

August 13, 2007

## Content Managers Guide to Practice Education Guidelines (PEG)

### Summary

This guide provides step-by-step instructions on how to:

1. **Login** to HSPnet
2. **Access and/or view** Guideline Templates available for adoption
3. **Assign a Template** to create a Guideline for some or all sites in your Agency

### Background

The PEG module provides Practice Education Guideline templates available for use by Health Authorities and other Receiving Agencies, or by Placing Agencies. The Practice Education Collaborative of BC acted as Content Author to develop a set of standardized guideline Templates on behalf of Health Authorities, to be adopted or adapted as local guidelines to apply to one or many sites.

The role of a PEG Content Manager is to:



- View all provincial guideline Templates;
- Adopt a Template to establish a local Guideline for their Agency, as is from the Template or with changes to meet Agency requirements;
- Assign the Guideline to apply to one or more sites, sites and disciplines;
- View how Templates have been applied in other Agencies (view only).

### Step 1 - Login to HSPnet

Visit [www.hspcanada.net](http://www.hspcanada.net) and click on the map of your province to access HSPnet for your jurisdiction, and login with your user ID and password as provided by HSPnet. If you forget your password, click on the [Help with forgotten password](#) link to request a new temporary password via email.

### Step 2 – View Available Guideline Templates

In the left navigation, choose **Content Services** → **Guidelines**. The **Practice Education Guidelines** screen defaults to a View of “Templates”, which displays a list of existing Templates, categorized by Topic. To view how the Templates have been adopted by Agencies, select “Guidelines” from the View dropdown.

1. View a guideline template by clicking . The red checkmark indicates there is a template available for the Subtopic; if no checkmark is visible then the Template is blank (hasn't yet been drafted).
2. Template or Guideline status can be either New (draft), Pending (awaiting approval), Approved, or Under Review.
3. The History icon  displays a list of all changes to the status of a Template or Guideline, from New to Pending to Approved.

4. The Subscribe to Status Changes icon allows you to request email updates when the status of a Template or Guideline is changed. The Subscribed icon indicates you have already subscribed. Click this icon to unsubscribe.

### Practice Education Guidelines

**Current View**

View: Templates

Status:  New  Pending  Approved  Review  Inactive

Topic: All

Topic/Subtopic	Applied to Agencies	Template	Status	
<b>On-Site - Care &amp; Supervision</b>				
Access to Health Records	10		Approved Nov 12/06	 Ref# GL-24
Consent by Client for Student Involvement	2		Approved Nov 19/06	 Ref# GL-31
Documentation & Signatory				

### Step 3 – Adopt or Adapt a Guideline from PEG Templates

1. Select “Guidelines” from the View filter; this will display all approved Templates that are available for adoption. Previously adopted Guidelines will display as:

Subtopic	Applied to Sites/SubDisc.	Guideline Status	
<b>On-Site - Care &amp; Supervision</b>			
<b>Access to Health Records</b> <span style="float: right;">+</span>			
MtSJ	1	New Nov 12/06	 Ref# GL-24-25
<b>Consent by Client for Student Involvement</b>			

- - adopted without changes
  - - if changes were made to the Template during adoption
  - - if a pre-existing policy or other non-Template guideline is being used
2. Click the “Create Guideline” icon to open the **Agency Guideline Maintenance** window. Click one of the above icons to edit an existing Guideline, or click + to create another Guideline for the same subtopic. For example, if an existing Guideline applies only to the discipline of Nursing, you would need to create another Guideline of the same subtopic for other disciplines.
3. In **Agency Guideline Maintenance**, enter one or more Content Managers by selecting a name from the dropdown. Enter comments and a Review date to schedule a planned review at a future date. Click ✓ to save changes.
4. When the screen refreshes, two new Category links will appear; click [Agency Content](#) to view or revise the content for this Guidelines.

**Categories:** ✓ [Agency Status & Reviews](#) Agency Content ✓ [Application](#)

5. Select a radio button to select between three options :

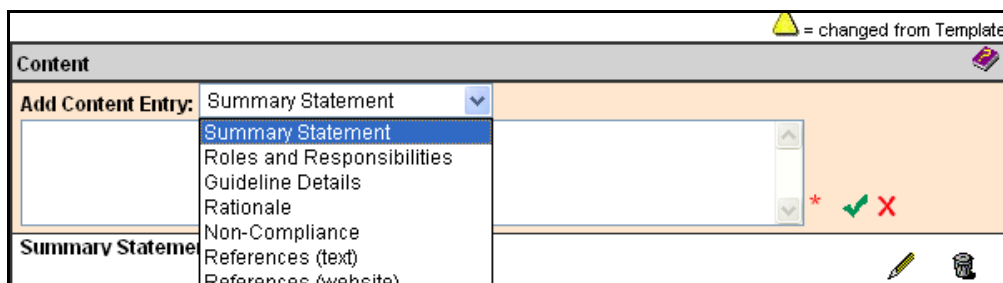
- **Adopt** the Template “as is” by selecting “Adapt template w/o changes”.
- **Adapt** the Template to edit or add new content notes by clearing the checkbox for “Adapt Template w/o changes”

**Source:**  Guideline Template  Other ✓ X

↳  Adapt Template w/o changes

- **Other** to replace the Template content with new material or to enter/upload a pre-existing policy or guideline.

6. Select a content heading from the Add Content Entry dropdown and type or copy/paste text into the space provided. Click Edit to change previously entered text, or click to delete. Click to Save changes when adding or editing a content entry.



7. Upload a document by clicking . Click “Browse” to find a local document in Word or PDF (recommended) format or image file (GIF or JPEG), and select the document type from the dropdown; enter a Comment if document type of “Other” is selected.

## Step 4 – Apply Guideline to Sites and Disciplines

Once Guideline content is entered, the Guideline must be applied to one or more Disciplines and Sites. Ideally, a Guideline can be applied to all Disciplines and Sites, but in some situations it may be necessary to vary the Guideline for specific disciplines, Sites, or even a specific unit or program.

1. Click [Application](#) to view options.
2. Select the radio button for All Disciplines, or click on one or more Disciplines/subdisciplines from the picklist and click to add to the “Included” list.
3. Repeat these steps to apply the Guideline to one or more Sites, and if needed to limit to only certain Services and/or Destinations.
4. Click to complete the Application process.

## Step 6 – Changing Status

Return to the [Agency Status & Review](#) Category to set a new status for the Guideline. When first created, a Guideline has a status of New or draft. Other available statuses include “Send for Approval” (name of approving individual or body must be entered), “Change Status to Approved”, “Place Under Review” if an Approved guideline is under review for changes, and “Inactivate” to retire a guideline that is no longer in use or is being replaced.

You have now completed the steps for creating and applying Practice Education Guidelines.

If you have any questions or need assistance, please don't hesitate to contact us at [support@hspcanada.net](mailto:support@hspcanada.net).

**All our best**

**HSPnet Development Team**  
[www.hspcanada.net](http://www.hspcanada.net)  
[hspnet@hspcanada.net](mailto:hspnet@hspcanada.net)