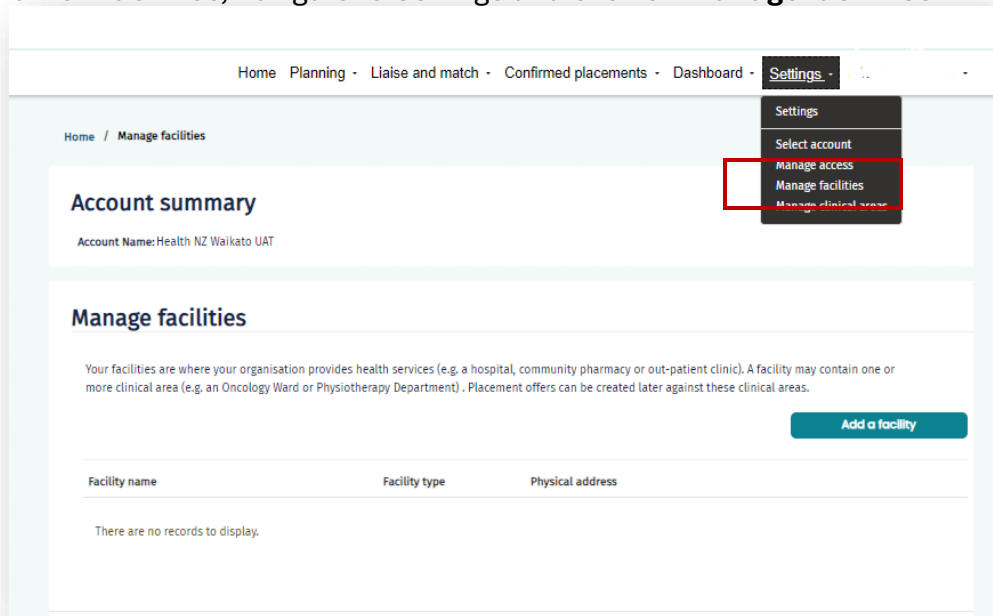
## Managing accounts, users and facilities

View, Add, Edit, and Remove

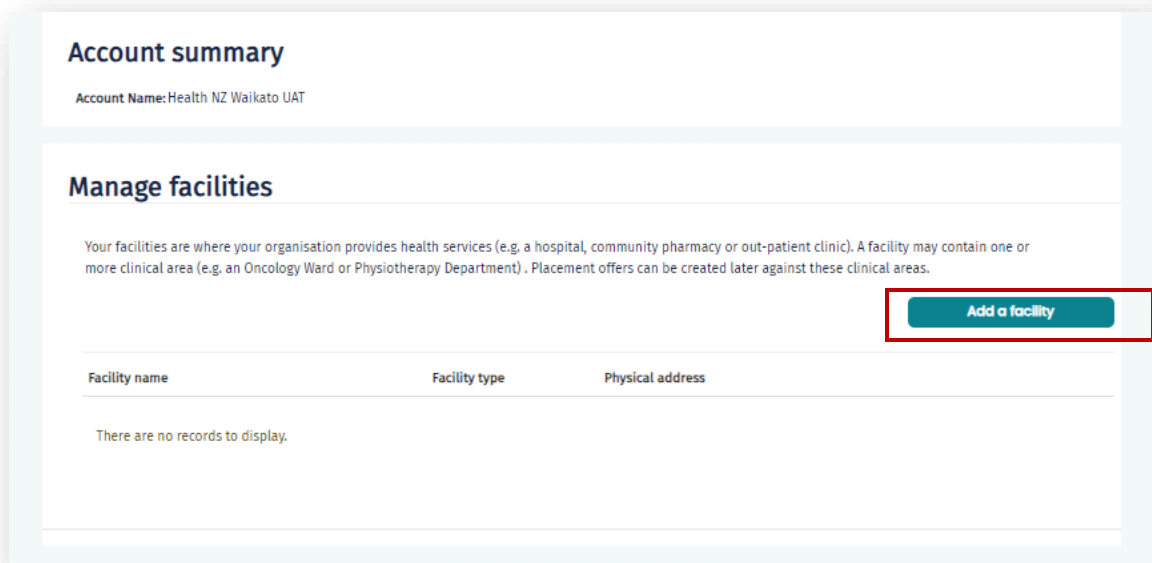
# Manage facilities by adding, editing and removing facilities

You can view, add, edit and remove a facility.

- To view facilities, navigate to Settings and click on **Manage facilities**.



- To add a new facility, click **Add a facility**



## 2

### Managing accounts, users and facilities

View, Add, Edit, and Remove

## 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.

### Details

**Account name**

**Do you have an existing HPI facility? \***

**Physical Address**

**Street 1**

**Street 2**

**Street 3**

**Town/City**

**ZIP/Post Code**

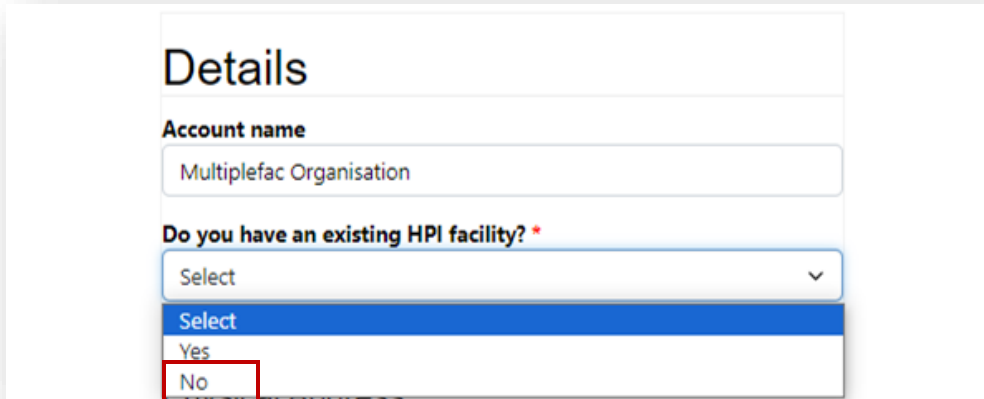
# 3

## Managing accounts, users and facilities

View, Add, Edit, and Remove

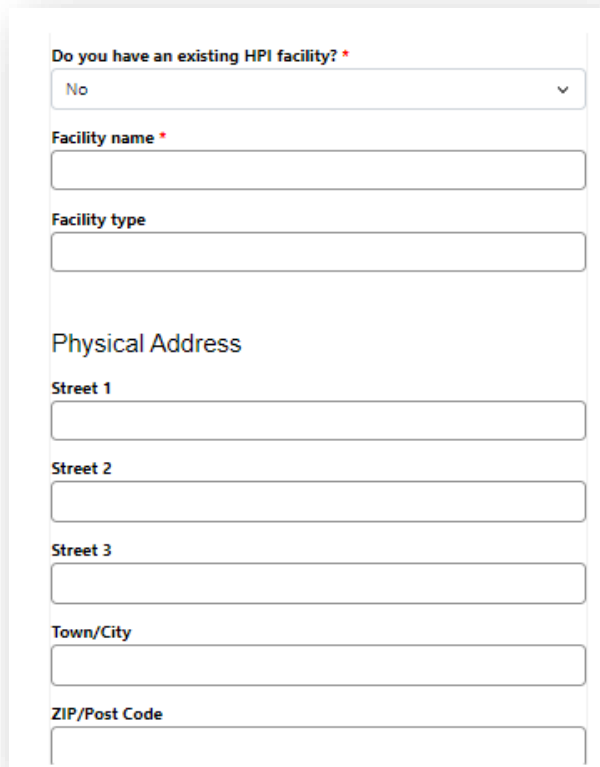
# Manage facilities by adding, editing and removing facilities

➤ Select **No**, when you come to the **Do you have an existing HPI facility?**



The screenshot shows a form titled "Details". The "Account name" field contains "Multiplefac Organisation". Below it is a dropdown menu for "Do you have an existing HPI facility? \*". The dropdown is open, showing options: "Select", "Yes", and "No". The "No" option is highlighted with a red box.

- Complete your facility details including address and Health New Zealand region. Facilities are where an organisation provides health services.
- Examples of **Facility type** are a hospital, community pharmacy or out-patient clinic.



The screenshot shows a form for adding a facility. The "Do you have an existing HPI facility? \*" dropdown is set to "No". Below it are fields for "Facility name \*", "Facility type", and "Physical Address". The "Physical Address" section includes fields for "Street 1", "Street 2", "Street 3", "Town/City", and "ZIP/Post Code".

# 4


## Managing accounts, users and facilities

View, Add, Edit, and Remove

### Manage facilities by adding, editing and removing facilities

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

A screenshot of a web form. At the top, there is a label 'Region' above a text input field containing 'Te Waipounamu'. Below the input field, a dark grey button with the text 'Submit' is highlighted with a red rectangular border.

- To edit and update details for a facility, click the down-arrow  next to the facility and select **Edit**
- click **Submit** at the bottom of the form

The screenshot shows a web interface for managing facilities. At the top, there is a breadcrumb 'Home / Manage facilities'. Below this is a section titled 'Account summary' with the text 'Account Name: Health NZ Te Toka Tumai Auckland UAT'. The main section is titled 'Manage facilities' and contains a descriptive paragraph: 'Your facilities are where your 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 later against these clinical areas.' To the right of this text is a teal button labeled 'Add a facility'. Below the text is a table with three columns: 'Facility name', 'Facility type', and 'Physical address'. The table contains one row: 'Greenlane Clinical Centre', 'Out-patient facility', and '214 Green Lane West Road Auckland 1051'. To the right of the table, a dropdown menu is open, showing a dark blue button with a white down arrow, and a white box containing the options 'Edit' and 'Remove'. The dropdown menu and its options are highlighted with a red rectangular border.

Facility name	Facility type	Physical address
Greenlane Clinical Centre	Out-patient facility	214 Green Lane West Road Auckland 1051

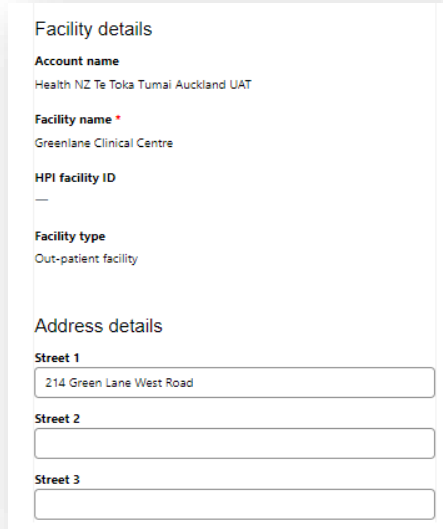
# 5

## Managing accounts, users and facilities

View, Add, Edit, and Remove

# Manage facilities by adding, editing and removing facilities

- Make the changes needed in the Facility details and click **Submit** to update.



Facility details

**Account name**  
Health NZ Te Toka Tumai Auckland UAT

**Facility name \***  
Greenlane Clinical Centre

**HPI facility ID**  
—


**Facility type**  
Out-patient facility

**Address details**

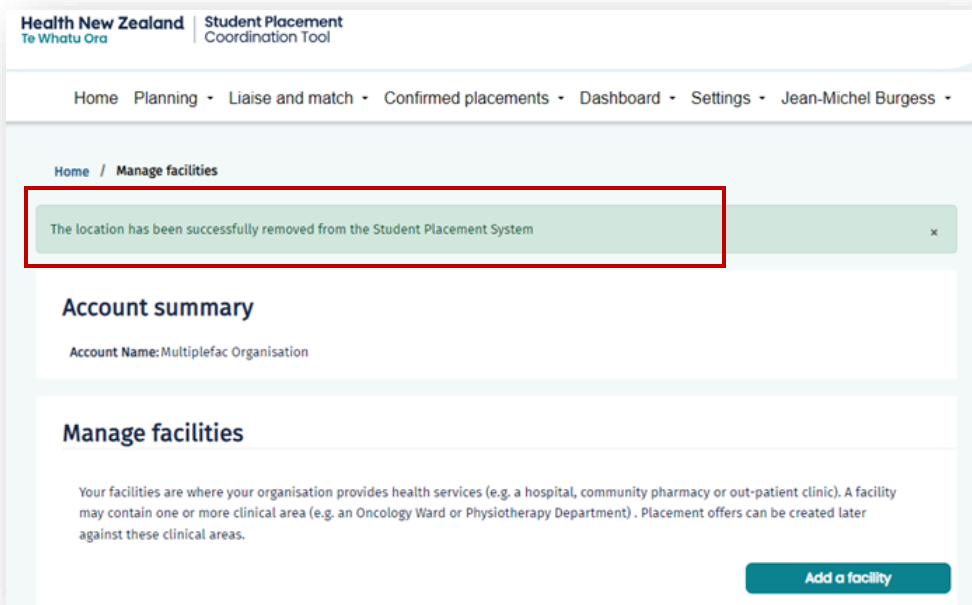
**Street 1**  
214 Green Lane West Road

**Street 2**  
—

**Street 3**  
—

- To remove a facility, click on the down-arrow  next to the facility and select **Remove**

- **Note:** When a facility is removed, you will see the following confirmation message



Health New Zealand | Student Placement  
Te Whatu Ora | Coordination Tool

Home Planning ▾ Liaise and match ▾ Confirmed placements ▾ Dashboard ▾ Settings ▾ Jean-Michel Burgess ▾

Home / Manage facilities

The location has been successfully removed from the Student Placement System x

**Account summary**

Account Name: Multiprefac Organisation

**Manage facilities**

Your facilities are where your 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 later against these clinical areas.

[Add a facility](#)

# 1

## Managing accounts, users and facilities

View, Add, Edit, and Remove

### Key terms

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Definition of terms used in this how-to guide:

Clinical Area Descriptor	A specific type of placement setting. This could be a place e.g. a specific ward, or a team/person.
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.
Offer ID	This number can be entered to view specific expressions of interest.
	The format of this number is <b>SPO-000000</b> (e.g., SPO-001043).
Placement request	The Education Provider can request a number of placement days on a specific Placement Offer detail for consideration by the Health Provider.
Profession	This means the area of health the person will be training in.
	A non-comprehensive list of Allied, Scientific or Technical Health education programmes that will be included are: <ul style="list-style-type: none"><li>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.</li></ul>

## 2

### Managing accounts, users and facilities

View, Add, Edit, and Remove

## Key terms

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Definition of terms used in this how-to guide:

Portal roles	<ul style="list-style-type: none"><li>• Every user is assigned one of the following portal roles. This determines your level of access within the specified portal.</li><li>• <b>Administrator:</b> 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.</li><li>• <b>The Coordinator</b> 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.</li><li>• <b>Read Only:</b> There will be read only access available in future iterations of the tool.</li><li>• Note: your portal role is not the same as your job title.</li></ul>
Region	Specify between the 4 regions (Northern, Te Manawa Taki, Central, Te Waipounamu)