

CHAPTER 9. PLACING AGENCY – USING THE WORKSHEETS

9.1. USING THE INDIVIDUAL WORKSHEET (IWS)

This section explains how to use the worksheet in order to determine placement needs by:


- Adding or editing placement location Preferences
- Comparing Preferences to placements made in a previous Term
- Comparing Preferences to Placement Requests (to be sent later)

Once you have identified placement needs in the Worksheet, you can:



- Copy the Requests to your Outbox for further edits and/or selective sending later, or
- Send “generic” or unnamed requests directly to Receiving Agencies


Add/Edit Student Preferences

Once enrolled students have been copied to the Worksheet from the **ENROLLMENT** screen, follow these steps to add/edit Preferences in the Worksheet:



To specify Service only, select “(any)” for Site and then select the preferred Service.

1. Select **INDIVIDUAL WORKSHEET** from the left navigation and select the desired Cohort from the Current View at the top of the screen.
2. In the Students table, click  to add or edit preferences for a student. Enter or edit any fields to identify Preferences for:
 - Site (e.g. TRH)
 - Service (e.g. Surg)
 - Destination (e.g. 4West) (Optional)
3. Click  to add/edit the Preferences and Save.



Preferences can only be edited one at a time in the Individual Worksheet, therefore the enrollment screen is a better choice for making several additions/edits.

Individual Worksheet

Current View Filter – Check the Cohort, Term and Course to be sure you have the right information.

Department: NSG |
 Program: BSN-B |
 Cohort: test |
 Term: SPR03 |
 Course: Nurs330

Hide Students |
 Show Students |
 Refresh View

| Student (6 shown) | Pref 1 | | | Pref 2 | | | Pref 3 | | |
|----------------------|--------|-----|------|--------|-----|------|--------|-----|------|
| | Site | Svc | Dest | Site | Svc | Dest | Site | Svc | Dest |
| Barber, M.E | - | - | - | - | - | - | - | - | - |
| Jamieson, T | - | - | - | - | - | - | - | - | - |
| Jenkins, T | - | - | - | - | - | - | - | - | - |
| Jewison, T | - | - | - | - | - | - | - | - | - |
| Meyer, S.H | - | - | - | - | - | - | - | - | - |
| Newkirk, J.F | - | - | - | - | - | - | - | - | - |

Last Saved: Sep 30/03 11:59 am

Copy Worksheet from Previous Offering

Instructions: Add "parent" entries by clicking on the + below. Once entries are copied to Outbox or sent to Receiving Agencies, you can then split them across multiple destinations or add Linked Destinations (such as All/Obs rotations) in the Outbox.

| Agency | Site | Svc | Dest | Start / End | Days / Time | Requested |
|--|------|-----|------|-------------|-------------|-----------|
| <input checked="" type="checkbox"/> | | | | | | + |
| Press the 'Add' button to add an entry | | | | | | |
| Entries: 0 | | | | 0 0 0 | | |

Hide Students

The individual worksheet will automatically open with the students hidden but will indicate the number of students and a prompt to show student list if desired.

Viewing Student Profile


The student profile may be viewed and printed from the Individual Worksheet by clicking on the student name hyperlink. Additions and edits can only be made in the student screen.

Copy from Previous Offering

The worksheet may be used to generate placement requests using the The "Copy From Previous Occasion" button. This feature in the Group and Individual worksheets, allows you to retrieve a copy of the placements requested for that course in the previous term, even if the course skipped one or more terms, thereby saving you from having to re-create new groups or individual placements in the worksheet.

Adding a Placement Request

- To create placement for individual placement requests follow these steps:
1. Select **INDIVIDUAL WORKSHEET** from the left navigation
 2. Set the **Current View** to focus on the cohort, term and course you wish to concentrate on.

 Use the tallies at the bottom of the screen to double check that the number of placements you have created meet the number of students.

3. Click the **Show Students** button to see preferences of individual students, or hide students if you know what placements you will be requesting.
4. Select the **+** to add a placement request. Use the dropdown menus to select the Agency, site, service and destination of the placement.
5. Click on the calendar to change the start and end dates that were inherited from the course in the cohort screen.
6. Enter the number of placements requested, the days of the week and times if known.
7. Click on the **✓** to save the request.

Copy Placement Requests to Outbox

To send placement requests to your Outbox for further deliberation and manipulation follow these steps:

1. Select **INDIVIDUAL WORKSHEET** from the left navigation and select the desired Cohort from the Current View at the top of the screen.
2. Click the checkboxes to select specific placements, or click **Select All** to select all placement requests.
3. From **Action** dropdown choose **Send to Outbox**.
4. Select the **Submit** button.




Sending Placement Requests to Receiving Agency


To send placement requests direct to the Receiving Agency follow these steps:

1. Select **INDIVIDUAL WORKSHEET** from the left navigation and select the desired Cohort from the Current View at the top of the screen.
2. Click the checkboxes to select specific placements, or click **Select All** to select all placement requests.
3. From **Action** dropdown choose **Send Requests to Receiving Agency**
4. Select the **Submit** button.

9.2. USING THE GROUP WORKSHEET (GWS)

Adding a Group Placement Request

1. Select **GROUP WORKSHEET** from the left navigation.
2. Select the desired Cohort, term and course from the Current View at the top of the screen.
3. Select the **+** to add a placement request. Use the dropdown menus to select the Agency, site, service and destination of the placement.
4. If the placement requests will be the same or very similar to the requests made the previous time the course was offered, select the Copy from Previous Offering to quickly create a list of the placements you requested for this course the last time the course was offered.
5. Changes can be made to the created placements by clicking on the . To remove any placement requests click on the  to delete.
6. Click on the calendar to change the start and end dates that were inherited from the course in the cohort screen.
7. Enter the size of the group placement requested, the days of the week and times if known.
8. Click on the  to save the request.



When using the **Copy from Previous Offering**, make sure the dates are correct in the Cohort Screen

| ✓ | Name | Site | Svc | Dest | Start / End | Days / Time | PR Status / Instructor | Size | Created | Accepted |
|---|---------|--|-----|--------------------------------------|-------------|---|----------------------------------|---------------------------------------|--------------|----------|
| A | Agency: | VCHA | | | Jan 5/04 | 11:00 - 12:00 | n/a | 0 | 0 | |
| | Site: | St Paul's Hosp... | | | Apr 28/04 | 11:00 - 12:00 | Driol, K | | | |
| | Svc: | Medicine | | | Start Time: | End Time: | <input type="checkbox"/> Various | | | |
| | Dest: | 7B - Medicine | | | Days: | <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> R <input type="checkbox"/> F <input type="checkbox"/> S <input type="checkbox"/> U <input type="checkbox"/> Various | | | | |
| Press the 'Add' button to add a Group | | | | | | | | | | + ✓ X |
| Groups: 0 | | | | | | | | | 0 | 0 |
| | | | | | | | | | Confirmed: 0 | |
| <input type="button" value="Select All"/> | | <input type="button" value="Select None"/> | | Selected Items: <input type="text"/> | | | | <input type="button" value="Submit"/> | | |

Copy Placement Requests to Outbox

To copy placement requests to your Outbox for further deliberation and manipulation follow these steps:

1. Select **GROUP WORKSHEET** from the left navigation and select the desired Cohort from the Current View at the top of the screen.
2. Click the checkboxes to select specific placements, or click **Select All** to select all placement requests.
3. From **Action** dropdown choose **Copy to Outbox**.
4. Select the **Submit** button. (See section 8 for Using the Outbox)

Sending Placement Requests to Interschool



To send placement requests to the Nursing Interschool for conflict resolution follow these steps:

 Once NIS has received the group requests, conflict resolution will be completed and forwarded to the Receiving Agencies. Placing Agencies will then be able to view final placement requests.

1. Select **GROUP WORKSHEET** from the left navigation and select the desired Cohort from the Current View at the top of the screen.
2. Click the checkboxes to select specific placements, or click **Select All** to select all placement requests.
3. From **Action** dropdown choose **Send Requests to Interschool**
4. Select the **Submit** button.

9.3. ASSIGNING STUDENTS IN THE INDIVIDUAL WORKSHEETS

Assigning a student to an accepted placement

1. Select **INDIVIDUAL WORKSHEET** from the left navigation.
2. Select the desired Cohort, term and course from the Current View at the top of the screen.
3. Select the **Assignment** button on the left navigation.
4. Ensure the Current View filter states the Cohort, term and course you are planning to assign.
5. In the Students table, click  to assign your confirmed placements to a student.
6. Click on the  to save.
7. Click the checkboxes to select specific student assignments, or click **Select All** to select all assign and confirm placements.
8. From **Action** dropdown choose **Temporarily Assign Students or Confirm Assignments** if you are ready.





When you temp. assign a student the status indicates

Temp.



Un-Assigning a Student to a temp. placement


1. Select **INDIVIDUAL WORKSHEET** from the left navigation.
2. Select the desired Cohort, term and course from the Current View at the top of the screen.

3. Select the **Assignment** button on the left navigation.
4. In the Students table, click  to edit your temporarily assigned placement to a student. Only placements that have been accepted will be available to use in the dropdown. Select the new placement.
5. Click on the  to save.

9.4. ASSIGNING STUDENTS IN THE GROUP WORKSHEETS

Assigning a student to an accepted group placement

1. Select **GROUP WORKSHEET OR INDIVIDUAL WORKSHEET** from the left navigation.
2. Select the desired Cohort, term and course from the Current View at the top of the screen.
3. Select the **Assignment** button on the left navigation.
4. Ensure the Current View filter states the Cohort, term and course you are planning to assign.
5. In the Students table, click  to assign your confirmed placements to a student.
6. Click on the  to save.
7. Click the checkboxes to select specific student assignments, or click **Select All** to select all assign and confirm placements.
8. From **Action** dropdown choose **Assign Students and Confirm PR**.

 Once a student is assigned they will disappear from the list. To view assigned students select the “show confirmed students in the current view filter at the top.