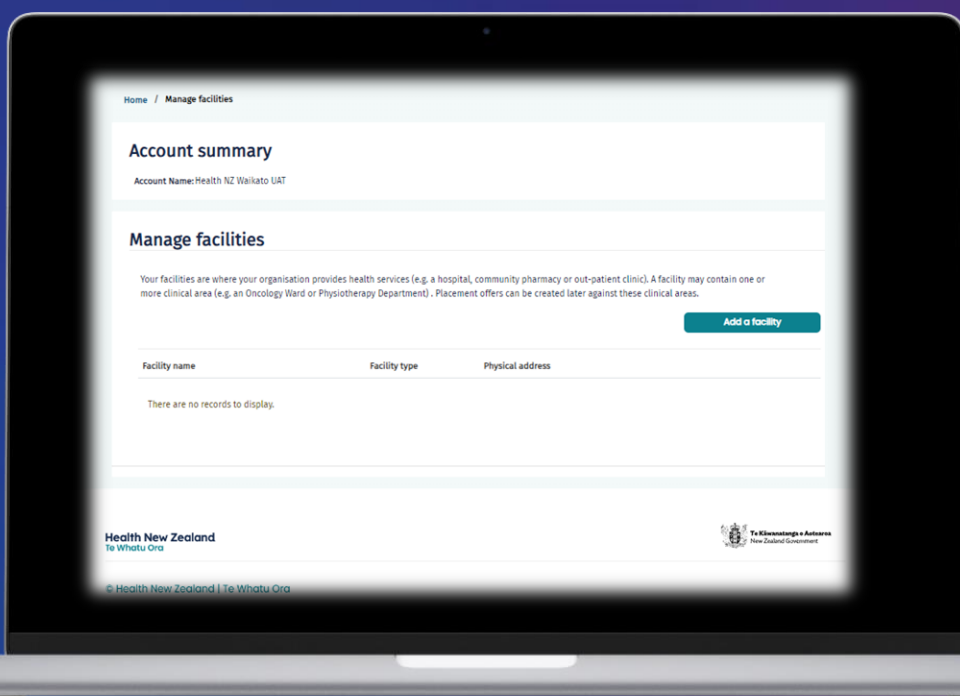


# Education Provider account set up guidance





# 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 [Key terms](#) at the end of this document)

The screenshot shows the 'Student Placement Coordination Tool' interface. At the top left, it says 'Health New Zealand Te Whatu Ora' and 'Student Placement Coordination Tool'. The navigation bar includes 'Home', 'Planning', 'Liaise and match', 'Confirmed placements', 'Dashboard', 'Settings', and 'Sascha Bailey'. A 'Settings' dropdown menu is open, showing options for 'Select account', 'Manage access', and 'Manage programmes'. The main content area has a 'Home' link and a 'Welcome to the Student Placement Coordination Tool' heading. Below this is a paragraph about the tool's purpose and a 'Latest notifications' section with a table of recent events.

Subject	Date created	Status
Your Placement Request ERQ-001089 is approved with modification	16-12-2024 11:47 AM	Read
Your Placement Request ERQ-001120 is approved	12-12-2024 3:23 PM	Unread
Your Placement Request ERQ-001117 is approved	12-12-2024 3:23 PM	Unread
Your Placement Request ERQ-001116 is approved	12-12-2024 3:22 PM	Unread
Your Placement Request ERQ-001115 is approved	12-12-2024 3:22 PM	Unread

## 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

# 1

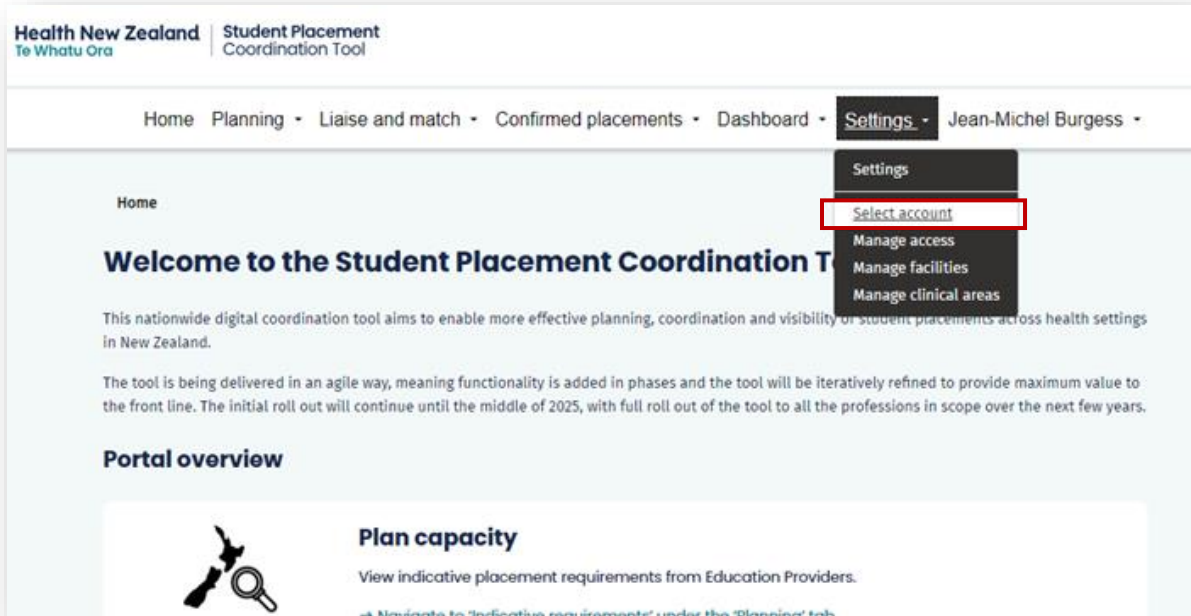
## Education Provider Accounts

How to select your account

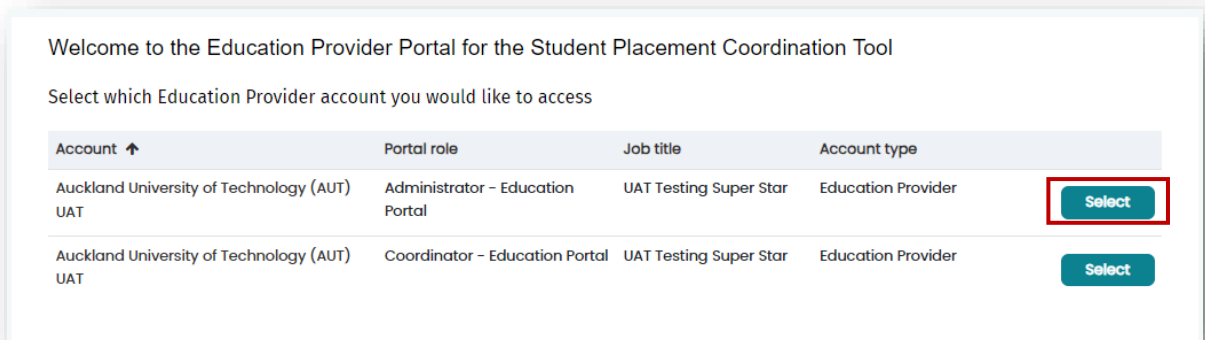
# How to select and view your account

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.



# 2

## Manage Access

How to Add, Edit and Remove users

### 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**

The screenshot shows the user interface of the Student Placement Coordination Tool. At the top left, the logo for Health New Zealand (Te Whatu Ora) and the tool name are visible. The top navigation bar includes links for Home, Planning, Liaise and match, Confirmed placements, Dashboard, and Settings. The user's name, Sascha Bailey, is displayed on the right. A dropdown menu is open under the Settings link, with the 'Manage access' option highlighted by a red rectangle. The main content area features a 'Welcome to the Student Placement Coordination Tool' message, a brief description of the tool's purpose, and a 'Latest notifications' section containing a table of recent events.

Subject	Date created	Status
Your Placement Request ERQ-001089 is approved with modification	16-12-2024 11:47 AM	Read
Your Placement Request ERQ-001120 is approved	12-12-2024 3:23 PM	Unread
Your Placement Request ERQ-001117 is approved	12-12-2024 3:23 PM	Unread
Your Placement Request ERQ-001116 is approved	12-12-2024 3:22 PM	Unread
Your Placement Request ERQ-001115 is approved	12-12-2024 3:22 PM	Unread

## 2

### 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	0444444444

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

## 2

### Manage Access

How to Add, Edit and Remove users

## 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 \*

Job title

Email address \*

Phone number

Invite user

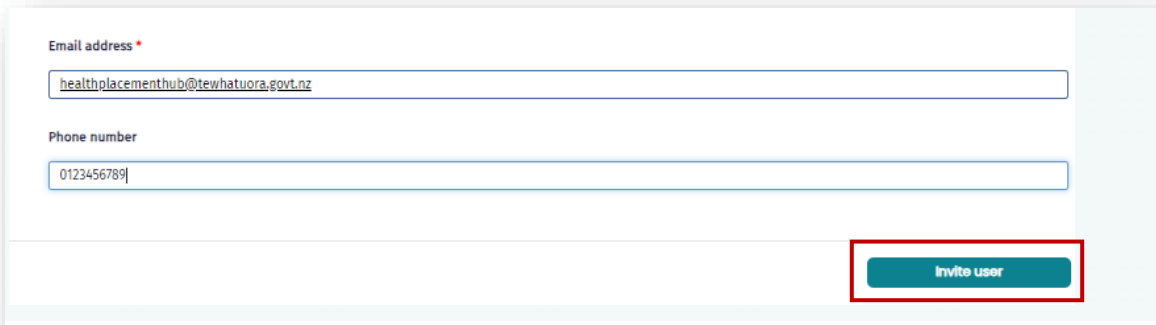
## 2

### Manage Access

How to Add, Edit and Remove users

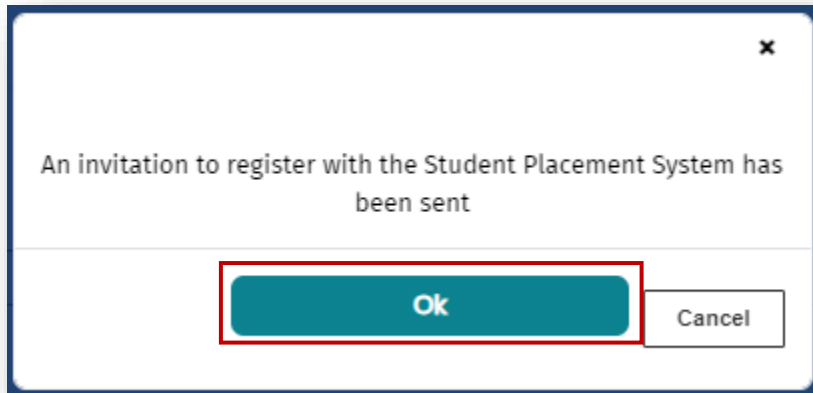
## How to add and remove users

- Once you have completed filling in all 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'. At the bottom right of the form, there is a teal button labeled 'Invite user' which is highlighted with a red rectangular box.

- 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

# 2

## Manage Access

How to Add, Edit and Remove users

### How to add and remove users

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

Home / Manage access

### Account summary


Account Name: Auckland University of Technology (AUT) UAT      Primary Contact: Ben Wemyss  
Physical Address:

---

### Manage access

A education provider administrator can invite and remove staff members in their organisation, as well as edit their portal roles.

[Invite a user](#)

Name	Portal role ↑	Job title	Email	Phone	
Willem van den Bosch	Administrator - Education Portal	Administrator UAT	wdb5091+spsuat@gmail.com	021111999222	
Sophie Joel3	Administrator - Education Portal	Testing Job role	sophie.joe+1033@tewhatuora.govt.nz	0111111111	<div style="border: 1px solid red; padding: 2px;"><a href="#">Edit</a> <a href="#">Remove</a></div>



# 3

## Manage programmes How to Create and Edit programmes

### 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.

The screenshot displays the 'Manage programmes' interface. At the top, there is a navigation bar with 'Settings' selected, which has opened a dropdown menu containing 'Settings', 'Select account', and 'Manage programmes' (highlighted with a red box). Below the navigation, the breadcrumb 'Home / Manage programmes' is visible. The main heading is 'Manage programmes'. On the right side, there is a teal 'New Programme' button (highlighted with a red box). Below this is a table with two columns: 'Programme name' and 'Primary contact person'. The table contains two rows: 'Bachelor of Health Science' with contact 'Nikki Upoko', and 'Bachelor of Health Science (Perioperative Practice)' with contact 'Sascha Bailey'. To the right of each row is a dropdown arrow. Below the table, there is an 'Edit Programme' button (highlighted with a red box). The footer includes the 'Health New Zealand Te Whatu Ora' logo and the 'Te Kāwanatanga o Aotearoa New Zealand Government' logo.

Programme name ↑	Primary contact person
Bachelor of Health Science	Nikki Upoko
Bachelor of Health Science (Perioperative Practice)	Sascha Bailey

# 3

## Manage programmes How to Create and Edit programmes

### 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	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Account</b></p> <p>Auckland University of Technology (AUT) UAT</p> </div>	The account name is your organisation name and will be pre-filled.
Programme name	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Programme name *</b></p> <p>Bachelor of Health Science (Perioperative Practice)</p> </div>	The programme name is a free-text field, please adhere to your organisations naming conventions to avoid confusion.
Profession	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Profession *</b></p> <p>Anaesthetic Technicians</p> </div>	This means the area of health the person will be training in e.g., physiotherapy.
Primary contact person	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Primary contact person *</b></p> <p>Select</p> <p>Select</p> </div>	The primary contact can be changed here if needed
Physical address		
Zip / Postcode	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>ZIP / Postcode *</b></p> <p></p> </div>	This is the post-code of the facility where the programme is being offered. <b>NOTE: Your post-code is mandatory while the full address is optional</b>

# 3

## Manage programmes

How to Create and Edit programmes

# 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**

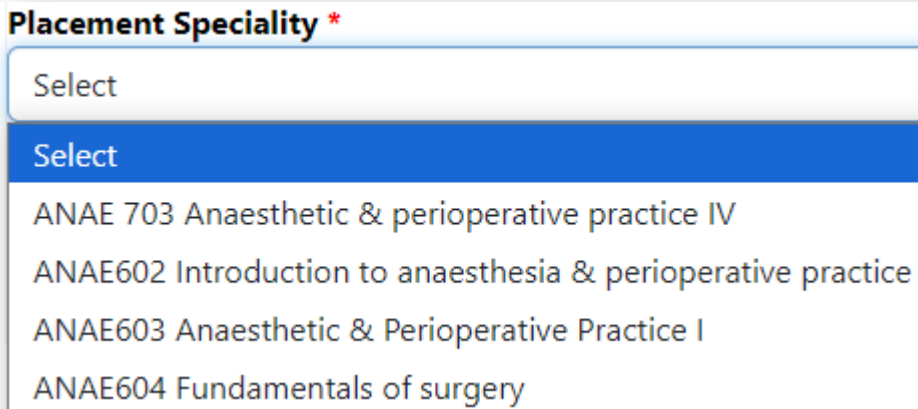
### 3

## Manage programmes

How to Create and Edit programmes

# 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

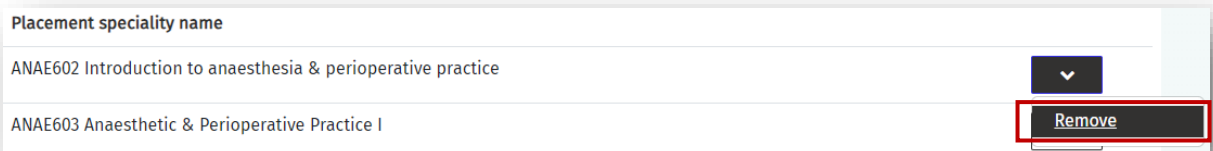
ANAE603 Anaesthetic & Perioperative Practice I

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

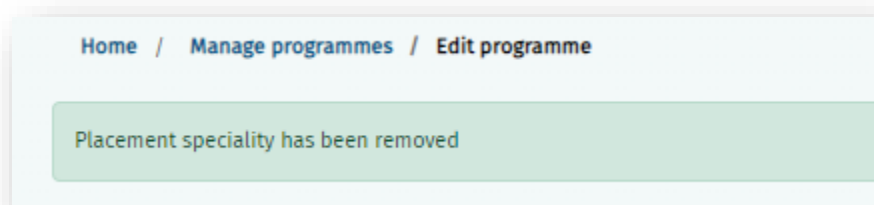
- You can remove that entry by clicking on the down-arrow to the right of the incorrect entry and selecting **Remove**



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

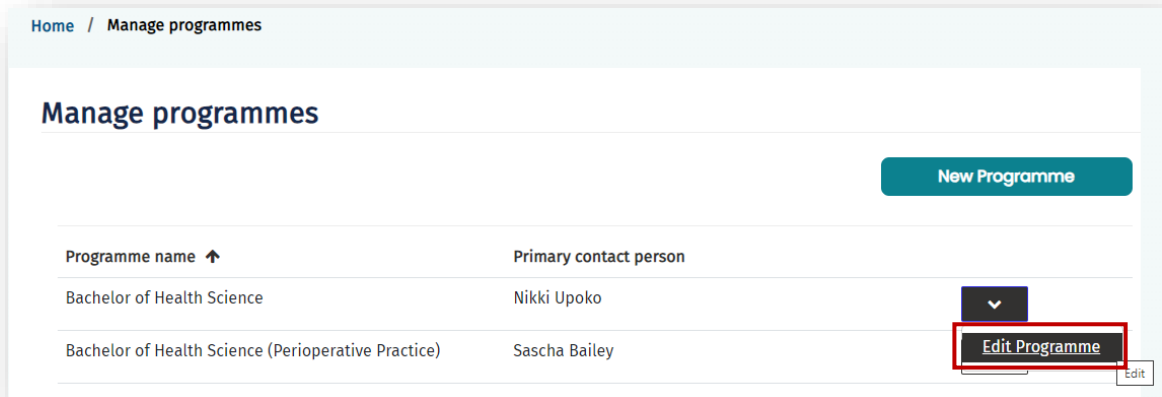
Placement speciality has been removed

# 3

## Manage programmes

How to Create and Edit programmes

### 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

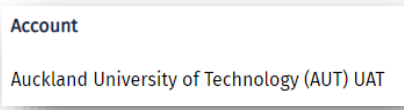
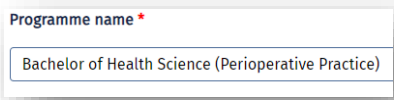
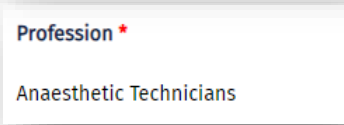
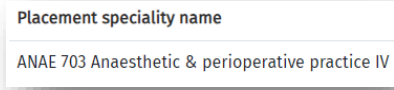
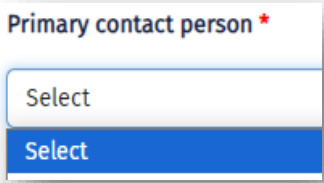
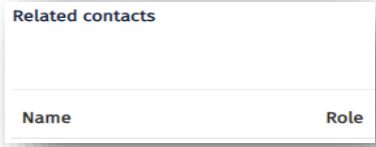
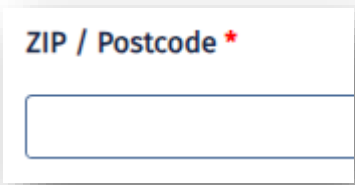
The **Edit a programme** page will appear with a combination of pre-filled and empty fields. The requirements for each field are as follows (see next page):

## 3

## Manage programmes

### How to Create and Edit programmes

## How to edit a programme

Programme Details		
Education Provider		The account name is your organisations name and will be pre-filled.
Programme name		The programme name is a free-text box so please adhere to your organisations naming conventions to avoid confusion.
Profession		This is pre-filled with data from when the programme was initially created in this system
Placement specialities		<p>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.</p> <p>Any specialities that have been included prior will appear here. You can add additional specialities by clicking on <b>Add a placement speciality</b></p>
Primary contact person		The primary contact can be changed here if needed
Related contacts		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		<p>This is the post-code of the facility where the programme is being offered.</p> <p>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.</p>

- 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	<p>This means the area of health the person will be training in.</p> <p>A non-comprehensive list of Allied, Scientific or Technical Health education programmes that will be included are:</p> <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>
Programme	This is the name of the qualification that requires student placements in health settings e.g. Bachelor of Nursing
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)
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.