

June 1, 2011

Placement Cycle Overview for Receiving Coordinators

Summary:

This guide provides step-by-step instructions on the key elements for monitoring and responding to incoming requests from Placing Agencies.

Associated Icons:



Details on placement requests



Go To Inbox in Calendar Mode

Background

Receiving Coordinators (RC) are responsible for responding directly to incoming placement requests, or for redirecting requests to a Destination Coordinator (DC) for their consideration. If the DC is not using HSPnet, the RC must enter a response on behalf. If the DC has an active user account then the request will be delivered electronically to the DC inbox (displayed status of Redir), otherwise the redirection process will generate a PDF copy of the request (status of Redir-P) for delivery via email or fax.

RC need not login to HSPnet on a daily basis -- an email will be sent if there are one or more **Pending** requests in their HSPnet inbox awaiting response.

Step 1 – Login to HSPnet

- Click the link provided in the body of the HSPnet email about new pending requests, or visit www.hspcanada.net from your browser; click your province on the clickable map to view the login page and local HSPnet News.
- Enter your User ID (usually first initial + last name) and your password.

Note: If you forget your password, please use the [Help with Forgotten Password](#) link to request that a new password be sent to you via email.

Step 2 – Review Your Welcome Screen

- On login, the Term dropdown is filtered to “Today” which shows all placements active today and for the coming four-month period. You may need to change the Term dropdown to the term specified in your email from HSPnet, then **Refresh View**.

Inbox Summary		
Request Status	Action Needed	For Followup
New	0 New Dests to be Redirected	
Pending	8 Pending	0 Pending - Redir 1 Pending Redir-P

- Incoming placement requests that require your attention will be listed in your Inbox Summary as **Pending**. Click this link to open the **Preview: Pending Requests** window.

Step 3 – Redirect Placement Requests

- In the **Preview** screen, click the checkbox for one or more pending requests to be redirected.
- Select “Redirect” from the Action Dropdown and enter any delivery options for non-user DC (“Reply By” date, format of the PDF request, etc.).

- For delivery of requests to multiple destinations, select the option “Individual PDF for each Placement Request/ Destination” to create individual PDF files that can be delivered via email if the DC is not using HSPnet;

- Check the option to “Included detailed (shift) schedule) if you wish to include a calendar of the schedule.

Using the “Redirect” action, even for non-user DC, is effective because:

- It automatically delivers the request to the DC inbox if they have HSPnet access; or
 - It automatically generates an individual PDF file for delivery via email to non-user DC, and updates your Welcome screen to remind you when the printed reports are ready to be delivered; and
 - It changes the request status to Redir (for DC users) or Redir-P (for non-user DC), which helps track delivery status for you *AND* signals to the schools that you are taking action.
- Your Welcome screen will refresh to display the pending requests under “xx Requests Pending at the Destination”, so you can continue to monitor for a timely reply by the DC.

Upon redirection, one of two scenarios will occur:

Scenario # 1 – Destination Coordinator (DC) is using HSPnet



- If the DC has an active user ID, they will receive an automated email message notifying them of Pending placement requests (message is repeated every 7 days unless they login). The DC can then Accept the request (status changes to AccD) and assign a preceptor/supervisor if required, or Decline the request (DecD) after entry of a reason.

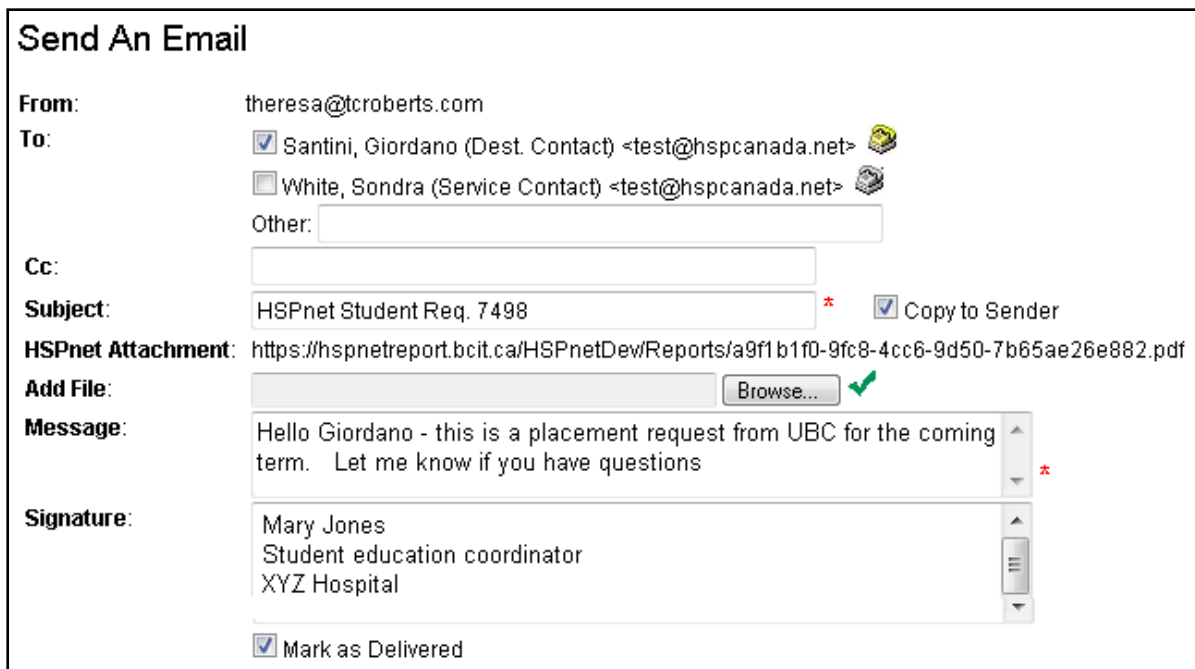
- Once the DC replies, your **Welcome** screen will display this in your **Action Needed** Column under “xx Requests Acc-D to be AccA” or “xx Requests DecD to be DecA”.

Inbox Summary		
Request Status	Action Needed	For Followup
New	0 New Dests to be Redirected	
Pending	4 Pending 1 to be Delivered	9 Pending - Redir 4 Pending - Redir-P 0 Pending - Auto-Redir
Accepted	1 AccD to be AccA	11 AccA to be Confirmed
Declined	0 DecD to be DecA	280 Declined
Confirmed	100 need Supervisor Assignment	16 need Student Assignment

NOTE: It is the responsibility of the RC to complete the process, in other words to Accept or Decline on behalf of the Agency, by selecting this option from your Action dropdown (see Step 4).



Scenario # 2 – Destination Coordinator (DC) is not using HSPnet

- f. If the DC does not have an active user ID, the redirection process will change the request status to “Redir-P” and a PDF copy of the request form will be added to your **Report Queue**. The PDF file will be ready for delivery in one minute or less, and a warning **Reports to be Delivered** will appear in **Welcome**.
- g. To email the placement request form, click the red link from your Welcome Screen or click **Reporting** → **Queue** in the left navigation.
- h. To deliver a report with status of “Ready”:
 - Click  to open the **Send an Email** window for delivery from HSPnet.
 - Alternately, you can click Preview  to view the file in Adobe Reader, from where it can be saved locally, printed, or sent as an email attachment from your email system.



Send An Email


From: theresa@tcroberts.com

To: Santini, Giordano (Dest. Contact) <test@hspcanada.net> 
 White, Sondra (Service Contact) <test@hspcanada.net> 
Other:

Cc:

Subject: HSPnet Student Req. 7498 * Copy to Sender

HSPnet Attachment: https://hspnetreport.bcit.ca/HSPnetDewReports/a9f1b1f0-9fc8-4cc6-9d50-7b65ae26e882.pdf

Add File: 

Message: Hello Giordano - this is a placement request from UBC for the coming term. Let me know if you have questions *

Signature: Mary Jones
Student education coordinator
XYZ Hospital

Mark as Delivered

- i. The **Send an Email** window will:
 - Automatically insert the email address of the DC (or RC/Service Contact) if their contact information is entered in HSPnet;
 - Allow you to enter one or more “Other” addressees or “Cc” recipients;
 - Allow you to enter a Subject and custom message (both are mandatory);
 - Automatically attach the PDF HSPnet request form;
 - Allow you to upload and attach your own local documents, such as a policy document or evaluation form;
 - Send a copy of the message and attachment(s) to your regular email account for your records;
 - Mark the report in your Report Queue as “Delivered” to help you to track delivery of all Redir-P requests.

Step 4 – Accept/Decline on Behalf of non-user DC

- In **Welcome**, click [Redir-P](#) from the “For Followup” column of your Inbox Summary.
- Select one or more placement requests using the checkbox, and choose “Accept by Agency” or “Decline by Agency” from the Action dropdown.
 - (optional) Enter the name or title of the person on whose behalf you are replying;
 - (mandatory) Enter a reason when declining a request.
- Click **Submit** to change status and update your **Welcome** screen.

For Followup	
0	Pending - Redir
1	Pending Redir-P

Step 5 – Assign Preceptors/Supervisors for non-user DC

- In **Welcome**, click [Preceptor Assignment](#) to open the **Preview** window.
- Select a preceptor from the dropdown; if the preceptor you want is not listed, add that individual to the Staff database by clicking **Add New Preceptor**. In the popup window, enter the required information and click to Save. Click **Close Window** to return to the **Preview** window; the new preceptor will now be available in the dropdown.
- Once you select a supervisor/preceptor, two icons will allow you to either save the assignment or assign another supervisor.

Declined	2	DecD to be DecA
Confirmed	8	need Preceptor Assignment
Total: 27		

- To add another preceptor, click Add to open the **Multiple Preceptors** window.
- Click and select the second preceptor from the dropdown. Assign a portion of the total placement hours to the new preceptor, and click to Save.
- Click the Adjust Hours icon to adjust the hours of the other preceptor, or click **Distribute Equally** to divide hours equally among the preceptors.

Preceptor:

For detailed instructions for adding multiple preceptors, see the Quick Reference Guide *Assigning Multiple Supervisors/Preceptors* at <http://www.hspcanada.net/resources/links.asp>

Step 6 – Print Destination Placement Schedules

- From the **Reporting** → **Report Menu** in the left navigation, choose [Destination Placement Schedule](#) from the **Placements & Schedules** tab.
- Select a Term or enter specific dates and indicate the request statuses to be included.
- Highlight one or more Destinations from the “not included” list column and click **>>** to add to the “included” list.
- Click **Run Report** to add the report to your Reporting Queue. **NOTE:** when generating a report for multiple destinations, click the checkbox for “Individual PDF file” to allow individual delivery via email to each DC.

Placements & Schedules

Destination Placement Schedule

Settings for this report

Term: - OR - Between: and

Include: Confirmed Requests Only Accepted & Confirmed Requests Pend/Redir, Accepted & Confirmed Requests

Destinations:

not included		included
BridgeHse / MentH-Res / BridgeHse		RichHosp / Medicine / 2S
Comm/Rich / Admin / ANY		
Comm/Rich / Admin / CCAdmin		
Comm/Rich / Admin / MHAdmin		
Comm/Rich / Admin / PHAdmin		
Comm/Rich / ArtTherapy / MH-C&Y		
Comm/Rich / ArtTherapy / MH-RSP		
Comm/Rich / ArtTherapy / MHS		

Individual PDF file for each Destination

Things to Remember

- 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@hspscanada.net, and a response will be sent in 4 working hours or less.

You have now reviewed the steps for managing incoming requests. If you have any questions or need assistance, please don't hesitate to contact us at support@hspscanada.net.

HSPnet Team
Health Sciences Placement Network
www.hspscanada.net