

# FACT SHEET – Placement Booking Workflow in Placeright™

18/01/2021

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## Purpose

The purpose of this document is to provide an overview of the placement booking workflow using the clinical placement management system Placeright™ in South Australia.

## Placement Booking Workflow

The planning of clinical placements goes through a Request – Offer – Confirm workflow. This workflow may be cyclical, involving multiple request and offer negotiation stages prior to confirmation. This process actively engages both Health site staff (aka Placement Hosts / Providers – PPs) and Education Provider staff (EPs), as each has a role in the cycle.

### Requesting placements (EP)

First an EP creates a placement **request** in Placeright using a selected partnership with a South Australian placement organisation. The 'Preferred Facility' should be identified in the request.

### Offering placements (PP)

The PP can then view the details, make changes if required and allocate the request to locations within their organisation to make an **offer**.

The PP and EP may pre-agree a placement based on prior discussions outside of Placeright. In this case the PP instead of making an offer can confirm the request on behalf of the EP essentially skipping the offer phase. The EP should scan for and process confirmed and offered bookings.

It is also recommended to re-confirm placement bookings when actioning 'Pending Changes' rather than 'offering' them again.

### Confirming placements (EP)

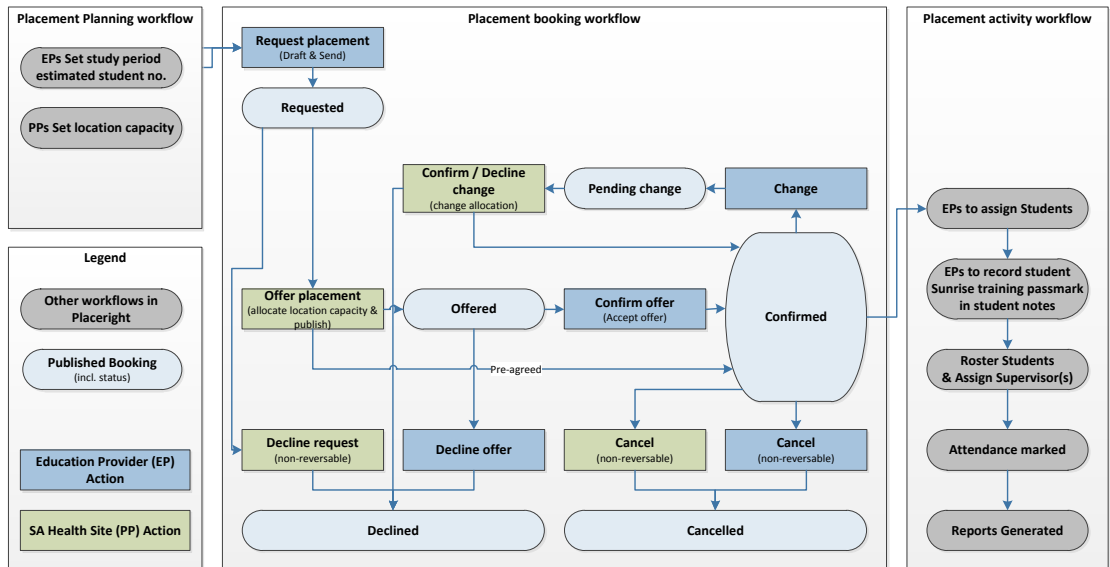
On receipt of the offer, the EP can view the details of the offer including the location to which the students have been allocated and has the option of **confirming**, declining or requesting changes. Requiring confirmation by the EP is designed to minimise cancellations, as the EP must actively engage with the PP to finalise the placement. Once a booking has been confirmed, it can no longer be declined by either party; instead it must be cancelled. Any cancellation clauses should be recorded in the partnership agreement documentation and may lead to cancellation fees in some circumstances.

In Placeright, each stage in the planning workflow is denoted with a booking status. The diagram below describes the process and statuses.

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<http://www.sahealth.sa.gov.au/betterplaced>



## Other Workflows in Placeright

As indicated in the above diagram there are two other workflows that are not covered in this factsheet as follows:

- **Placement planning activities:** Planning activities include preparation activities undertaken by PPs and EPs each year such as setting the future year’s study periods estimated student numbers and the location capacities.
- **Placement activities:** Once placement bookings have been confirmed a number of booking activities will occur:
  - EPs need to assign students to placements at least 4 weeks prior to placement commencements;
 

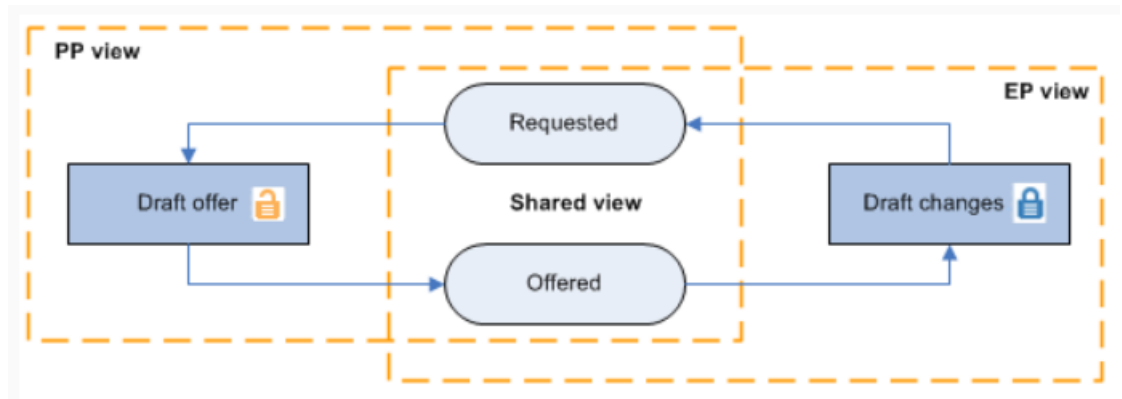
If the placement will be at a Sunrise live site, the EPs should also enter the students’ Sunrise EMR training passmarks in the Student notes field after assigning the students to bookings.
  - Before the start of the placement rosters need to be completed and supervisors assigned to the placement roster and reports are run;
  - During and after the placement attendance marking and reports are run.

## Booking Versioning

Placeright is designed with ‘versioning’ which allows the system to maintain a historical record of changes made to a placement booking throughout the entire booking workflow. Versioning involves creating a new record every time changes are made to a booking through a ‘draft version – publish version’ cycle. This feature will assist with managing placements as it allows users to review previous versions of a booking and identify who made the changes.

If a user modifies a placement booking, either to edit the details or allocate to locations, they must first ‘unlock’ the booking. Unlocking a booking creates a draft for that user that cannot be viewed or changed by users from the other

side of the partnership. Once the changes have been completed, the draft must then be 'published' to share with the partner. The new version of the booking is identified with a new status. See the diagram below.



These versions of the placement booking and its status are recorded as a new version of the booking. The version is date stamped with the name of the partner who published the change. In addition, system-generated notification emails are sent to the relevant partnership user showing these important details.



## Booking Status

On the placement bookings summary screen, the list of bookings can be viewed and filtered in a variety of ways – see below:

Status	Education Provider Partnership Name	Placement ID Partnership ID	Discipline/Course Placement Type	Preferred Facility	Start Date End Date
Confirmed	Another University UniAnother-RN	KXJ0W1K8 NKQV6P	Nursing (Registered) Acute / Medical	Z_NSG_LMH_Medical	07/01/2019 20/01/2019
Confirmed	SA University SAUni-RN	7WQVKV36 G24J6C	Nursing (Registered) Critical Care / Emergency	Z_NSG_LMH_Critical Care Services	14/01/2019 03/02/2019
Confirmed	Another University UniAnother-RN	05YBPZJO CX2HNY	Nursing (Registered) Acute / Surgical	Z_NSG_LMH_Surgical	04/03/2019 31/03/2019
Offer	Another University UniAnother-RN	1VC5HP2G NKQV6P	Nursing (Registered) Critical Care / Emergency	Z_NSG_LMH_Critical Care Services	04/03/2019 24/03/2019

Each placement has a *Status* which reflects the state of the booking at the time. Statuses are designed to assist the user to recognise bookings requiring action and to manage upcoming placements efficiently and. The statuses are:

<b>Request</b>	A placement has been requested by the EP. The PP is required to action the request.
<b>Offer</b>	The PP has offered a placement to the EP. The EP is required to action the offer.
<b>Pending Changes</b>	EP has requests changes to a booking. A response is required from the PP. The capacity allocations may need to be changed.
<b>Confirmed</b>	The placement has been confirmed by either the EP or PP. No further action is required until EPs upload student names.
<b>Declined</b>	The placement has been declined by either the EP or PP. A

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declined booking cannot be reinstated.


**Cancelled**

The placement has been cancelled by either the EP or PP. Once a booking has been confirmed it can no longer be declined; instead it must be cancelled, potentially invoking any cancellation clauses defined by the partnership agreement. Similar to a declined booking, a cancelled booking cannot be reinstated.

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In line with versioning, bookings that have been unlocked for editing by either partner have an additional symbol next to the status:

 indicates that the booking is unlocked by your organisation. Any draft changes cannot be viewed by the partner until published. **Action is required by your organisation.**

 indicates that the booking is locked by the partner organisation. The booking cannot be unlocked for drafting by your organisation but it can be declined / cancelled if no longer required / available. **Action is required by education provider staff.**

### Further Information:

Contact the better placed team [betterplaced@sa.gov.au](mailto:betterplaced@sa.gov.au) for support as needed.

### Online Support, information and Resources

Refer to the SA Health Better Placed website main landing page [www.sahealth.sa.gov.au/betterplaced](http://www.sahealth.sa.gov.au/betterplaced) and subpages.

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#### For more information

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