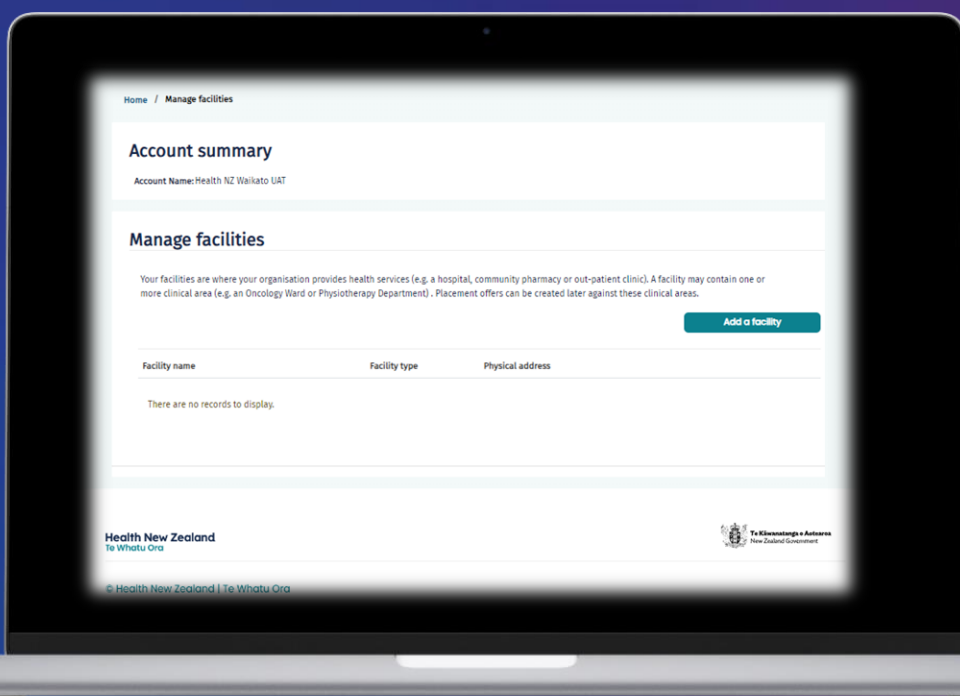# Education Provider account set up guidance

Select accounts and manage user access and programmes

- Settings / Select account
- Settings / Manage access
- Settings / Manage programmes

(A definition of the terms used in this guide can be found in the <u>Key terms</u> at the end of this document)

From here, you can:

- View and select your Education Provider accounts
- Manage access for your organisation by adding and removing users
- Manage programmes by adding or editing programmes

How to select and view your account
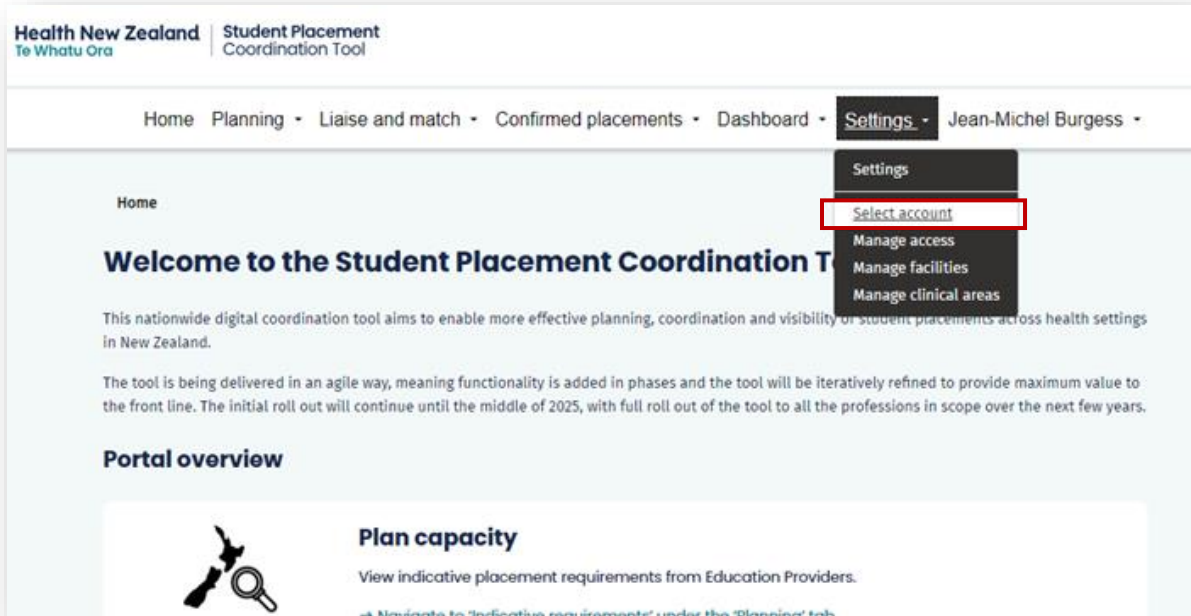
You can view and select your Education Provider account

➤ To view and select your account, navigate to **Settings**, and click **Select account**

➤ To select a Education Provider account, click **Select** next the account you want to access.

How to add and remove users

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

➤ To view users, navigate to **Settings** and click **Manage access**
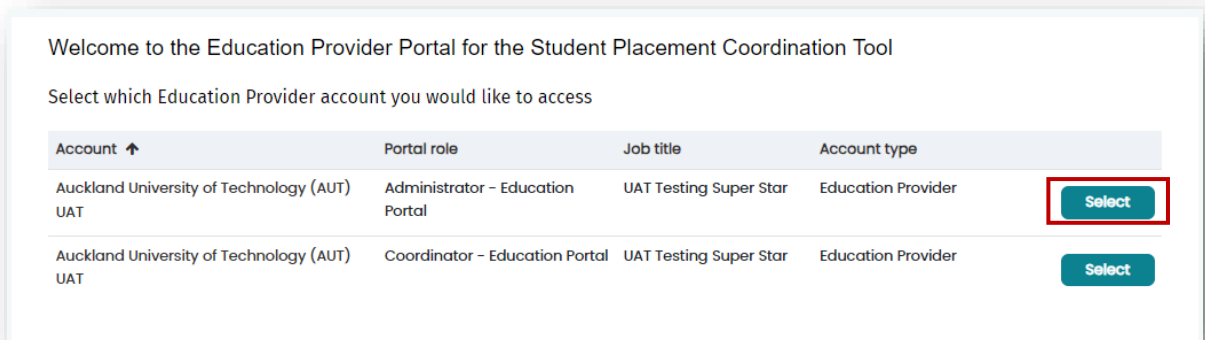
Manage Access
How to Add, Edit and Remove users

How to add and remove users

- To invite a new user, click **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@tewhatuora.govt.nz	044444444

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

How to add and remove users

Fields that are followed by a * (star) are required.

➢ To select a user's role in the Education 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 *

Administrator - Health Portal

Job title

Email address *

Phone number

Provide a telephone number

Invite user

How to add and remove users

➢ Once you have completed filling in all fields, click **Invite user**

➢ The following pop-up message will be displayed, click **OK** to confirm. You will return to the **Manage access** page
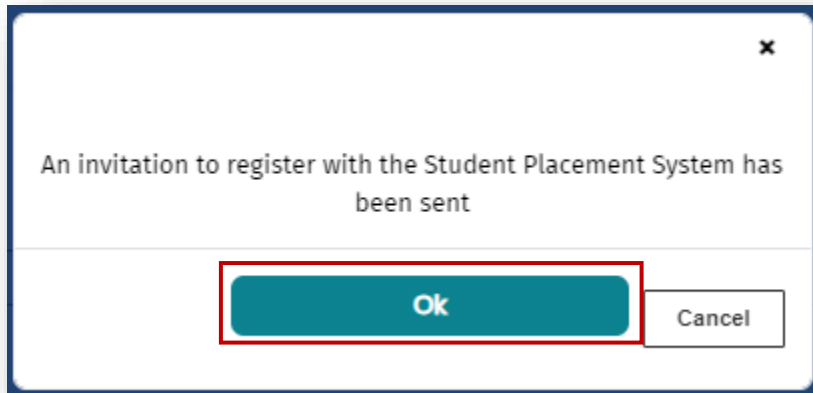
Note:
- *If you **click "Cancel"**, you will return to the Add User page*
- *You will only be able to view the new user in the "Manage access" page once they have accepted the invitation and set up their account*

How to add and remove users

➢ To remove a user, click on [⌄] and select **Remove**

How to create and edit programmes

- Settings / Manage programmes

(Definitions of the terms used in this guide can be found in the Key terms at the end of this document)

You must set up your programmes that will be requiring placements in Health prior to performing other placement related tasks in this tool.

When you go into Settings / Manage programmes, you will be able to see all the programmes that you have created in this tool.

If there are programmes being offered in your organisation that do not appear here or are not correct in this system, you can either create a new programme or edit an existing one from here.

How to add a new programme

Home / Indicative requirements

- To Add a new programme, click on the **New Programme** button

Home / Manage programmes

Manage programmes

New Programme

At this point a form titled **Add a programme** will appear with a combination of pre-filled and empty fields. The requirements for each field are as follows:

Programme Details		
Education Provider	**Account** Auckland University of Technology (AUT) UAT	The account name is your organisation name and will be pre-filled.
Programme name	**Programme name** * Bachelor of Health Science (Perioperative Practice)	The programme name is a free-text field, please adhere to your organisations naming conventions to avoid confusion.
Profession	**Profession** * Anaesthetic Technicians	This means the area of health the person will be training in e.g., physiotherapy.
Primary contact person	**Primary contact person** * Select Select	The primary contact can be changed here if needed
Physical address		
Zip / Postcode	ZIP / Postcode *	This is the post-code of the facility where the programme is being offered. **NOTE: Your post-code is mandatory while the full address is optional**

How to add or remove a placement speciality

While editing a programme, you can add or remove placement specialities as needed

➢ To add placement specialities, click **Add a placement speciality**

Home / Manage programmes / Edit programme

Edit a programme

Programme details

Account

Auckland University of Technology (AUT) UAT

Programme name *

Bachelor of Health Science (Perioperative Practice)

Placement specialities

Profession *

Anaesthetic Technicians

Placement specialities

Add a placement speciality

A box will appear, please click in the box and select an item from the drop-down menu. You can add more than 1 speciality but must do them 1 at a time.

Placement Speciality *

Select

Add speciality
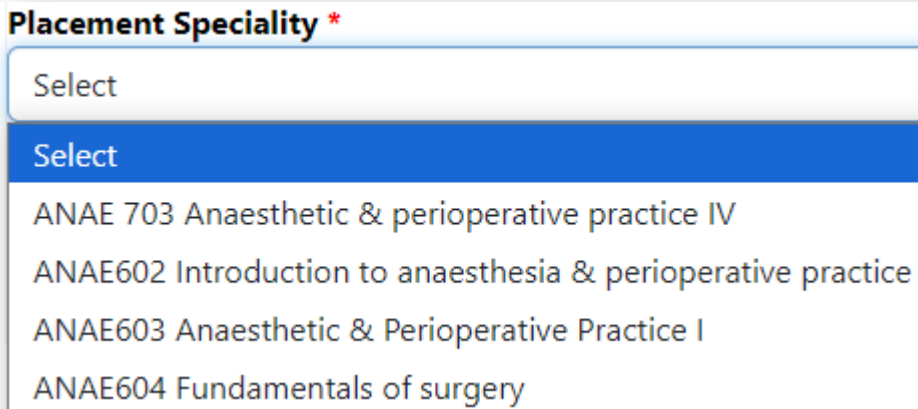
How to add or remove a placement speciality

➢ Select required speciality and press **Add Speciality**

Placement Speciality *

Select

| Select |
| ANAE 703 Anaesthetic & perioperative practice IV |
| ANAE602 Introduction to anaesthesia & perioperative practice |
| ANAE603 Anaesthetic & Perioperative Practice I |
| ANAE604 Fundamentals of surgery |
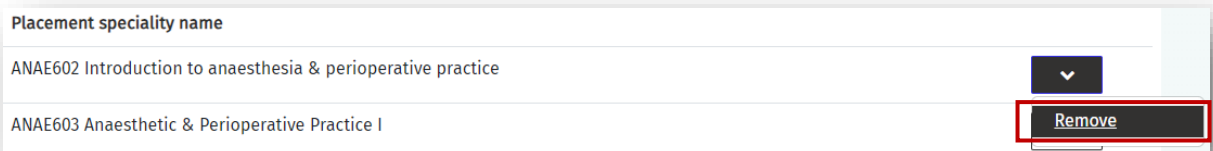
This will take you back to the **Edit a programme** page

If for any reason the speciality added is incorrect, or one of the previous entries is incorrect
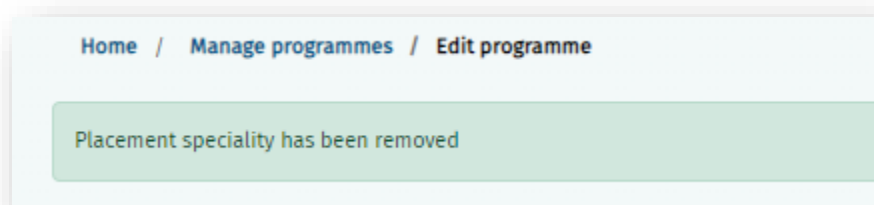
- You can remove that entry by clicking on the down-arrow to the right of the incorrect entry and selecting **Remove**

Placement speciality name	
ANAE602 Introduction to anaesthesia & perioperative practice	⌄
ANAE603 Anaesthetic & Perioperative Practice I	Remove

Once it has been removed, a confirmation pop-up will appear at the top of the **Edit a programme** page

Home / Manage programmes / Edit programme

Placement speciality has been removed

How to edit a programme
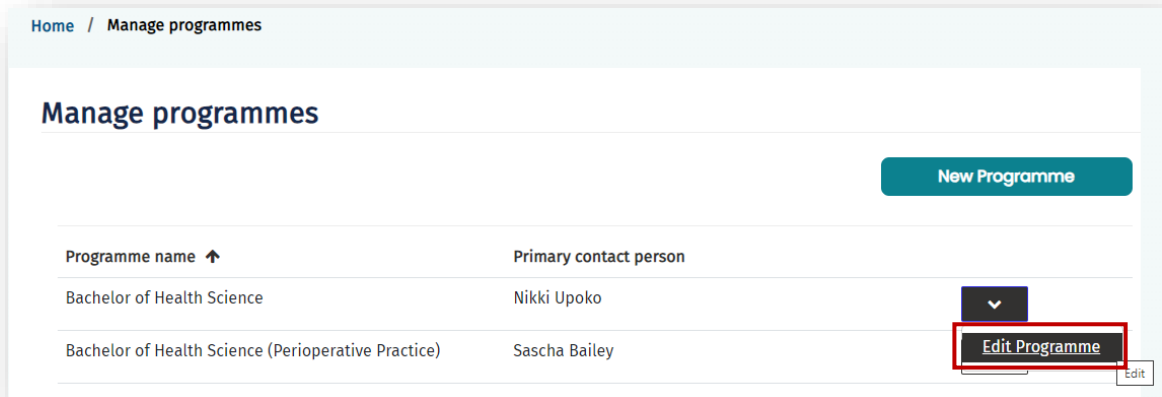
- To edit an existing programme, click on the down-arrow to the right of the item to be changed and select **Edit Programme**

- Alternatively, this page can be reached after you click **Continue** when creating a new programme

The **Edit a programme** page will appear with a combination of pre-filled and empty fields. The requirements for each field are as follows (see next page):

How to edit a programme

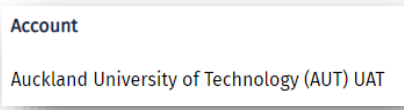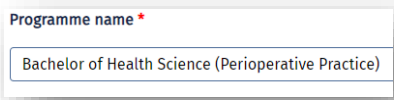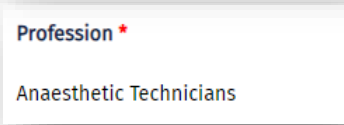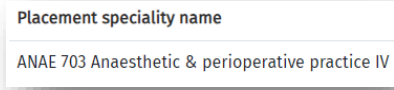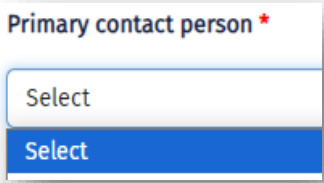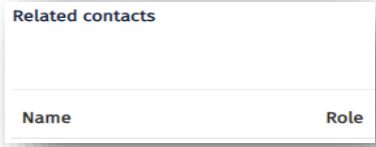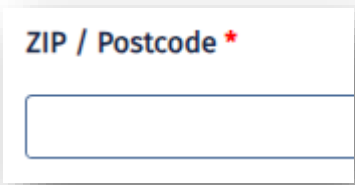| Programme Details		
Education Provider	**Account** Auckland University of Technology (AUT) UAT	The account name is your organisations name and will be pre-filled.
Programme name	**Programme name *** Bachelor of Health Science (Perioperative Practice)	The programme name is a free-text box so please adhere to your organisations naming conventions to avoid confusion.
Profession	**Profession *** Anaesthetic Technicians	This is pre-filled with data from when the programme was initially created in this system
Placement specialities	**Placement speciality name** ANAE 703 Anaesthetic & perioperative practice IV	Describes what type of service is under the profession e.g., acute services or Kaupapa Māori placement. This name may be different between education providers. Any specialities that have been included prior will appear here. You can add additional specialities by clicking on **Add a placement speciality**
Primary contact person	**Primary contact person *** Select Select	The primary contact can be changed here if needed
Related contacts	**Related contacts** Name Role	Additional contacts can be entered here. This will not affect or add additional permissions for use, this is solely so that backup contacts can be included if needed
Physical address		
Zip / Postcode	**ZIP / Postcode ***	This is the post-code of the facility where the programme is being offered. While this is the only required field in the address block, it is expected that the other fields will be completed to avoid confusion should it arise.

- Once completed, click **Update**

Key terms

Definitions of terms used in this how-to guide:

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:
	• 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.
Programme	This is the name of the qualification that requires student placements in health settings e.g. Bachelor of Nursing
Portal roles	• 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.
	• **The 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	Specify between the 4 regions (Northern, Te Manawa Taki, Central, Te Waipounamu)
Speciality	Talks about what type of service is under the profession e.g., acute services or Kaupapa Māori placement. This name may be different between education providers.