

June 1, 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. For creating placements via the **Quick Entry Screen**, refer to that Quick Reference Guide.

Note: a complementary Quick Reference Guide entitled *Using the Call for Offers Feature* is available for educational programs that use this type of placement request.

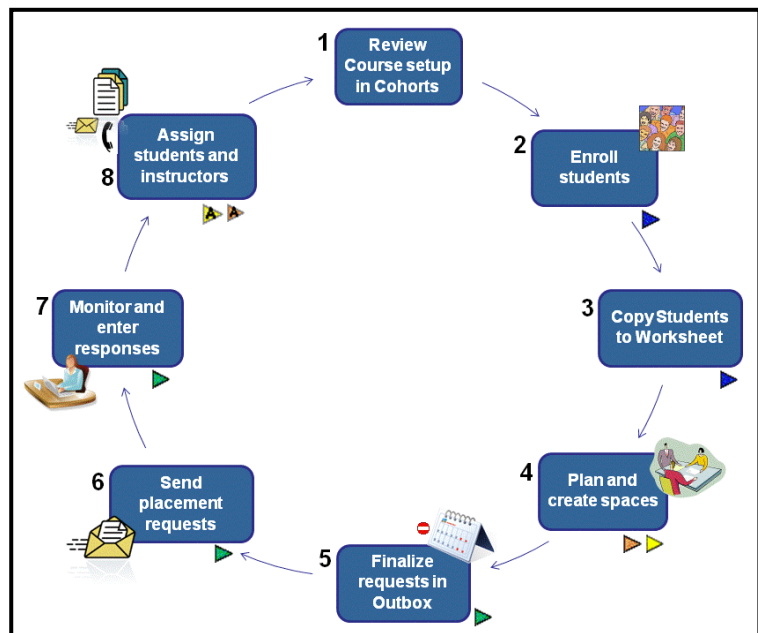
### Step 1 – Review Course Setup

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

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

### Step 2 – Review Enrollment

- Click GoTo Enrollment ► to advance to the Enrollment worksheet for the selected Course and Term.
- If students are enrolled, review the list and update as needed. If actual students are not known at this time (e.g. the intake is not yet finalized), you can skip to step 2.c and use the “Placeholder” student for now.



- To upload a new class list, upload the document (Excel/Word table) via the link [Upload Student File to this Cohort](#) (see Quick Reference Guide *Staff & Student File Uploads* for detailed instructions).
- To enroll one or a small number of students that are already entered in the database, click to search the student database. This step may also be needed when updating a list that was previously uploaded, for example when a student returns from a leave of absence.
- If any student(s) will not be placed in the selected course/term, you should click their checkbox and choose the action “Remove from Cohort (all unassigned courses)” if they are leaving the program or continuing with another cohort, or the action “Waive (this course only)” if they are continuing with the cohort but not being placed in the course/term. Alternately you can choose the action “Enroll students in another cohort” if they are continuing at a later time.

- c. If student Preferences are to be entered, click to enter a preference for a single student or click **Edit All** to update several students. Preferences can be used later to guide manual assignment once placements are known, or can be used in Step 3 to generate requests based on student preferences (Option #1).

### Step 3 – Copy Students to the Worksheet

There are two options for creating new requests:

#### Option #1 - Copy Students to a Worksheet and Assign later to available placements

- 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 another course
- Students are assigned later

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

- “Copy Previous” cannot be used since requests are based on preferences of current students
- Students are assigned automatically, but can be reassigned later if needed

- 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 “Copy Students to Individual Worksheet” for individual placements (e.g. preceptorship, fieldwork);
- Option #2 - Use “Copy Student Preferences ...” when students are to be automatically assigned now to their preference as entered in Enrollment.

- b. When the screen refreshes:

- The Action column for each student will display “Work” to indicate they are now in the Individual Worksheet;

Student		Nurs320G (NIS Group)				
✓ Pref (28 shown)	Agency	Site	Service	Dest	Action	
<input type="checkbox"/> 1 <sup>st</sup> <a href="#">Aniston, J</a>	-	-	-	-	Grp	

- One or more GoTo buttons will now appear in the Current View filter:
  - to advance to the **Individual Worksheet**
  - to advance to the **Outbox** if requests are already generated (when Option #2 is used)
  - to advance to the **Assignment Worksheet**.
- The Cohorts screen will also display these GoTo buttons, thereby providing a visual summary of your progress at each step:

Sept 2010 (Sept2010) , 4 years							
Term	Course	Start Date	End Date	Course Leader			
Fall09	RSPT230/1	Sep 1/09	Dec 31/09				

- 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 to Send 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 the **Worksheet** to monitor your progress.

✓	Agency / Site Ref#	Svc	Dest	Start / End	Days / Time	PR Status / Instructor	Spaces Created	Accepted
Entries: 5							5	4
Students: 9							Confirmed: 1	

In the above example, there are:

- 9 students enrolled = spaces needed
- 5 worksheet spaces = Size
- 4 spaces Created by adding to the Outbox, and 1 of these spaces is 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

- When a worksheet is first created it offers two options for copying spaces: from a worksheet for 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.)

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**

- **Copy from Previous Acceptances**  
copies only those requests that were Accepted in the other Course.

- When copying, you also have options as to what default Comment and Schedule information to use:
  - **Current Cohort** uses the default Comment or Schedule (e.g. M-F days) as entered for the Target course in the Cohorts screen;
  - **Source Worksheet** copies the Comments and Schedule from each request to be 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”)

- In the **Worksheet**, click **+ Edit Dest / Add** to allow editing – this will display two icons:
  - **+ Add** a new space (individual or group) by selecting the Agency, Site, Service and Destination from dropdowns; or
  - **?** Search the database of available locations and Add one or more new spaces in a single step.

- Edit or enter schedule information as needed including start/end dates, block dates, days of the week, start/end times or Shift Codes.

- Click to Save changes.

- Click Copy for any saved worksheet entry to create another similar entry, and click Edit to change Destination, schedule, comments before advancing to the Outbox.

Individual Worksheet

Agency / Ref#	Site	Svc	Dest	Start / End	Days / Time	PR Status / Instructor	Spaces Created	Accepted		
<input checked="" type="checkbox"/>	CCareVanc 6316	CapHouse	CCareResid* [OccReh/Adu]	ResidUnit* [OccReh/Adu]	Sep 1/08 Dec 31/08	Var 8	Sent Munroe, A	1 1	0	
<input checked="" type="checkbox"/>	CCareVanc 6538	CapHouse	CCareResid* [OccReh/Adu]	ResidUnit* [OccReh/Adu]	Sep 1/08 Dec 31/08	Var 8	Sent Munroe, A	1 1	0	

Entries: 3 (from 1 CFO)  
Students: 9

Confirmed: 1



**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

- When ready to generate new requests from worksheet spaces from the **Individual Worksheet**, click the checkbox for one or more records or **Select All** and choose an option from the Action dropdown:

- Select “Copy to Outbox” for further review and/or changes before sending; 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; *changes can still be made later in the Outbox at any time.*
- Click **Submit** to proceed.



**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 Individual Shift Schedule (see *Quick Reference Guide*);
- Splitting to create Multi-Destination (split) requests or rotations (see *Quick Reference Guide*)

## Step 6 – Send Requests to Receiving Agencies

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

- Click the checkbox for one or more requests, select “Send” from the Action dropdown and **Submit**.

**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.

- For delivery of requests to multiple destinations, check the option “Individual PDF for each Placement Request/ Destination” to create individual PDF’s that can be delivered via email to sites that are not using HSPnet;

The screenshot shows a web interface for sending requests. At the top, there is a header with a dropdown menu set to 'Pend' and a 'Submit' button. Below this, there is a section titled 'Options for this action'. A dropdown menu is set to 'PR Forms (program default)'. A checkbox labeled 'Individual PDF file for each Placement Request/Destination' is checked and highlighted with a blue box. Other options include 'Append detailed (shift) schedule' and 'Reply By Date for printed Requests:'. There is also a checkbox for 'add Overdue Reply warning'.

- Enter a “Reply By” date to display on printed reports, and change the contact information from the default (sender) to an alternate individual if appropriate.
- b. After sending, the request status will display as “Sent” if the receiving site/service is using HSPnet, or “Sent-P” for non-user sites.
- For Sent-P, a PDF file is generated automatically and added to your Report Queue for delivery via fax or email to the non-user site. The PDF file will be ready for delivery in one minute or less, and an alert **Reports to be Delivered** will appear in Welcome. Click on the alert or click **Reporting** → **Queue** to view your ready reports.
- c. In the report queue, click for any report with status “Ready” to open the **Send an Email** window for delivery by HSPnet, or click Preview to view the file in Adobe Reader, where it can be saved locally, printed for fax delivery, or sent as an email attachment from your agency’s email system.
- d. The **Send an Email** window will suggest the site contact and email address if entered in HSPnet. The window provides several features;
- Option to enter one or more “Other” addressees or “Cc” recipients;
  - Fields to enter a Subject and message (both are mandatory);
  - Automatic attachment of the PDF form generated by HSPnet;
  - Option to upload and attach local documents, such as a course outline or evaluation form;
  - Option to send a copy to your regular email account, for your records;
  - Option to mark the report in your Report Queue as “Delivered” to track delivery to a recipient.



**TIP:** If no email address is entered for a site contact, you can enter this missing information by clicking the phone icon or . This will open a window that permits an update of contact information if the site is not using HSPnet.


## 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 on behalf of non-user sites.

- When a non-user site replies to a request, locate the request by clicking the appropriate Preview link such as “xx Pending – [Sent-P](#)”.
- In the preview window, click the checkbox for one or more requests, select “Accept by Agency” (or Decline) from the Action dropdown and **Submit**; note that a reason is mandatory when declining.
- If a site does not reply, you can choose the status of Cancel with a reason “No response from the destination”.



## 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 for assignment to students.
- ✓ If you need to replace the lost spaces resulting from a decline or cancellation, or if you need to add additional spaces to a course at any time, return to the Worksheet and repeat Steps 4 and 5.
- ✓ Click  to view the full details of any request, including Placing and Receiving Agency contacts, detailed schedule information, and comments/alerts.
- ✓ Click **Help/Support** → **Email Help** in the left navigation to request user support. This will open a new email message pre-addressed to [support@hspcanada.net](mailto:support@hspcanada.net), and a response will be sent in 4 working hours or less.

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

### HSPnet Team

[support@hspcanada.net](mailto:support@hspcanada.net)