

FACT SHEET – Changing Subject and Study Period assigned to a Booking

19/08/2020

OFFICIAL

Purpose

The purpose of this fact sheet is to provide a step by step guide for education provider (EP) staff on how to change a confirmed placement booking's *Subject* and *Study period*, aka student cohort, in the *Clinical Placement Management System* (CPMS), Placeright™. This is achieved via each individual placement booking.

Overview

The preferred method to change a confirmed placement booking's *Subject* and *Study period* assignment in Placeright is by following the below steps:

- Step 1. De-assign all students from the booking;
- Step 2. De-assign the current *Subject* and *Study Period*;
- Step 3. Assign the new *Subject* and *Study Period*;
- Step 4. Publish the booking as a *Pending Change*;
- Step 5. Assign the new students to the booking;
- Step 6. Add the students' rosters.

The above steps are outlined in more detail on the following pages using an example of changing a booking's student cohort from Year 3 to Year 2.

Pre- requisites

The following pre-requisites are noted:

- Prior to proceeding with any *Subject* and *Study period* changes, it is highly recommended that you consult with the SA Health site's clinical placement staff to ensure they will accept the proposed change to an alternative student cohort.

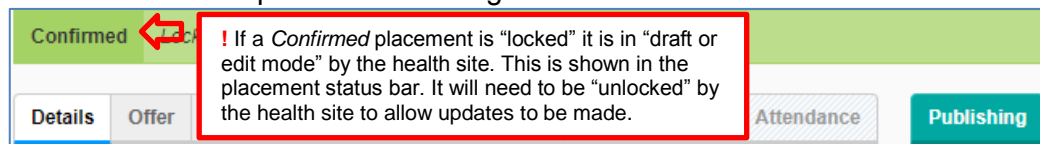
For nursing in particular, it is recommended that you also refer to the "LHN Organisational and Capacity Reference document" in the Placeright document library as this outlines health sites specific rules around student allocations at a ward / unit level.

Once the change of student cohort has been agreed, the SA Health site's clinical placement staff must clear all the students' rosters in the booking/s prior to proceeding.

Note: Placeright will not permit the de-assigning of the old Subject and Study period if there are students assigned to the placement.

Pre-requisites (...continued)

- Make sure that the placement booking is 'Confirmed' and not 'Locked':



- The relevant *Subject and Study period* needs to be set up in the *Structure* page in Placeright and need to be *Active* including the Campus.
- *Subject and Study period* changes should not be made after placement commencement. A lead time of at least 4 weeks prior to placement start for any *Subject and Study period* changes ensures that Health site staff have sufficient lead time for pre-placement administration of the new student cohort.

1. De-assign all students from the booking

Once all the pre-requisites have been met, you may begin the process to change the student cohort by removing all students from the booking/s.

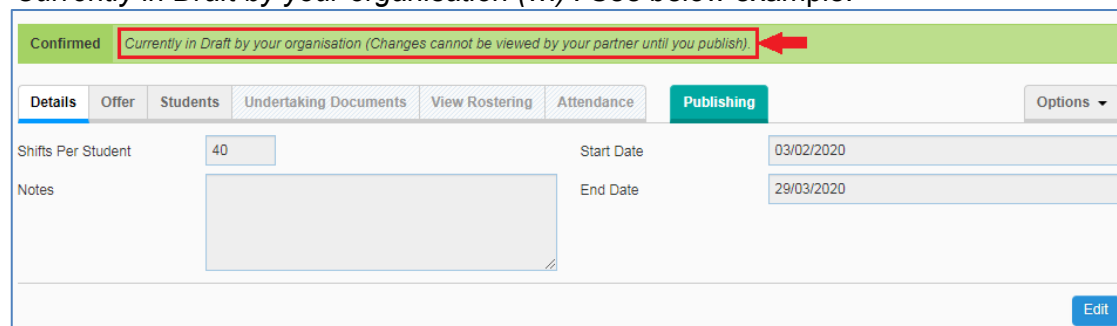
Note: You may have difficulty doing this if the students have existing rosters. In this case contact the Health site's clinical placement staff and ask them to remove the students. The following steps can be followed if the student has no rosters or marked attendance in Placeright:

Log into Placeright and find the placement booking that is required to be changed via *Manage Booking*, view the booking and *Unlock* it.

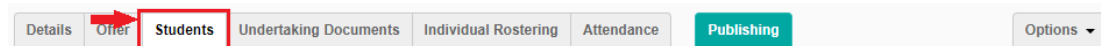
Note the bookings Placement ID.

Note: If more than one booking needs to be changed repeat these steps for each booking.

After unlocking the booking the screen should indicate that the booking is 'Currently in Draft by your organisation (...)'. See below example:

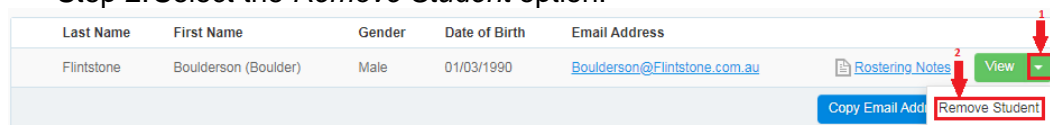


Click on the Students tab:



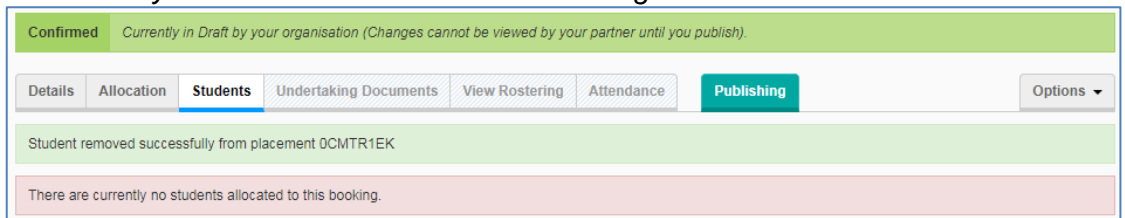
Remove all students – for each student:

- Step 1. Click on the *Down Arrows* next to the *View* buttons of all students;
- Step 2. Select the *Remove Student* option.



Note: You won't be able to remove students if they still have rosters set.

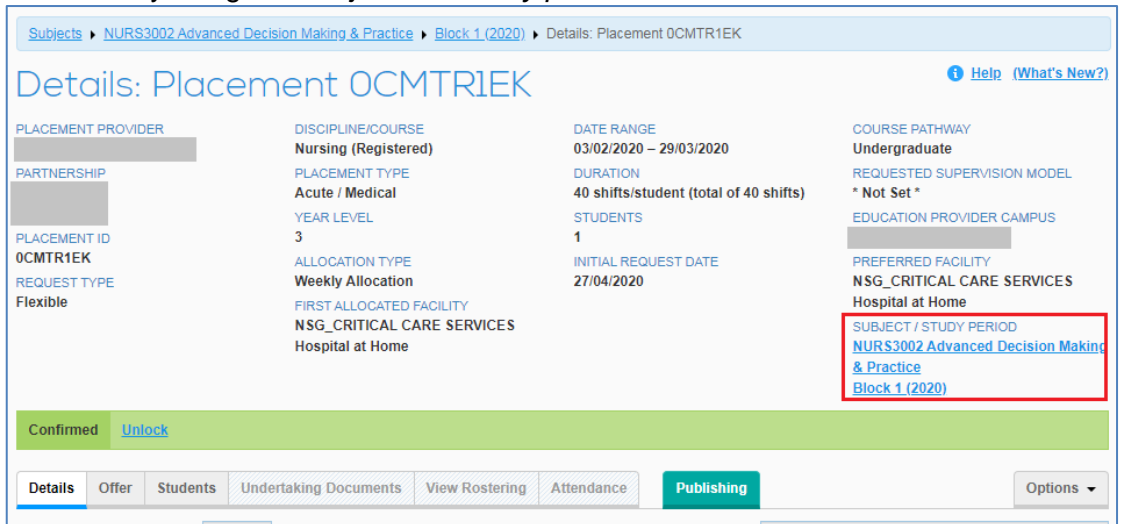
Once all the students have been removed the screen should indicate that “*There are currently no students allocated to this booking*”:



Publish the booking.

2. De-assign the current *Subject* and *Study Period*

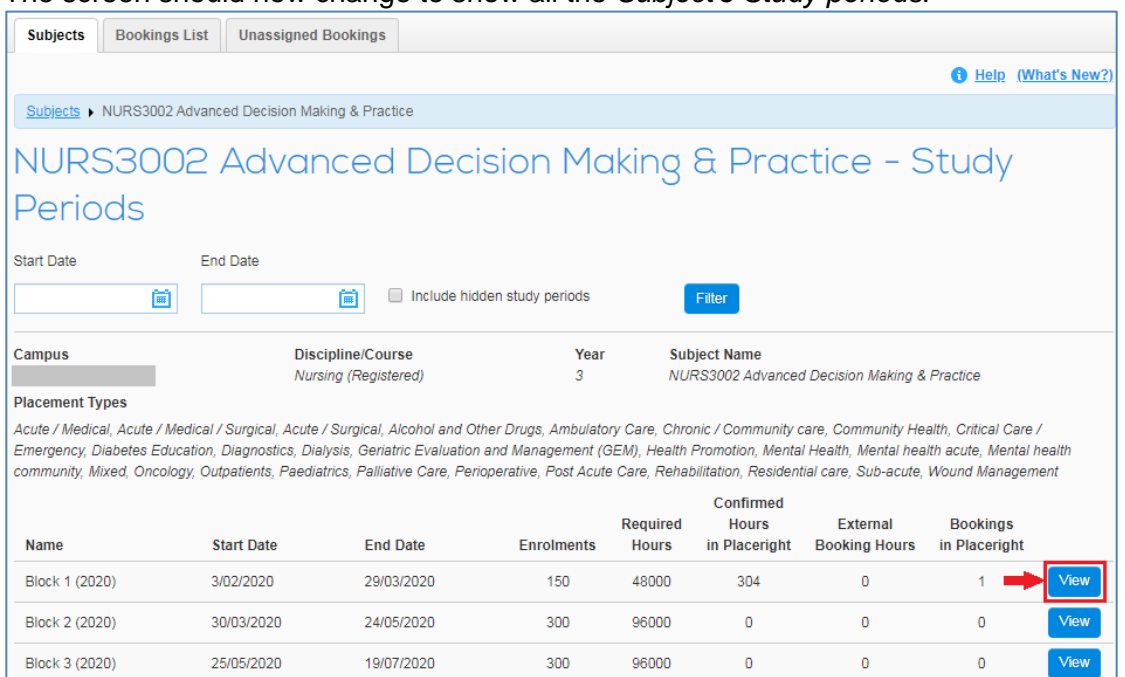
Re-open the booking using the Placement ID that you noted in step 1 and note the currently assigned *Subject* and *Study period*:



To de-assign the year 3 *Subject* and *Study period* in this booking by clicking on it in the booking header as shown above.

In this example, click on the *Subject* “*NURS3002 Advanced Decision Making & Practice*” and *Study period* “*Block 1 (2020)*”.

The screen should now change to show all the *Subject’s Study periods*:



Find the current year 3 *Study period* and click “View” to show all bookings in that *Study period*. View the booking – see below example:

Subjects > NURS3002 Advanced Decision Making & Practice > Block 1 (2020) - Assigned Bookings

Study Period - Assigned Bookings

SUBJECT: NURS3002 Advanced Decision Making & Practice
CAMPUS: [Redacted]
DISCIPLINE/COURSE / YEAR: Nursing (Registered) / 3
SUBJECT NAME: NURS3002 Advanced Decision Making & Practice
COURSE PATHWAY: Undergraduate

STUDY PERIOD:
NAME: Block 1 (2020)
DATE RANGE: 3/02/2020 - 29/03/2020
ENROLMENTS: 150

TOTAL HOURS REQUIRED: 48000 hrs
Requested: 0 hrs
Offered: 0 hrs
Confirmed: 304 hrs
Pending Changes: 0 hrs
Declined: 608 hrs
TOTAL EXTERNAL BOOKINGS: 0 hrs

Locked to Partner
 Draft
 Modified by Partner

Placement Types:
 Acute / Medical, Acute / Medical / Surgical, Acute / Surgical, Alcohol and Other Drugs, Ambulatory Care, Chronic / Community care, Community Health, Critical Care / Emergency, Diabetes Education, Diagnostics, Dialysis, Geriatric Evaluation and Management (GEM), Health Promotion, Mental Health, Mental health acute, Mental health community, Mixed, Oncology, Outpatients, Paediatrics, Palliative Care, Perioperative, Post Acute Care, Rehabilitation, Residential care, Sub-acute, Wound Management

Assigned Bookings | Possible Bookings

Status: - Optional - | Display date: Date range requested | Filter

Create Draft Request

| Status | Placement Provider Partnership Name | Placement ID Partnership ID | Start Date End Date | Initial Request Date | Year Level Type | Students | Hours | Match | |
|-----------|-------------------------------------|-----------------------------|-----------------------|----------------------|-----------------|----------|-------|-------|------|
| Cancelled | [Redacted] | P01E9Z0G NKQV6P | 03/02/2020 29/03/2020 | 27/04/2020 | 3 Flexible | 2 | 608 | Full | View |
| Confirmed | [Redacted] | 0CMTR1EK NKQV6P | 03/02/2020 29/03/2020 | 27/04/2020 | 3 Flexible | 1 | 304 | Full | View |

Find the booking in the list and click the “View” button to select it as shown above.

| | | | | | | | | | |
|-----------|---------------------------------|-----------------|-----------------------|------------|------------|---|-----|------|-------------------|
| Confirmed | SA_Lyell McEwin Hospital LMH_RN | 0CMTR1EK NKQV6P | 03/02/2020 29/03/2020 | 27/04/2020 | 3 Flexible | 1 | 304 | Full | View De-assign |
|-----------|---------------------------------|-----------------|-----------------------|------------|------------|---|-----|------|-------------------|

De-assign the current Subject and Study period by:

- Step 1. Click on the *Down Arrows* next to the *View* button of the booking;
- Step 2. Select the *De-assign* option.

You will have to click ‘Ok’ on the following pop-up prompt to confirm this action:

placerright.net.au says

Are you sure you want to de-assign placement 0CMTR1EK from Study Period Block 1 (2020)?

OK Cancel

Note: When you click ok the pop-up will close and the booking will disappear from the current year 3 Study period’s assigned bookings list. This is normal as you the booking will now show under the “Unassigned Bookings” list.

3. Assign the new *Subject* and *Study Period*

Click on the “*Unassigned Bookings*” tab in *Manage Bookings*, find the booking using the previously noted *Placement ID* in step 1 and click on the *View* button:

Unassigned Bookings

Partnership: [NKQV6P] LMH_RN | Discipline/Course: - Optional - | Start Date: 01/01/2020 | Year Level: - Optional -

Status: Confirmed | Placement Type: - Optional - | End Date: | Display date: Date range requested

Placement ID: | Booking Type: - Optional - | Publish Status: - Optional -

This screen currently has filters applied. (Remove) [Filter]

Create Draft Request

| Status | Placement Provider Partnership Name | Placement ID Partnership ID | Discipline/Course Placement Type | Start Date End Date | Initial Request Date | Year Level Type | Students |
|-----------|--|--------------------------------|---|--------------------------|-------------------------|--------------------|----------|
| Confirmed | SA_Lyell McEwin Hospital LMH_RN | DCMTR1EK NKQV6P | Nursing (Registered) Acute / Medical | 03/02/2020 29/03/2020 | 27/04/2020 | 3 Flexible | 1 |

The booking will be displayed and you will now be required to *Edit* the booking’s *Details* by clicking on the *Edit* button as shown below:

Confirmed *Currently in Draft by your organisation (Changes cannot be viewed by your partner until you publish).*

Details Offer Students Undertaking Documents View Rostering Attendance Publishing Options

Shifts Per Student: 40 | Start Date: 03/02/2020

Notes: | End Date: 29/03/2020

Select the year 2 Subject & Study period and click on the *Next* button:

Confirmed *Currently in Draft by your organisation (Changes cannot be viewed by your partner until you publish).*

Details Offer Students Undertaking Documents View Rostering Attendance Publishing Options

Currently in Edit mode

Step 1: Request Details Step 2: Block Request Days Step 3: Complete

Booking Type: Flexible

Subject: 1 - Required - 2 NURS2002 Professionalism in Action

Study Period: - Required - Block 1 (2020) (30/03/2020 - 26/04/2020)

Education Provider Campus: FU Bedford Park NSG

Placement Type: Acute / Medical

Preferred Facility: NSG_CRITICAL CARE SERVICES Hospital at Ho

Course Pathway: Undergraduate

Requested Supervision Model: - Optional -

Year Level: 3

Students: 1

Start Date: 03/02/2020

End Date: 29/03/2020

Shifts Per Student: 40 [Switch to hours per student](#)

Notes:

Return to Request Details

Check the booking's *Detail* again and click on the *Update* button:

The screenshot shows a 'Notes' field at the top. Below it, there are two buttons: 'Previous' on the left and 'Update' on the right. The 'Update' button is highlighted with a red box and a red arrow pointing to it from the right.

4. Publish the booking as a *Pending Change*

Publish this change by clicking on the *Publishing* tab, click on *Request Changes*, adding any appropriate *Notes regarding this action* and clicking on *Confirm selection* as shown below:

The screenshot shows the booking detail page with the 'Publishing' tab selected. The 'Request Changes' option is highlighted with a green box and a red arrow. The 'Confirm selection' button is also highlighted with a red box and a red arrow. The 'Notes regarding this action' field contains the text: 'Changed assigned Subject and Study Period from Year 3 to Year 2'. The 'Request Changes' option is described as: 'Request Changes allows your partner to view the changes to the details and respond.' The 'Cancel' option is described as: 'Cancel informs both partners that the placement will not occur and automatically removes any allocation. View agreement documentation'. The 'Restore' option is described as: 'Restore last version deletes all changes to the booking detail and allocation. Both partners will be able to view the previous published version.'

Note: The new year 2 Subject and Study Period is now assigned and the SA Health site's clinical placement staff are now able to see it in the booking's header.

5. Assign the new students to the booking

Important! Notify the SA Health site's clinical placement staff that the *Subject* and *Study period* change has been made, quote the Placement ID, and request that they process the *Pending Change* and to *re-confirm the booking*.

Note: Whilst the booking remains in Pending Change status you will not be able to assign students to the booking.

Once the *Pending Change* has been processed by the SA Health site's clinical placement staff the booking should show with *Confirmed* status.

You will now be able to upload / assign students to the booking in the booking's *Students* tab as per the standard process.

6. Add students' rosters

Enter the students' first day of placement in the roster against the corresponding location. This should occur at least 4 weeks out from placement commencement. The remainder of the roster can be entered by you or the SA Health site clinical placement staff depending on rostering arrangements between both parties.

Note: If students are rostered at Sunrise live sites, add a suitable Student Note in the Placeright student records that indicate that the students have "Passed Sunrise training >80%".



For more information

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