July 7, 2009

Placement Cycle Overview for Placing Agencies

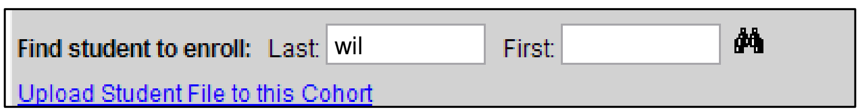
Summary:

This guide provides Step-by-Step instructions for creating and sending placement requests from the **Cohorts** screen. For creating placements via the **Quick Entry Screen**, see that Quick Reference Guide.

Step 1 – Enroll one or more Students

a. In the **Cohorts** screen, click GoTo Enrollment to advance to the Enrollment worksheet screen for the selected Course and Term. At least one Student must be enrolled before creating new requests.

b. In **Enrollment**, click the Find icon to open the Find Students window. Enter 2 or 3 letters of a student's last and/or first name, or student number, and click Search to find matching student(s).



c. From the list of matching Students, click the checkbox for one or more student(s) to be enrolled and then Enroll Selected Students. When finished enrolling students, 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).

d. 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 2 – Copy Students to the Individual Worksheet

There are two options for creating new requests:

❒ **Option #1**

Copy Students without Preferences

- Create requests before students are enrolled and/or 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 as necessary.

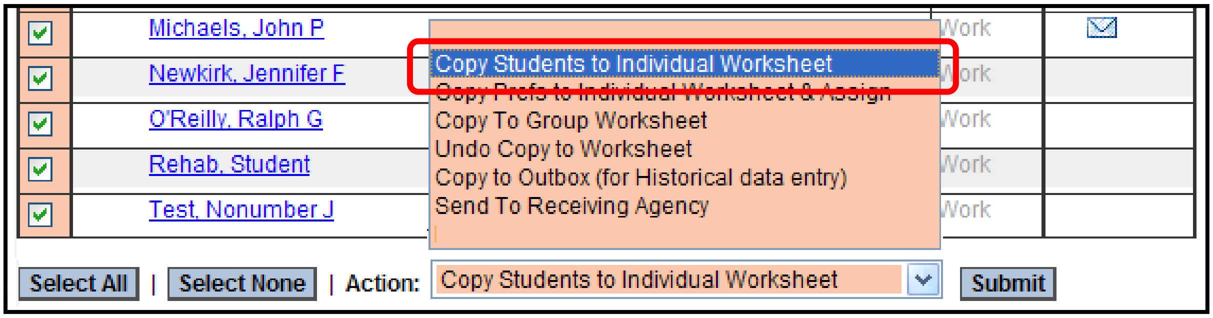
❒ **Option #2**

Copy Students with their Preferences & Assign

- Students are assigned automatically to their preferred location, but can be reassigned later
- "Copy Previous Requests" is not available since requests are generated from student preferences

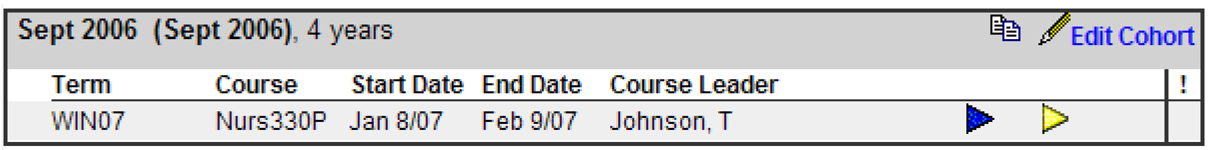
Option #1 - *Copy Students without Preferences*

a. In Enrollment, click the checkbox for one or more students and choose "Copy Students to Individual Worksheet" then Submit .



b. When the screen refreshes:

- The Action column for each student will display "Work" to indicate they are now in the Individual Worksheet;
- A new GoTo Individual Worksheet button will now appear in the Current View filter bar;
- The Cohorts screen will also display this GoTo button, thereby providing a visual summary of your progress:

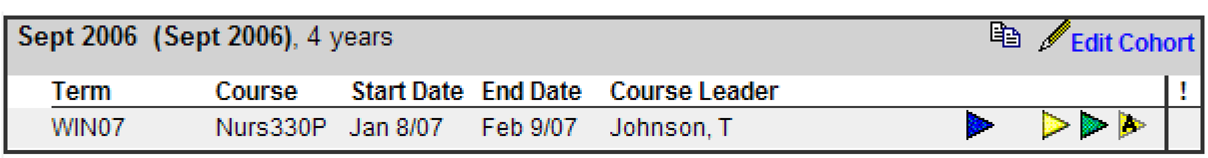


Option #2 - *Copy Students with their Preferences & Assign*

c. In Enrollment, click the checkbox for one or more students and choose "Copy Prefs to Individual Worksheet and Assign" then Submit .

d. When the screen refreshes:

- The Action column for each student will display "Work" to indicate they are now in the Individual Worksheet;
- Three new GoTo buttons will appear in the Current View filter bar:
  - to advance to the Individual Worksheet
  - to advance to the Outbox where requests are ready to be Sent
  - to advance to the Assignment screen (where student assignments can be changed).
- The Cohorts screen will also display this GoTo button, thereby providing a visual summary of your progress:



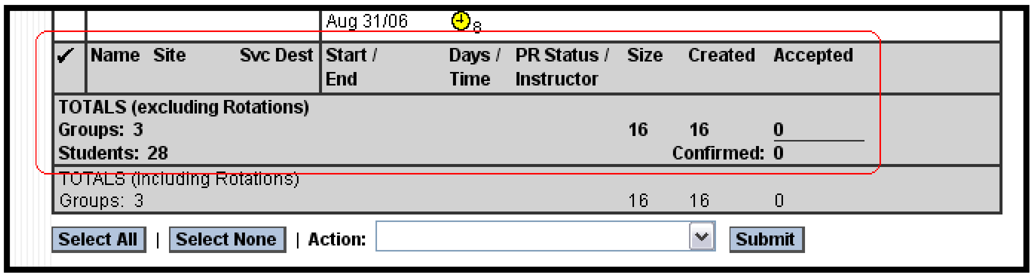
e. *Skip Step 3* (as you have already created Spaces) *and proceed to Step 4.b.*

Step 3 – Create Spaces or Calls for Offer (CFO) 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.



In the above example, there are:

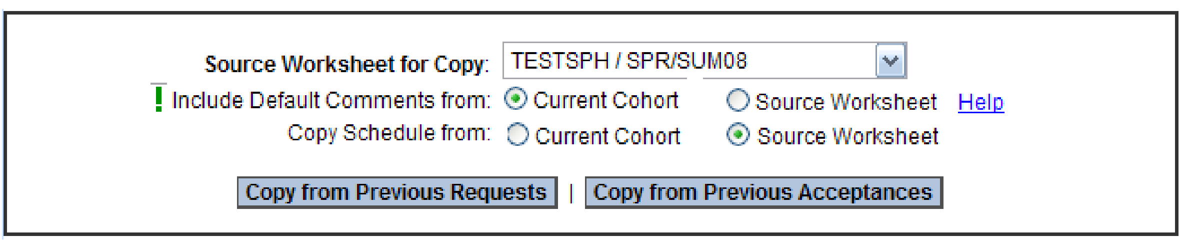
28 Students enrolled = Spaces needed
16 Spaces (in 3 Groups) = Worksheet Size
16 Spaces Created (in the Outbox), and 0 Spaces Accepted by the Receiving Agency

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



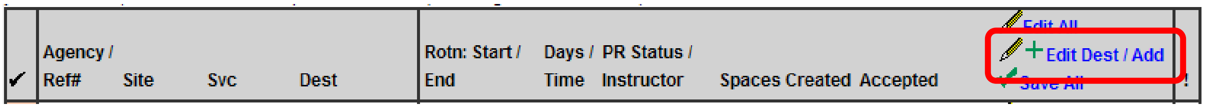
b. When copying, you also have options as to what default Comment and Schedule information to use:

- **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 **Edit Dest / Add** to switch the worksheet to edit mode:



d. Click + to create each new Worksheet space:

- Select the appropriate Agency, Site, Service and Destination from the dropdowns;
- Edit or enter schedule information as needed including start/end dates, Rotation dates, days of the week, start/end times or Shift Codes;
- Assign a school facilitator from the dropdown as appropriate.

e. 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 4 – Sending Requests to Receiving Agencies

When ready to generate new requests from Worksheet spaces:

a. Click the checkbox for one or more records or **Select All** and select "Send Requests to Receiving Agencies" if requests are ready to send now "as is"; then **Submit** .

> **TIP**: Placements can be copied to the Outbox before sending if there is further work needed to finalize requests, such as:
>
> - Adding or revising a Comment or urgent Alert;
> - Entering detailed schedules in the Shift Schedule (see *Quick Reference Guide*); or
> - Splitting to create Multi-Destination (split) requests.

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

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.

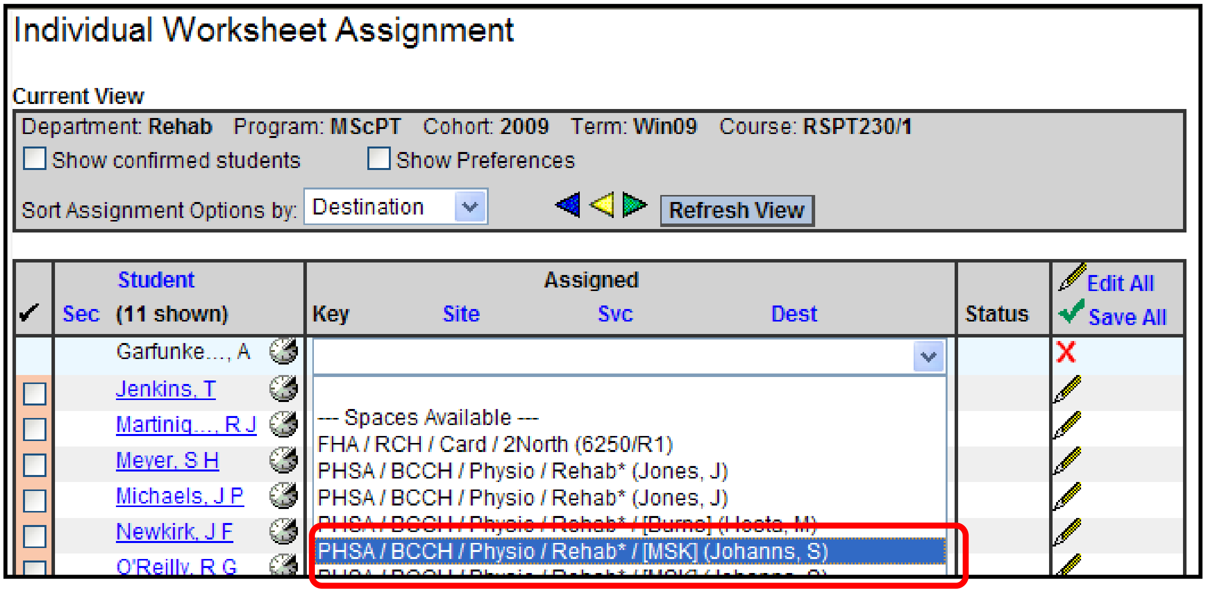
c. After sending, the request status will display as:

- "Sent" if the receiving site/service is using HSPnet, or
- "Sent-P" if the receiving site is a non-user.
  - A PDF file will be generated automatically and added to your Report Queue for delivery via fax or email to each non-user agency.
  - You will need to reply on behalf of the non-user agency in your Welcome or Outbox screen.

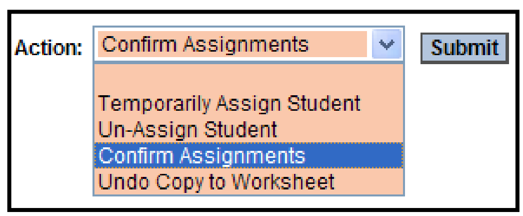
Step 5 – Assigning Students *(Option 1)* and Reassigning Students *(Option 1 or 2)*

a. Students can be assigned or reassigned in the Assignment screen Individual worksheet:

- Click **Edit All** and select a destination from the Assignment dropdown (or Edit to add/change a single student assignment)
- Click **Save All** to save the assignment entry(ies)



b. When ready to confirm assignments, click one or more student checkboxes and select the appropriate Action to assign students either temporarily (to requests before they are accepted) or to Confirm Assignments (to accepted placements).



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.

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.

All our best
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