Oxinet Ltd.

PEMS 2.0 Provider View Dashboard

Debbi Hinchliffe

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Introduction:

PEMS: Placement Education Management System 2.0 has been designed to be more intuitive, web-based product designed with industry and HEI collaboration to support complex student placement systems.
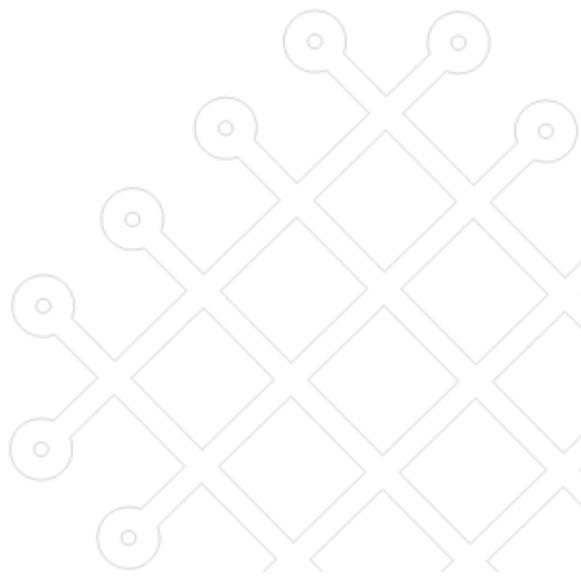
This training and testing guide for Placement Coordinator /Assessor /Supervisor /Practice Nominated Auditor / Finance Officer access.
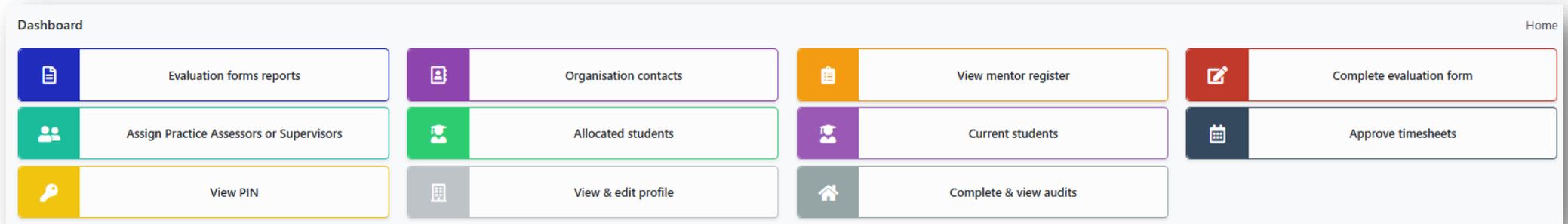
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Provider – Dashboard: (Placement Coordinator)

This will be dependent on what permissions have been set will be dependent on what contact type

- ➢ Evaluation Forms Report – Evaluation Summary of all evaluations completed for linked organisations.
- ➢ Organisation Contacts – Access to linked organisations via Organisation Explorer.
- ➢ View Mentor Register – Access to Manage all Mentors page.
- ➢ Complete Evaluation Form – Access to the Evaluations Form List.
- ➢ Assign Practice Assessors or Supervisors – Access to the Placement Slot Management page.
- ➢ Allocated Students – Access to the Allocated Students page.
- ➢ Current Students – Access to the Current Student page
- ➢ Approve Timesheets – Access to the Approved Timesheet page.
- ➢ View PIN – Access to the assigned PIN code.
- ➢ View & Edit Profile – Access to the linked Placement Profile page.
- ➢ Complete & View Audits – Access to the Manage Audits page.
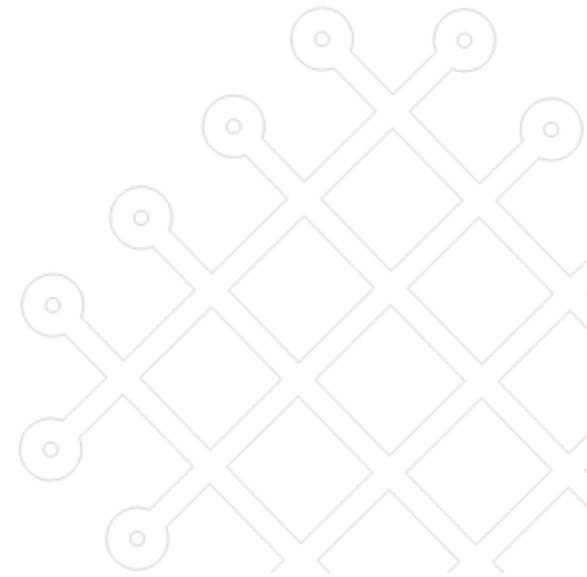
Evaluation Forms Reports:

Based on permission setting, this will show for providers who are required to complete an evaluation form:

	Form Name	Student	Location	Start Date	End Date	Form Type	Status	To Be Completed By	Submitted
☑	Default PLF placement evaluation	N/A	Demo Organisation 5 Placement 1	01/04/25	01/06/25	Mid Asssessment	New		
☑	Default PLF placement evaluation	N/A	Demo Organisation 4 Placement 2	01/04/25	01/06/25	Mid Asssessment	In Progress		

➤ Click onto the Edit Icon, to open the evaluation form.

Default PLF placement evaluation

Student:	**N/A**
Student Code:	
Course:	()
Organisation:	Demo Trust >> Demo Organisation 4 >> Demo Organisation 4 Placement 2
Practice Assessor:	Placement Coordinator
Placement Period:	01/04/25 - 01/06/25
Form Type:	Final Assessment
Date Due:	08/06/25
Date Submitted:	Not Yet Submitted

How much notice were you given that you would be supporting/supervising and/or assessing a student in practice

○ 1 week or less ○ 2 weeks ○ 3 weeks ○ 4 weeks ○ more than 4 weeks

My allocated student contacted me/the placement area prior to the placement

○ Yes ○ No

The student was able to inform me of the learning outcomes/competencies/proficiencies they would be working towards during the placement

○ Yes ○ No

The student had completed their pre-placement documentation prior to commencing placement

○ Yes ○ No

I was able to meet with the student at the beginning of the placement to discuss how they could achieve the outcomes for the placement

○ Yes ○ No

The evaluation form gives the opportunity to either 'Save Progress for Later' if the form is partially completed, or 'Submit' once completed.

Please do make any comments on what went well or any issues encountered below

[   ]

[Save Progress for Later]   [Submit]

Organisation Contacts:

Organisation contacts

Gives the ability to view all the organisations the user is linked to.

Organisation Explorer:

For Users with multiple organisations linked will find using the search fields Helpful:
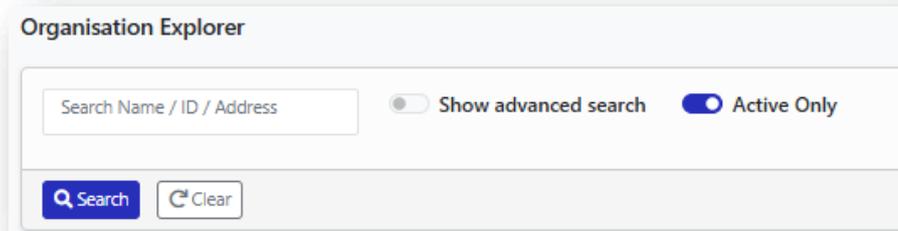
➢ Enter the name of the organisation into the search field
➢ Click Search

Advanced Search: This function will expand your search.

➢ Click Show Advanced Search
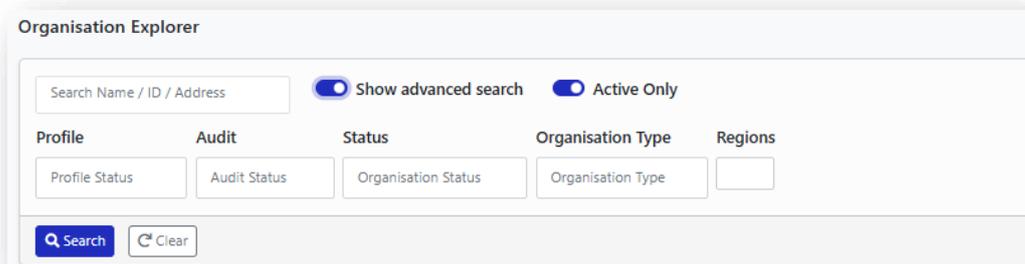
➢ Profile: Select from the drop-down list.
➢ Audit: Select from the drop-down list.
➢ Status: Select from the drop-down list.
➢ Organisation Type: Select from the drop-down list.
➢ Regions: Select from the drop-down list.
➢ Click Search
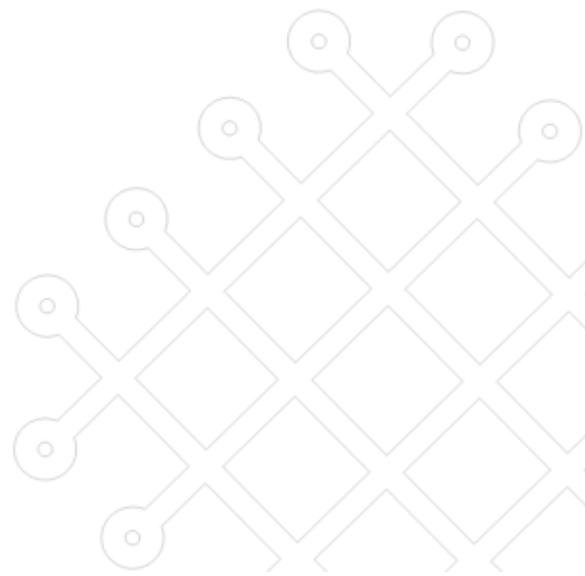
Example view of the hierarchy within the Organisation Explorer.

Organisation Details Tab:

Within the Organisation details, it will show the details of the organisation.

Contacts Tab:

This tab will show all contacts that are linked to this organisation. It will also show contacts that are linked to the organisation hierarchy.
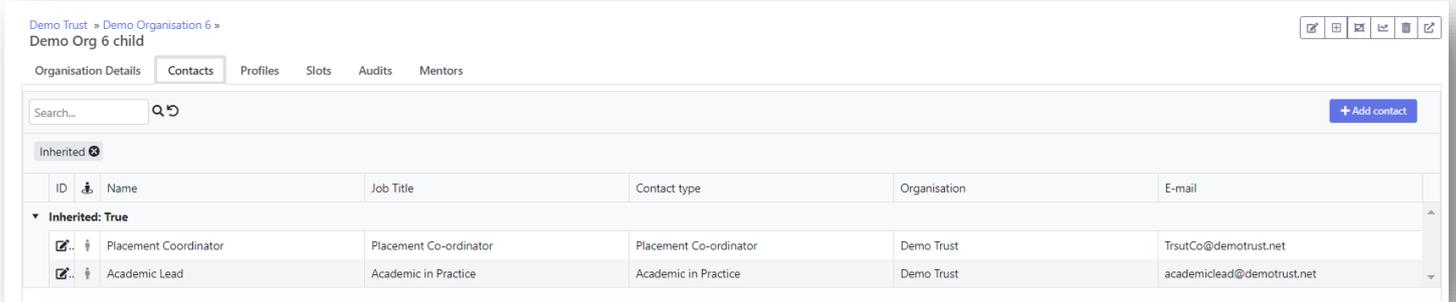
If you have multiple contacts within one organisation, you can search:
➢ Enter Name of contact
➢ Click Return symbol.

Create a New Contact
➢ Click Add Contact button.
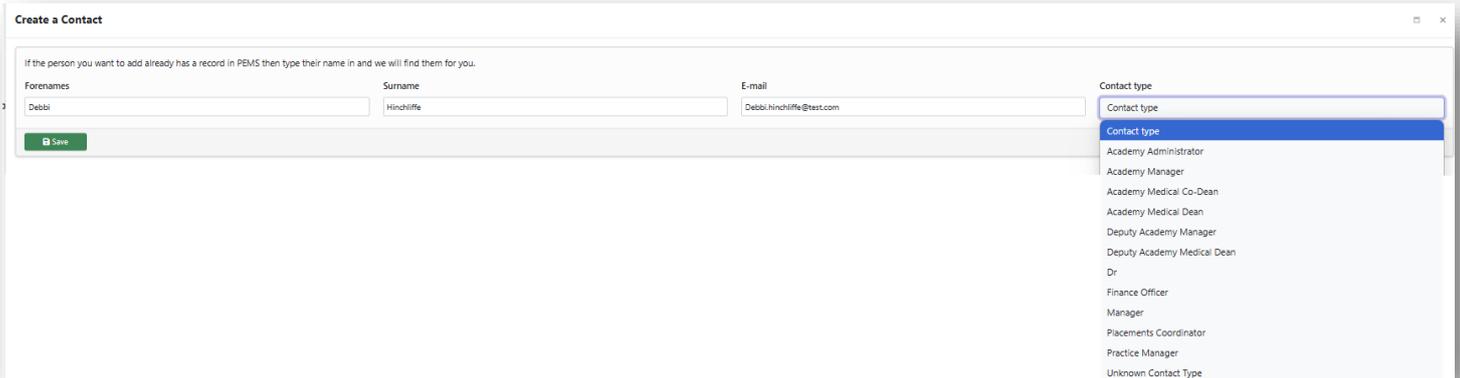
➢ Forename: Enter Contacts details.
➢ Surname: Enter Contacts details.
➢ Email address: Enter Email address.
➢ Contact Type: Select from drop down menu.

When you click save, it will give an option if the person is already on PEMS. This will help not to duplicate contacts.
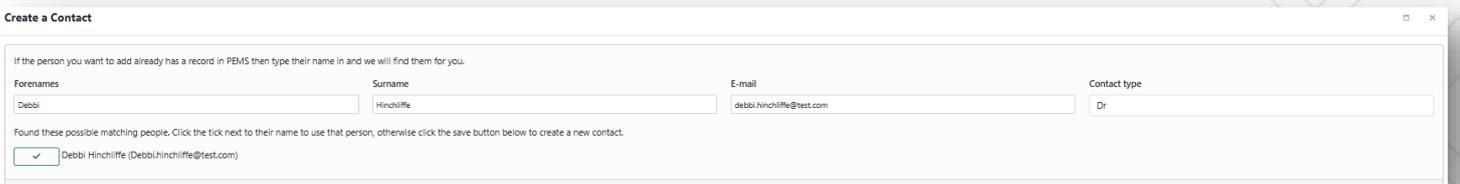
Once you have saved the contact, it will show in the example below:

Demo Organisation 2 Placement One

Organisation Details | **Contacts** | Profiles

Search...

Contact Location ⊗

			Name	Job Title	Contact type	Organisation	E-mail
▼ **Local contacts**							
✎	⚓	👤	Debbi Hinchliffe	Nominated Auditor	Nominated Auditor	Demo Organisation 2 Placement One	dhinchliffe@test.test
✎	⚓	👤	Academic Lead	Academic in Practice	Academic in Practice	Demo Organisation 2 Placement One	academiclead@demotrust.net
✎	⚓	👤	Sarah Mentor	Practice Assessor	Practice Assessor	Demo Organisation 2 Placement One	Mentor@org2placement1.net

+ Add contact

Accessing the Contact Details

Contact Details	Notes

Contact Details

Title	Name	E-mail	Telephone
	Academic Lead	academiclead@demotrust.net	

Address

[Edit] [Delete]

Linked Organisations

Organisation | **Contact type**
| | Select | [+ Add] [Clear] |

Drag a column header and drop it here to group by that column

Action	Organisation	Contact type	Job Title	E-mail	Telephone
✎	Demo Organisation 2 » **Demo Organisation 2 Placement One**	Academic in Practice			

Edit Contacts

Option to Edit the profile or permanently Delete the contact.

Contact Details

Title	Name	E-mail	Telephone
	Academic Lead	academiclead@demotrust.net	

Address

[Edit] [Delete]

➢ Click Edit.
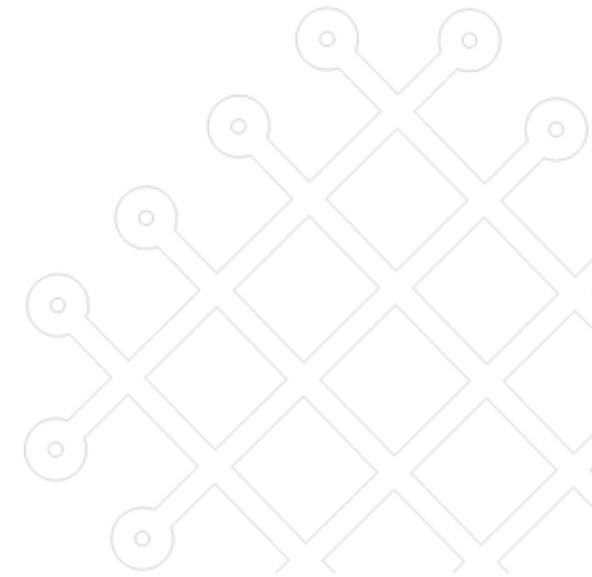
This will show all the details of the contact when created. By clicking the 'Edit' button, it will open a pop-up window, so that you can edit the data:

You will be able to view which organisation the contact is linked to:

If the contact is linked to other organisations, you can add additional organisations by:

> ➢ Click on the Organisation field - select from drop-down menu the Organisation.
> ➢ Click on the Contact Type field – select from drop-down menu the Contact type.
> ➢ Click Add.

Notes Tab:

Click onto the note tab, this will allow you to save notes about this contact.

➢ Note – Enter text within the Notes box.
➢ Select Note Type – from drop-down list
➢ Click Add

The note will appear in the table below.

	Note Type	Date	Note
✎ 🗑	Admin - Editable Note	2025-02-20 14:50:19	Pems Admin This is a test note
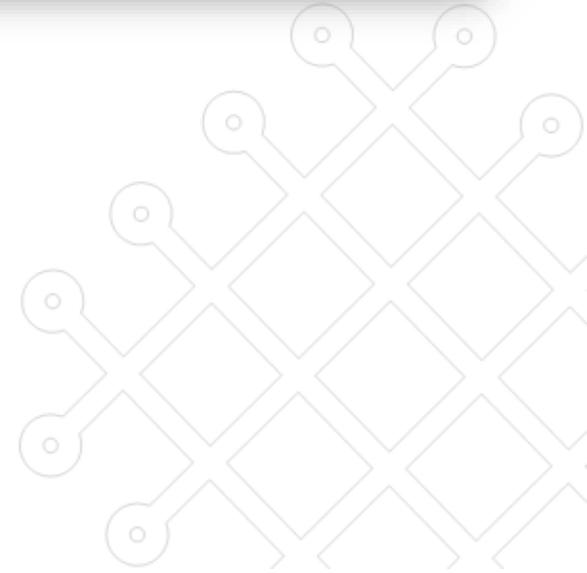
Organisation Audits Tab:

This page will be able to show the administrators the status.

➢ Click on Status – Select from drop-down menu

This will show all the audits that are linked to the organisation:

➢ Click onto the Edit Icon to open the audit.

Placement Audit
Placement Audit Summary:

Manage placement area audit

| Summary | Response | Placement Agreement | Linked Profiles |

Audit Details

Entity Name
Demo Organisation 1 Placement One (Demo Organisation 1)

Created
04/12/24

Audit Category
Placement

Audit Type
Audit

Audit ID
6743

Instance Code
4SWB2JFW

Status
New Audit ✎

Link Lecturer
Select ✎

Nominated Practice Colleague
Select ✎

Applies From
✎

ValidUntil
✎

Placement Agreement

Valid from
✎

Expires
✎

Notes

No Notes

➕ Add Note

Editable areas:

➢ Status – Select from the drop-down menu
➢ Link Lecturer - Select from the drop-down menu
➢ Nominated Practice Colleague - Select from the drop-down menu
➢ Applies from – Select date via calendar
➢ Valid until – Select date via calendar

Placement Agreement:

> ➢ Valid From – Select date from calendar
> ➢ Expires - Select date from calendar

Notes:
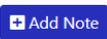
> ➢ Click onto 'Add Note'
> ➢ Opens pop-up window
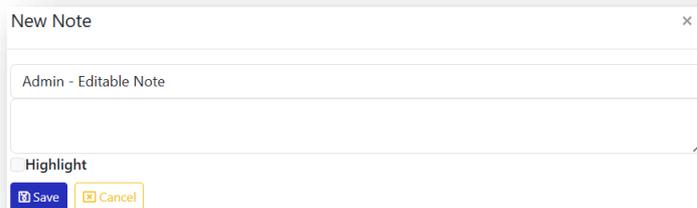
> ➢ Click into Editable Note box
> ➢ Click onto Save

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Audit – Response:

Summary | **Response** | Placement Agreement | Linked Profiles
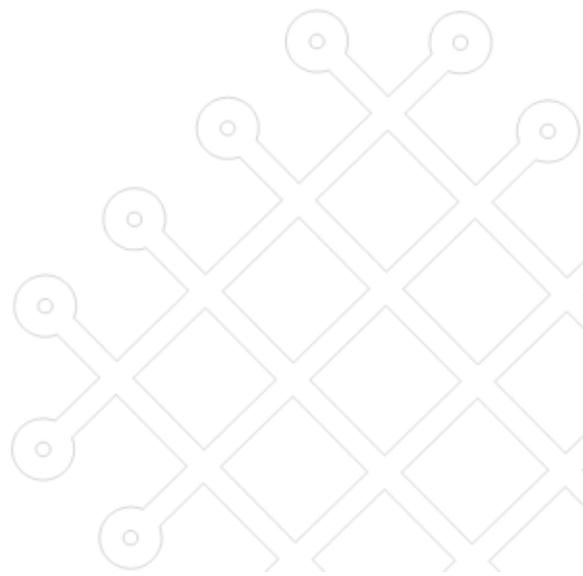
Organisation Details

Practice Learning Environment Information

1.1

1.1 The following AEIs use this placement for student learning:

- [ ] BBP
- [ ] Bucks New University
- [ ] City, University of London
- [ ] Canterbury Christ Church University
- [ ] Kingston & St George's University London
- [ ] Kings College London
- [ ] Brunel University London
- [ ] Middlesex University
- [ ] University of Greenwich
- [ ] University of Hertfordshire
- [ ] University of East London
- [ ] University of West London
- [ ] London South Bank University
- [ ] University of Roehampton London
- [ ] Other:

Status [Select]

1.2

1.2 NMC Approved Programme:

- [ ] Nursing
- [ ] Midwifery
- [ ] Nursing Associate
- [ ] SCPHN/HV
- [ ] Prescribing Programmes
- [ ] District Nursing
- [ ] CPPD
- [ ] Return to Practice

Status [Select]

1.3

1.3.1 1.3.1 - **To be completed by the Faculty Director of Practice Learning only**

Maximum number of students that can be supervised and/or assessed in the practice learning environment (Please indicate specific programme (if relevant) and level of student)

Status [Select]

Organisation Mentors Tab:

The mentor tab shows all contacts that have been assigned the Mentor category.

> ➢ Click onto the 'View' icon on the mentor you want to open.

Mentor Information:

Educator, Placement1

Name	Job Title	Telephone
Educator, Placement1		

Address

E-mail
Placement@Org1place1.net

Mentor Information

Regulator
General Medical Council ✎

Practice Area
None ✎

Current
Yes ✎

Active
Yes ✎

Expires
10/06/2025

Notes

💬 Test   Demo Provider   2024-22-11
14:04

➕ Add Note

Linked Organisations

Drag a column header and drop it here to group by that column

Action	Organisation	Contact type	Job Title	E-mail	Telephone
✎ 🗑	Demo Organisation 1 » **Demo Organisation 1 Placement One**	Practice Learning Facilitator			

Qualifications

Action	Date	Qualification
✎ 🗑	21/08/2023	Preparation of Mentors

➕ Add Qualification

Updates

Action	Date	Update
✎ 🗑	11/06/2024	Workshop

➕ Add Update

Mentor information:

- ➢ Regulator: Click 'Edit' icon – Select from the drop-down menu
- ➢ Practice Area: Click 'Edit' icon - Select from the drop-down menu
- ➢ Current: Click 'Edit' icon – Select Yes / No
- ➢ Active: Click 'Edit' icon - Select Yes / No
- ➢ Expires date: this will automatically update.

Qualifications:

- ➢ Click 'Add Qualification'

- ➢ Type: Select from the drop-down menu
- ➢ Enter text within the (Please Specify)
- ➢ Date: Select a date via calendar

Edit Existing Qualifications

- ➢ Click 'Edit' icon
- ➢ Opens Qualification pop-up window
  - o Type: Select from drop-down menu
  - o Date: Select date via Calendar
- ➢ Click Save
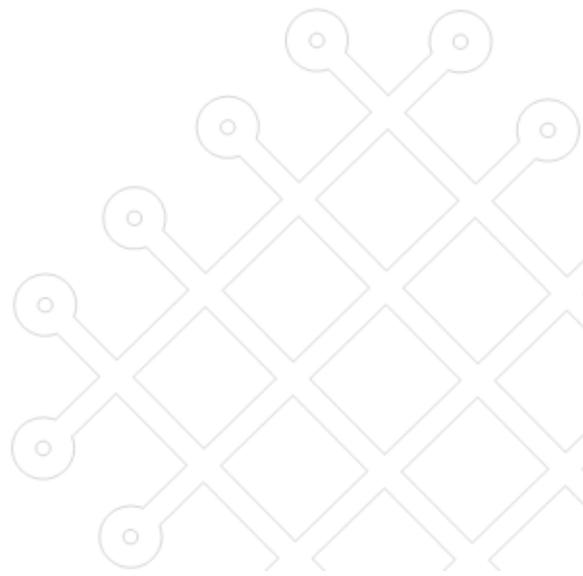
Notes:

Any notes entered here; the Organisation will also see the added notes.

- ➢ Click 'Add Note'
- ➢ Opens a pop-up window – New Note
- ➢ Enter text within the box
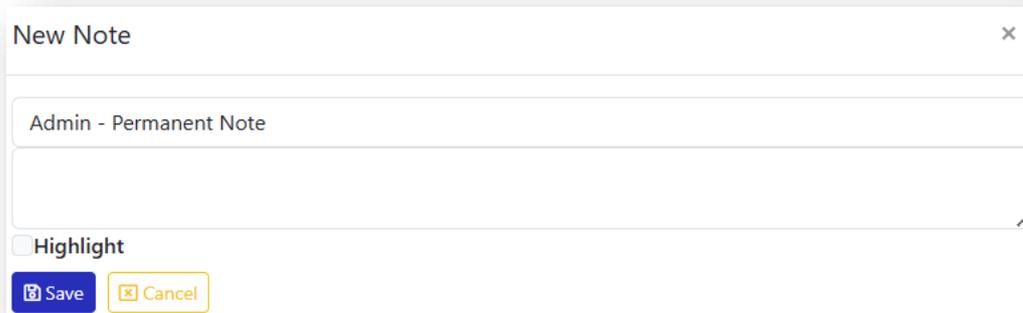
- ➢ Click Save
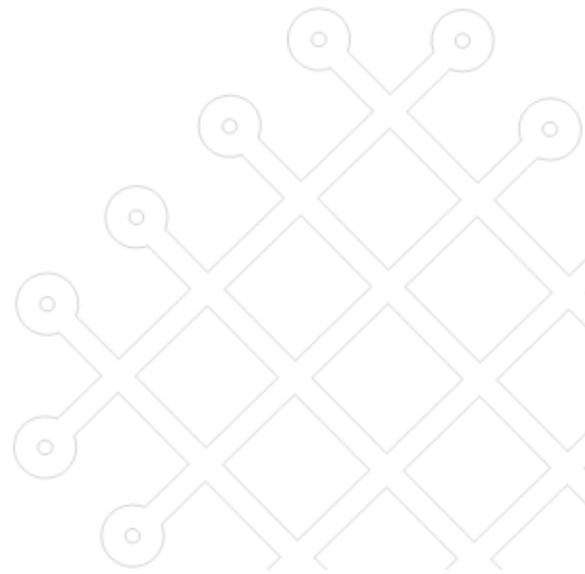
Linked Organisation:

Linked Organisations

Drag a column header and drop it here to group by that column

Action	Organisation	Contact type	Job Title	E-mail	Telephone
✎ 🗑	Demo Organisation 1 » **Demo Organisation 1 Placement One**	Practice Learning Facilitator			

➢ To make changes to the organisations
➢ Click onto the 'Edit' icon
➢ Opens a pop-up window – Additional Contact Details

Additional Contact Details

Contact type
Practice Learning Facilitator

E-mail
E-mail

Job Title
Job Title

Telephone
Telephone

🖫 Save

➢ Contact Type: Select from the drop-down menu
➢ Email: Enter the email address
➢ Job Title: Enter the job title
➢ Telephone: Enter the telephone number
➢ Click Save

To remove an Organisation linked from the mentor's profile:

➢ Click 'Delete' icon
➢ Warning message appears

demo.pems-prerelease.oxi-net.com says

Are you sure you want to remove the Qualification: 29977

OK   Cancel

➢ Removes the organisation from the mentor's profile.

Updates:

> ➢ Click 'Add Update'
> ➢ Opens a pop-up window - Update

> ➢ Type: Select from the drop-down menu
> ➢ Date: Select a date via the calendar
> ➢ Click Save

Edit Existing Qualifications

> ➢ Click 'Edit' icon
> ➢ Opens Update pop-up window
>> o Type: Enter Text
>> o Date: Enter Text

Click Save

To remove an update from the mentor's profile:

> ➢ Click 'Delete' icon
> ➢ Warning message appears

> ➢ Removes the organisation from the mentor's profile.

View Mentor Register:

| View mentor register |
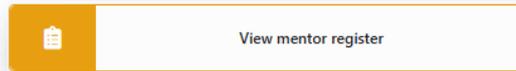
The Register will show all mentors if you are linked to more than one organisation. Using the search filters will help to find mentors.
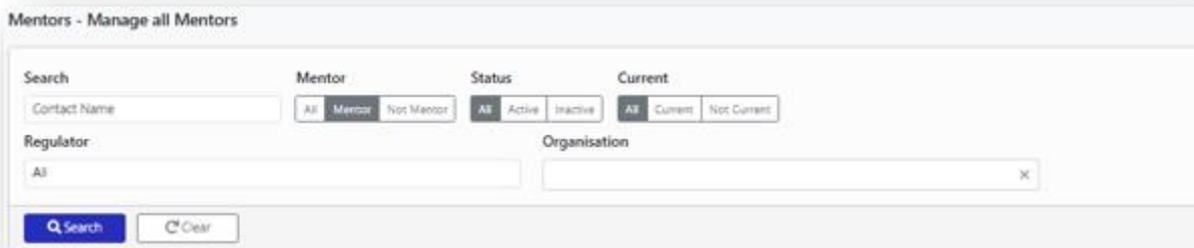
Search Filters:

- ➢ Search: Enter the Contact Name.
- ➢ Mentor: Three options – Show All or just Mentors or just non-mentors.
- ➢ Status: Three options – Show All or just Active or just Inactive.
- ➢ Current: Three options - Show All or Current or Not Current.
- ➢ Regulator: Select from the drop-down list.
- ➢ Organisation: Select from the drop-down list.
- ➢ Click Search.

Shows a list of mentors associated with the organisation.
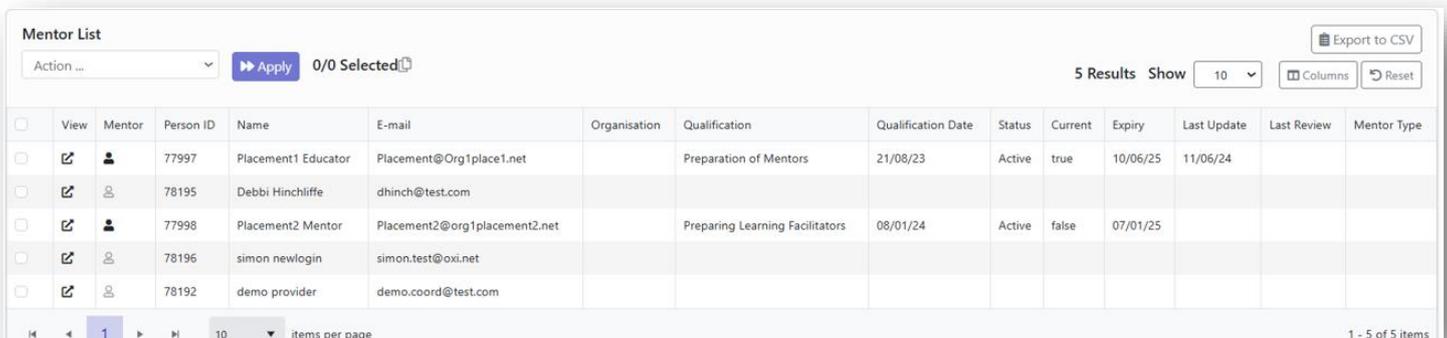
	View	Mentor	Person ID	Name	E-mail	Organisation	Qualification	Qualification Date	Status	Current	Expiry	Last Update	Last Review	Mentor Type
	☑	👤	77997	Placement1 Educator	Placement@Org1place1.net		Preparation of Mentors	21/08/23	Active	true	10/06/25	11/06/24		
	☑	👤	78195	Debbi Hinchliffe	dhinch@test.com									
	☑	👤	77998	Placement2 Mentor	Placement2@org1placement2.net		Preparing Learning Facilitators	08/01/24	Active	false	07/01/25			
	☑	👤	78196	simon newlogin	simon.test@oxi.net									
	☑	👤	78192	demo provider	demo.coord@test.com									

- ➢ Click onto the 'View' icon on the mentor you want to open.

Accessing the mentor details, this process is the same as per pages 18 -22.
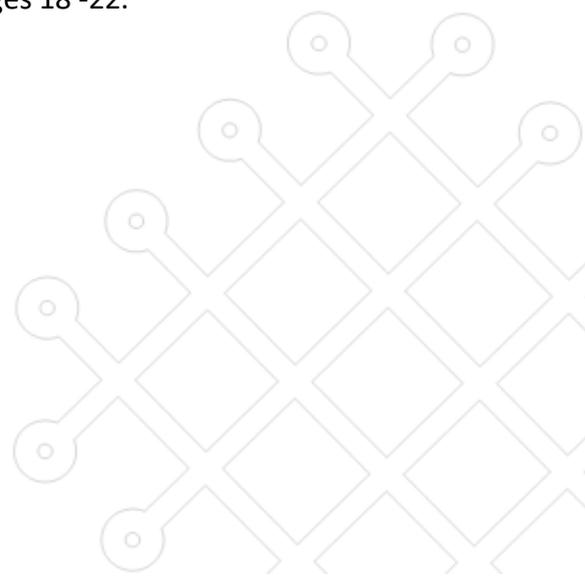
Complete Evaluation Form:

This portal button will become available if a placement evaluation form is required to be completed, once the student has completed their placement.

	Form Name	Student	Location	Start Date	End Date	Form Type	Status	To Be Completed By	Submitted
✏	Default PLF placement evaluation	N/A	Demo Organisation 5 Placement 1	01/04/25	01/06/25	Mid Asssessment	New		
✏	Default PLF placement evaluation	N/A	Demo Organisation 4 Placement 2	01/04/25	01/06/25	Mid Assessment	In Progress		

> ➤ Click onto the Edit Icon – to access the Placement Evaluation Form

This opens the Evaluation Form:

Default PLF placement evaluation

Student:	**N/A**
Student Code:	0
Course:	
Organisation:	Demo Trust >> Demo Organisation 5 >> Demo Organisation 5 Placement 1
Practice Assessor:	Placement Coordinator
Placement Period:	01/04/25 - 01/06/25
Form Type:	Final Assessment
Date Due:	08/06/25
Date Submitted:	Not Yet Submitted

How much notice were you given that you would be supporting/supervising and/or assessing a student in practice

○ 1 week or less   ○ 2 weeks   ○ 3 weeks   ○ 4 weeks   ○ more than 4 weeks

My allocated student contacted me/the placement area prior to the placement

○ Yes   ○ No

The student was able to inform me of the learning outcomes/competencies/proficiencies they would be working towards during the placement

○ Yes   ○ No

The student had completed their pre-placement documentation prior to commencing placement

○ Yes   ○ No

At the bottom of the Evaluation Form, you will be given two options:
> ➤ Option 1. If partially completed, you have to ability to 'Save Progress for Later'.
> ➤ Option 2. If completed, you can 'Submit' the form.

Please do make any comments on what went well or any issues encountered below

[Save Progress for Later]   [Submit]

Assigned Practice Assessors or Supervisors:

| | Assign Practice Assessors or Supervisors |

Placement Slot Management

× Start Date: 01/09/24   × End Date: 01/09/25   × Slot Status: Committed   × Is Parent Slot: No

Slot   Assignments

Search	Student	Course	Cohort
Profile name or ID	Student name or Code	All	All
Organisation	**Dates**	**Slot Status**	**Deletable**
	01/09/24 01/09/25	Committed ×	All

🔍 Search   ⟳ Clear

📄 Export All   📄 Export Page   🗑 Delete Slots   7 Results   Show 10   ⊞ Columns   ↺ Reset

	View	Slot ID	Placement Profile	Workflow	Organisation	Organisation ID	Course	Forenames Student	Surname Student	Cohort	Start Date ↓	End Date	Status	Mentor	Supervising Tutor	Practice Supervisor	Deletable
☐	⬀	119483	Demo Organisation 1 Placement One Profile	Demo students year Placement 4	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO Course	Student 1	De Montfort	Sep 2023	28/07/25	24/08/25	Committed	👤 Placement Coordinator	👤 N/A	👤 N/A	No
☐	⬀	119484	Demo Organisation 1 Placement One Profile	Demo students year Placement 4	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO Course	Student 2	De Montfort	Sep 2023	28/07/25	24/08/25	Committed	👤 Placement Coordinator	👤 N/A	👤 N/A	No
☐	⬀	121549	Demo Organisation 1 Placement One Profile	Year 1 Course 1 Placement 4	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO-NIDSWP	Student2	DEMO1	May 2024	07/04/25	04/05/25	Committed	👤 N/A	👤 N/A	👤 N/A	No
☐	⬀	121350	Demo Organisation 1 Placement One Profile	alex specific Placement 1	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO-ART-THERAPY	Student5	CNWTrust	Jan 2024	05/02/25	05/02/25	Committed	👤 N/A	👤 N/A	👤 N/A	No
☐	⬀	119834	Demo Organisation 1 Placement One Profile		Demo Organisation 1 Placement One (Demo Organi...	7631					03/02/25	30/03/25	Committed	👤 N/A	👤 N/A	👤 N/A	No
☐	⬀	119463	Demo Organisation 1 Placement One Profile	Demo students year Placement 2	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO Course	Student 6	De Montfort	Sep 2023	06/01/25	16/02/25	Committed	👤 Placement Coordinator	👤 N/A	👤 N/A	No
☐	⬀	119464	Demo Organisation 1 Placement One Profile	Demo students year Placement 2	Demo Organisation 1 Placement One (Demo Organi...	7631	DEMO Course	Student 4	De Montfort	Sep 2023	06/01/25	16/02/25	Committed	👤 Placement Coordinator	👤 N/A	👤 N/A	No

|◀ ◀ 1 ▶ ▶| 10   items per page   1 - 7 of 7 items

Placement Slot

Details Demo Organisation 1 Placement One Profile - Demo Organisation 1 Placement One (Demo Organisation 1) - Student De montfort

Organisation
Demo Organisation 1 Placement One ☑

Student
Student De montfort ☑

Profile
Demo Organisation 1 Placement One Profile

Dates
28/07/25   24/08/2025

Shift Type
All Day

Slot Status
Committed

Practice Assessor
Placement Coordinator ⊗
✕

Practice Supervisor
Debbi Hinchliffe Placement Supervisor Demo Organisation 1 Placement One ⊗ |
✕

[🖫 Save] [⊘ Cancel Slot] [🗏 Duplicate slot]

Course Specialties

Adult Nursing   [➕ Add]

Course Code	Specialty Code	Course
DEMO-AD		DEMO Course

Experiences

Experience

Allocated Students:

This opens to a new window; it shows all the students that have been allocated.
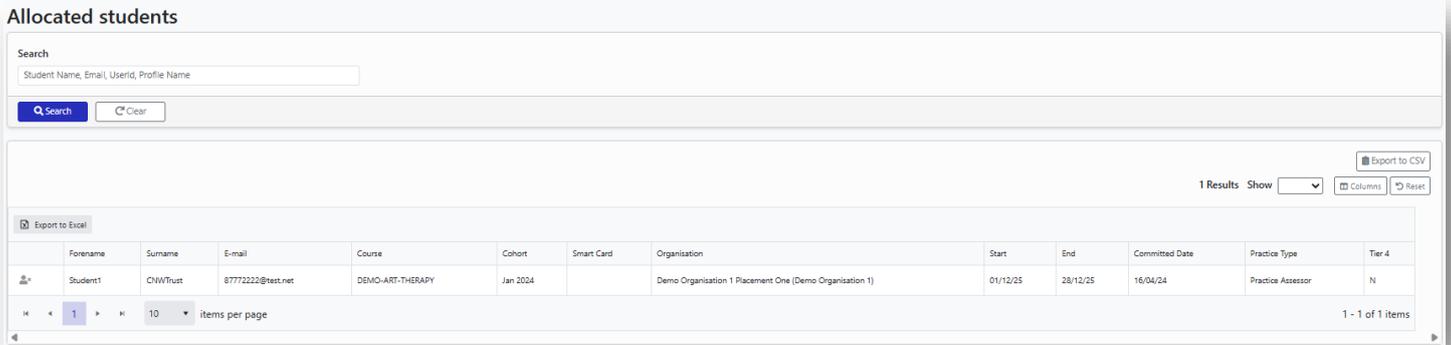
➢ Click onto the Edit Icon - This opens a pop-up window – Report Absences.
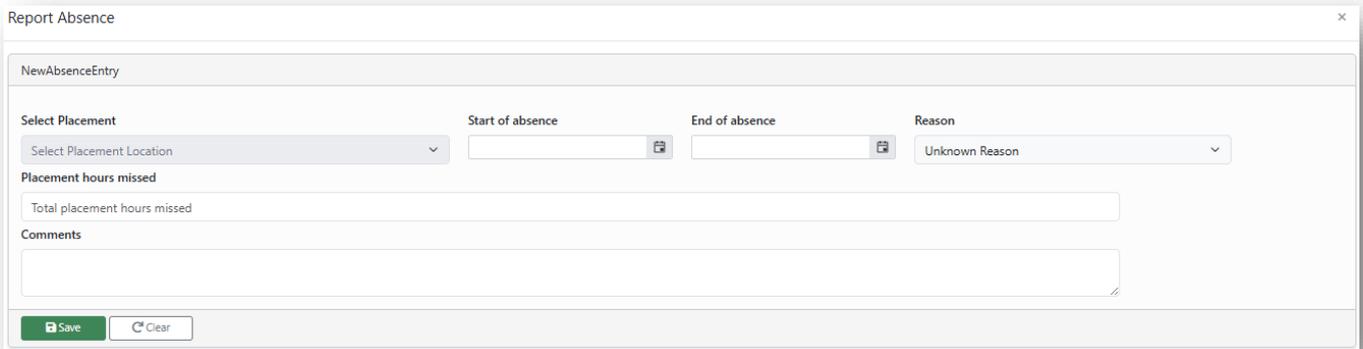
➢ Select Placement – Select from the drop-down list.
➢ Start of absences – Select a date via the calendar icon.
➢ End of absences – Select a date via the calendar icon.
➢ Reason – Select from the drop-down list.
➢ Placement Hours Missed – Enter the number of hours missed.
➢ Comment – Enter a text comment.
➢ Click Save.
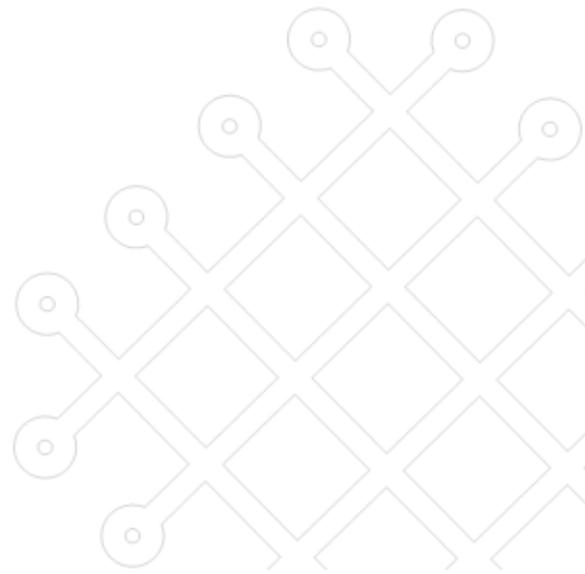
Current Students:

This opens a new tab showing all the student that have been allocated to the organisation.

Current students

Search

Student Name, Email, UserId, Profile Name

🔍 Search | ⟳ Clear

🗐 Export to CSV

14 Results Show [▼] 🗐 Columns | ⟲ Reset

📊 Export to Excel

	Forename	Surname	E-mail	Course	Cohort	Smart Card	Organisation	Start	End	Committed Date	Expected Hours	Tier 4
👤×	Student1	CNWTrust	87772222@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/12/25	28/12/25	16/04/24	75	N
👤×	Student2	CNWTrust	877772222@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/12/25	28/12/25	16/04/24	75	N
👤×	Student8	CNWTrust	877772229@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	16/10/25	19/10/25		24	N
👤×	Student5	CNWTrust	877772226@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	13/10/25	15/10/25	16/04/24	16	N
👤×	Student2	CNWTrust	877772222@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	08/09/25	14/09/25	16/04/24	40	N
👤×	Student3	CNWTrust	877772224@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	320	N
👤×	Student3	CNWTrust	877772224@test.net	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	320	N
👤×	Student 1	De Montfort	10888881111@test.net	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	7.5	N
👤×	Student 2	De Montfort	10888881112@test.net	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	7.5	N
👤×	Student2	DEMO1	777777222@test.net	DEMO-NIDSWP	May 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	07/04/25	04/05/25	13/11/24	7.5	N

⏮ ◀ **1** 2 ▶ ⏭ [10 ▼] items per page   1 - 10 of 14 items

➤ Click onto the Edit Icon to open the Absence Report.

Report Absence

➢ Select Placement – Select from the drop-down list.
➢ Start of absences – Select a date via the calendar icon.
➢ End of absences – Select a date via the calendar icon.
➢ Reason – Select from the drop-down list.
➢ Placement Hours Missed – Enter the number of hours missed.
➢ Comment – Enter a text comment.
➢ Click Save.
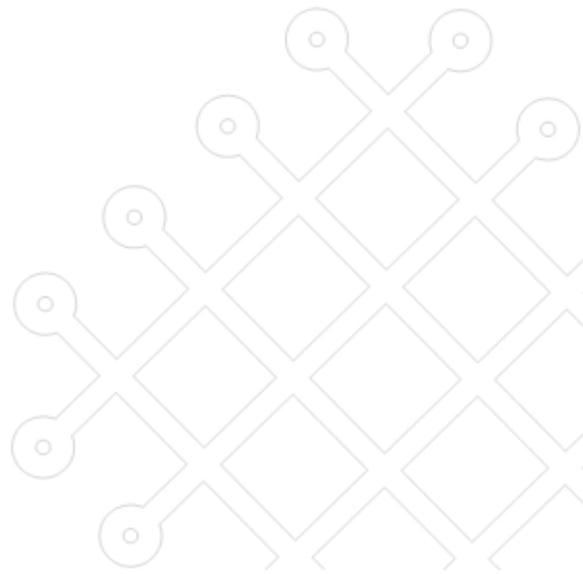
Approve Timesheets:
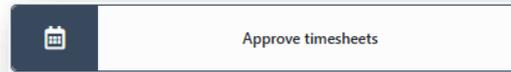
This gives access to the timesheet table that will list all students that have submitted their timesheet (via the Timesheet App).

Approve	Student	Placement location	Start Date	End Date	Total Hours	Status
⬈	Student4 Cnwtrust	Demo Organisation 1 Placement One	Monday, 29 April 2024	Friday, 3 May 2024	29.5	Awaiting Approval

➢ Status – Select from the drop-down list – available options – In Progress / Awaiting Approval / Approved.

To access the student's timesheet:
➢ Click onto the Approve Icon.

Module	Placement Location	Start Date	End Date	Total Hours	Expected Hours	Deficit Hours
▼	Demo Organisation 1 Placement One (Demo Organisation 1)	29/04/24	28/07/24	29.5	200	170.5

	Week Number	Start	End	Status	Approved	Approved By	Week Hours	Action
▼	1	29/04/24	05/05/24	AwaitingApproval			29.5	✔ Approve ⊘ Reject

Day	Hours	Comments	Amendment Reason	Original Hours	Amended By
Monday	7.5			7.5	
Wednesday	7.25			7.25	
Thursday	7.5			7.5	
Friday	7.25			7.25	

| ▶ | Demo Organisation 1 Placement One (Demo Organisation 1) | 01/05/24 | 03/05/24 | 0 Total Placement Hours: 29.5 | 0 Total Placement Hours: 200 | 0 Total Deficit Hours: 170.5 |

➢ Click Approve if the recorded hours are correct.
➢ Click Reject if the recorded hours are incorrect.

View PIN:

View PIN

Providers are provided a Pin Code that will permission to approve allocated students' timesheets.

Pincode

7835

Change PIN
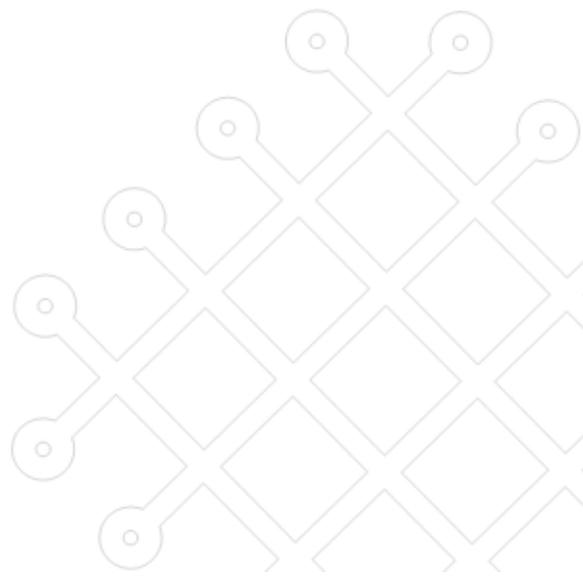
View & Edit Profile:
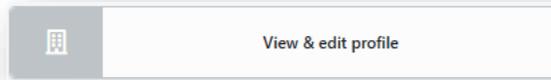
Click onto the Profile tab, this will give access to the profiles that are linked to this organisation.

> ➢ Click onto the View/Edit Icon

'Edit' Profile Contacts

This will show a list of all the contacts that are listed within the organisation.

Profile contacts

View	ID	Forenames	Surname	Organisation	Title	Role	Email Address	Phone	Associated with profile	Notify of placement	Available to Students
⬈	40320	Placement1	Educator	Demo Organisation 1 Placement One		Practice Learning Facilitator	Placement@Org1place1.net		☑	☑	☑
⬈	40319	Academic	Lead	Demo Trust		Academic in Practice	academiclead@demotrust.net		☑	☑	☑
⬈	40432	Demo	Academic	Demo Organisation 1 Placement One		Demo Academic	demo-academic@test.com		☑	☐	☐
⬈	40433	Debbi	Hinchliffe	Demo Organisation 1 Placement One		Placement Co-ordinator	dhinch@test.com		☐		
⬈	40428	Placement2	Mentor	Demo Organisation 1 Placement One		Practice Learning Facilitator	Placement2@org1placement2.net		☐		
⬈	40434	simon	newlogin	Demo Organisation 1 Placement One		Placement Co-ordinator	simon.test@oxi.net		☐		
⬈	40431	demo	provider	Demo Organisation 1 Placement One		Demo Provider	demo.coord@test.com		☐		
⬈	40437	Paul	Simon	Demo Organisation 1 Placement One		Demo Academic	PSimon@test.com		☐		

➢ This gives you the option to select if the contact is 'Associated with profile'.
➢ This gives you the option to select whether the contact is to be notified of any allocations.
➢ This gives you the option to select whether the contact's details will be given to the student upon allocation.

There is the ability to 'Add a new person as contact'. This opens a new pop-up window – Add new person as contact.

By filling in the fields, it will give you suggestions of existing person already in PEMS. If the name matches, you click onto the suggested name and click save.

Placement Information:

These are pre-assigned questions, these questions are set to describe what the placement is, what information is required to supply to the student.

Placement Information

Who to contact prior to placement

| B I U | ☰ ☰ ☰ | ☰ ☰ | ☰ ☰ | ∞ ⟷ 🖼 | ⊞ | (inherited...) ✕ ▾ | (inherited...) ✕ ▾ | A ▾ | ◌ ▾ |

Contact telephone number

| B I U | ☰ ☰ ☰ | ☰ ☰ | ☰ ☰ | ∞ ⟷ 🖼 | ⊞ | (inherited...) ✕ ▾ | (inherited...) ✕ ▾ | A ▾ | ◌ ▾ |

◉ Accommodation Availability

| B I U | ☰ ☰ ☰ | ☰ ☰ | ☰ ☰ | ∞ ⟷ 🖼 | ⊞ | (inherited...) ✕ ▾ | (inherited...) ✕ ▾ | A ▾ | ◌ ▾ |

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Describe the service provided, the client groups for whom it is provided and the potential clinical/practice experience required

| B I U | ☰ ☰ ☰ | ☰ ☰ | ☰ ☰ | ∞ ⟷ 🖼 | ⊞ | (inherited...) ✕ ▾ | (inherited...) ✕ ▾ | A ▾ | ◌ ▾ |

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Show history for profile

This will show the history of who has made changes to the profile. Indicating the Actor / Action Type / Dates

Show history for profile

Actor	ActionType	Date
demo.coord@test.com	Saved	21/11/24
admin	Saved	26/07/24
admin	Saved	26/07/24
admin	Saved	26/07/24
admin	Saved	26/07/24

Complete & View Audits:

This will show all the audits that are available to organisations linked to the Placement Coordinator.

- ➢ Audit Status: Select from the drop-down list.
- ➢ Audit Type: Select from the drop-down list.
- ➢ Audit Expires: Select a date via the calendar icon
- ➢ Reviewed: Select either All / Yes / No
- ➢ Reviewed on: Select a date via the calendar icon
- ➢ Red/Amber/Green Status: Select from the drop-down list.
- ➢ Click Search

This will show all the audits relevant to the search fields.

	ID	Organisation	Organisation Parent Name	Audit Type	Status	Link Lecturer	Nominated Practice Colleague	From	Expires	Outstanding Actions
☑	6760	Demo Organisation 2 Placement One	Demo Organisation 2	New Practice area	New Audit					
☑	6754	Demo Organisation 1 Placement One	Demo Organisation 1	New Practice area	In Progress	Demo Academic	Debbi Hinchliffe	31/03/25		1
☑	6745	Demo Organisation 3 Placement 1	Demo Organisation 3	Placement	In Progress					
☑	6744	Demo Organisation 1 Placement Two	Demo Organisation 1	Placement	New Audit					
☑	6743	Demo Organisation 1 Placement One	Demo Organisation 1	Placement	New Audit					
☑	4736	Demo Organisation 5 Placement 2	Demo Organisation 5	Placement	New Audit					
☑	4732	Demo Organisation 1	Demo Trust	Placement	New Audit					
☑	4729	Demo Organisation 2 Placement One	Demo Organisation 2	Placement	New Audit					
☑	4723	Demo Organisation 1	Demo Trust	Placement	New Audit					

The above table will show a list of available audits. To access the audit, click onto the Edit Icon.
Opens the audit.

Summary tab:

This provides un-editable audit details, the only section that can be edited is Notes.

Manage placement area audit

Summary   Response   Competencies   Placement Agreement   🖶 Print

Audit Details

Entity Name
Demo Organisation 1 Placement One (Demo Organisation 1)

Created
17/01/25

Audit Category
New Practice area

Audit Type
Audit

Audit ID
6754

Instance Code
JYJ91EJJ

Status
In Progress

Link Lecturer
Demo Academic

Nominated Practice Colleague

Applies From
31/03/2025

Valid Until

Placement Agreement

Valid from
31/03/2025

Expires
30/03/2026

Notes

No Notes

➕ Add Note

> Click onto 'Add Note'
> Opens pop-up window

> Click into Editable Note box
> Click onto Save

Notes

No Notes

➕ Add Note

New Note   ✕

Admin - Editable Note

☐ Highlight

💾 Save   ✖ Cancel

Response tab:

Manage placement area audit

Summary | **Response** | Placement Agreement | Linked Profiles

Organisation Details

Practice Learning Environment Information

1.1   Status   [Select ▾]

1.1 The following AEIs use this placement for student learning:

- ☐ BBP
- ☐ Bucks New University
- ☐ City, University of London
- ☐ Canterbury Christ Church University
- ☐ Kingston & St George's University London
- ☐ Kings College London
- ☐ Brunel University London
- ☐ Middlesex University
- ☐ University of Greenwich
- ☐ University of Hertfordshire
- ☐ University of East London
- ☐ University of West London
- ☐ London South Bank University
- ☐ University of Roehampton London
- ☐ Other:

1.2   Status   [Select ▾]

1.2 NMC Approved Programme:

- ☐ Nursing
- ☐ Midwifery
- ☐ Nursing Associate
- ☐ SCPHN/HV
- ☐ Prescribing Programmes
- ☐ District Nursing
- ☐ CPPD
- ☐ Return to Practice

1.3   Status   [Select ▾]

1.3.1 1.3.1 - **To be completed by the Faculty Director of Practice Learning only**
Maximum number of students that can be supervised and/or assessed in the practice learning environment (Please indicate specific programme (if relevant) and level of student)

Process	Path	Action	Outcome	P/F
Test 1 – Admin log in as this user				
	Home > Contact List > Named Contact Details	Click onto 'Log in to PEMS as this user' Click OK to confirm	Takes you to the contacts dashboard.	
Test 2 – Evaluation Forms Report				

Run Evaluation Form Reports	Home > Evaluation Forms Summary	Opens the Evaluation Forms Summary Page
		Select from the drop down menu with Report Type
		Select from the drop down menu the Organisation
		Select Yes / No to Include Child Organisations
		Select between:
		  End Date Between
		  Start Date Between
		  Form completed date between
		Enter Date via clicking the Calendar Icon
		Select from the drop down menu the Workflow
		Select from the drop down menu the Course
		Click Generate Report
			Shows the correct data inputted,
			
			Report is generated underneath	

		Evaluation Form Summary Responses Click to Export to Word Click to Export summary as CSV Click to Print summary	Exports to Word successfully Exports to CSV successfully Prints summary successfully.	
Test 3 - Organisation Contacts				
Accessing the assigned Organisation	Home > *Organisation Explorer*	Search field - enter name of organisation - this can be used if the Contact is linked to multiple organisations.	Shows the correct organisation. Opens the Organisation Details Page	
	Organisation Explorer > Organisation *Details* tab	Organisation Details Tab: Shows the details of the Organisation: Address - Include the Postcode	Shows data to be correct.	

		Organisation ID Organisation Email Address Reference ID (if applicable) Region (if applicable) Organisation Status Description Telephone Organisation Type Previous Names Notes		
	Organisation Explorer > Organisation Details > Edit Icon (*if applicable*)	Click the Edit Icon, located on the top right side of the Organisation page.	Opens new tab - Update Organisation	
	Organisation Explorer > Organisation Details > Update Organisation - Organisation tab	Organisation Tab Organisation: Name - able to edit the name Organisation Details: Parent Organisation - Select from drop down menu Region - Select from drop down menu (if applicable) Organisation Type - Select from drop down menu Size - Select from drop down menu Status - Select from drop down menu Reference ID - Enter data (if applicable) Description - Enter data into the text box Address: Enter address within the text fields provided County - Enter data into the text box Postcode - Enter data into the text box Email - Enter data into the text box Phone - Enter data into the text box Click Save	All fields allow you to select or enter data A message will show in top right corner stating - Organisation has successfully save	
	Organisation Explorer > *Contacts* tab	Contacts that are linked to the organisation	Shows all the contacts listed within the assigned organisation	

	Organisation Explorer > Contacts > Add Contact (*If applicable*)	Click onto Add Contact button Enter Forename Enter Surname Enter Email Select from drop down menu a Contact Type Click Save	New contact details shows within the Contact Tab.	
	Organisation Explorer > *Profiles* tab	Profiles that are linked to that organisation	Shows all the profiles listed within the assigned organisation	
	Organisation Explorer > Profiles > View	Status - change to current Click to Include Child Organisations (*if applicable*) Click onto the Edit Icon	Shows the current profiles Will include all organisations that are linked as a child (i*f applicable*) Opens new tab - Named profile	
	Organisation Explorer > Profiles > Profile Contacts	Click onto Add New Person as Contact button Enter Forename Enter Surname Enter Email Select from drop down menu a Contact Type Select Suggestion if the correct contact appears. Click Save	Named person shows in the Profile Contact Table list.	
	Organisation Explorer > Profiles > Profile Contacts > Edit Icon	Click Onto Edit Icon next the contact's name	Opens new tab - Named Contact	
	Organisation Explorer > Profiles > Profile Contacts > Contact Details	Click Edit button to make changes to the Contact Details Make changes to Title: Make changes to Forename: Make changes to Surname: Make changes to Email Address: Make changes to Phone: Make changes to Address: Make changes to Postcode: Click Save	Ability to make and save changes to the contact details.	

	Organisation Explorer > Profiles > Profile Contacts > Contact Details > Delete	Click Delete Click OK or Cancel to permanently removing the contact	Pop up message - warning appears Ability to click OK or Cancel the request to permanently remove contact.
	Organisation Explorer > Profiles > Profile Contacts > Contact Details > Notes Tab	Notes Tab: Enter text data into Note box Select from drop down menu Note Type Click Add	Ability to add a note. Close Tab
	Organisation Explorer > Profiles > Profile Contacts	Tick Associated with Profile Tick Notify of Placement Tick Available to students	Blue tick appears in each category
	Organisation Explorer > Profiles > Placement Information	Enter Text data into each question	Shows data entered to be correct.
	Organisation Explorer > Profiles > Show history for profile	Click to show who has made amendments to the profile	Correctly shows names and date of saved changes.
	Organisation Explorer > Profiles > Save	Click to save all changes made to the profile	Correctly saves the changes Green message shows in top right corner stating Changes have been saved. Close tab.
	Organisation Explorer > Audits Tab	Select from drop down the status of the audit Click the Include Child Organisation (*if applicable*)	Shows the selected status of the audits within the table.
	Organisation Explorer > Audit Tab > View Icon	Click onto the view icon	Opens Manage Placement Area Audit
	Home > Manage Audits > Manage placement area audit	Summary Tab: View the Audit Details Response Tab: View the Completed Responses Competencies Tab: View the Competencies	Shows the Audit details Shows the Completed responses Shows the Competencies

	Organisation Explorer > Mentors Tab	Click onto the Mentors Tab	Opens a tab showing the mentor information	
		Click onto the Edit Icon	Opens a Mentor Details tab	
		Edit **Practice Area** - Select from drop down menu. Click Green tick to save Click Red cross to close without saving Edit **Current** - Select Yes or No Click Green tick to save Click Red cross to close without saving Edit **Active** - Select Yes or No Click Green tick to save Click Red cross to close without saving	Gives the ability to make these changes.	
Test 4 - View Mentor Register				
	Home > Mentors - Manage all Mentors	Ability to Search by Mentor name Ability to filter by Regulator by selecting from the drop-down menu Ability to filter by Organisation by selecting from the drop-down menu Click Search.	successfully find the correct Mentor by using these search fields.	
	Home > Mentors - Manage all Mentors > View Icon	Click the View Icon next to mentors Name Edit Practice Area - Select from drop down menu. Click Green tick to save Click Red cross to close without saving Edit Current - Select Yes or No Click Green tick to save Click Red cross to close without saving Edit Active - Select Yes or No Click Green tick to save Click Red cross to close without saving		

			Pop up window appears Access to add text data as an Editable note Ticked highlight, will highlight the message from the others. Pop up window closes, and messages appears under Notes.	
	Home > Mentors - Manage all Mentors > Notes	Click on *Add Note* Tick Highlight Click Save		
Test 5 - Assign Practice Assessors or Supervisors				
Assigning either Practice Assessor or Supervisor to a student, whilst in placement.	Home > Assign Practice Assessor or Supervisor	Click onto the Assign Practice Assessor or Supervisor	Opens new tab - Placement Slot Management page	
	Home > Placement Slot Management	Slot Tab: Search Profile - Ones which are affiliated with your linked organisation Search Student - Enter student name or ID Search Course - Select from drop down menu Search Cohort - Select from drop down menu Search Organisation - Select from drop down menu Enter Start Date - via calendar Enter End Date - via calendar Search Slot Status - select from drop down menu Search Deleted - Yes or No Click Search	Ability to search students	
	Home > Placement Slot Management > View Icon	Click View Icon	Opens new tab - Placement Slots page	
	Home > Placement Slot Management > Placement Slot	Views the details of the placement slot. Click Practice Assessor, select from drop down menu Click Practice Supervisor, select from drop down menu. Click Save	Ability to select correct Practice Assessor Ability to select correct Practice Supervisor	
Test 6 - Current Students				

	Home > Current Students	Search Student via Name, email or UserID Click Search	Shows the search student within the table.	
	Record an Absence Icon	Click onto the Absence Icon next to the student's name	Opens a pop-up window - Report Absences	

Test 7 - Approve Timesheets

	Home > Approve Timesheets	Click onto the Approve Timesheets portal button	Open the Approved Timesheets page	
		Option to change the status from the drop-down menu	Table will show the selected status.	
	Home > Approve Timesheets > Approve View Icon	Click the Approve View icon	Open the Student Timesheets	
	Home > Approve Timesheets > Student Timesheets	Click on to the Arrow to open Timesheets	Expands the timesheet to show the first week.	

Test 8 – View PIN

	Home > View PIN	Click on the View PIN portal button	Opens new tab Pincode	
		Click Change PIN Enter 4-digit number Enter same 4-digit number as confirmation Click Set PIN Code	Opens new tab Shows correct 4-digit number entered Confirms the correct 4-digit number Saves and Reset PIN code.	

Test 9 - View & Edit Profile

	Home > Placement Profiles	Enter name or ID of Profile to search Select organisation from drop down menu Select Course from the drop-down menu Select Profile Status from the drop-down menu Click Search	Shows the searched Organisation Profiles within the table shown.	
	Home > Placement Profiles > Edit Icon	Click onto the Edit Icon		

		Click onto Add New Person as Contact button Enter Forename Enter Surname Enter Email Select from drop down menu a Contact Type Select Suggestion if the correct contact appears. Click Save	Named person shows in the Profile Contact Table list.	
	Organisation Explorer > Profiles > Profile Contacts			
	Organisation Explorer > Profiles > Profile Contacts > Edit Icon	Click Onto Edit Icon next the contact's name	Opens new tab - Named Contact	
	Organisation Explorer > Profiles > Profile Contacts > Contact Details	Click Edit button to make changes to the Contact Details Make changes to Title: Make changes to Forename: Make changes to Surname: Make changes to Email Address: Make changes to Phone: Make changes to Address: Make changes to Postcode: Click Save	Ability to make and save changes to the contact details.	
	Organisation Explorer > Profiles > Profile Contacts > Contact Details > Delete	Click Delete Click OK or Cancel to permanently removing the contact	Pop up message - warning appears Ability to click OK or Cancel the request to permanently remove contact.	
	Organisation Explorer > Profiles > Profile Contacts > Contact Details > Notes Tab	Notes Tab: Enter text data into Note box Select from drop down menu Note Type Click Add	Ability to add a note. Close Tab	
	Organisation Explorer > Profiles > Profile Contacts	Tick Associated with Profile Tick Notify of Placement Tick Available to students	Blue tick appears in each category	
	Organisation Explorer > Profiles > Placement Information	Enter Text data into each question	Shows data entered to be correct.	

	Organisation Explorer > Profiles > Show history for profile	Click to show who has made amendments to the profile	Correctly shows names and date of saved changes.	
	Organisation Explorer > Profiles > Save	Click to save all changes made to the profile	Correctly saves the changes Green message shows in top right corner stating Changes have been saved. Close tab.	

Test 10 - Complete & View Audits

	Home	Click onto the Complete & View Audits Portal button	Opens new tab called Manage Audits	
	Home > Manage Audits	Using the search fields: Select Audit Status from the drop-down menu Select Audit Type from the drop-down menu Enter the date range for Audit Expiry Select Yes or No if Reviewed Enter the date range when Reviewed On Select Red/Amber/Green Status from drop down menu Click Search	Fields shows correct selected options. Search will show all the relevant audits in the table below:	
	Home > Manage Audits > View Icon	Click the View Icon next to the Organisation	Opens new tab called Manage Placement Area Audit	
	Home > Manage Audits > Manage placement area audit	Summary Tab: View the Audit Details Response Tab: View the Completed Responses Competencies Tab: View the Competencies	Shows the Audit details Shows the Completed responses Shows the Competencies	

## Practice Assessor / Supervisor Dashboard:

There will be portal buttons that are the same as the Placement Coordinator.
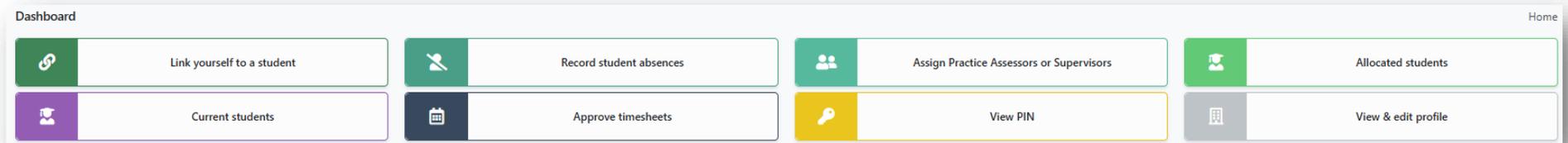
The additional buttons are:

➢ Link yourself to a student - A table of students will be shown.
➢ Record Student Absences - Ability to record student absences.

Introduction to PA Assessment Forms, these are found within the Allocated Students portal button:
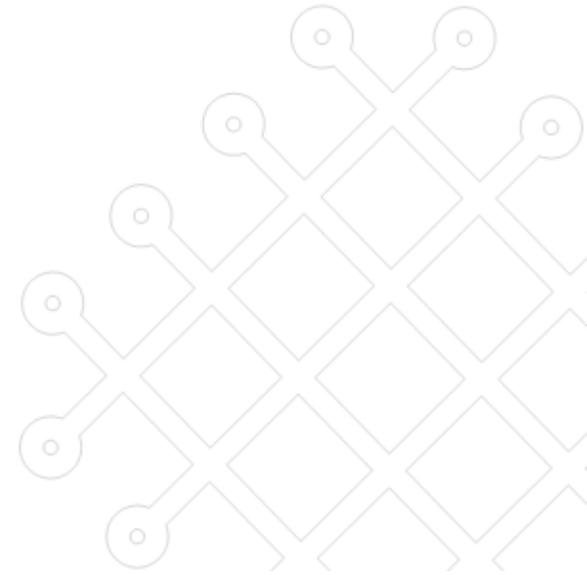
Allocated Students:

The Search filters have been covered on page 28.

The additional columns now added are Practice Assessor ¦ Practice Assessor Emails ¦ Form Type ¦ Assessment Status ¦ Assessment Form

> Form Type – This will show whether the form is a Mid Assessment or a Final Assessment.
> Assessment Type – This will show the state of the assessment.
> Assessment Form – Click on to the Edit icon.

This will open a Practice Assessor midterm Placement Evaluation Form.

![oxinet]

Copy of a Default Practice Assessor Placement Evaluation Form:

Default PLF placement evaluation

Student:	**Student Simontest**
Student Code:	888882227
Course:	DEMO Course (SIMON -TEST-AD)
Organisation:	Demo Trust >> Demo Organisation 6 >> Demo Org 6 child
Practice Assessor:	Debbi Demo
Placement Period:	09/05/25 - 16/05/25
Form Type:	Mid Asssessment
Date Due:	23/05/25
Date Submitted:	Not Yet Submitted

How much notice were you given that you would be supporting/supervising and/or assessing a student in practice

○ 1 week or less   ○ 2 weeks   ○ 3 weeks   ○ 4 weeks   ○ more than 4 weeks

My allocated student contacted me/the placement area prior to the placement

○ Yes   ○ No

The student was able to inform me of the learning outcomes/competencies/proficiencies they would be working towards during the placement

○ Yes   ○ No

The student had completed their pre-placement documentation prior to commencing placement

○ Yes   ○ No

I was able to meet with the student at the beginning of the placement to discuss how they could achieve the outcomes for the placement

○ Yes   ○ No

[Save Progress for Later]   [Submit]

Link yourself to a student:
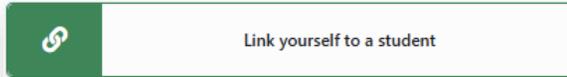
As a Practice Assessor, you have the capability to assign yourself to a student that is attending the organisation.

➢ Ability to search for the student: Enter the student's name and click Search.

Link myself to students

You may also be a Practice Assessor or Supervisor for the following students. If you are a Practice Assessor or Supervisor for these students, please add them to your list of allocated students

Search

Student Name, Email, UserId, Profile Name

[🔍 Search] [↻ Clear]

9 Results Show [▾] [Export to CSV] [Columns] [Reset]

[Export to Excel]

Link as PA	Forename	Surname	Course	Cohort	Smart Card	Organisation	Start	End	Committed Date	Tier 4
+	Student2	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/12/25	28/12/25	16/04/24	N
+	Student8	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	16/10/25	19/10/25		N
+	Student5	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	13/10/25	15/10/25	16/04/24	N
+	Student2	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	08/09/25	14/09/25	16/04/24	N
+	Student3	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	N
+	Student3	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	N
+	Student 1	De Montfort	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	N
+	Student 2	De Montfort	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	N
+	Student2	DEMO1	DEMO-NIDSWP	May 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	07/04/25	04/05/25	13/11/24	N

|◀ ◀ **1** ▶ ▶| 10 ▾ items per page   1 - 9 of 9 items

➢ Click onto '+' icon, this will like as PA (Practice Assessor)

Record Student Absences:

Record student absences

This gives you access to the Allocated Students.

➢ Click into the Search – Enter the student's name and Click Search.

Allocated students

Search

Student Name, Email, UserId, Profile Name

Search   Clear

Export to CSV

14 Results Show [▾]   Columns   Reset

Export to Excel

	Forename	Surname	Course	Cohort	Smart Card	Organisation	Start	End	Committed Date	Tier 4
	Student1	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/12/25	28/12/25	16/04/24	N
	Student2	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/12/25	28/12/25	16/04/24	N
	Student8	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	16/10/25	19/10/25		N
	Student5	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	13/10/25	15/10/25	16/04/24	N
	Student2	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	08/09/25	14/09/25	16/04/24	N
	Student3	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	N
	Student3	CNWTrust	DEMO-ART-THERAPY	Jan 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	01/09/25	26/10/25	16/04/24	N
	Student 1	De Montfort	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	N
	Student 2	De Montfort	DEMO Course	Sep 2023		Demo Organisation 1 Placement One (Demo Organisation 1)	28/07/25	24/08/25	08/12/23	N
	Student2	DEMO1	DEMO-NIDSWP	May 2024		Demo Organisation 1 Placement One (Demo Organisation 1)	07/04/25	04/05/25	13/11/24	N

|◄ ◄ 1 2 ► ►| 10 ▾ items per page   1 - 10 of 14 items

➢ Click onto the 'Edit' icon - opens a pop-up window called Report Absence.

Report Absence

This is to be completed to record a student absence.
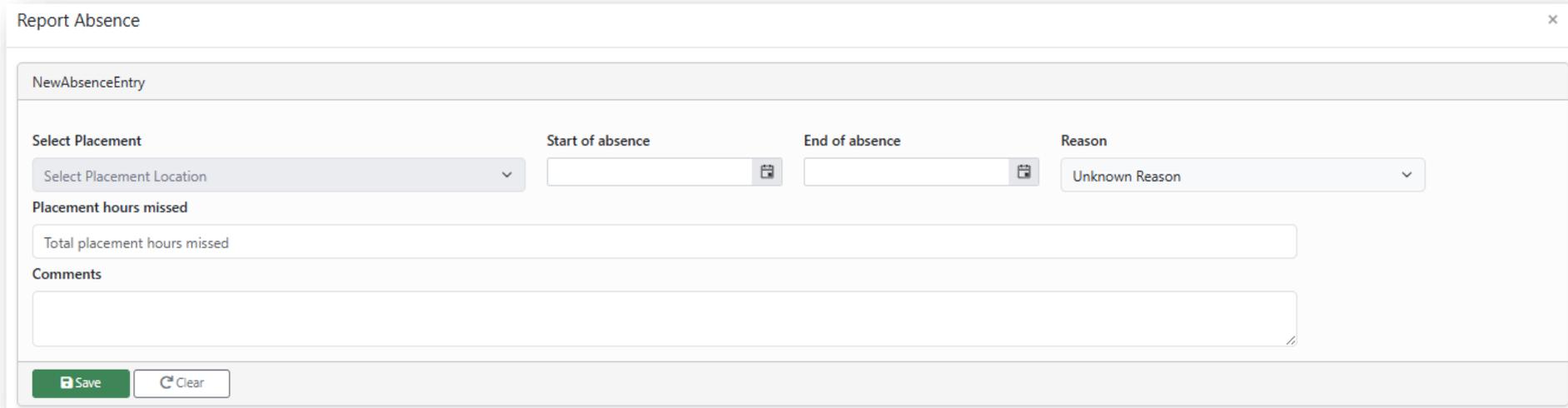
- ➢ Select Placement – Select from drop-down list.
- ➢ Start of absence – Select a date via calendar icon.
- ➢ End of absence – Select a date via calendar icon.
- ➢ Reason – Select from drop-down list.
- ➢ Placement hours missed – Enter the number of hours that have been missed.
- ➢ Comments – enter a comment if required.
- ➢ Click Save.
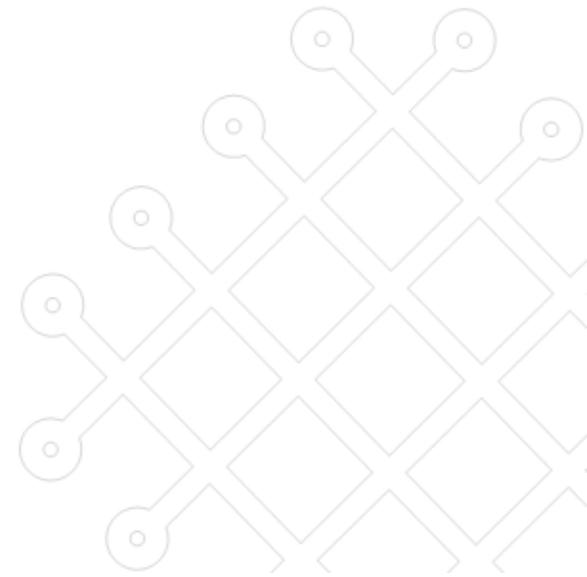
Testing: Practice Assessor / Supervisor Dashboard:

Process	Path	Action	Outcome	P/F
Test 1 – Admin log in as this user				
	Organisations > Contact List > Named Contact Details	Click onto 'Log in to PEMS as this user' Click OK to confirm	Takes you to the contacts dashboard.	
Test 2 – Accessing PA Assessment / Evaluation Forms				
	Home > Allocated Students	Search – Enter the Student's names Practice Assessor – Select from drop down list	Ability to search by student name Ability to select correct Practice Assessor.	
		Click onto Edit Icon within the Assessment Form Colum		
	Home > Default Practice Assessor Evaluation Form	Tick to answer questions Enter text to answer questions Click Save for later Click Submit	Correctly shows ticked questions Correctly shows text answers to questions. Ability to save for later Ability to successfully submit form.	
Test 3 – Link yourself to a student via portal button				
Search Student	Home > Linked yourself to a student	Search – Enter the student's name Click Search	Ability to search by student name Shows correct student.	
		Click onto '+' icon Drop down list will show the available PA (Practice Assessor)	Ability to link a PA to the student.	
Test 4 Record Student Absences via portal button				
Search Student	Home > Record Student Absences	Search – Enter the student's name Click Search	Ability to search by student name Shows correct student.	
		Click onto the 'Edit' icon	Opens a pop-up window called Report Absence	
Record Absences	Home > Report Absences	Select Placement – Select from drop-down list. Start of absence – Select a date via calendar icon. End of absence – Select a date via calendar icon. Reason – Select from drop-down list. Placement hours missed – Enter the number of hours that have been missed. Comments – enter a comment if required. Click Save.	Ability to accurately populated data and successfully saves information.	

Placement Nominated Auditor Dashboard:

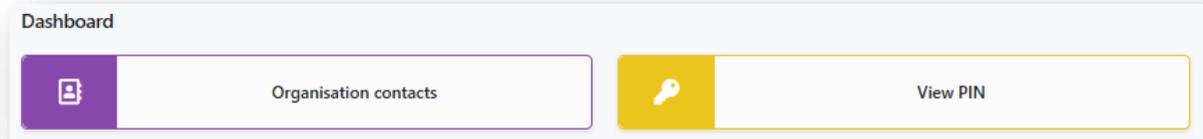There will be portal buttons that are the same as the Placement Coordinator.
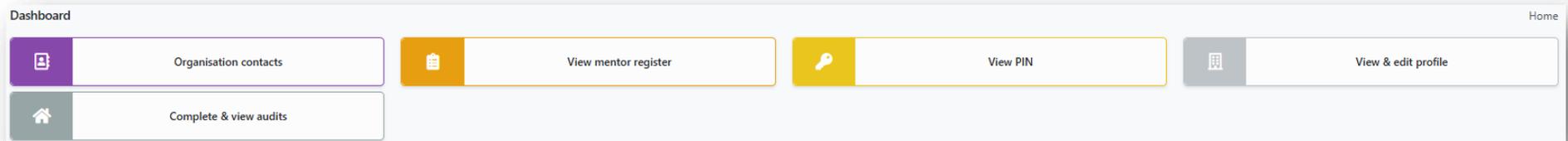
Finance Officer Dashboard:

Organisation Contacts:

Organisation Details Tab:

This information is explained on page 8.

Contacts Tab:

This information is explained on Pages 9-13

Demo Organisation 1 Placement One
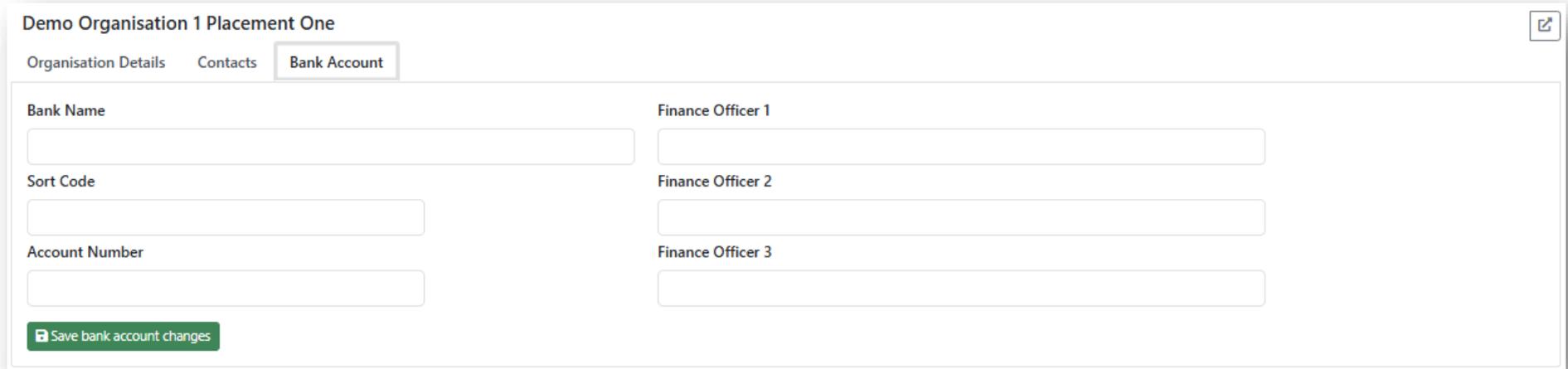
Organisation Details | **Contacts** | Bank Account

Search...

Contact Location ✕

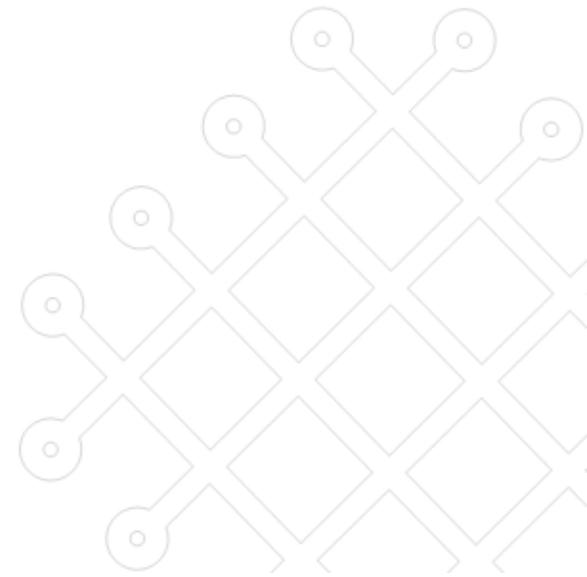|			Name	Job Title	Contact type	Organisation	E-mail
▼ Local contacts							
			Demo Academic	Link Lecturer	Link Lecturer	Demo Organisation 1 Placement One	demo-academic@test.com
			Placement1 Educator	Placement Assessor	Placement Assessor	Demo Organisation 1 Placement One	Placement@Org1place1.net
			Debbi Hinchliffe	Placement Supervisor	Placement Supervisor	Demo Organisation 1 Placement One	dhinch@test.com
			Debbi Hinchliffe	Link Lecturer	Link Lecturer	Demo Organisation 1 Placement One	debbi.hinchliffe@test.com
			Pip Jones	Practice Nominated Auditor	Practice Nominated Auditor	Demo Organisation 1 Placement One	pj@email.com
			Placement2 Mentor	Practice Nominated Auditor	Practice Nominated Auditor	Demo Organisation 1 Placement One	Placement2@org1placement2.net
			Simon Newlogin	Finance Officer	Finance Officer	Demo Organisation 1 Placement One	simon.test@oxi.net
			Simon Newlogin1	Finance Officer	Finance Officer	Demo Organisation 1 Placement One	SNewlogin1@test.com
			Demo Provider	Placement Co-ordinator	Placement Co-ordinator	Demo Organisation 1 Placement One	demo.coord@test.com
			Demo Test	Nominated Auditor	Nominated Auditor	Demo Organisation 1 Placement One	demo.test@test.com

Bank Account:

Administrators, Finance Officers and Placement Coordinators will be able to see this information tab. This information will not be available to any other contact type.

- ➢ Bank Name: Enter Name of bank
- ➢ Sort Code: Enter 6-digit number (removing the –). Example 142536
- ➢ Account Name: Enter the Account Name.
- ➢ Finance Officer 1,2 & 3: Enter the names of the Finance Officers
- ➢ Click Save Bank Account Changes.

Testing: Finance Officer Dashboard:

Process	Path	Action	Outcome	P/F
Test 1 – Admin log in as this user				
	Organisations > Contact List > Named Contact Details	Click onto 'Log in to PEMS as this user' Click OK to confirm	Takes you to the contacts dashboard.	
Test 2 –Bank Account Tab				
Editing Bank Account Details	Home > Organisation > Bank Account Tab	Bank Name: Enter Name of bank Sort Code: Enter 6-digit number (removing the –). Example 142536 Account Name: Enter the Account Name. Finance Officer 1,2 & 3: Enter the names of the Finance Officers Click Save Bank Account Changes.	Ability to accurately populated data and successfully saves information.	