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





Table of Contents

Accessing the InPlace Network	2
Request Access	2
Log In	2
Academic Institution Steps	3
1. Submit a New Request	4
2. Attach Students to Placements	9
3. Enter & Upload Student Compliance	13
Review/Download Compliance Documents	13
Enter & Upload Student Compliance	14
FAQs- How do I?	18
Review/Monitor my Requests & Placements?	18
Edit/Withdraw a Request?	20
Withdraw a Placement?	22
Add a Supervisor to a Placement?	23
Add my own Compliance items?	25
Add a Schedule to my Request?	26
Change my InPlace Email Notification Preferences?	29

Accessing the InPlace Network

** PLEASE NOTE that InPlace will not work in Internet Explorer.**

Request Access

New users can request access to the InPlace Network by registering on the <u>Clinical Education</u> <u>webpage</u>.

This registration also includes the opportunity to register for an InPlace training session. If needed, please feel free to re-register at any time to explore updates and renew familiarity within the platform.

Once Ochsner Health creates your InPlace Network account, you will receive an email in the in box provided in your registration with a link and instructions for login.

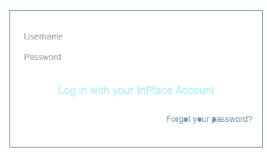
Logging In

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

The link to log in is not searchable online in your web browser. We recommend bookmarking it for rapid access to use each time to access the InPlace Network for Ochsner Health. It is also accessible vie the Clinical Education webpage.

Your username is the full email address utilized in registration for the account. Enter the password you created using your activation link. If needed, feel free to select "Forgot Password" to set a new password. Clear your cache, refresh the page, and re-attempt log in.





Quantum Information Technology Cookie Policy



Academic Institution Steps

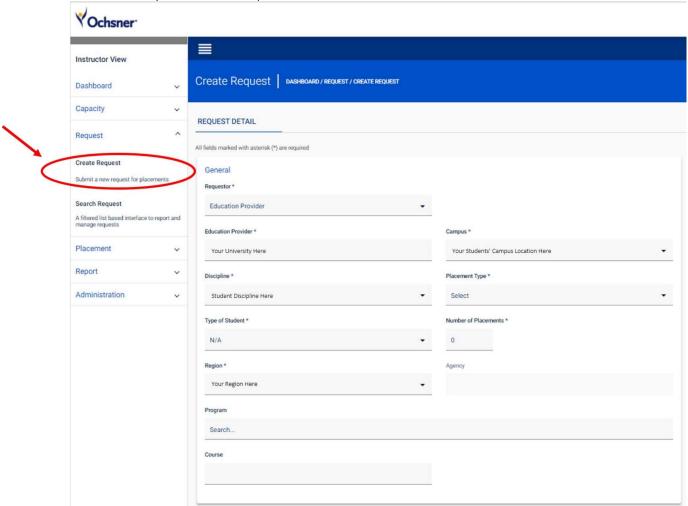
1-2-3s of Requesting a Clinical Rotation in InPlace

- 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



- a. Enter rotation information. Fields marked with asterisks(*) are required fields.
- b. Pre-licensure Nursing, Pharmacy, Rehab:
 - i. Create separate requests for each unit. (ex: 2 in surgical ICU, 2 in neuro CCU)
 - ii. Expand the hospitals by clicking the > symbol and select accordingly.
- c. All other disciplines/programs:
 - i. Create one request per cohort with the initial, primary, or preferred facility selected.
 - ii. Enter additional facilities scheduled or as options into Comments box. Clinical Education will adjust in a later step.
- d. Please add any students if known during the request step. A facility must be selected.
 - i. Health and Safety Attestation compliance can be entered at this step by clicking the number under "Compliance" in the Student's area.
- e. Include any information pertinent to setting or student need in Comments.

Field Name	Information Needed
Requestor* Education Provider* Campus*	Requestor, Education Provider, and Campus should pre-populate and may appear greyed out. If your any is incorrect, please email Clinical Education for correction.
Discipline*	Select student discipline from drop-down menu (e.g.: Nursing; Allied Health)
Placement Type*	Nursing: Select type of rotation (e.g.: Group) Allied Health: Select student program (e.g.: Radiologic Technology) Graduate Nursing, Physician Assistant: Select specialty for rotation.
Type of Student*	Select the student year of study from the drop-down menu
Number of Placements*	Number of student "spots" in group.
Region*	Area where hospital is located (ex: Southshore, Baton Rouge, etc.)
Agency/Facility*	Select the hospital or unit (see above guidance)
Program Course	Graduate Nursing: Enter DNP, PhD, MSN, or MSN Post-Master's Certificate. All Others: Type your program name or course only if desired.

2. If an instructor from your school will be supervising the students, click "Add Academic Supervisor".

For rotations reporting without a school instructor, please skip ahead to STEP 5.

Do not create accounts for or assign preceptors to any rotation. Clinical Education will complete this step. If you know who will be supervising, but they do not have an account, please enter information into the Comments section; Clinical Instructors must register for account.

Additional Information



Personnel Role Action

No supervisor added

- 3. 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	Add Supervisor	×
		All fields marked with asterisk (*) are required	
Email*	Supervisor's email	Email *	
Employee Code	Program or Discipline (e.g. UGN, SLP, PA)	Search or add new supervisor	8
First Name*	Supervisor first name	Employee Code	
Last Name*	Supervisor last name		
Business Phone*	Supervisor phone number (include cell number if available)		
Personnel Role*	Select supervisor's role from drop-down menu.		
		Mildle Name	
Region*	Area where hospital is geographically located (ex: Southshore,		
	Baton Rouge, etc.)	Last Name*	
Employment Type*	Select supervisor's employment type.		
Education Provider*	Will auto-populate with your school name.	Business Phone *	
Zaadatioii i i o i i aci	viii data populate viiii your asilool lidiile.		
Campus*	May autopopulate. Select Campus from drop down if needed.	Personnel Role *	
Discipline	Select supervisor discipline from drop-down menu.	Select	
4 61:-1 114 -1-11		Employment Type *	
4. Click "Add".			
Education Provide	r Contact will auto-populate the requestors information.	Education Provider	
Laucation 1 Tovide	t contact will auto-populate the requestors injornation.	Herzing University	

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

If a different individual will be managing the request process, please change this at this time. (The individual will need to be registered in InPlace Network.)

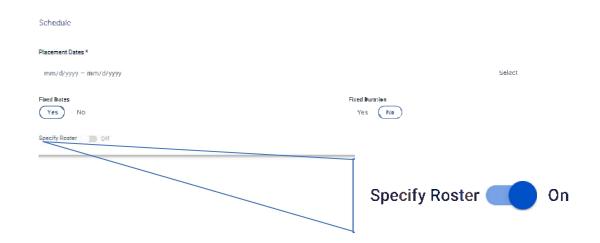
Otherwise, no changes are needed.

- 5. Comments: List any and all other dates, general schedules, facilities, regions, or units as alternates if the hospital coordinator cannot accommodate your request in its original form. Include reference to any prior communications as well as student setting needs or alternatives.
- **6. Schedule:** Precepted Nursing, Physician Assistant, Graduate Nursing, and most Allied Health rotations may skip this step.

Nursing Groups: Enter schedule information in "Schedule" panel.

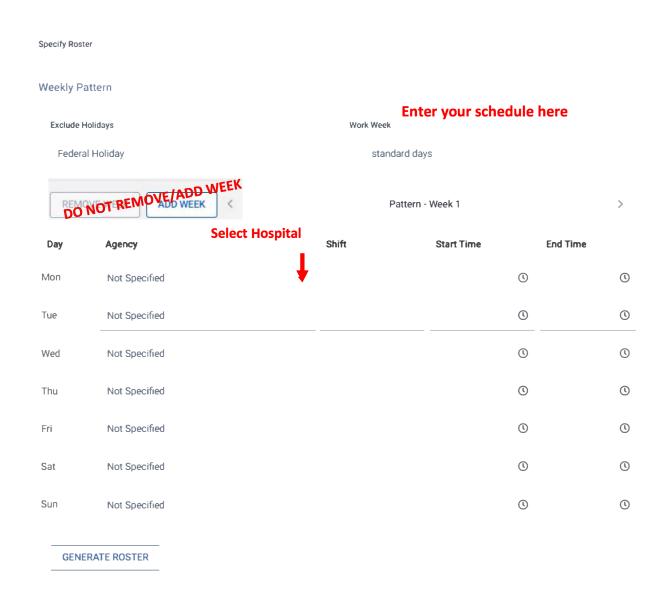
Fields marked with asterisks (*) are required fields.

- Type or select "Placement Dates*"
- Type the number of hours/days of "Duration*" & select "Days" or "Hours" as the unit
- o Indicate whether the dates and/or duration are fixed ("Yes") or are flexible ("No")
- o Toggle "Specify Roster" button to cause a "Weekly Pattern" panel to appear.



Set the students' schedule:

- Ensure any and all adjustments at the top of the page have been completed. Any changes to the above sections will erase Schedule entries and result in a need to repeat entry of schedule.
- Select 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.
- Select each day's shifts.
- Adjust the shift times using the built-in tool to update. Do not type enter different times. Utilize the Comments box to indicate conflicts or alternative needs.
 - o Time conflicts will generate a "warning" or "error" but will not prevent submission of request nor inherently result in denial.
 - Do not use the "Add Week" or "Remove Week" buttons.
- Click "Generate Roster" button at the bottom of the page. "Record saved" will pop up to confirm.
- Await the hospital's approval of your request before attaching students (next phase).



Once you have ensured all information is complete and accurate, including required fields and Comments:

- > Click "Save" at the bottom of the page.
- > A confirmation window will appear featuring a Request ID number for the group.
 - *Please record this Request ID number to keep track of this group's request.*

This request should appear as an item "Pending Response" within your Academic Dashboard and within Request > Search Request.

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"

Dashboard

Capacity

Request

Placement

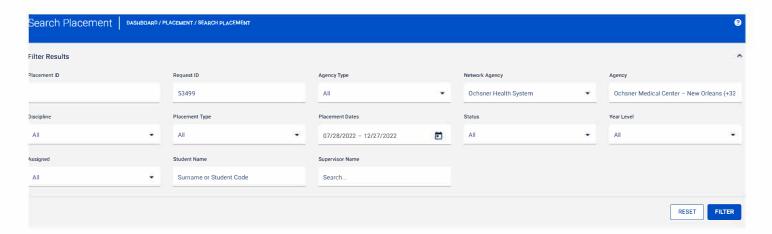
Search Placement

A fillered list based interface to report and manage placements

View Roster

View and print rosters for a supervisor or agency

- 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. Select "More Filters" if needed.
 - b. *The most direct way to find a specific group is to use the Request ID & Placement Start Dates*
 - c. When you're finished adding your desired filters, press the "Filter" button to apply your filters & search



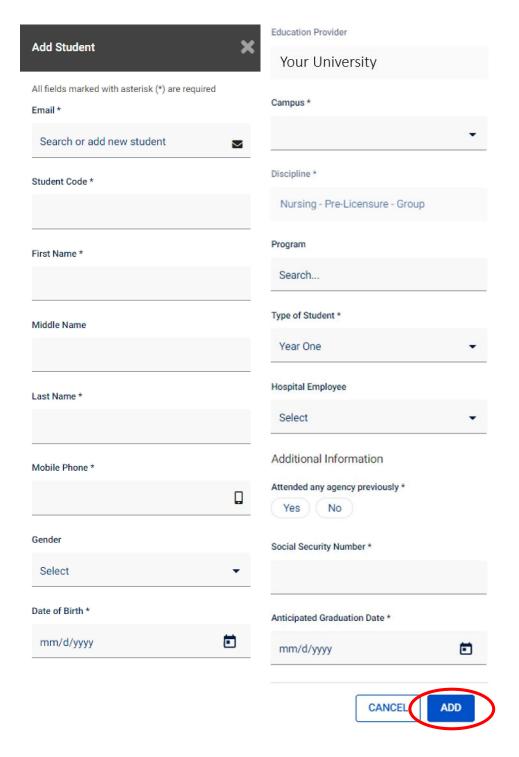
3. Within the resulting placement list, each row represents a student "seat." Select the <u>blue graduate</u> <u>icon</u> for each row ("seat") in the group, one at a time.



- 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

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



- 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."

3. Enter & Upload Student Compliance

The <u>Clinical Education website</u> contains the most up to date Health and Safety Attestation guidance. This webpage is searchable in your web browser if you are unable to use the link above and contains log in link for InPlace Network (active account required).

- Students do not have access to InPlace Network to upload their own compliance.
 - School must confirm compliance items and enter on student behalf.
 - o For instructions on how instructors can upload their own compliance, see page 25.
 - All compliance must be complete prior to the start of any clinical rotation.
- Students' compliance training will be assigned and completed via Workday Learn.
 - Each student will receive instructions and credentials for completion based on the data entered by the school into InPlace Network.
 - Upon completion, students will download certificate of completion from Workday. This
 certificate must be verified by the school. Please save this as recordof agreement to
 Student Handbook, Confidentiality, and policies and procedures.
 - No certificate will be generated for Epic training completion.
 - The certificate itself does *not* need to be uploaded *nor sent via email* to Clinical Education.
 - ➤ No paper copies will be accepted for Spring 2026.

Enter Student Compliance:

- 1. Student(s) must be attached to a placement in order to attest to Compliance.
- 2. Click the "Edit" button at the end of the row corresponding with the student's name to open their record.
 - a. This can also be accessed by clicking "Administration" -> "Manage Student" on the left hand navigation pane of the screen.
- 3. Within the "Edit Prerequisites" window, read each prompt, select the appropriate response, and Save.
- 4. Set the expiration date for the Handbook and Confidentiality Training to the end of the calendar vear.
- 5. Missing, incomplete, and 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 if needed.
 - a. Compliance training will be reassigned annually in accordance with Joint Commission standards.

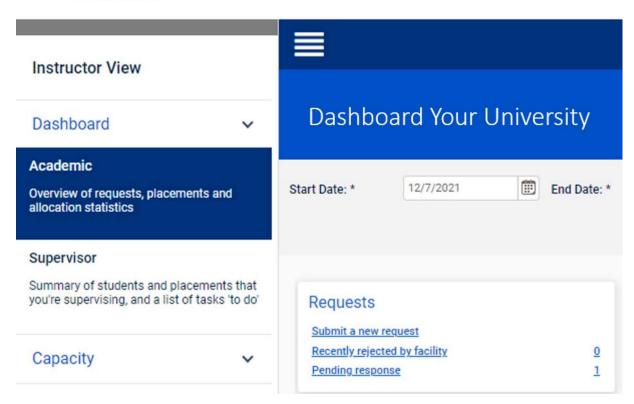
** PLEASE NOTE: Although listed items do NOT require an upload of documentation, per your school's Affiliation Agreement with Ochsner Health, your attestation of the students' compliance requires that your institution maintain this documentation for each student and that the school produce this documentation upon request from Ochsner Health.**

FAQs- How do I...?

Review/Monitor my Requests & Placements?

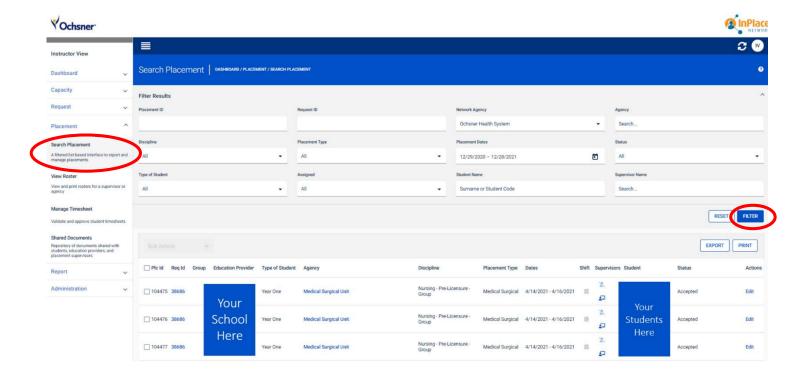
- 1. Click on "Academic" within the "Dashboard" tab on the left side
- 2. From here you can view a list of your request pending acceptance/rejection by the hospital, placements offered by the hospital that require your action, updated placements, or those recently canceled or rejected by the hospital,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





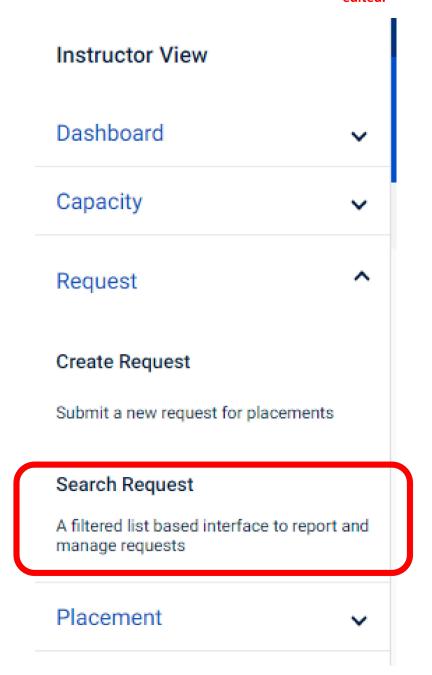
<u>OR</u>, for a more complete overview or for reporting purposes, you can view all of your placements (those requests that the hospital has taken action on) by,...

- 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

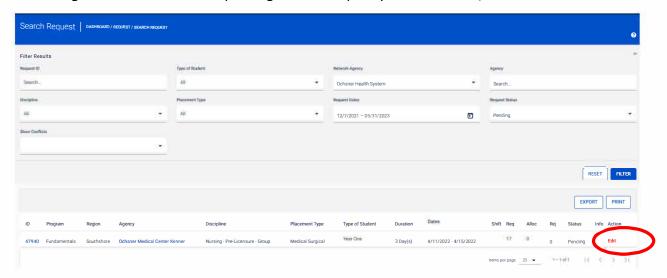


Edit/Withdraw a Request?

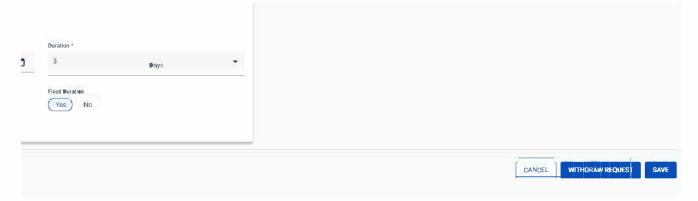
- **If for any reason any student(s) is/are not to attend clinicals, please withdraw the associated request/placement "spots"**
- 1. Click on the "Request" navigation tab, then "Search Request"
- 2. Use the filters at the top of the Search Request page to find your group(s)- the Request Dates filter 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.**



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"

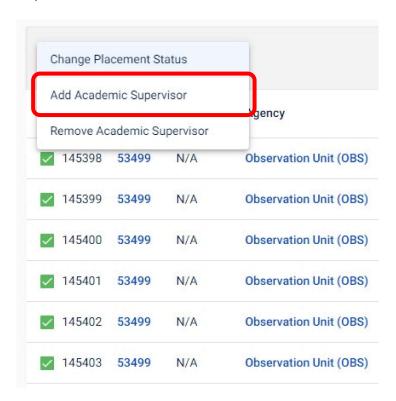


Withdraw a Placement?

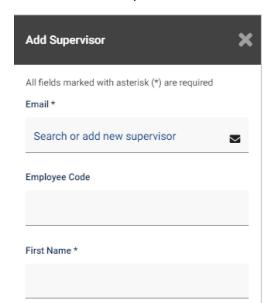
**If for any reason a group is not to attend clinicals, please notify the education contact at the facility.

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"



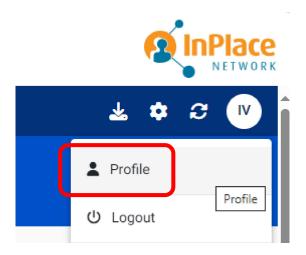
4. Enter the supervisor's email into the "Add Supervisor" window and select the appropriate supervisor from the drop-down menu OR complete the form to add the supervisor to the system and click the "Add" button (*Note that all fields marked with asterisks are required).



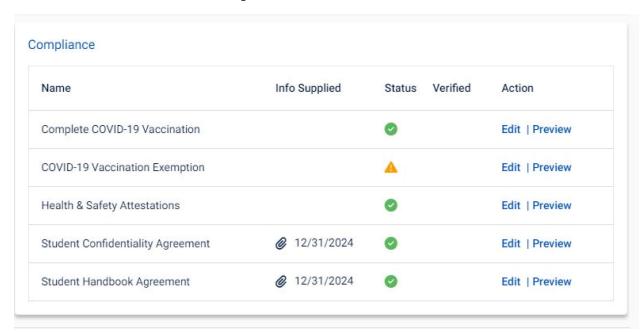


Add my own Compliance items?

1. Click the circle containing your initials in the top right corner of your screen, and select "Profile" from the drop-down menu



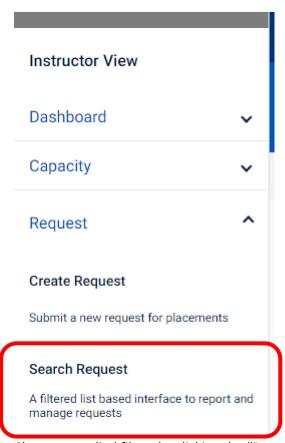
- 2. Follow the same steps as you would for adding student compliance (step 3 of Academic Institution Steps above)
 - a. The goal is for all of your yellow triangles to turn to green check marks and for there to be paperclips indicating attachments next to both the "Student Confidentiality" and the "Student Handbook Agreement"



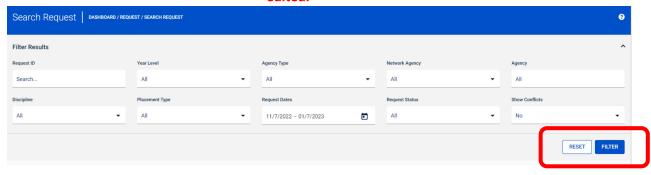
Add a Schedule to my Request?

1. Click on "Search Request" within the "Request" tab on the left side

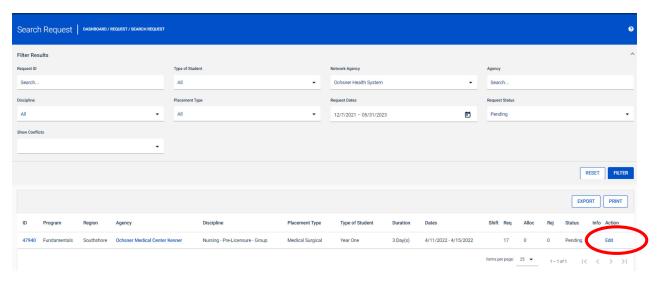




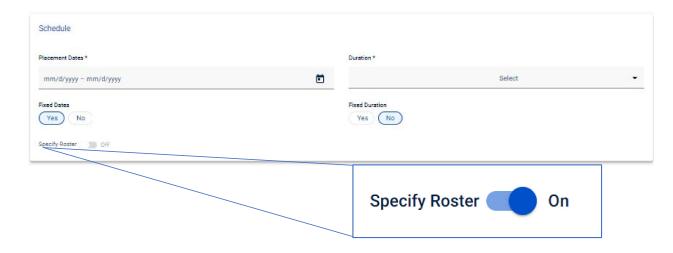
- 2. Clear any applied filters by clicking the "Reset" button
- 3. Use any of the filters at the top of the page to help you locate the request please note that the date filter will apply regardless of any other filters applied- and click the "Filter" button to apply the filter criteria
 - ** Note that 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.**



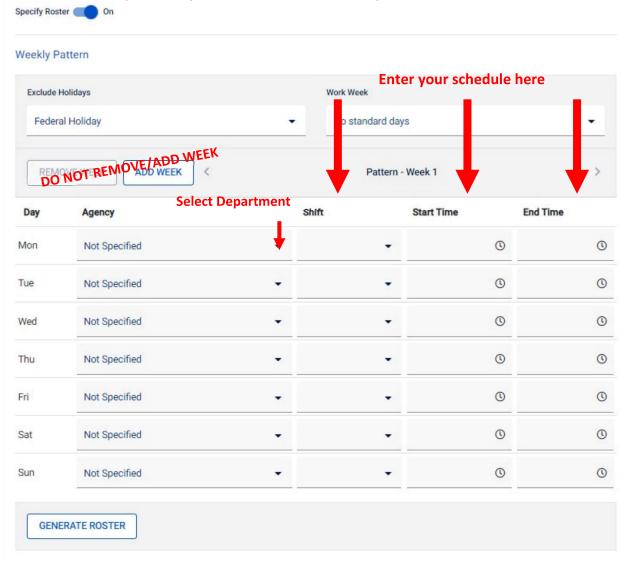
4. Within the resulting list of Requests, click on the word "Edit" on the right side of the row corresponding with the request you'd like to edit. This will pull up the "Request Details" page.



- 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.



- 1. 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 <u>NOT</u> 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

