

September 15, 2011

## Placement Cycle Overview for Placing Agencies

### Summary:



This guide provides Step-by-Step instructions for creating and sending placement requests from the **Cohorts** screen.

### Step 1 – Review Course Setup


In the **Cohorts** screen, review the course setup to ensure the correct information:

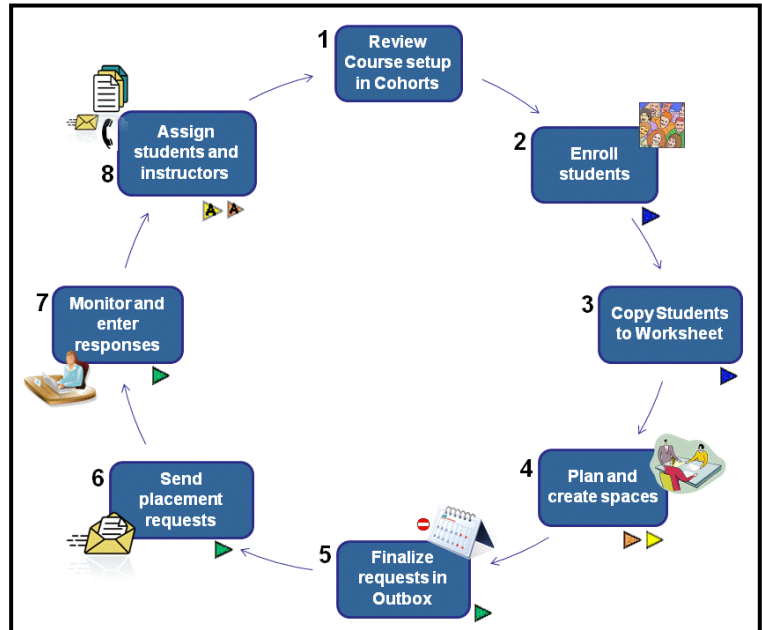
- Schedule - placement start/end dates, days of the week, shifts and hours
- Course leader(s)
- Default comment (to appear in each placement request unless modified later).

### Step 2 – Enroll Students

- Click GoTo Enrollment  to advance to the Enrollment worksheet for the selected Course and Term. At least one Student must be enrolled before creating new requests.
- To add students in **Enrollment**, click Find  to open the Find Students window. Enter 2 or 3 letters of a student's last and/or first name and click Search to find matching student(s).
- From the list of matching Students, click the checkbox for one or more student(s) to be enrolled and then click **Enroll Selected Students**. When finished enrolling students, click **Close Window**.

NOTE: if you have a lengthy list of students for enrollment in an electronic file (e.g. Word/Excel), send the file to HSPnet via the [Upload Student File to this Cohort](#) link for processing (see Quick Reference Guide *Staff & Student File Uploads* for detailed instructions).

- When the Enrollment screen refreshes, the selected student(s) will be enrolled. If student Preferences are to be entered, click  to enter a preference for a single student or click **Edit All** to update several students at a time. Entered preferences may be used for information only (when assigning students to accepted requests and attempting to match with student choice) or can be used to generate requests directly when preferences are used to determine where requests are sent.



### Step 3 – Copy Students to the Worksheet

There are two primary options for creating new requests:

#### Option #1 - Copy Students to a Group or Individual Worksheet

- Allows creation of placements before students are enrolled and before their preferences or assignments are known
- Allows use of “Copy Previous” to quickly re-use locations requested in a previous Term
- Students are assigned later, and can be reassigned if changes are necessary

#### Option #2 - Copy Student Preferences to Individual Worksheet and Assign – students are assigned automatically to their preferred location, but can be reassigned later if needed

- “Copy Previous” cannot be used since requests are generated from student preferences
- Students are assigned automatically, but can be reassigned later if changes are necessary

a. In **Enrollment**, click the checkbox for one or more students and choose one of the above options from the Action dropdown, then **Submit** .

- Option #1 - use:
  - Use “Copy Students to Group Worksheet” for clinical (instructor-led) Groups
  - Use “Copy Students to Individual Worksheet” when students will be assigned later (also used for the “Call for Offers” placement type)
- Option #2 - Use “Copy Student Preferences ...” when students are to be automatically assigned now to their preference entered in Enrollment

b. When the screen refreshes:

- The Action column for each student will display “Work” if copied to the Individual Worksheet or “Grp” if copied to the Group Worksheet

Find student to enroll: Last: <input type="text"/> First: <input type="text"/>								
Student	<input checked="" type="checkbox"/> Nurs320G (NIS Group)	Agency	Site	Service	Dest	Action	Edit All Save All	
<input checked="" type="checkbox"/> 1 <sup>st</sup> Aniston, J		-	-	-	-	Grp		
<input checked="" type="checkbox"/> 1 <sup>st</sup> Barber, M F		-	-	-	-	Grp		

- One or more GoTo buttons will now appear in the Current View filter:
  - for advancing to the Group Worksheet
  - for advancing to the Individual Worksheet
  - for advancing to the Outbox if one or more requests have been generated (occurs automatically when Option 2 is chosen)
  - or to advance to the Assignment screen for the Worksheet used.
- The Cohorts screen will also display these GoTo buttons, thereby providing a visual summary of the progress of each step:

Sept 2006 (Sept 2006), 4 years						Edit Cohort	
Term	Course	Start Date	End Date	Course Leader			
② FALL06	Nurs320G	Oct 9/06	Nov 3/06	Demitra, J	▶	▶	▶
WIN07	Nurs330P	Jan 8/07	Feb 9/07	Johnson, T	▶	▶	▶
WIN07	Nurs331G	Feb 26/07	Apr 10/07	Simon, P / Wilkins, H J	▶	▶	▶
SPR/SUM07	Nurs335G	May 10/07	Jun 22/07	Dawn, K	▶	▶	▶
FALL07	Nurs430X	Sep 17/07	Oct 17/07		▶	▶	▶

In the above example, spaces have been created in the Groups Worksheet for all courses except Nurs330P which has been sent to the Individual Worksheet.

- c. **If you chose Option #1** then proceed to Step 4.
- d. **If you chose Option #2** your requests have already been created and assigned to students according to their Preferences, and are now ready for Sending from the Outbox (skip to Step 5).

### Step 4 – Create Spaces in the Worksheet

In the Worksheet you can:

- Copy requests from a worksheet in another Course (the “Source” worksheet) to the current empty worksheet (the “Target”); or
- Create new spaces “from scratch”.

In either option, you should create enough spaces for current or projected student enrollments, and a tally is provided at the bottom of each Worksheet to monitor your progress.

Name	Site	Svc Dest	Start / End	Days / Time	PR Status / Instructor	Size	Created	Accepted
TOTALS (excluding Rotations)								
Groups: 3							16	16
Students: 28								0
								Confirmed: 0

In the above example, there are:  
 28 Students enrolled = Spaces needed  
 16 Spaces (in 3 Groups) = Worksheet Size  
 16 Spaces Created (in the Outbox), and 0 Spaces Accepted by the Receiving Agency



**TIP** - You can return to a Worksheet at any time to create additional spaces as needed (e.g. when a request is declined or cancelled).

### Copying Requests from a Previous Worksheet

- a. When a worksheet is created it offers two options for copying spaces from another worksheet, either from the same Course or from a different Course using the same type of worksheet:
  - **Copy from Previous Requests** copies all requests regardless of their final status (declined, etc.)
  - **Copy from Previous Acceptances** copies only requests that were Accepted in the other Course.

Source Worksheet for Copy: TESTSPH / SPR/SUM08

! Include Default Comments from:  Current Cohort  Source Worksheet [Help](#)

Copy Schedule from:  Current Cohort  Source Worksheet

**Copy from Previous Requests** | **Copy from Previous Acceptances**

- b. When copying, you also have options as to what default Comment and Schedule information to use:
- **Current Cohort** uses default Comment or Schedule (e.g. MTW days) as entered for the Target Cohort/Course/Term in the Cohorts screen;
  - **Source Worksheet** copies the Comments and Schedule from each request being copied from the previous course offering, regardless of the defaults entered in Cohorts for the Target.



**TIP:** the “Copy from Previous” buttons disappear once you create the first new space “from scratch”. If you decide later that copying would have been faster, simply delete the newly created spaces from the Worksheet and the Copy options will reappear.

### Creating New Requests (“from scratch”)

c. Click **+** to create each new Worksheet space:

- Select the appropriate Agency, Site, Service and Destination from the dropdowns;
- Enter Group size for a group placement;
- Edit or enter schedule information as needed including start/end dates, block dates, days of the week, start/end times or Shift Codes;
- Assign the Group instructor or preceptor/facilitator from the dropdown if known.

**Group Worksheet**

Current View

Department: Nursing	Program: BScN	Cohort: AAA	Term: SPR/SUM10	Course: Nurs320Srg
Agency/Site: ALL	Blocks: ALL		Service: ALL	
Instructor: ALL	Start: ALL	Reset Filters		

Assignment | Load Instructors | Refresh View

Agency / Grp./Ref#	Site	Svc	Dest	Start / End	Days / Time	PR Status / Instructor	Size	Created	Accepted	Action
<input type="checkbox"/>	VCHA	VGH Labs*	Lab*	May 3/10	MTW	New	6	6	0	<a href="#">Edit All</a> <a href="#">View Des</a> <a href="#">Save All</a>
<input type="checkbox"/>	VCHA	VGH RespTher	OR*	May 3/10	MTW	n/a	5	0	0	<a href="#">Edit All</a> <a href="#">View Des</a> <a href="#">Save All</a>
<input type="checkbox"/>	2/-			May 14/10						<a href="#">Edit All</a> <a href="#">View Des</a> <a href="#">Save All</a>
<input checked="" type="checkbox"/>										<a href="#">Edit All</a> <a href="#">View Des</a> <a href="#">Save All</a>

TOTALS (excluding Rotations)  
Groups: 2      11   6   0  
Students: 52      Confirmed: 0

d. Click **✓** to Save changes. You can then Copy the resulting Worksheet entry to create another similar entry, which you can then Edit to make changes (e.g. to change Destination).





**TIP:** If you cannot enter the Service or Destination for a Site at this time, you can still create the spaces and leave Service/Destination blank for now and enter them later in the Outbox before sending.

### Step 5 – Finalize Requests in the Outbox

- a. When ready to generate new requests from Worksheet spaces, click the checkbox for one or more records or **Select All** and:
- select “Copy to Outbox” from the Action dropdown; or
  - select “Send Requests to Receiving Agencies” if requests are ready to send now “as is” – *this will copy requests to the Outbox and Send them in a single step*
  - Click **Submit** to copy requests.




**TIP:** Placements should be copied to the Outbox if there is further work needed to finalize requests before sending, such as:

- Adding a Comment or urgent Alert;
- Entering detailed schedules in the Shift Schedule (see *Quick Reference Guide*);  
Individual  or Group 
- Splitting to create Multi-Destination (split) requests or rotations (see *Quick Reference Guide*), or
- Linking requests to share an instructor or (see *Quick Reference Guide*).

## Step 6 – Send Requests to Receiving Agencies

If requests weren't sent directly from the Worksheet, you must Send them from the Outbox.

- a. Click the checkbox for one or more requests, select "Send" from the Action dropdown and  .



**NOTE:** The Agency, Site and Service must be entered before a request can be Sent. The Destination can be left blank if the Receiving Coordinator normally determines the destination for you, or if you wish to enter it later. In most cases, however, Destination should be specified before sending.





- b. After sending, the request status will display as "Sent" if the receiving site/service is using HSPnet, or "Sent-P" if not. A PDF file will be generated automatically and added to your **Report Queue** for any Sent-P request needing delivery via fax or email to a non-user agency.

## Step 7 – Monitor and enter replies

The **Welcome** screen is the most effective way to monitor replies from sites who use HSPnet, and to enter replies from non-user sites.

- a. When a non-user site replies to a request, find the request in the appropriate Preview link such as "xx Pending – Sent-P".
- b. When replying on behalf of a non-user, choose the appropriate Action (Accept or Decline by Agency) or choose the status of Cancel with a reason "No response from the destination" if the site did not reply.

## Step 8 – Assigning Instructors and Students

- a. Instructors can be assigned:
  - At the time of creating requests in the **Worksheet**;
  - In the **Assignment** screen (accessed from GoTo Assignment button   for the worksheet);  
or
  - In **Outbox** by editing Details for an individual request.
- b. Students can be assigned or reassigned in the Assignment screen for the **Group**  or **Individual**  worksheet:

- o Click **Edit All** and select a destination from the Assignment dropdown (or Edit to add/change a single student assignment);
- o Click **Save All** to save the assignment entries;
- o Click one or more student checkboxes and select the appropriate Action to assign students either temporarily (Individual worksheet) or to “Finalize assignment and release student name” (Individual or Group worksheet).

Group Worksheet Assignment

Current View

Department: Nursing Program: BScN Cohort: 2009Win Term: WIN12 Course: Nurs335G Section: ALL

Show confirmed students  Show Preferences  Show Site Prerequisites Campus: ALL **NEW**

Sort Assignment Options by: Destination **Load Instructors** **Hide Students** **Refresh View**

✓	Student Sec (3 shown)	First Preference Site Svc Dest	Assigned				Edit All ✓ Save All
			Group	Site	Svc	Dest	
<input type="checkbox"/>	<a href="#">Areyat, J</a>	- - -	4	RichHosp	Ext Care	MIN 2E*	
<input type="checkbox"/>	<a href="#">Areyndold, J M (D2)</a>	- - -	4	RichHosp	Ext Care	MIN 2E*	
<input type="checkbox"/>	<a href="#">Flintsto, F</a>	- - -	4	RichHosp	Ext Care	MIN 2E*	

Select All | Select None | Action:  **Submit**

- Finalize assignment and release student name
- Un-Assign student
- Assign Students to Group

- c. To reassign students later, click one or more student checkboxes and select an Action of “Unassign Student,” and then change and re-confirm their assignment via the above steps.

**NOTE:** If a individual placement request is assigned to more than one student OR a group placement request is over-allocated for the group size a warning symbol ! will appear and the assignments must be corrected before final confirmation.

✓	Student Sec (5 shown)	Key	Assigned			Status	Edit All ✓ Save All
			Site	Svc	Dest		
<input type="checkbox"/>	<a href="#">Aniston, J M</a>	May 1/10 !	EvergBap	CCareResid*	EvergBap*		
<input type="checkbox"/>	<a href="#">Thompkin, M</a>	May 1/10	EvergBap	CCareResid*	EvergBap*		
<input type="checkbox"/>	<a href="#">Thorstei, M</a>	May 1/10 !	EvergBap	CCareResid*	EvergBap*		
<input type="checkbox"/>	<a href="#">Thorstin, J</a>	May 1/10 !	EvergBap	CCareResid*	EvergBap*		

## Things to Remember

- If a sent request is subsequently declined or cancelled, these spaces will display in gray font in the Worksheet as “0” and will not be included in the Worksheet tally because they are no longer available to students.
- If you need to replace the lost spaces, or if you need to add additional spaces to a course at any time, you can do so by returning to the Worksheet and repeating Steps 4 and 5.

You have now completed the steps to create, send, and finalize placement requests. If you have any questions or need assistance, please don't hesitate to contact us.

**HSPnet Team**  
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