# INPLACE USER GUIDE

## Agency Management

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# Agency Overview

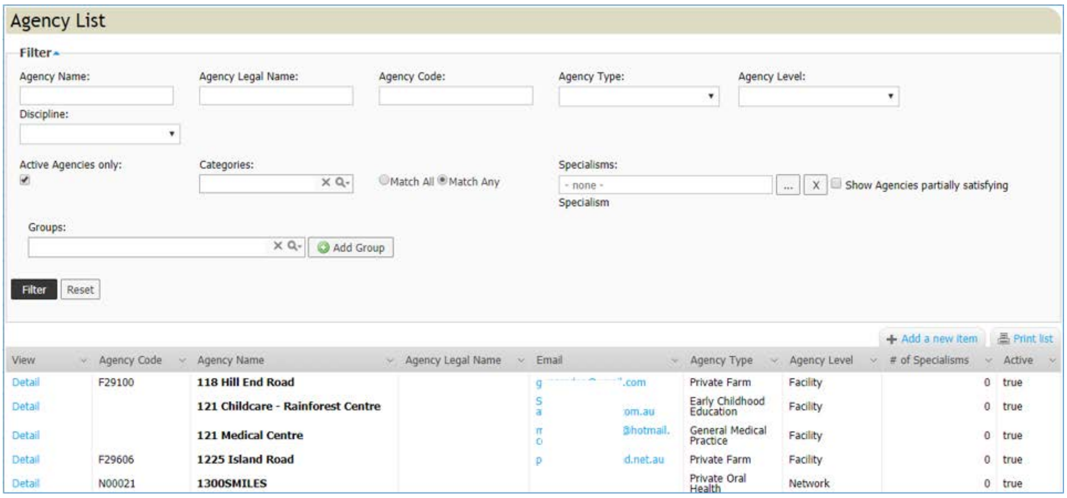
Agencies provide the placements that students attend. Agencies are known outside InPlace as ‘Placement Sites’ or ‘Placement Providers’.  Agencies may be loaded in bulk using the Data Migration Tool or set up individually via the Agency List.

After they have been set up, any changes to Agencies or their associated Agency Personnel must be maintained via the Agency List (**Manage** menu > **Agency**).

**Disciplines** are associated with an Agency on creation to allow visibility of Agency details to relevant users (Students, Placement Coordinators, etc.). An Agency can be associated to more than one Discipline.

## Search/View Agency

1. Go to **Manage** > **Agency**




2. Enter search criteria and click **Filter**
3. In the View column click on the **Detail** link
4. Click on tabs to view/update details as associated with the agency

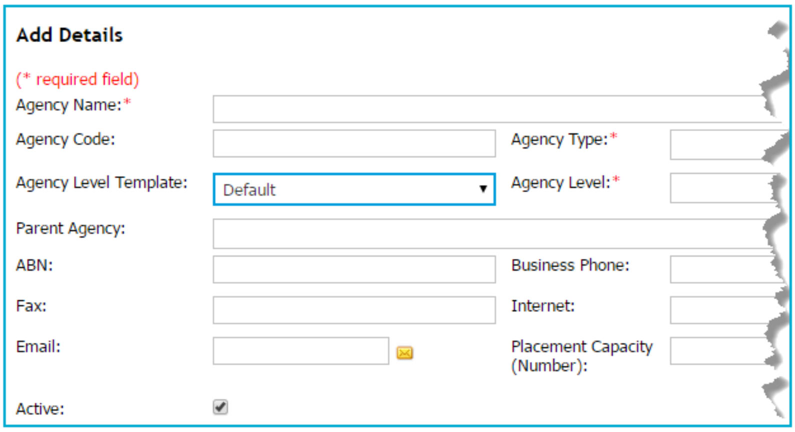

## Create New Agency

1. Go to **Manage > Agency**
2. Search using the Filter to check the Agency does not already exist. (Refer to steps above in *Search/View Agency* section)

**Important Note**: Only search using the Agency Name, *not Discipline* – the agency may already be created in InPlace but not associated with the discipline you are working with.

3. Click **Add a new item**.


4. In the **Add Details** section, add the following (***** = mandatory fields).




| Field | Description/Action |
|---|---|
| * **Agency Name** | Enter the name of the Agency. |
| **Agency Code** | Unique code identifying the Agency. |
| * **Agency Type** | Selection Agency type (e.g. Adoptions, Court, etc). |
| **Agency Level Template** | Selection of level groupings. |
| * **Agency Level** | Selection of Agency Level (e.g. Facility, Department, Ward). |
| **Parent Agency** | Select the parent Agency from this menu if applicable. |
| **ABN** | Agency's Australian Business Number. |
| **Business Phone** | Agency's phone number. |
| **Fax** | Agency's fax number. |
| **Internet** | Agency's website address (URL). |
| **Email** | Agency's email address. |
| **Placement Capacity (Number)** | The maximum number of Placements that the Agency can provide for a given time. |
| **Active** | This check-box determines whether or not the Agency is currently able to provide placements. An Agency may be made *Inactive* (but not deleted) for historical record keeping. |

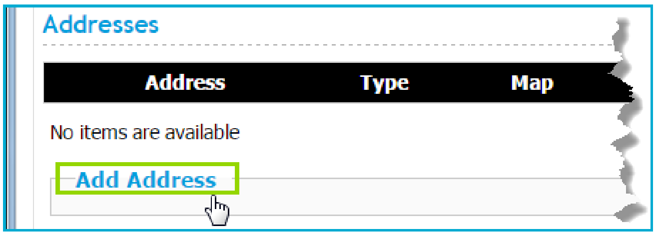
2. Select the relevant Disciplines for the Agency. The Disciplines will be associated with the Agency.

After you have associated a Discipline to an Agency, the Extended Attributes (XAs) are displayed under the main Agency Details on the **Details** tab. These attributes allow you to specify details for each aspect of the Discipline.

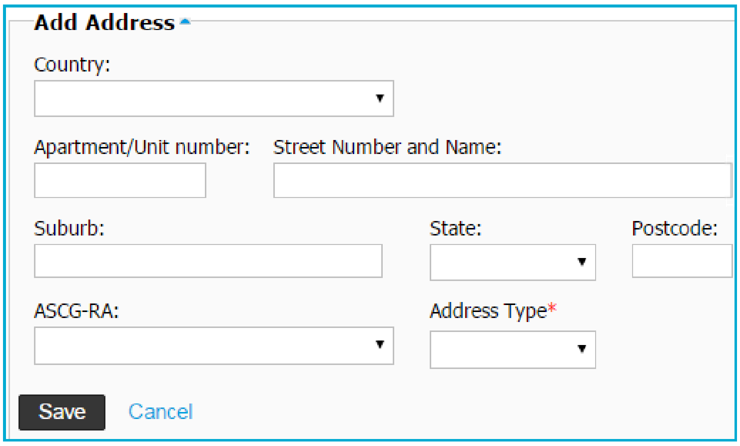
3. Click **Save.**

   The Agency record is created and the following tabs are made available:


4. Add Agency Address**, Click Add Address.**
5. Enter Address details.



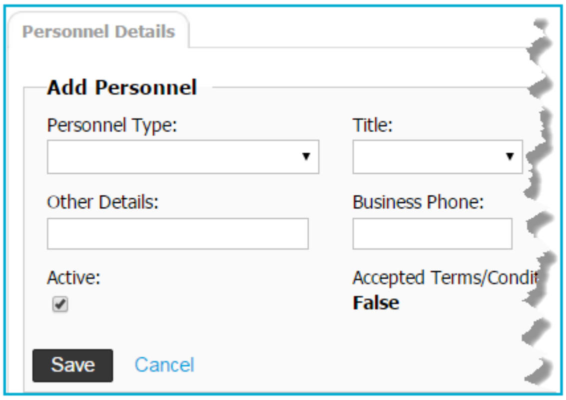

The address details are displayed.



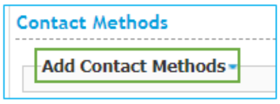

**Tip:** Press your tab key on your keyboard to the ‘ASCG-RA:’ field. This automatically generates the RA Code based on the address information provided.

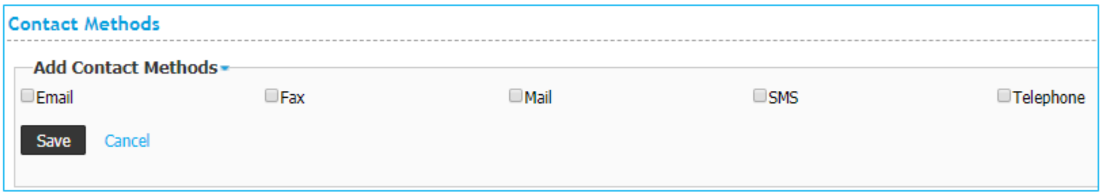
5. Click **Save.**
6. Add Agency Personnel, Click **Add Personnel.**
7. Enter Personnel details.


The personnel details are displayed.

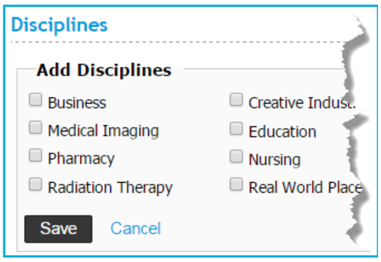



8. Click **Save.**
9. Add Agency **Contact Methods.**
10. Select at least one of the following methods of contacts for the Agency.




11. Click **Save.**
12. Add Discipline, click **Add Disciplines.**




13. Tick the discipline/s that are relevant for the agency.
14. Click **Save.**

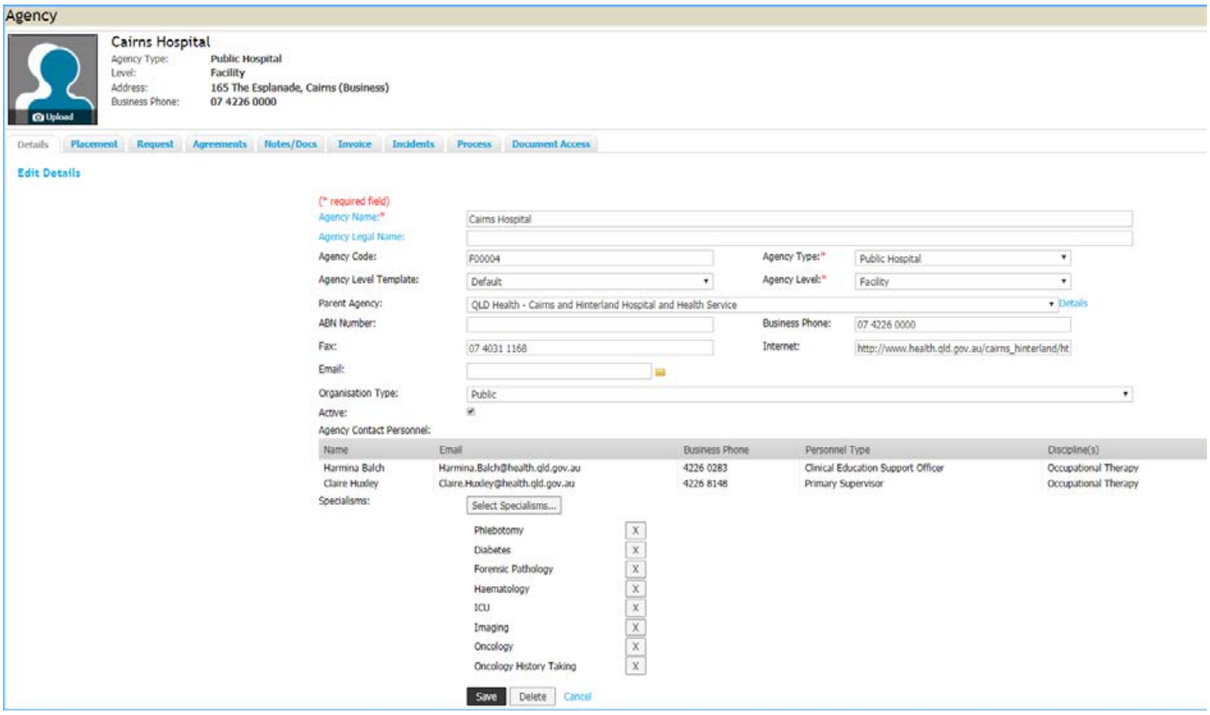
**Note** – Liaisons and Invoice categories are not currently used.

# Edit Existing Agency

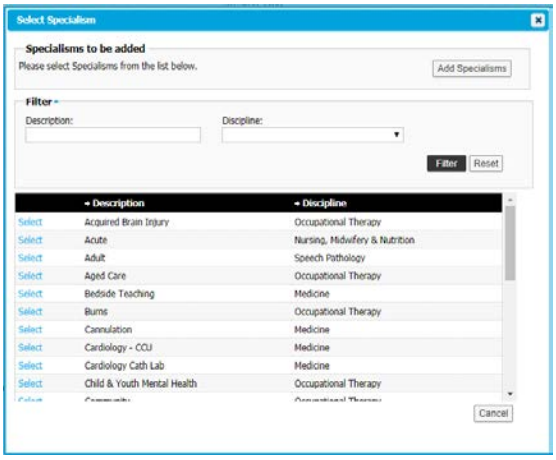
1. Go to **Manage** > **Agency**
2. Search using the filter.
3. Click on **Detail** to open Agency.
4. Click on tabs to edit details as associated with the agency.


# Details

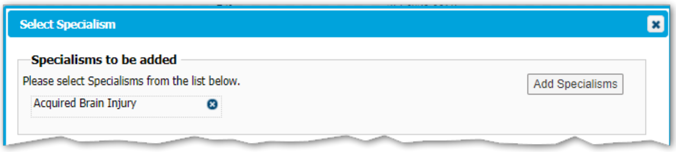
1. Click on **Details** tab
2. Update Agency information as required.
3. Click **Save**.



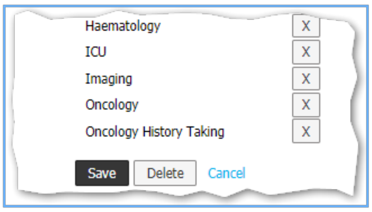

4. To add a Specialism, click **Select Specialisms**.
5. Use the **Filter** to search for a Specialism.
6. Click **Filter.**




7. Click **Select** and it will appear in **Specialisms to be added**.




8. Click **Add Specialisms** to add to the agency.
9. Click **Save**.
10. To remove a Specialism, in the **Details** tab Click **X** beside the Specialism.
11. Click **Save**.



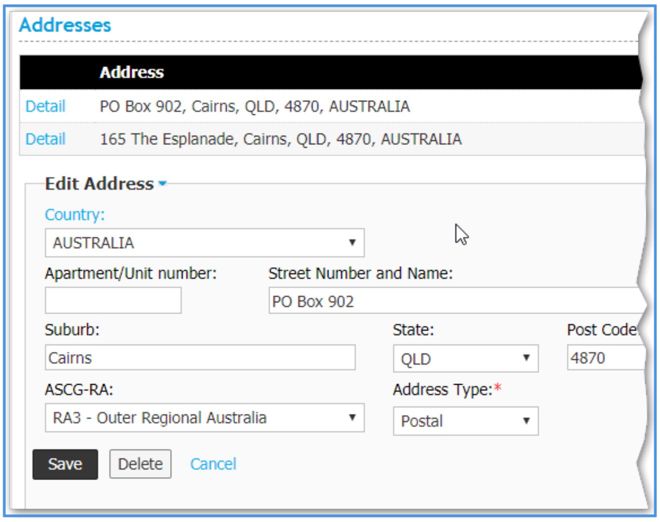

## *Departments / Wards*

Any **Departments / Wards** associated with the Agency will be listed.

To access the individual Department / Ward, click **Detail**.

## *Edit / Delete Addresses*

1. Click **Detail** to view the selected address.
2. Update the required fields.
3. Relevant Country and RA Codes must be completed.
4. Click **Save**




5. To delete an address, click **Delete**.
6. Click **Ok** to confirm deletion.

## *View/ Edit Personnel*

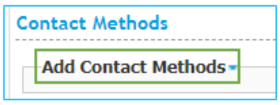
1. Tick the box to Show All Personnel.

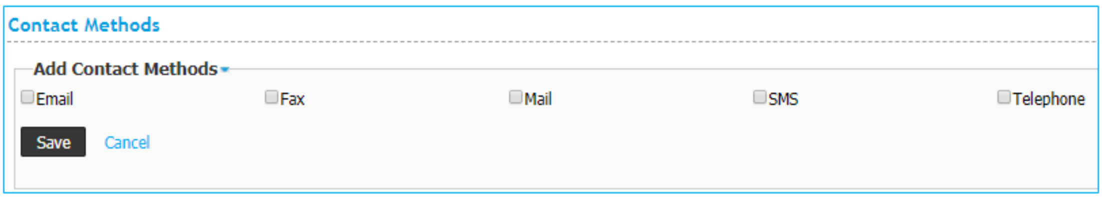

2. Click on the name of the chosen Personnel member to view the Personnel Details.
3. Click on tabs to view/update details as associated with the Personnel.


4. Click **Save**
5. To delete Personnel member, click **Delete**.
6. Click **Ok** to confirm deletion.

## *Edit Contact Methods*

1. Add Agency **Contact Methods**
2. Select at least one of the following methods of contacts for the Agency




3. Click **Save**

### *Edit Disciplines*

1. To Edit Discipline, click **Edit Disciplines**
2. Tick the discipline/s that are relevant for the agency


3. Click **Save**

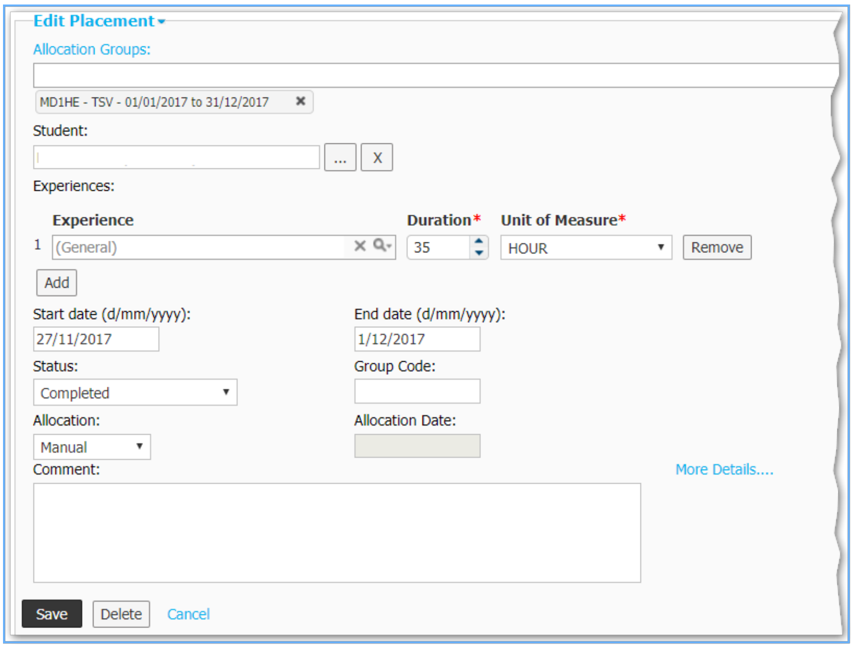
**Note** – Liaisons and Categories are not currently used.

## Placement

All placement history associated with this facility will be listed.

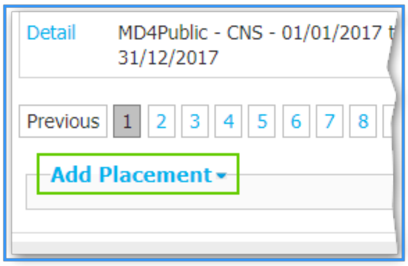
### *Edit a placement*

1. Click on **Placement** tab.
2. Locate the placement in the list and click **Detail**
3. **Edit Placement** tab will open at the bottom of the page.
4. Edit the required fields
5. Click **Save**

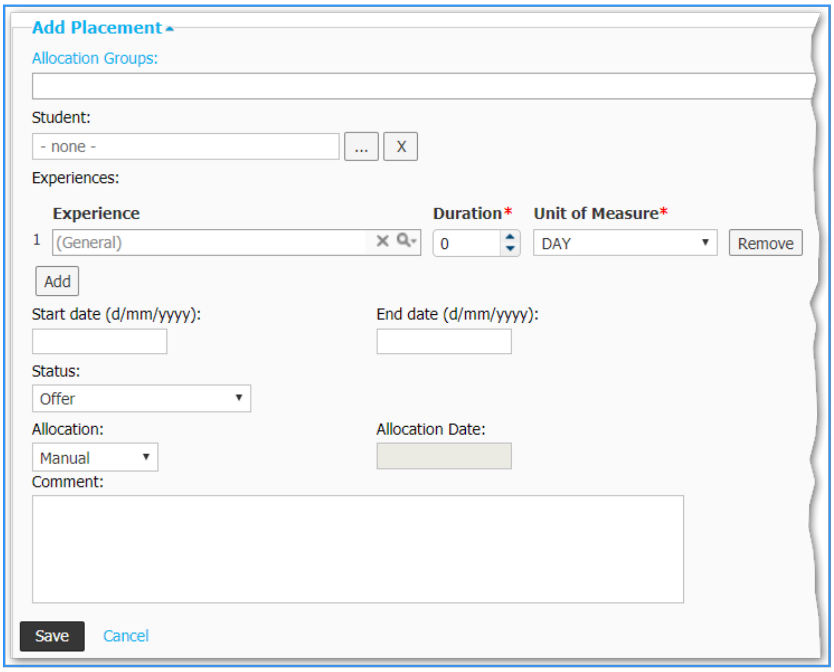


## *Add a placement*

1. Click on **Placement** tab.
2. Scroll to the bottom of the list and click **Add Placement to** expand the tab.

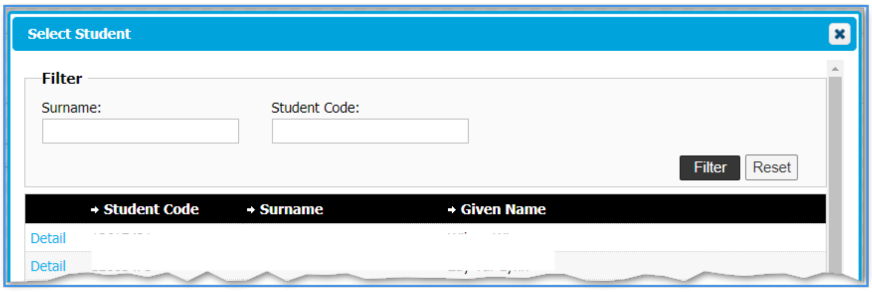



3. Enter the **Allocation Group**




4. To enter the **Student**, click **...**

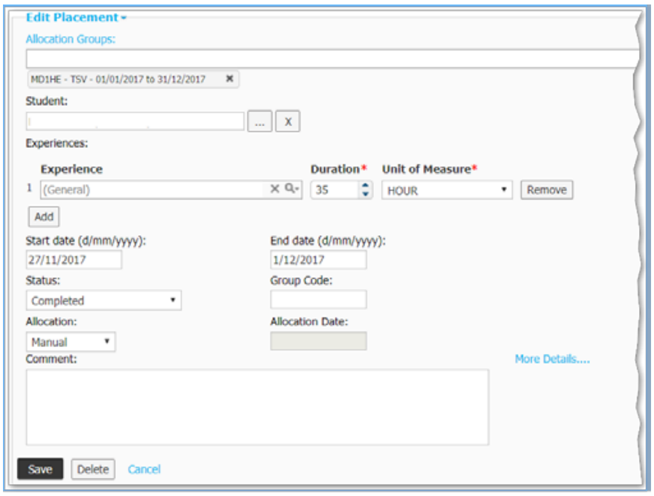

5. Search for the student using the **Filter** for **Surname** and/or **Student Code**
6. Click **Detail** to select the student.

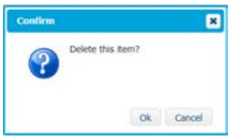



7. Enter the Duration and change Unit of Measure to **'HOUR'**
8. Enter Start Date
9. Enter End Date
10. Select Status
11. Click **Save**

## *Delete a placement*

1. Click on **Placement** tab.
2. Locate the placement in the list and click **Detail**
3. Edit placement tab will open at the bottom of the page.
4. Click **Delete**
5. Click **Ok** to confirm deletion

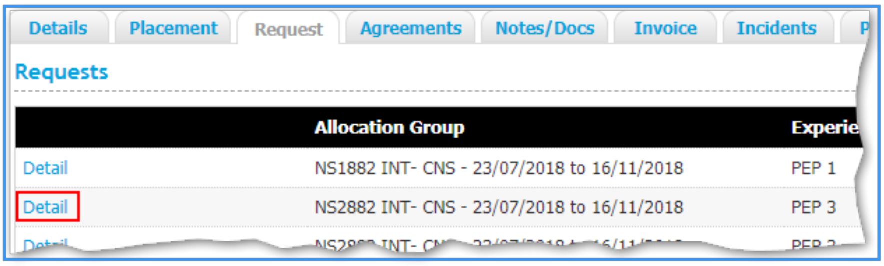


## Request

All request history associated with this facility will be listed.

1. Locate the request in the list
2. Click **Detail** to view the individual placement request.



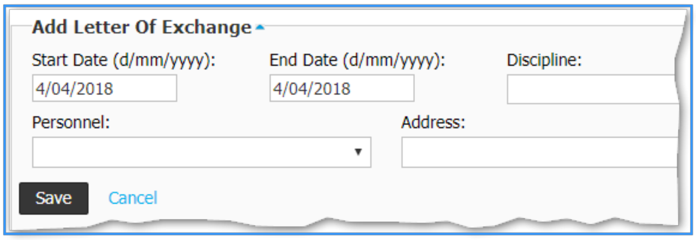

## Agreements

All **Agreements** and **Letters of Exchange** associated with this facility will be listed.

1. Click on **Agreements** tab.

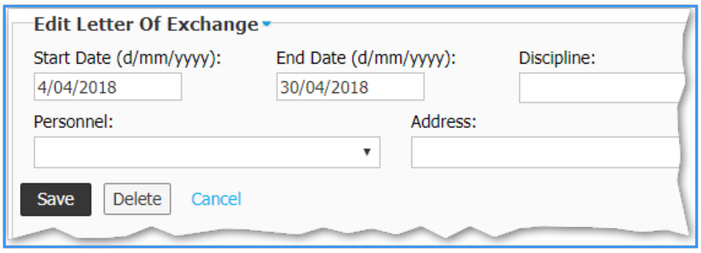
### *Add Letter of Exchange*

1. Click **Add Letter of Exchange**
2. Enter **Start Date** and **End Date**
3. Enter **Discipline, Personnel and Address**
4. Click **Save**




### *Edit Letter of Exchange*

1. Click **Detail.**
2. Update required fields.
3. Click **Save.**




### *Delete Letter of Exchange*

1. Click **Detail.**
2. Click **Delete.**
3. Click **Ok** to confirm deletion.

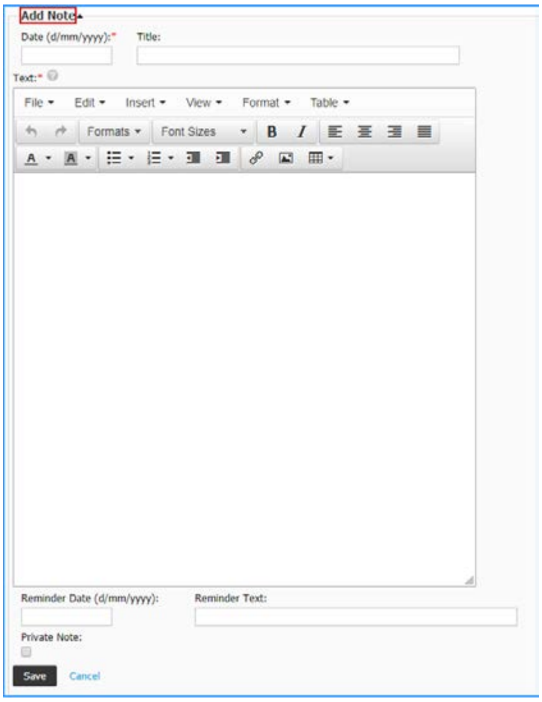
## Notes/Docs

The Notes/Docs tab lists the **Notes** and **Documents** associated with the Agency.

1. Click on **Notes/Docs** tab.

### Add Note

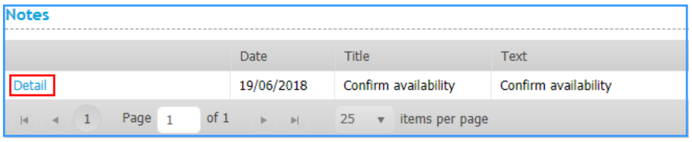
1. Click **Add Note**




2. Enter **Date**.
3. Enter **Title**.
4. Enter **Text**. Formatting capabilities are available.
5. Enter **Reminder Date** (if applicable).
6. Enter **Reminder Text** (if applicable).
7. Tick **Private Note** (if applicable).
8. Click **Save**.

### Edit Note

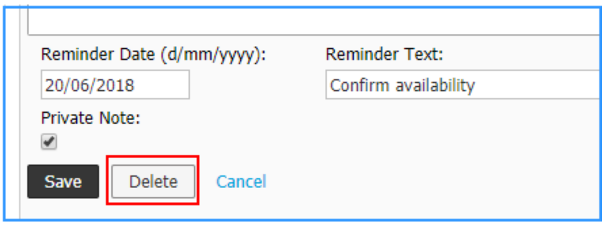
1. Click **Detail**.




2. Update the required information.
3. Click **Save.**

## Delete Note

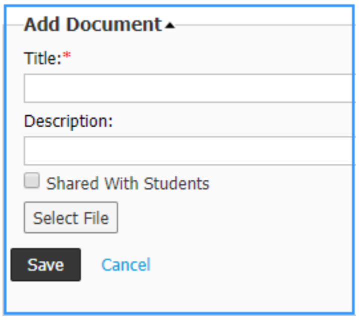
1. Click **Detail**
2. Click **Delete**




3. Click **Ok** to confirm deletion

## Add Document

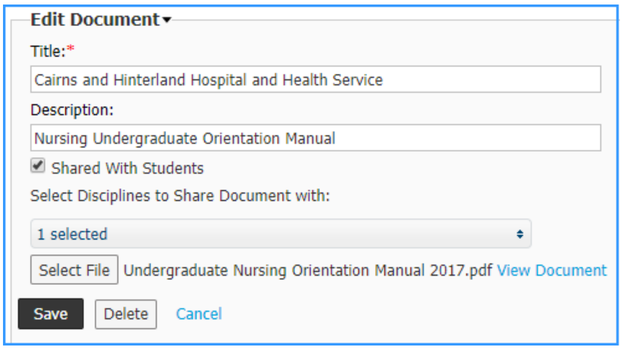
1. Click **Add Document**




2. Enter **Title**.
3. Enter **Description**.
4. Click **Select File**.
5. Locate file.
6. Click **Open**.
7. Click **Save**.

## Edit Document

1. Click **Detail**.
2. Update the required information.




3. To replace the document, click **Select File**.
4. Locate file.
5. Click **Open**.
6. Click **Save**.

## Delete Document

1. Click **Detail**.
2. Click **Delete**.
3. Click **Ok** to confirm deletion.

**Note** – Invoice tab is not currently used.

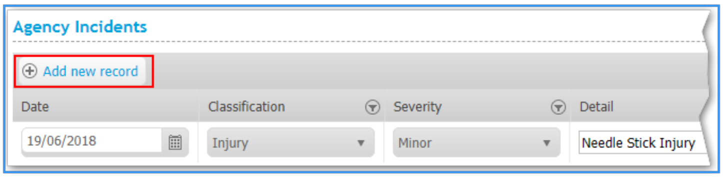
# Incidents

The Incidents tab lists the **Incidents** associated with the Agency.

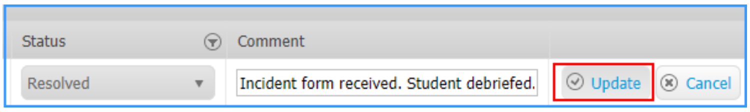
1. Click on **Incidents** tab.

## Add Agency Incident

1. Click on **Add new record**

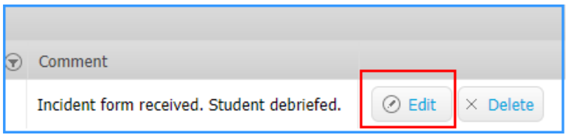



2. Update the required information
3. Click **Update**.




## Edit Agency Incident

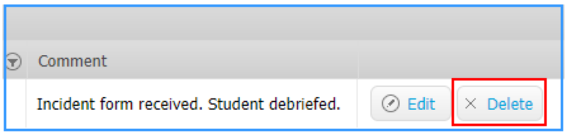
1. Click on **Edit**.




2. Edit the information required.
3. Click **Update**.

## Delete Agency Incident

1. Click on **Delete**.

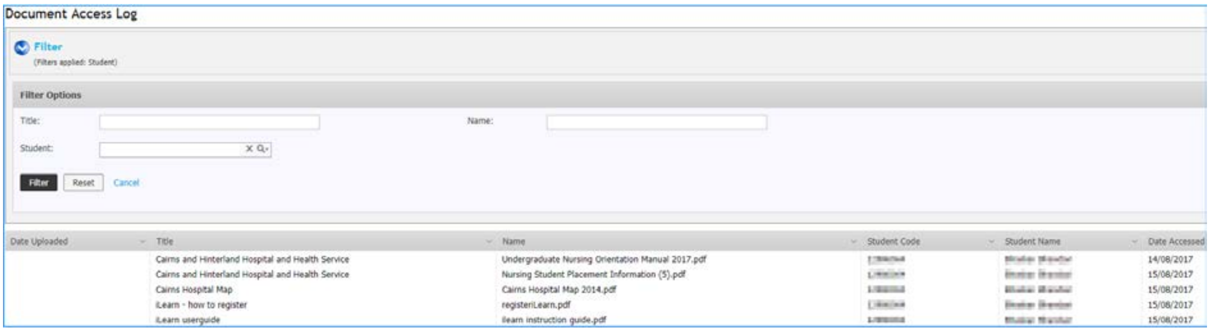



2. Click **Ok**.

**Note** – Process tab is not currently used.

## Documents Access Log

1. Click to open the **Filter**.
2. Enter either the **Title** or **Name** of the document to search a list of students who have accessed it.
3. Search for a **Student** to view the documents they have accessed.




### Document History

| Author | Date | Version | Status | Comments |
|---|---|---|---|---|
| Katrina Beauchamp | 22nd March 2018 | 1.0 | Create | Based on QIT Help Documentation |
| Christine Rollo | 19th June 2018 | 1.1 | Updated | Reviewed and updated. |
| | | | | |