STREAMLINING OPERATIONS TO MANAGE, TRACK, AND ORGANIZE CLINICAL PLACEMENT AGREEMENTS

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DESCRIPTION

Historically, the Student Affairs department at Humber River Health (HRH) engaged in manual search of existing individual clinical placement agreements with educational institutions in Portable Document Format (PDF) to confirm their validity prior to approving new student placements. With over 60 academic partner institutions and hundreds of students rotating through HRH each semester, managing placement agreements accurately and efficiently is critical. The traditional process was time-consuming and often led to delays and inaccuracy especially during peak placement periods. As there was not a centralized method to track the details of clinical placement agreements, the Student Affairs team launched a clinical agreement tracker using Excel. The Excel database was created to organize key details such as partner names, agreement status, and school contact details: streamlining operations, improving compliance, accuracy and ensuring quick access to up-to-date agreement information.

OBJECTIVE

To ensure timely, organized tracking of clinical agreements with a growing number of partner institutions.

ACTIONS TAKEN

To enhance efficiency in managing clinical placement agreements with over 60 partner institutions, the Student Affairs team developed a centralized Excel-based database. The database captures essential information such as partner names, program types, agreement start and end dates, and accurate contract execution dates, ensuring risk mitigation. The database is regularly updated to maintain accuracy and up-to-date contacts. To prevent disruptions, Student Affairs proactively contacts academic institutions at least two months before agreements expire. This streamlined approach has significantly reduced administrative delays, improved contract compliance, and strengthened collaboration between Humber River Health and its growing network of educational partners.

Figure 1. HRH Academic Partners – collaboration with diverse educational institutions, providing quality clinical placements and learning opportunities.

Academic Partner	Contact Person	E-mail	Phone Number	Agreement Start Date	Agreement End Date	Agreement Good	Agreement Expired	Notes

Figure 2. The Clinical Placement Agreement database, highlighting the key details used as part of clinical placement agreement management.

SUMMARY OF RESULTS

The centralized Excel database transformed the management of over 60 clinical placement agreements by offering real-time access to key details and improving accuracy. The database alerts the Student Affairs team two months before agreements expire, prompting timely outreach to partner schools for renewal. This proactive approach has reduced administrative delays, streamlined placement decisions, and strengthened communication with academic partners. Overall, the initiative has optimized workflows, enhanced compliance, and created a sustainable, efficient system to support seamless student placements at Humber River Health.

LESSONS LEARNED

Centralized tracking and early outreach enhance accuracy, prevent delays, and strengthens partnerships—ensuring smooth, timely, and compliant clinical placement processes.