Ochsner Health InPlace Academic User Guide

Optimizing your use of the clinical placement software that connects higher education institutions to the Ochsner Health system for a streamlined, collaborative placement process

Ochsner Health

Table of Contents

Students/instructors will not be permitted to participate in clinicals at any Ochsner Health campus until all respective compliance items are complete.

Accessing the InPlace Network

** PLEASE NOTE that InPlace will not work in Internet Explorer.
Please use Microsoft Edge or Google Chrome to access InPlace.**

Request Access

New users can request access to the InPlace Network via an email to sarah.bernard2@ochsner.org.

Requests should contain the following information:

1. Instructor/Coordinator's Full Name
2. Academic Institution Name
3. Instructor/Coordinator's Office Phone Number
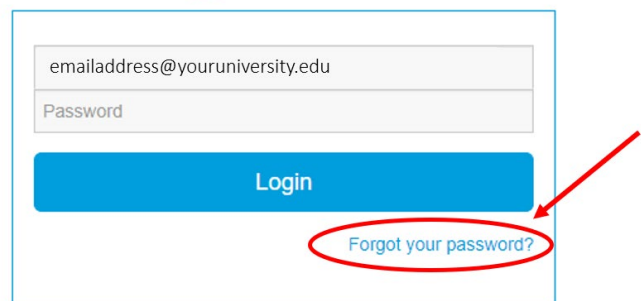4. Instructor/Coordinator's Email Address

Log In

1. As soon as Ochsner Health creates your InPlace account, you should receive an email in the inbox of the email that you provided (see above) with a link and instructions for login.

   If you do not receive this email, please use the following link to access InPlace's login page:

   https://auth-us.inplacesoftware.com/Account/Login *

   *We recommend that you bookmark this page in your web browser

2. Within the login page, type in your Username- this will be the full email address that you provided for account creation (see above).
3. Click on "Forgot your password?'

4. Type your email into the "Recover your password" window. An email will be sent to your inbox.
5. Check your email inbox for the InPlace email and follow the instructions to "reset" (create) your password.

Recover your password

A recovery link will be sent to your email.

Email

[   ]

Submit

Return to log in page

6. After resetting your password, use the "Return to log in page" button or the login link above to bring you back to the login page and login using your email address as your username and your new password as your password.*

   *We recommend that you bookmark this page in your web browser

Students/instructors will not be permitted to participate in clinicals at any Ochsner Health campus until all respective compliance items are complete.
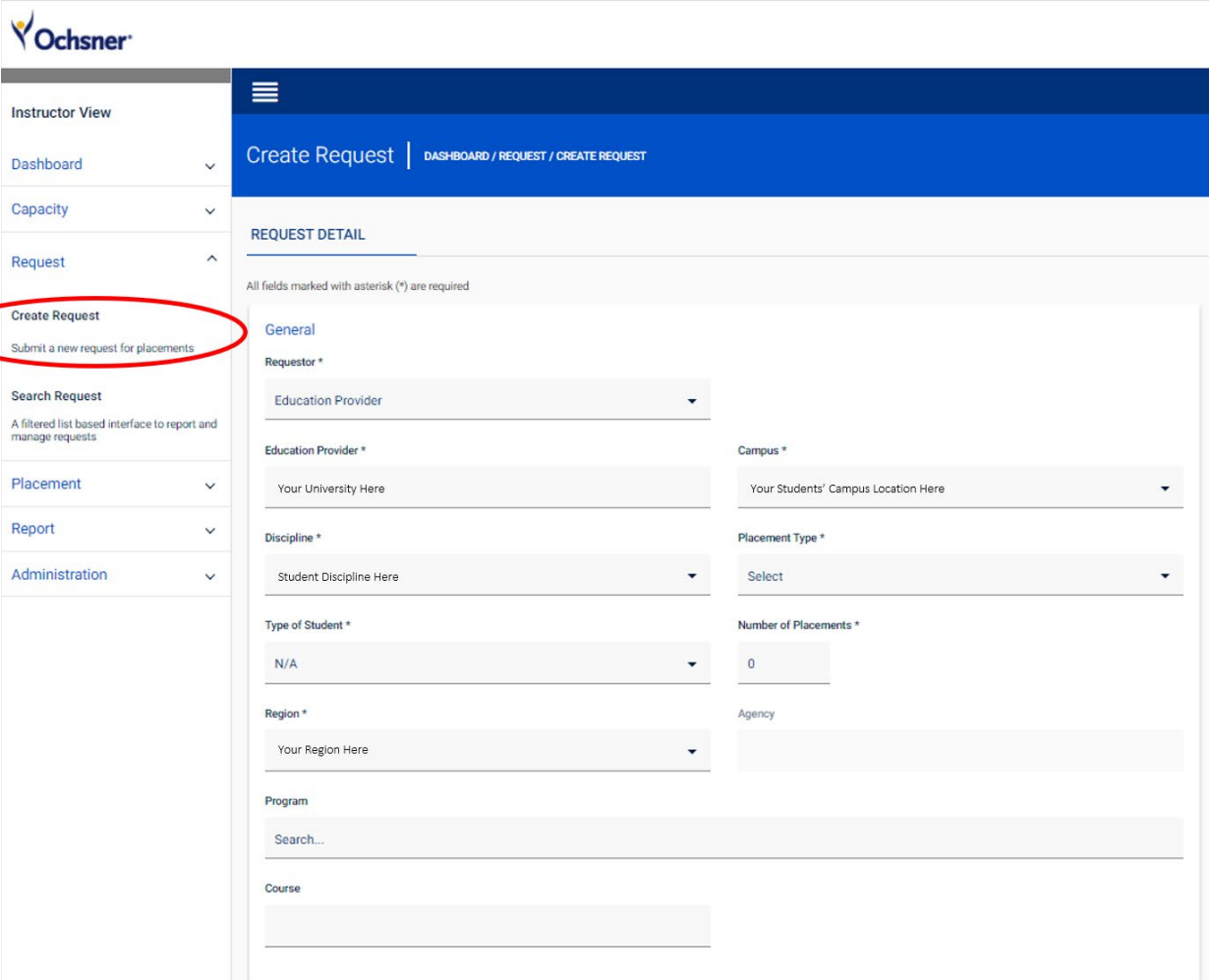
Academic Institution Steps

1-2-3s of Requesting a Clinical Rotation in InPlace
1. Submit a New **Request**   2. **Attach** Students to Placements   3. Enter & Upload Student **Compliance**

1. Submit a New Request

   If for any reason any student(s) is/are not to attend clinicals, please withdraw the associated request/placement "spots"- see FAQs for instructions

1. Click "Create Request" in the "Requests" tab on left of screen

Students/instructors will not be permitted to participate in clinicals at any Ochsner Health campus until all respective compliance items are complete.

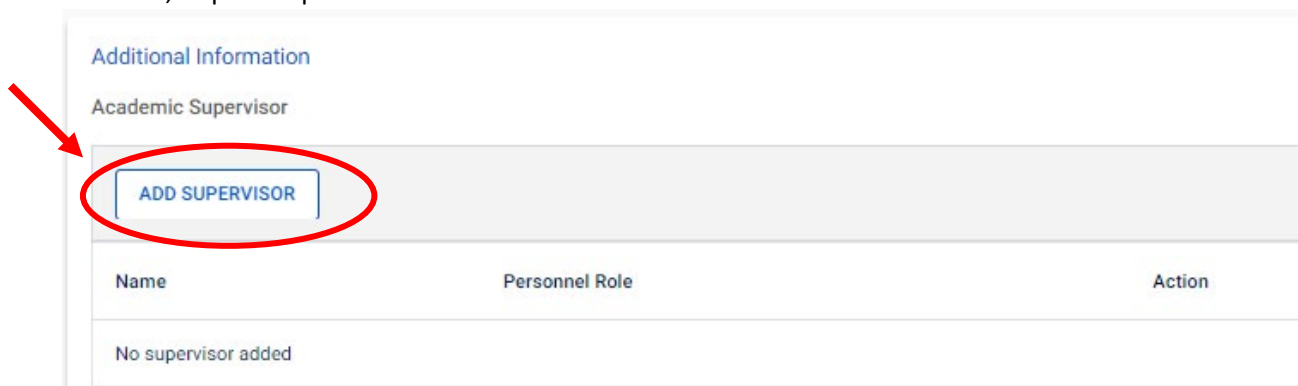2. Enter rotation information into the "General" panel using the key below

    a. Please make separate requests for each unit (ex: 2 in surgical ICU, 2 in neuro CCU)

    b. <u>Fields marked with asterisks (*) are required fields.</u>

Field Name	Information Needed	Required/Optional
Requestor*	Education Provider should pre-populate	Required
Education Provider*	University name should pre-populate (if not, select from drop-down menu)	Required
Campus*	Select students' campus of your institution from drop-down menu	Required
Discipline*	Select student discipline from drop-down menu (ex: Nursing; Allied Health)	Required
Placement Type*	**Nursing:** Select type of rotation (ex: Group) **Allied Health:** Select student program (ex: Radiologic Technology)	Required
Type of Student*	Select the student year of study from the drop-down menu	Required
Number of Placements*	Number of student "spots" in group	Required
Region*	Area where hospital is located (ex: Southshore, Baton Rouge, etc.)	Required
Agency	Select the hospital **Nursing: Expand the hospital using the > symbol to select the floor/unit from the drop-down menu Allied Health/PA: Select the hospital (no department selection needed)**	**THIS IS REQUIRED FOR OCHSNER HEALTH BUT DOES NOT DISPLAY AS REQUIRED IN INPLACE- PLEASE COMPLETE THIS FIELD**
Program	Type your program name if desired	Optional
Course	Type your own course designator if desired	Optional

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3. If you know who from your school will be supervising the students, click "Add Supervisor" in the "Additional Information" panel. *
   *If you do not know who will be supervising from the school or if this does not apply to your students, skip to step 6.

4. Enter supervisor information using the guide below
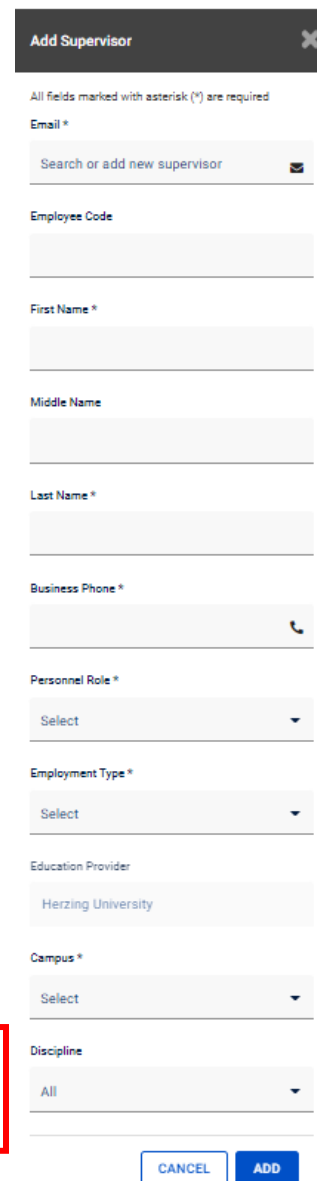
   a. Fields marked with asterisks (*) are required fields.
   b. If the supervisor has been entered into InPlace previously, their information will populate when you begin to type their email address, and you can select their name from the drop-down menu to auto-fill their details.

Field Name	Information Needed	Required/ Optional
Email*	Supervisor's email	Required
Employee Code	Optional	Optional
First Name*	Supervisor first name	Required
Middle Name	Supervisor middle name	Optional
Last Name*	Supervisor last name	Required
Business Phone*	Supervisor phone number (please include cell number if available)	Required
Personnel Role*	Select supervisor's role from drop-down menu (ex: Clinical Instructor, Placement Supervisor, etc.)	Required
Region*	Area where hospital is located (ex: Southshore, Baton Rouge, etc.)	Required
Employment Type*	Select supervisor's employment type as "permanent or contract"	Required
Education Provider will auto-populate with your school name		
Campus*	Select supervisor's campus of your institution from drop-down menu	Required
Discipline	Select supervisor discipline taught from drop-down menu (ex: Nursing- Pre-Licensure- Group, Nursing- Graduate, etc.)	Optional

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5. Click "Add"

~~ "Education Provider Contact" should auto-populate your information, and you are not required to make any changes to these fields~~

6. Add any comments you'd like attached to your request (not required)- **this is a good place to list other days, times, or units as alternates if the hospital coordinator cannot accommodate your request in its original form.**

7. <mark>Nursing Groups only:</mark> Enter schedule information in "Schedule" panel. *If you are requesting a rotation for an Allied Health, PA, or Precepted Nursing rotation, skip to step

    a. <u style="color:red">Fields marked with asterisks (*) are required fields.</u>
    b. Type or select "Placement Dates*"
    c. Type the number of hours/days of "Duration*" & select "Days" or "Hours" as the unit
    d. Indicate whether the dates and/or duration are fixed ("Yes") or are flexible ("No")

8. Toggle "Show Roster" button (see above)- this will cause a "Weekly Pattern" panel to appear.

9. Set the students' schedule by:
   a. selecting the desired hospital from the drop-down menu in the "Agency" column for each day of the week that you plan to have students on campus;
   b. selecting each day's shifts;
   c. and adjusting the shift times (use the built-in clock to update; don't type in new times)
      i. Time conflicts will be indicated but will not prevent submission of request
      ii. DO NOT use the "Add Week" or "Remove Week" buttons
      iii. ***If you update anything on the top of the page ("General" panel), times below will wipe out, so you'll need to re-enter shift days and times**

Specify Roster ⬤ On

Weekly Pattern

Enter your schedule here

Exclude Holidays	Work Week
Federal Holiday ▼	o standard days ▼

REMOVE WEEK / **DO NOT REMOVE/ADD WEEK** / ADD WEEK ‹ Pattern - Week 1 ›

Select Hospital

Day	Agency	Shift	Start Time	End Time
Mon	Not Specified	▼	🕐	🕐
Tue	Not Specified ▼	▼	🕐	🕐
Wed	Not Specified ▼	▼	🕐	🕐
Thu	Not Specified ▼	▼	🕐	🕐
Fri	Not Specified ▼	▼	🕐	🕐
Sat	Not Specified ▼	▼	🕐	🕐
Sun	Not Specified ▼	▼	🕐	🕐

GENERATE ROSTER

10. Click "Generate Roster" button at the bottom of the page- "Record saved" will pop up to confirm
11. Click "Save" at the bottom of the page.
12. A confirmation window will appear featuring the 5-digit Request ID number for the group. ***Please record this number to keep track of this group's request.***

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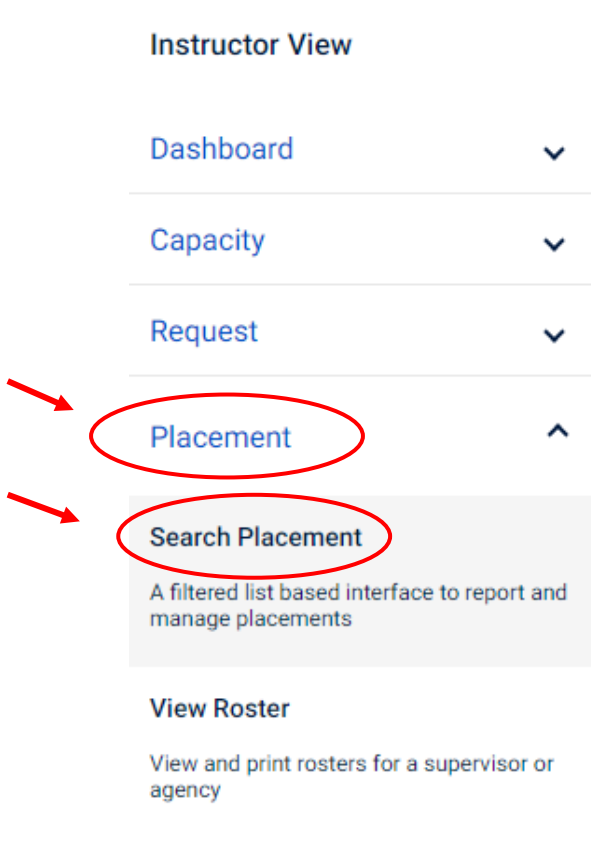
13. Await the hospital's approval of your request before attaching students (next phase). This request should appear as an item "Pending Response" within your Academic Dashboard and within Request > Search Request.
    a. **You will receive an email as soon as the request is approved and ready for you to attach students.**

2. Attach Students to Placements

Please note that if you have not attached students at the time of your request, you can only add students to a placement AFTER the hospital has accepted your request (not while the request remains in Pending status)

1. Click on "Placement" tab (left side) > "Search Placement"

Instructor View

Dashboard ⌄

Capacity ⌄

Request ⌄

Placement ⌃

Search Placement

A filtered list based interface to report and manage placements

View Roster

View and print rosters for a supervisor or agency

Students/instructors will not be permitted to participate in clinicals at any Ochsner Health campus until all respective compliance items are complete.

2. Reset the search filters ("Reset" button) and then use the filters to find the group(s) you're looking for.
   a. Use as few or as many filters as you'd like
   b. The only required filter that *will always apply regardless of other selections* is the Placement Dates filter
   c. *The most direct way to find a specific group is to use the 5-digit Request ID & Placement Dates*
   d. When you're finished adding your desired filters, press the "Filter" button to apply your filters & search

3. Within the resulting placement list, each row represents a student "seat." Select the blue graduate icon for each row ("seat") in the group, one at a time.

4. Enter student details in each field of the "Add Student" window.
   a. Fields marked with asterisks (*) are required fields.
   b. IF the student has previously been added to the InPlace system, either for a previous rotation or recently via spreadsheet upload, you can type their name into the search bar at the top of the Add Student window, and you will see options that populate for you to select the student from the list. Select the correct student, and their form will auto-populate.
   c. **Use the key below to fill out student details (if student not previously added):**

Field Name	Information Needed	Required/Optional
Email*	Student email address	Required
Student Code*	University ID number	Required
First Name*	Student first name	Required
Middle Name	Student middle name	Optional
Last Name*	Student last name	Required
Mobile Phone*	Select country code from drop-down menu, and type student cell phone number, including area code	Required

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Gender	Select student gender from drop-down menu	Optional
Date of Birth*	Enter student birth date as mm/dd/yyyy	Required
Education Provider will auto-populate with your school name		
Campus*	School campus where student is based	Required
Discipline will auto-populate from request		
Program	Examples: Bachelor of Science in Nursing (BSN), LPN Program, ADN Nursing	Optional
Type of Student*	Select year from drop-down menu	Required
Attended any agency previously*	Has the student rotated at any OH facility before? Select Yes or No	Required
Social Security Number	Enter a placeholder digit for the first 5 digits and then the true last 4 digits of the student SSN	Required
Anticipated Graduation Date*	Expected graduation date (mm/dd/yyyy)	Required

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Add Student ✕

All fields marked with asterisk (*) are required

Email *

Search or add new student ✉

Student Code *

First Name *

Middle Name

Last Name *

Mobile Phone *

📱

Gender

Select ▼

Date of Birth *

mm/d/yyyy 📅

Education Provider

Your University

Campus *

▼

Discipline *

Nursing - Pre-Licensure - Group

Program

Search...

Type of Student *

Year One ▼

Hospital Employee

Select ▼

Additional Information

Attended any agency previously *

Yes   No

Social Security Number *

Anticipated Graduation Date *

mm/d/yyyy 📅

CANCEL   **ADD**

6. Scroll down to the bottom of the Add Student window and click "Add" to save the student information. The student compliance panel should appear below the student details.

7. Use your web browser's back arrow to back out of the student details view, confirm that the student name has been added to the placement "seat," and repeat all steps for all empty "seats."

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3. Enter & Upload Student Compliance

Review/Download Compliance Documents

1. Open the clinical education website appropriate to your student group**:
   1. Nursing: https://education.ochsner.org/clined/clinical-nursing-education/student-expectations
   2. Allied Health: https://education.ochsner.org/clined/allied-health/review-and-provide-required-documentation
      **You should be able to find these webpages by searching for "Ochsner Nursing Education" or "Ochsner Allied Health Education" in your web browser if you are unable to use the links above.
2. Refer to the following pages within each site to view all student documentation and guidelines:
   1. Nursing: "Student Expectations"
   2. Allied Health: "Step 2: Review and Provide Required Documentation"
3. Have students review the available resources, and review these yourself if you will be supervising students on the unit.
4. Download and have students and instructors sign and date both:
   1. Student Handbook Agreement
   2. Student Confidentiality Agreement
5. Save the signed forms on your computer for upload to the InPlace system. The InPlace system accepts a multitude of formats, including pictures, PDFs, Word documents, etc. Feel free to save a single student's handbook and confidentiality form together as one file (with 2 pages), but please do not save an entire group's forms together as one file.

* **Please refer to the webpage for the most up-to-date documents & information and do not save local copies for reuse.**

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Enter & Upload Student Compliance

Note that the student(s) must be attached to the placement group in order for you to add student compliance data and the students to be cleared to attend clinicals

1. Follow steps 1-3 of "Attach Students to Placements" (pages 9-10)
2. Click the "Edit" button at the end of the row corresponding with the student's name

...ors	Student	Status	Actions
	Ivy Meds	Published	**Edit**

4. This will open the student's account. Scroll down to the Prerequisites section.
5. Missing or expired/expiring compliance will be marked with a yellow caution triangle. Click on the "Edit" button below each of these items to correct/update the compliance record for that student.

Compliance

Name	Info Supplied	Status	Action
Complete COVID-19 Vaccination		⚠	Edit | Preview
COVID-19 Vaccination Exemption		⚠	Edit | Preview
Health & Safety Attestations		⚠	Edit | Preview
Student Confidentiality		⚠	Edit | Preview
Student Handbook Agreement		⚠	Edit | Preview

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5. within the "Edit Prerequisites" window, read the prompt, select the appropriate response, and Save.**

MMRx2 or Positive Titer: Rubella

MMRx2 or Positive Titer: Mumps

MMRx2 or Positive Titer: Measles

6. Vericellax2 or Positive Titer: Chicken Pox

7. Hepatitis B Vaccine Complete or Titer Showing Immunity or

declination form signed

8. Drug Screen Completed (cleared and appropriate to work in a hospital

setting)

9. Checked Sexual Offender Registry for the Student's State of Clinical

Rotation & State of Residency

(cleared and appropriate to work in a hospital setting)

10. Current Influenza Vaccination (must have received prior to spring

rotation)

11. Current Nursing License for State of Clinical Site (if applicable)

Yes   No

CANCEL   SAVE

** PLEASE NOTE that these items do NOT require an upload of documentation, BUT, per your school's Affiliation Agreement with Ochsner Health, your attestation of the students' compliance requires that your institution maintain this documentation for each student and that the school produce this documentation upon request from Ochsner Health. The exceptions are the Student Confidentiality & Student Handbook Agreements, which each require a document upload (see next page).

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6. For the last 2 compliance items- "Student Confidentiality" & "Student Handbook Agreement":
   a. After answering the prompt, enter the Expiration Date as December 31st of the current calendar year.
   b. Upload a PDF/scan/picture of the students' <u>signed</u> confidentiality and handbook agreements by clicking the "Attach File" button, selecting the appropriate file, and clicking "Open" within your computer's file browser.
      i. See "Review/Download Compliance Documents" section above for information on how to find and download these documents for signing.
   Click the "Save" Button to save the compliance item

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7. Verify that the student's COVID status is marked as either vaccination or exemption (not both)-this will leave 1 item flagged as incomplete with a yellow triangle, but this is correct.

Example of fully compliant student:

Prerequisite
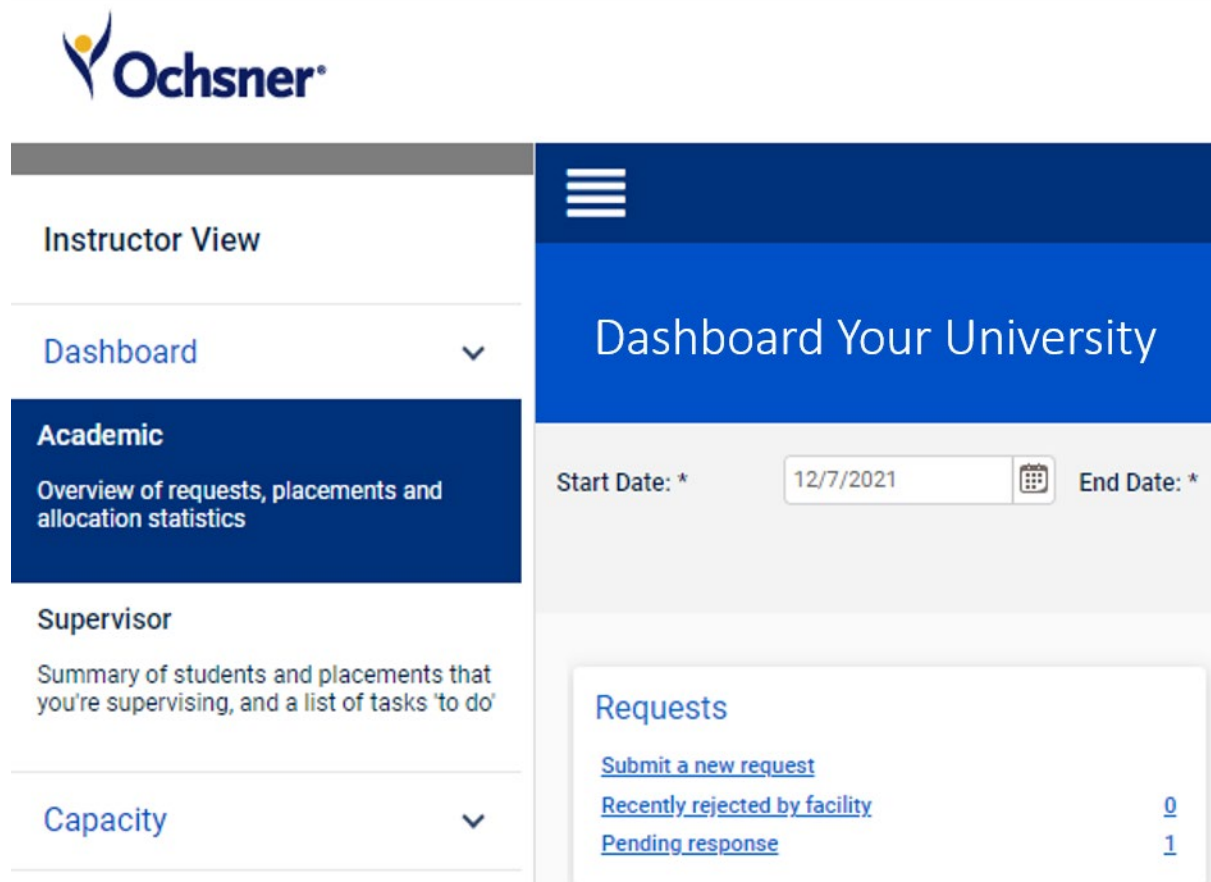
Name	Info Supplied	Status	Action
Complete COVID-19 Vaccination		✔	Edit | Preview
COVID-19 Vaccination Exemption		⚠	Edit | Preview
Health & Safety Attestations		✔	Edit | Preview
Student Confidentiality	📎 12/31/2023	✔	Edit | Preview
Student Handbook Agreement	📎 12/31/2023	✔	Edit | Preview

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FAQs- How do I...?

Review/Monitor my Requests & Placements?

1. Click on "Academic" within the "Dashboard" tab on the left side
2. From here you can view a list of your request pending acceptance/rejection by the hospital, placements offered by the hospital that require your action, updated placements, or those recently canceled or rejected by the hospital, by clicking on the associated linked dashboard item

OR, for a more complete overview or for reporting purposes, you can view all of your placements (those requests that the hospital has taken action on) by,…

1. clicking "Search Placements" under the "Placement" tab on the left side of your screen
2. Select the desired date range and apply any other appropriate filters, and click the "Filter" button to generate a list of all student placements
   a. Don't forget to click the "Reset" button before you adjust any filters

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Edit/Withdraw a Request?

If for any reason any student(s) is/are not to attend clinicals, please withdraw the associated request/placement "spots"

1. Click on the "Request" navigation tab, then "Search Request"
2. Use the filters at the top of the Search Request page to find your group(s)- the Request Dates filter will apply regardless of any other filters used (or not); then click "Filter"

** Note that if your request is not here, it has been actioned by the hospitals and is now in the "Placements" panel, in which case, the placement can still be withdrawn but can no longer be edited.**

Instructor View

Dashboard ⌄

Capacity ⌄

Request ⌃

Create Request

Submit a new request for placements

Search Request

A filtered list based interface to report and manage requests

Placement ⌄

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3. Within the resulting list of Requests (titled "Search Requests"), click on the word "Edit" on the right side of the row corresponding with the request you'd like to edit/withdraw

4. From the "Request Details" page, you can make any changes you need, but be sure to scroll down and click the "Save" button. If you wish to withdraw the request, scroll down to the bottom and click "Withdraw Request."
   a. Confirm the withdrawal, and the request "Status" should change to "Withdrawn"

Withdraw a Placement?

**If for any reason a group is not to attend clinicals, please notify the education contact at the facility.

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Add a Supervisor to a Placement?

1. Open the "Placement" navigation tab and select "Search Placement."
2. Use the filters at the top of the Search Placement page to locate the placement(s) for which you would like to add a supervisor (*Note that the date filter will apply regardless of any other filters used)
2. Select the check box next to all placement "spots" that you'd like to edit
   a. Note that the Request ID is the same for all members of a group. The Placement ID (Plc IId) identifies individual students.
3. Drop down the "Bulk Action" menu and select "Add Academic Supervisor"
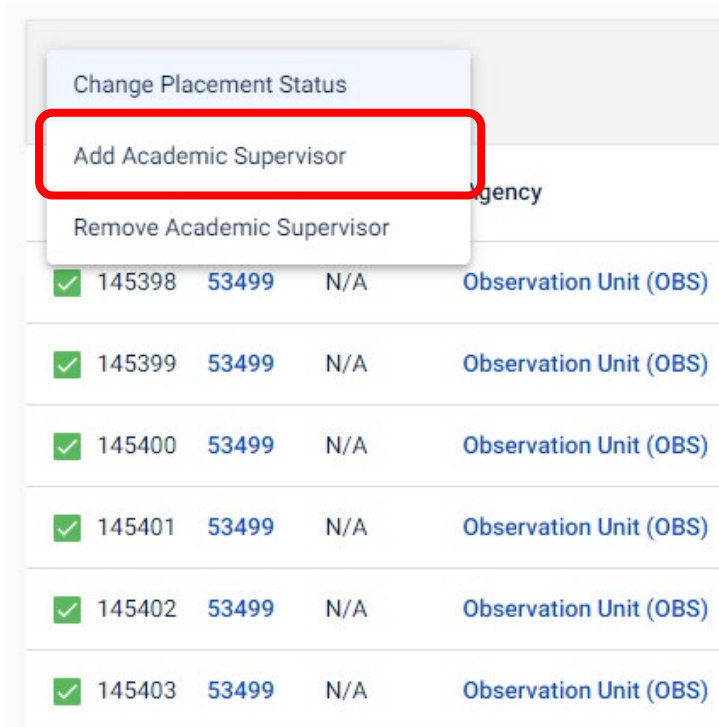
4. Enter the supervisor's email into the "Add Supervisor" window and select the appropriate supervisor from the drop-down menu OR complete the form to add the supervisor to the system and click the "Add" button (*Note that all fields marked with asterisks are required).

Add my own Compliance items?

1. Click the circle containing your initials in the top right corner of your screen, and select "Profile" from the drop-down menu
2. Follow the same steps as you would for adding student compliance (step 3 of Academic Institution Steps above)
   a. The goal is for all of your yellow triangles to turn to green check marks and for there to be paperclips indicating attachments next to both the "Student Confidentiality" and the "Student Handbook Agreement"

Prerequisite

Name	Info Supplied	Status	Action
Student Confidentiality		⚠	Edit | Preview
Criminal Background Check		⚠	Edit | Preview
Current BLS (AHA)		⚠	Edit | Preview
Checked Sexual Offender Registry		⚠	Edit | Preview
Proof of Immunizations / Titer		⚠	Edit | Preview
Seasonal Flu Shot		⚠	Edit | Preview
Current RN License if out of state Nursing student		⚠	Edit | Preview
Re-entry Guidelines		⚠	Edit | Preview
Drug Screen completed		⚠	Edit | Preview
OIG/GSA Verification		⚠	Edit | Preview
Hepatitis B Vaccine or Titer		⚠	Edit | Preview
Health Insurance		⚠	Edit | Preview
Student Handbook Agreement		⚠	Edit | Preview

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Add a Schedule to my Request?

1. Click on "Search Request" within the "Request" tab on the left side
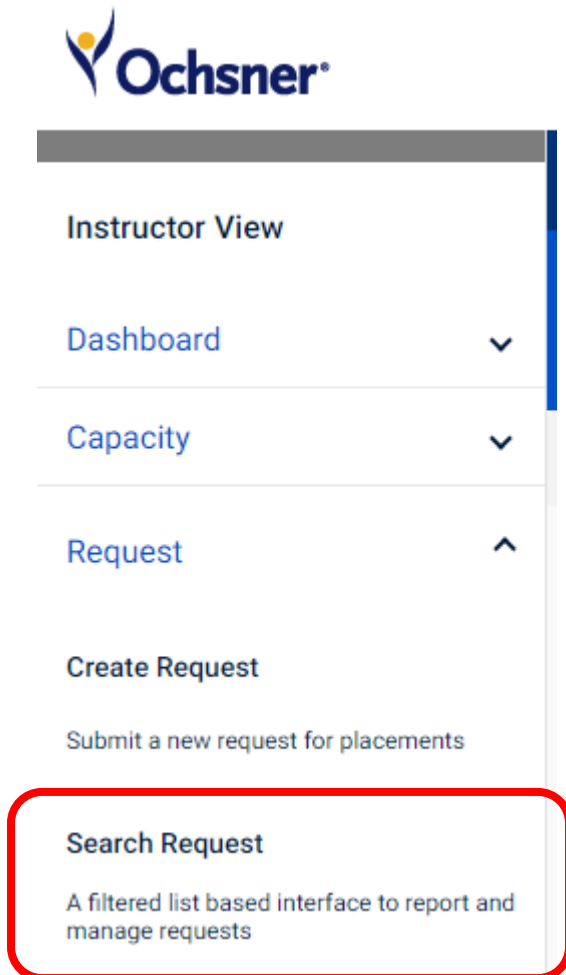
2. Clear any applied filters by clicking the "Reset" button
3. Use any of the filters at the top of the page to help you locate the request – please note that the date filter will apply regardless of any other filters applied- and click the "Filter" button to apply the filter criteria
** Note that if your request is not here, it has been actioned by the hospitals and is now in the "Placements" panel, in which case, the placement can still be withdrawn but can no longer be edited.**

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4. Within the resulting list of Requests, click on the word "Edit" on the right side of the row corresponding with the request you'd like to edit. This will pull up the "Request Details" page.

5. Scroll down to enter schedule information in the "Schedule" panel
   a. Indicate whether the dates and/or duration are fixed ("Yes") or are flexible ("No")
6. Toggle "Show Roster" button (see above)- this will cause a "Weekly Pattern" panel to appear.

5. Set the students' schedule by:
   a. selecting the desired hospital department from the drop-down menu in the "Agency" column for each day of the week that you plan to have students on campus (the list will populate based on the selection you made in the "Agency" field in the request above);
   b. selecting each day's shifts in the Shift column for each day that the students will be on campus;
   c. and adjusting the shift times- default times will populate; please change these to the correct times for your group
      iv. Time conflicts will be indicated but will not prevent submission of request
      v. DO NOT use the "Add Week" or "Remove Week" buttons
      vi. ***If you update anything on the top of the page ("General" panel), times below will wipe out, so you'll need to re-enter shift days and times**

2. Click "Generate Roster" button at the bottom of the page to lock in your schedule- "Record saved" will pop up to confirm

a. This action will apply the schedule to all weeks in the rotation. **Please advance the view of the weekly schedule to view each week (forward arrow at the top of the Schedule panel) and cancel any individual days that the students should _NOT_ be expected on campus because of holidays, etc.**

3. Click "Save" at the bottom of the page
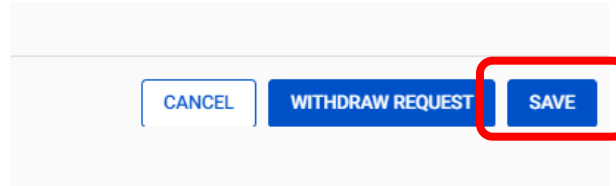
Change my InPlace Email Notification Preferences?

1. Click the circle containing your initials in the top right corner of your screen, and select "Profile" from the drop-down menu
2. Click the "My Account" tab at the top of the page
3. Scroll down to the "Notification" panel and select all email communications you'd like to receive from InPlace.
4. Click the "Save Notifications" button at the bottom of the page

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