

Updated: May 13, 2010

## Groups Summary

### Summary:

The Groups Summary provides a set of views to support capacity and utilization management of instructor-led Groups, and with resolution of Group scheduling conflicts.

### Associated Icons:



Group Shift Schedule



Group Shift Schedule – shift changes exist

## Background

Instructor-led groups present unique challenges with scheduling and capacity management. In some jurisdictions (such as a city or region), Placing Agencies may create scheduling conflicts when two or more Instructor-led Groups are requested for the same shift on a unit. The Groups Summary screen provides different views for managing capacity and utilization:




**Note:** The Groups Summary screen is accessed from the left navigation:

### Placing Coordinators:

Worksheets  
 Enrollment  
 Groups  
 Individual  
 Groups Summary

### Receiving Coordinators:

Inbox  
 Ref#    
 Quick Entry  
 Groups Summary

- All destinations in a site
- All destinations in a service (e.g. Medicine) across sites
- Group overlaps (conflicts) only

The Groups Summary screen is visible to both Placing and Receiving Agencies and provides a shared worksheet for collaborative processes to review unit availability, resolve scheduling overlaps (conflicts), and distribute placements equitably.

Scheduling overlaps may be resolved through processes such as:

- Placing Agencies meet in advance of a term to plan group schedules, thereby avoiding as many conflicts as possible;
- A program may resolve as many conflicts as possible by contacting the other requesting program to develop a shared schedule or to negotiate moving to another unit;
- A central coordinator reviews conflicts and contacts programs involved to propose solutions (such as alternating days/evenings) and monitors all Destinations to ensure that conflicts are resolved;
- Placing Agencies meet as a group to review upcoming schedules and to collaboratively resolve overlaps through joint solutions such as alternating schedules or moving to another destination.

In order for scheduling conflicts to be flagged automatically by HSPnet, all participating schools must be setup under **Maintenance** → **Setup/Lookup** → **Programs** to use the NIS Tools module and to Automatically Flag Conflicts. *This setup change must be performed by HSPnet Support, and first requires discussion among all schools in a jurisdiction on how they will use automated conflict flagging.*

## Using the Groups Summary screen

### Groups Summary

**Current View**

<b>FROM</b>	Agency ALL	Department ALL	Program ALL
<b>TO</b>	Agency Vancouver Coastal Health Authority	Site RichHosp	Service ALL
		Destination ALL	
<b>Term:</b>	Past Term	-- OR - Between:	Jan 1/10 and Apr 30/10
<b>Mode:</b>	All destinations - by Site All destinations - by Service Group overlaps only		

The Group Summary has several useful **Current View** filter options:

- **FROM Agency** – allows a user to view only requests and conflicts involving one school, or to view ALL requests (all schools) in the specified Receiving Agency.
- **TO Agency** – can be set to view one or more Sites or Destinations in a Receiving Agency.
- **Term** – can be set to a placement period such as Fall 2010, or to a custom period (a single week or month).
- **Mode** – this dropdown includes three options:
  - **All destinations** – by site
  - **All destinations** – by service
  - **Group overlaps only**

### Mode 1: All destinations – by Site

This view lists all destinations *for one site only*, and the number of active group requests on each.

Site	Service	Destination	PR Count	Conflict Count
RichHosp	ANY	<a href="#">2South</a>	0	
RichHosp	Card	<a href="#">cardunit</a>	1	
RichHosp	Card	<a href="#">CCU</a>	1	

Click the Group Shift Schedule icon to view a detailed schedule for the destination, including group overlaps (displayed in red) – see the Quick Reference Guide entitled *Group Shift Schedule* for detailed instructions on this feature.

NOTE - In the example above, unit 2South has no icon because there are zero group requests for that destination.

### Mode 2: All destinations – by Service

This view lists all destinations *for any site in the receiving agency* under a specific service such as Medicine or Surgery. This view is especially useful for “finding” capacity in a region when the students’ curriculum requires a specific type of educational experience.

Site	Service	Destination	PR Count	Conflict Count	
MtSJoe	MedicineIP	<a href="#">MedUnit</a>	1		
RichHosp	MedicineIP	<a href="#">2South</a>	2	2	
RichHosp	MedicineIP	<a href="#">3S</a>	0		
RichHosp	MedicineIP	<a href="#">8North</a>	1		
SPH	MedicineIP	<a href="#">4W</a>	0		
SPH	MedicineIP	<a href="#">5A</a>	0		

NOTE - *Placing Coordinators can view all sites within a region in this view, whereas Receiving Coordinators can view all sites within their access rights.*

### Mode 3: Group Overlaps only

This view focuses on destinations that have two or more groups with scheduling overlaps as identified with a conflict flag that is automatically set by HSPnet (requires setup of NIS tools as explained on page 1). Once all scheduling conflicts are resolved (e.g. by alternating day and evening shifts) the destination is no longer displayed in this mode.

### Things to Remember

- Placing Coordinator users can edit the dates and other schedule information for their own groups via the Group Shift Schedule or in Details ; Receiving Coordinators cannot edit the dates or schedule of an instructor-led Group.
- The site, service and destination of a group request can be edited by a Placing Coordinator (for groups in her own program) or by a Receiving Coordinator (for requests to her allowed sites) in the Inbox/Outbox, or as shown below in the Details dropdowns. Editing this information serves to “move” the group to another unit, or to finalize a group location if the initial destination requested is blank or “Any”.

**Placement Information** (Ref#: 6795)

**Sent to:** Agency: **Vancouver Coastal Health Authority**

Site:

Svc:

[Dest:](#)

If you have any questions or need assistance with the Groups Summary screen, please don't hesitate to contact us.

**All Our Best**  
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