CCPS - Easy Steps for Clinical Agency Users

STEP ONE –Unit Location

Entering the unit and location information for each agency is the first step for Clinical Agencies using the CCPS clinical placement system. The units that are selected will form the basis for those that will have availability to accept nursing students and define what information the schools will see when searching for placement matches. While locations are optional, it is recommended that they are used so that schools have additional information about each of the units. All of the data entry provides information to either the system or other coordinators so that each has the information it needs to complete the process of scheduling placements.

STEP TWO – Unit Schedules

For each unit that was selected in the first step, schedules/availability must be created that indicates which time slots are actually available to accept nursing students (by dates, shifts, and days of the week). Clinical Agencies also specify the maximum number of students that can be accommodated on the unit. The system creates 24x7 schedules/availability by default, using four parameters selected by the user. Once the availability is created, coordinators have the option to customize it for their needs.

STEP THREE - Placement Requests

Once the units and availability for each have been defined, schools will be able to find potential matches for their cohort schedules and request the time slots. As they make placement requests, their proposals will show up in the queue for clinical agencies. Using screens and reports, Clinical Coordinators review each placement request and decide whether to accept or decline it, then update it appropriately in the system. Optionally, preferred partners may be designated to help with the matching process.

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The "Easy Steps" job aid provides instructions for the most common tasks within CCPS.

Please refer to the CCPS User Manual if you need are looking for more in-depth assistance.

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STEP ONE - Unit Locations

How to Add New Units:

This is the first step for a Clinical Coordinator to take to indicate where the clinical agency can accept nursing student cohorts. The CCPS Administrators have defined a standard list of clinical departments and units that are most common at hospitals. From this list, Clinical Coordinators select which units are available at their agency.

Click on **STEP 1 – Unit Locations**

1. **Click** on the **Add New Unit** link

   Note: The list on the top part of the screen shows the units that have already been selected for the agency. The bottom section is where you choose additional units to add for your agency. If no units have been previously selected and saved, the first box on this screen will not be displayed and the screen will indicate "Agency does not have any clinical units available for placement."
2. Use the drop down list to select a clinical department. The screen will refresh to show the available clinical units for the selected department.
3. **Click** a unit to select it, or select several units by holding down the Control (Command) key as you click them. (The Shift key may also be used to select units that are adjacent to each other.)
4. **Click** the right-facing arrow to move the selected unit(s) into the box at the right, which indicates the clinical units that will be made available for clinical placements.
5. Use the left facing arrow to move units back out of the selected units listing. You may use the double arrows (and) to move the entire list of units back and forth.
6. Repeat steps 2 – 5 to select clinical units from other departments.
7. **Click Submit** at the bottom of the page when you are finished selecting units. The page will refresh with a success or failure message and if successful, the display box at the top of the screen will appear, listing the clinical units you have just selected.

Report Available for STEP ONE:

If you would like a listing of all the Clinical Units that you have created for your Clinical Agency Click on List Units / Select your Clinical Agency / and Click on Display Report.

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STEP ONE - Unit Locations

How to Add or Update a Unit Location

This is an optional feature in CCPS that Clinical Coordinators may use to provide additional information about their clinical units. Some clinical agencies will need to use it when their site has multiple locations of a particular clinical unit. If no locations are provided, a default location of “Not specified” will be assigned by the system. *Note:* While locations are optional, it is recommended that they be used to further describe clinical units. The additional information is often helpful to both clinical agencies and schools.

Click on **STEP 1 – Unit Locations -** The screen will show a list of the clinical units available at your agency, along with the location(s), if any have already been provided (otherwise, “Not Specified” will be used)

1. **Click** the **Modify Unit Locations link**
2. In the Department column**, click** on the department name you wish to edit. The clinical department/unit that you have selected will turn red. In the space below the listing of all units and locations, the system will display **all** of the locations for your clinical agency.
3. **Place a checkmark** in the box next to “New Location” and type in the new location name, or select one of the existing location names to add a location for this unit.
4. **Click Submit**

Note: You may also remove locations from a unit by deselecting the location. However, if availability has already been created for that unit and location, the checkbox will be grayed out and cannot be unassigned

On this screen, you may also modify the name of existing locations and/or delete them entirely.

1. To **modify** an existing location name, simply make your changes in the text field containing the name and **click Submit**
2. To **delete** a location name, **click on the “Delete Location”** link to the right of the name. You will only be able to delete a location that does not have availability against it and that is not assigned to any units. If this is not the case, the link will be grayed out and unavailable.
3. **Click Submit**

Report Available for STEP ONE:

If you would like a listing of all the Clinical Units that you have created for your Clinical Agency - Click on List Units / Select your Clinical Agency / and Click on Display Report.

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STEP TWO - Unit Schedules

In this step of the process, a clinical agency will create default 24 x 7 schedules/availability for each of the clinical units that have been selected. An agency may then edit the default schedules for their specific needs by editing the dates, shifts and days that are available for accepting nursing student cohorts.

How to Create Unit Schedules

Click on STEP 2 – Unit Schedules

1. **Click** on **Add Unit Schedule** link
    a. The screen will display the list of units (by location) that can be selected for creating default availability: (By default, none of the locations will be selected. When a location is grayed out, that means that default availability was already created for it)
2. **Select the unit location(s)** for which you would like to create availability or use the **Select All feature** to choose all available unit locations.
3. **Select the shift length** for the selected unit location(s) – either 8 hour shifts or 12 hour shifts. The default selection is 8 hour shifts.
    a. (*Note:* If some units at your agency are 8 while others are 12, be sure that all of the units you have selected are on the same shift length. You can create availability separately for those with a different shift length.)
4. **Select the start time** for your day shift using the drop down lists for hour and minute. The default selection is 7 am.
    a. This variable will be used by the system to calculate the shift start and end times for all shifts (3 per day if 8 hour shift length is selected, 2 per day if 12 hour is chosen).
5. **Enter the maximum number of students** that could be accepted for clinical placement on these units. The default is 10 students.
6. If desired, **enter a brief comment** to accompany the unit's availability.
7. **Click Submit** once all entries are completed.
    a. A pop-up box will display a graphic of the availability that will be created by the system (using the default start time of 07:00) so that you can visualize what is being done.
8. **Click OK** to accept the default availability and stay on the current screen.
    Or
9. **Click Edit** to be taken directly to the Edit Unit Availability screen so that you may customize the default availability or indicate blackout days, dates or times
10. Repeat steps 2– 9 to create availability for additional unit locations.

Report Available for STEP TWO:

If you would like a listing of all the Unit Schedules that you have created for your Clinical Agency - Click on Unit Schedules Report / Select your Clincal Agency / Select All Units/ and Click on Display Report.

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STEP TWO - Unit Schedules

Clinical Coordinators have access to modify the availability for their agency's clinical units. Coordinators may modify existing default availability that was created automatically by the system, or add and delete records that will further define availability.

How to Edit Unit Schedules

Click on **STEP 2 –Unit Schedules**

1. **Click** on the **"Modify Unit Schedules"** link
2. **Place a checkmark** in the box to the left of the unit location for the unit you would like to edit. You may also use the **Select All / Deselect All** options at the top right corner of the list to make your selections.

   Note: Be selective in how many units you wish to edit at the same time – unless you are planning to make the same changes for all of your availability, it may be easier to work with only a few select units at a time.

3. **Enter the dates of availability** that you wish to search within – the application will look for availability with start dates within this window. Default dates are provided for you.
4. **Click the Display Schedules button**.
   a. The records representing the unit schedule(s) you selected will be displayed on the screen.
   b. All of the fields except Department, Unit and Location are editable and may be changed simply by typing in the white area
   c. Changes may be made in any of the white editable fields.
   d. You may select a single row by clicking anywhere on the row. The selected row will be highlighted in a darker color. The selection checkbox at the left may also be used to select one or more rows to copy, delete or edit.
5. **Click** the **Submit, Copy or Delete buttons** below the grid to make your changes
   a. If you change your mind (before clicking submit) and do not want to save the changes you have made, click Reset. This will restore all of previous values.

Report Available for STEP TWO:

If you would like a listing of all the Unit Schedules that you have created for your Clinical Agency - Click on **Unit Schedules Report** / Select your Clinical Agency / Select All Units/ and Click on Display Report.

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STEP TWO - Unit Schedules

Clinical Coordinators have access to modify the availability for their agency's clinical units. Coordinators may modify existing default availability that was created automatically by the system, or add and delete records that will further define availability.

How to Edit Multiple Unit Schedules at One Time (Global Edit)

Click on **STEP 2 – Unit Schedules**

1. **Click** on the **"Modify Unit Schedules"** link
2. **Place a checkmark** in the box to the left of the unit location for the unit you would like to edit. You may also use the **Select All / Deselect All** options at the top right corner of the list to make your selections.
    i. *Note:* Be selective in how many units you wish to edit at the same time – unless you are planning to make the same changes for all of your availability, it may be easier to work with only a few select units at a time.
3. **Enter the dates of availability** that you wish to search within – the application will look for availability with start dates within this window. Default dates are provided for you.
4. **Click the Display Schedules button**.
    a. The records representing the unit schedule(s) you selected will be displayed on the screen.
5. Select (enter checkmark) for all the schedules you would like to modify (use select all schedules) if changing them all.
6. **Click** the **Global Edit button** below the grid to apply your changes to all selected sschedules. (*Note:* This button is grayed out until at least one schedule is selected.)
    a. A new section will be displayed at the bottom of the page that provides you with a place to specify the value(s) you wish to modify for the selected schedules:
7. **Enter the value(s)** that you want applied to all the selected rows. Only the values you enter will be changed – the fields that are left blank will remain as is
8. **Click OK** to make the changes, or Cancel to abort the action and leave the current information unchanged.

Report Available for STEP TWO:

If you would like a listing of all the Unit Schedules that you have created for your Clinical Agency - Click on **Unit Schedules Report** / Select your Clinical Agency / Select All Units/ and Click on Display Report.

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STEP THREE - Placement Requests

The third and final step in the clinical placement process is where the actual matching of schedule information (cohort schedules and unit availability) occurs. Clinical coordinators will use the screen and reports in the Placement Request section to review and respond to the clinical placement requests made by the schools.

The Placement Requests Summary page allows a clinical coordinator to view multiple requests at one time grouped by the proposing school.

How to Review and Respond to a Placement Request

Prior to taking action on the requests, it may be helpful to run a report to see all of the proposals that have been made for clinical placements. The **Placement Calendar Report** is very helpful in showing all requests in a calendar format, which will quickly identify where overlapping requests may have been made and determine what can be accepted.

Click on STEP 3 – Placement Requests

1. **Click on** Placement Requests Summary link
2. **Enter a date range** in the From and To fields. This will result in only the proposals that occur in the range entered being displayed.
3. **Select your filter criteria**
4. **Click "Search."**
    a. The next screen will group the requests by the proposing school and unit.
5. You may view comments between the school and clinical agency related to that proposal by clicking on **View** in the Comments column. To see additional information about the request or to see the Unit Availability grid, you may click on the magnifying glass in the Department/Unit column.
6. You may select an action for multiple proposals on the screen simply by selecting your choice from the drop down list next to each proposal. (Note: if you are accepting a request, in the **# Placing** column, enter the # of students you are accepting for that request, if different than the default #)
7. Once you have made your selections, click on the **Confirm Changes** button at the bottom of the screen.
8. The next screen will display the changes you selected and include a **text box** for you to enter a comment to the school. For proposals that you are declining, you must select a reason for declining.
9. You can click the **Cancel** button to go back to the previous screen and none of your changes will be saved, or you can click the **Save These Changes** button to complete the process.
    a. Clicking **Save These Changes** will trigger the system to send an automated email to each school affected notifying them of the status of their proposal.

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Unit Placement Flexibility

If you receive a request for a specific unit and you no longer have space on that unit but you do have space on another unit within that department, you may use this feature to assign a different unit to this cohort group. You should always review the comments to ensure that the school has not indicated they specifically need this unit before employing this feature.

Click on STEP 3 – Placement Requests

From the Placement Request Summary screen

1. Select the Placement Request you want to work with
2. After determining you do not have space on the requested unit, use the drop down arrow (next to the Dept/Unit field) to display a listing of the other units you do have available in that department
3. Select another unit from the list
4. Enter the # of students you are accepting
5. Select ACCEPTED from the drop down list
6. Click on CONFIRM CHANGES
7. If desired, enter any comment for the School Coordinator
8. Click on SAVE THESE CHANGES

An auto email notification with your comments will be sent to the School Coordinator

When reviewing requests on the **Placement Request Summary** screen, you may see a ***(Y)*** indicator in the Historical Column to denote a historical placement request.

Also note that on the **Placement Request Summary screen additional filters have been added to help manage your view and sort your work. Placement Requests may be sorted by status code (the default view is "Proposed" status) and by school. The "Show Preferred Partners Only" filter is also still available.

Reports Available for STEP THREE:

If you would like a report that provides information on all the Placement Requests w/status that have been submitted to your Clinical Agency - **Click on** **Placement Calendar Report** or **Placement Request Status Report**.

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Re-proposal Option:

Click on STEP 3 – Placement Requests

If you receive a request and you need the school to select a unit from another department or select a different day of the week, you may use the "Re-propose" option to communicate this information to them. You will not need to decline the request.

From the Placement Request Summary screen

1. From the drop down list, select "Re-proposed"
2. Click CONFIRM CHANGE
3. Enter a descriptive note that describes what you need the school to do
4. Click SAVE THESE CHANGES

An auto email notification with your comments will be sent to the School Coordinator

Reports Available for STEP THREE:

If you would like a report that provides information on all the Placement Requests w/status that have been submitted to your Clinical Agency - **Click on** **Placement Calendar Report** or **Placement Request Status Report**.

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Reporting

Reports may be generated from several locations within CCPS or from the Reports tab.

Note: To print or Export a report you must turn off your pop-up blocker (see Tools on your top window's menu)

How to Export, Print oe Email Reports within CCPS:

1. Select the Report that you want to run
2. Enter all the required selection criteria for the specific report
3. Enter the date range of the report
4. Click Display Report.
5. From the gray bar above the report, click the export button (1^{st} icon – looks like a disc)
6. From the Export Options pop up box, click on drop down and select the export option of your choice (most common are PDF or Excel (Data Only) and click OK
7. If you selected Excel as an export option, from the next pop up box, select Open or to save on your PC, click Save.
8. If you selected PDF, your report will appear in another window from which you can print, save to your PC, or embed the report into an email.
9. Select the action you want to complete and follow the instructions in the subsequent pop up boxes.

Note: If you just want to **print** your report – from the gray bar above the report, click on the 2^{nd} icon – Printer and follow the instructions in the subsequent pop up boxes.

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