

Updated: August 15, 2010

Using the Call for Offers (CFO) feature

Summary:

A “Call for Offers” allows an educational program to send open-ended requests to receiving sites, who may then respond with one or more “Accepted” (available) offers for students. Students can then be assigned (manually or via automated matching) to the available offers, which are then Confirmed to finalize the placement cycle and to release student name to the receiving site.

Background






Some educational programs use a “Call for Offers” approach to generate a set of placement offers that can later be assigned to students based on their placement preferences or other criteria.

Activating the “Call for Offers” feature

To activate this feature, contact support@hspscanada.net to discuss its use and benefits for your program.

Step 1 – Review Enrollment

Creating a “Call for Offers” (CFO) Request (*Placing Coordinators*)

- In **Cohorts**, click GoTo Enrollment  for the upcoming Course/Term. Review enrolled students before proceeding to ensure all students active in this Cohort are enrolled, and to remove any students that are inactive or have moved to another Cohort.
- Click the checkbox for one or more enrolled students and select “Copy to Individual Worksheet” from the Action dropdown, then **Submit**.
- Click GoTo Individual Worksheet  and review your options for creating new CFO:
 - If you have previously sent CFO to a set of sites that are suitable for this course, use **Copy from Previous Requests** to copy a list of sites used in a previous course/term;
 - To edit the copied list, or to add new sites, click **Edit Dest / Add** to display new icons to Add  a single site or to “Find and Add” one or more sites in a single step. 
 - Click “Find”  to search the database for for a single region or based on keywords. For example if you enter “Pharm Edmonton” in the “Location contains” field, the results will include all pharmacy sites or departments in Edmonton (use “include City name” to search addresses).
 - From the search results, click the checkbox for one or more sites and **Create Worksheet Entries** to add those sites to the Worksheet.

Find Destinations For Worksheet

Current View

Agency: ALL

Site Type: ALL

Destination Name Contains: Pharm Edmonton

Enter multiple search variables separated by spaces

Include City Name in Search

- d. Change any site that was copied or entered via Edit and revise the Agency, Site, Service, and/or Destination from the dropdowns; change other settings if needed (e.g. Rotation dates, shifts and days, comment). Ensure “Use Call for Offers” is checked, then Save to continue.

- e. When finished copying or creating CFO requests in the Worksheet, click the checkbox for one or more requests and select “Send to Receiving Agencies” from the Action dropdown, then **Submit**.

Note: This action offers several options for sending to non-user sites such as specifying a Reply By deadline. Be sure to check the “Individual PDF” option if you plan to send the CFO form to receiving sites, as this will generate an individual PDF for each site suitable for delivery via email.

Options for this action

Print Requests as: PR Forms PR Forms (Expanded) Schedule PR Letter No Report

Individual PDF file for each Placement Request/Destination

Reply By Date for printed Requests: add Overdue Reply warning

Your Welcome Screen will now display a Summary table with the number of CFO for each course in the selected Term. CFO’s with no reply will display as “(Pend)” (this flag displays in red font to Receiving Sites using HSPnet). In this example there are 4 CFO in total, resulting in 4 available (unused) Offers from 3 replies, and 1 pending CFO (no reply).

Call For Offers Summary

Program / Course	Active	Accepted (Avail.)	Confirmed
BSscOT / RSPT230/1	3 CFO 1 CFO (Pend)	4 Offers	

Step 2 - Generating (Accepting) Offers (Receiving Coordinators)*

* - Placing Coordinators will need to perform this step on behalf of receiving sites that are not using HSPnet.

- a. To enter offers on a pending CFO, click “xx CFO (Pend)” link in Welcome to open the preview window and click the link for any [Call For OFFERS](#) – this will open the “Call for Offers” window to display Offers for this Destination.

- b. Select from the dropdowns to specify Destination or unit/program available, enter optional information such as a Comment. You can also specify an optional Request or experience descriptor such as “Musculoskeletal” or “Neuro” and associated population (e.g. geriatrics).

c. You may assign a supervisor (preceptor or Clinical Instructor) now, or this can be done later.

NOTE – if the supervisor's name does not appear in the dropdown, you will need to add this individual to the Agency's staff database by clicking the "(Add new...)" option.

d. If the supervisor can accommodate a 2:1 placement, enter a single supervisor for 2 student spaces.

e. Click to Save changes for this Offer. When the screen refreshes, you can:

- Edit the Offer
- Delete the Offer ; or
- Add more Offers .

Offers for this Destination		Total Students: 0 (Accepted) 2 (Pending)	
Location	Dates	Students	Status / Comments
Various Program	Sep 15/08 Nov 13/08	2	Pending Student may rotate into outpatient clinic Clinical Instructor 1: Robertson, Mary J
		Total Students: 0 (Accepted) 2 (Pending)	

|
 |
 |

f. When ready to Accept the Offers to be available for students, click and then to view your changes.

The Accepted spaces will now display in Welcome as Accepted (Available) Offers in your CFO Summary table. Click [xx Offers](#) to view all Offers now available.

Call For Offers Summary

Program / Course	Active	Accepted (Avail.)	Confirmed
BScOT / RSPT230/1	4 CFO	6 Offers	

The accepted Offers in the above example would display as [Offers: 2/2](#) in your Preview window, indicating that 2 Offers were made and both are Available (not yet assigned) to Students.

Outbox							
	Status	Course/ Type	Start/ End	Days/ Time Student	From/ Prog	To Agency/ Site	Service
<input type="checkbox"/>	AccA/CFO	RSPT230/1 Field	Sep 15/08 Nov 13/08	OFFERS: 2/2 8	UBC	OthHealth AIDSSociet	Comm HC

Step 3 – Manual Assignment of Students to Offers (Placing Coordinators)

NOTE: for automated matching, see the Quick Reference Guide entitled *Automated Student Matching*

- Click GoTo Assignment from **Cohorts** or **Outbox** to advance to the Assignment worksheet.
- Click **Edit All** and select an available Offer from the "Assigned" dropdown for one or more students (or click to Edit a single student's assignment).

Individual Worksheet Assignment										
Current View										
Department: RehabSci Program: BscPT Cohort: test2 Term: WIN06 Course: RSPT230/1										
<input type="checkbox"/> Show confirmed students Sort Assignment Options by: Destination <input type="button" value="Refresh View"/>										
<input checked="" type="checkbox"/>	Student (42 shown)	Requested			Assigned				Status	 Edit All Save All
		Site	Svc	Dest	Key	Site	Svc	Dest		
	Arey, J	-	-	-	<div style="border: 1px solid blue; padding: 2px;"> PhysPriv / VCHARegion / Med* / JonesW* / [Burns] (4095) VCH / RichHosp / Physio / 4N Rehab* / [MSK] (4096) VCH / RichHosp / Physio / 4N Rehab* / [Sports] (4097) VCH / RichHosp / Physio / 4N Rehab* / [Sports] (4098) VCH / RichHosp / Physio / ICU* / [CritCare] (4104) </div>				X	
	Areynold, J	-	-	-					X	
	Barber, M E	-	-	-					X	
	Garfunke, A	-	-	-					X	
	Jacobs, W	-	-	-					X	
	Jamieson, T	-	-	-					X	

c. Click **Save All** to save the assignment entries – remember to Save frequently when assigning several students at a time via Edit All, to avoid losing your selections in the event of a network interruption.

- d. When ready to confirm assignments and release Student name to the receiving sites, click one or more student checkboxes and select “Confirm Assignments” from the Action dropdown, then **Submit**.

Individual Worksheet Assignment						
	Student (9 shown)	Key	Site	Assigned Svc	Dest	
<input checked="" type="checkbox"/>	Rehab_S	N/A	CapHouse	Resid	ResidUnit*	
<input checked="" type="checkbox"/>	Jenkins_I	N/A	KGH	MedicineIP	Unit41	

Select All | Select None | Action: **Confirm Assignments** | Submit

Temporarily Assign Student
Un-Assign Student
Confirm Assignments

Your Welcome screen will update to show status of available (unused) Offers versus Confirmed placements (Offers assigned to Students):

Call For Offers Summary

Program / Course	Active	Accepted (Avail.)	Confirmed
BScOT / RSPT230/1	4 CFO	4 Offers	2 Students

- e. To change student assignments later:
- Click GoTo Assignment
 - Click one or more student checkboxes and select “Un-Assign Student” from the Action dropdown, then **Submit**.

Once a student is unassigned, their assignment can then be changed as per steps 3.b to 3.d.

Step 4 - Managing Unused Offers

Unused offers can be left as is, to be reported later when tracking offers that were generated versus offers used. Alternately, the CFO process may be used to generate enough offers for each student to have two or more rotations in different locations. For example, a Cohorts screen may be setup to offer a course twice, with course names such as PT300A and PT300B. Once offers are assigned to students in the “A” course, then the unused offers are moved to the “B” course for assignment as a second rotation.

To move unused offers to another course:

1. From **Cohorts**, navigate to the Course with unused offers by clicking GoTo Assignment .
2. Click the checkbox for one or more available offers, choose “Move Unused Offers” from the Action dropdown, and select the correct “target” course to receive the unused rotations.

<input type="checkbox"/>	Rehab/Priv DevonPT	Physio* Clinic*	Nov 9/09 M-F	1
<input checked="" type="checkbox"/>	Ref# 72649	[Muscl]	Dec 18/09	
Entries: 14				14

Select All | Select None | Action: **Move Unused Offers** | Submit

Move to Worksheet: **PTHER517 / Grad2011 / Fall09**

Other Courses:
OOP / OOP / Fall09
PTHER517 / Grad2011 / Fall09

Things to Remember

- If an accepted Offer is later cancelled, that space will be removed from the Worksheet Assignment dropdown and will no longer be available to students.
- If a student was assigned to an Offer that is later cancelled, that student will be unassigned and ready for reassignment in the Assignment screen, and your Welcome screen will alert you that a student has been unassigned.

You have now completed the placement cycle for Call for Offers. If you have any questions or need assistance, please don't hesitate to contact us.

HSPnet Support

Email: support@hspcanada.net