Managing Placements & Requests

Users: Facility

Viewing Placements

Use the Home Page to quickly review your placements by category: Open, Assigned, Closed & Released.
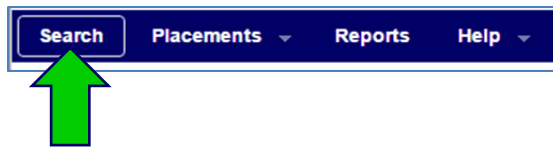
Or use the Search Button to refine your search based upon the school, days of the week, and dates.

From the Placement Grid, you can further sort and filter by numerous headers.   You may also Add a New Placement and Export the grid to Excel.
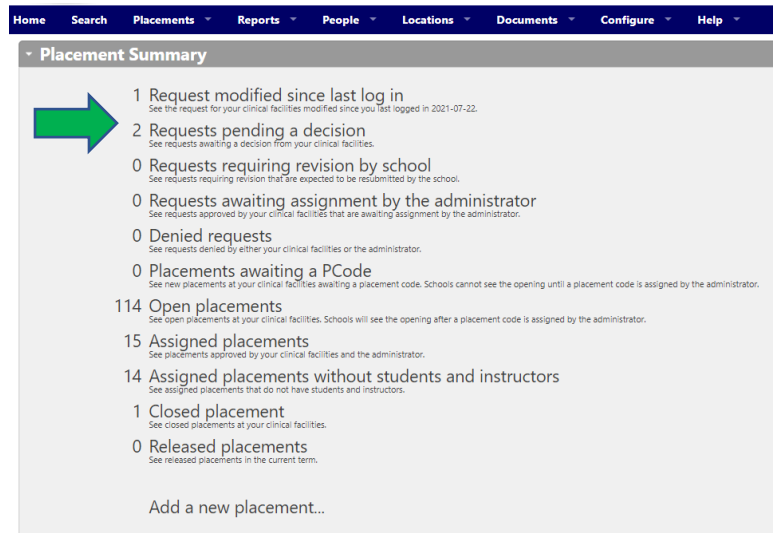
Responding to a Placement Request

You will be alerted about a placement request via an email that comes from TCPS PlacementPro. **NOTE: This email comes automatically from the server. Do not REPLY to it since inbound mail is not monitored! If you need to contact the facility, contact them directly!**

Email placement notification from School Train at Z School

TCPS PlacementPro Pam.Taylor@cyberhealthcaresolutions.com
to facility ▾

School Train updated the placement request on 2012-06-28 12:48:09.

To edit, go to http://66.147.244.92/index.php?r=placement/update&id=230565

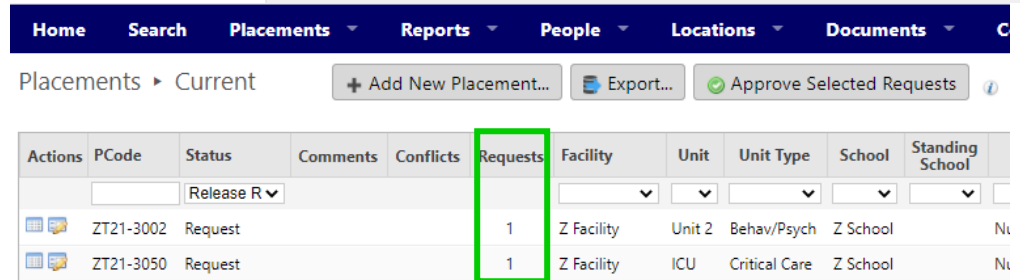|	
PCode	TC143
Status	Request
Facility	Z Facility
Unit	Unit 5
School	Z School
Standing School	Z School
Program	Nursing
Level	N: SN4
Instructor or Course	Simpson
Duration	Standing
Term	Summer
Start Date	2012-07-01
End Date	2012-08-05
Rotation	Group

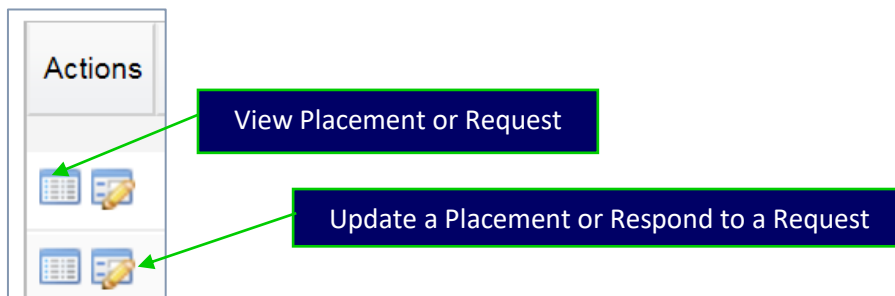You can also log into the PlacementPro system and your HOME page will show a count of your pending requests.

To respond, click on the Requests Pending a Decision link.

Placement Summary

1 Request modified since last log in
See the request for your clinical facilities modified since you last logged in 2021-07-22.

2 Requests pending a decision
See requests awaiting a decision from your clinical facilities.

0 Requests requiring revision by school
See requests requiring revision that are expected to be resubmitted by the school.

0 Requests awaiting assignment by the administrator
See requests approved by your clinical facilities that are awaiting assignment by the administrator.

0 Denied requests
See requests denied by either your clinical facilities or the administrator.

0 Placements awaiting a PCode
See new placements at your clinical facilities awaiting a placement code. Schools cannot see the opening until a placement code is assigned by the administrator.

114 Open placements
See open placements at your clinical facilities. Schools will see the opening after a placement code is assigned by the administrator.

15 Assigned placements
See placements approved by your clinical facilities and the administrator.

14 Assigned placements without students and instructors
See assigned placements that do not have students and instructors.

1 Closed placement
See closed placements at your clinical facilities.

0 Released placements
See released placements in the current term.

Add a new placement...

A listing of your Placement Requests will be displayed. If you have multiple requests for the same placement, the number of requests for a single placement will be noted in the Requests Column. In this case, there is only 1 request for each placement.

Placements ▸ Current   ➕ Add New Placement...   📑 Export...   ✅ Approve Selected Requests ⓘ

Actions	PCode	Status	Comments	Conflicts	Requests	Facility	Unit	Unit Type	School	Standing School
		Release R ▾				▾	▾	▾	▾	
▦ 🖉	ZT21-3002	Request			1	Z Facility	Unit 2	Behav/Psych	Z School	Nu
▦ 🖉	ZT21-3050	Request			1	Z Facility	ICU	Critical Care	Z School	Nu

Use the **Update Tool** in the Actions Column to select the request.

Actions

View Placement or Request

Update a Placement or Respond to a Request

The Request Form will open for your review and decision.

Two copies of the Placement will be visible, the original and the request with changes highlighted in <mark>YELLOW</mark> unless it is a NEW Placement Request. Be sure to note the changes carefully to make sure that you agree with each entry related to the Request.

Standing Duration Requested:

Note the Duration of the Placement!

If the School has entered REQUEST STANDING in their request and you wish to award them the placement on a standing basis – change the duration to STANDING. When you update the placement, their school will be added to the Standing School field.
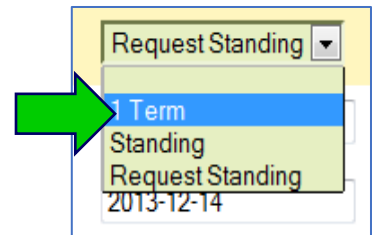
If you will only allow a 1 Term placement, change the placement duration to 1 Term.

You must change the duration to either 1 Term or Standing to approve the placement!

Placement Comments

If you need to add a pertinent comment to the placement, add it in the comments box. If a placement Request or Assigned placement has a comment, subsequent comments can be left in the placement data without overwriting existing comments.

Common Use of Comments:
- Reason for request denial
- Specific questions
- Specific student/faculty requirements

To finalize your decision, you will need to change the status of the placement.

- To APPROVE the placement, change the Status to Approved.
- If you want the School to submit additional information, enter what information you need in the Comments section and then change the Status to REVISE and RESUBMIT.
- If you want to DENY the request, change the Status to Denied. Your reasons for denial may be entered in the comments section if appropriate.

Click on Update to update the request. An email will be sent to the requesting school to alert them of your decision.

You may review the request based upon your decision from your Home Page:

- Requests requiring revision
- Denied requests
- Requests awaiting Admin Assignment
- Placements awaiting PCodes
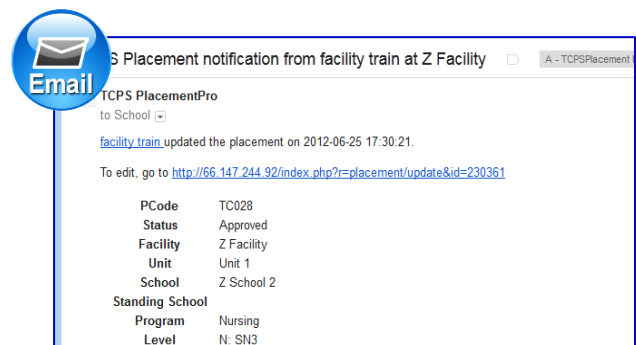
The Site Administrator will assign all approved placements and add any needed PCodes within the database. This should happen within 1 working day following the facility's approval of a placement.

Placement Updates

Sometimes a school will need to update an assigned placement – such as change an instructor or update their total number of students. The facility will be notified of the change by email, but the change may or may not require that the facility approve the change.

- **Updates that require Facility Approval:** Instructor change, Duration, and changes in Dates outside of the existing range/term.
- **Updates that do NOT require Facility Approval:** Level, Time on Unit, Precepted Hours, Total Number of Students, and Student Information.

When a placement is updated and requires facility approval, you will have a new Request that shows the conflicting/changed data from the originally assigned placement.

To approve the change, click on the Override Conflict check box and then Approve the request.

The following records indicate a potential conflict for placements occurring at the same place and time:

	PCode	ID	Override Conflict	Facility	Unit	Duration	Start	End	M	T	W	T	F	S	S	Rotation	Max Students	Total Students	Status	School
	ZTSP17-156	575483	No	Z Facility	A Pod	1 Term	2017-05-15	2017-08-20	E8							Group	8		Assigned	Z School
This record →	ZTSP17-149	576945	No	Z Facility	A Pod	1 Term	2017-05-15	2017-08-20	D8							Group	8	16	Request	Z School
	ZTSP17-168	591883	Yes	Z Facility	A Pod	Standing	2017-05-15	2017-08-20	D12							Management	2	6	Approved	Z School

☑ **Override Conflict** for this record

	Request	**Open Placement** Edit...
	* required.	

Clinical Facility

	Request	Open Placement
Facility * ⓘ	Z Facility ▼	Z Facility ▼
Unit * ⓘ	A Pod (Med/Surg) ▼	A Pod (Med/Surg) ▼

School

	Request	Open Placement
School ⓘ	Z School ▼	
Standing School ⓘ	▼	
Program ⓘ	Nursing ▼	Nursing ▼
Level ⓘ	N: SN2 ▼	▼
Course ⓘ	Adult 1 ↻	
Instructor ⓘ	Jane Smith ▼	▼

Dates & Times

	Request	Open Placement
Duration ⓘ	1 Term ▼	▼
Start Date * ⓘ	2017-05-15	2017-05-15
End Date * ⓘ	2017-08-20	2017-08-20

If you do not agree with the change, DENY the request.

Status ⓘ
- Request ▼ *Current Status*
- ○ **Revise and Resubmit**
- ◉ **Denied**
- ○ **Approved**

[Update]

Duplicate Placement Requests

There are times when two or more schools will request the same Open placement. The number of Requests for a single placement is noted on the Placement Requests screen under the Requests column and duplicate requests are listed in PCODE order.

Actions	PCode	Status	Requests	Region	Facility	Unit	Unit Type	School	Standing School
		Req ▾		▾	Z Fa ▾	▾	▾	▾	▾
	TC028	Request	2	Middle	Z Facility	Unit 1	Med/Surg	Z School 2	
	TC028	Request	2	Middle	Z Facility	Unit 1	Med/Surg	MTSU	
	TC132	Request	1	Middle	Z Facility	Unit 5	DEU	Z School	Z School
	TC145	Request	1	Middle	Z Facility	Unit 5	DEU	Z School	Z School

Click on the Update icon for either placement to review the requests. A duplicate request box will be displayed with each request listed. You may toggle between the two placements by clicking on the school name.

Home	Search	Placements ▾	Reports	Help ▾

Request TC028
required.

The open placement has been requested by:

	ID	School	Created	Modified	By
This record →	229727	Z School 2	2012-06-18 11:16:28	2012-06-18 11:16:28	Pam Taylor
	229729	Middle Tennessee State University	2012-06-18 11:16:28	2012-06-18 11:16:28	Pam Taylor

Clinical Facility

Facility *   Z Facility ▾

Determine which school's request you will approve by entering the appropriate status and clicking on the Update button. You will return to the Requests Screen.

Select the remaining duplicate placement with the same PCode and Deny the placement.

CAUTION: **If you approve both of these placements, both schools will receive notification that you have approved the placement for their students. In the PlacementPro system, however, the LAST school your approved will show as the approved school. Both schools will expect to use the placement, so be very careful to avoid double-booking of a placement!**

Conflicting Requests

Placement conflicts are never a happy time for the facility or the school. If a placement request is entered that appears to conflict with another placement in the system, an alert will be noted in the Update Placement Screen.

A conflict is defined as the same unit, date range, and day for group, observation, and management rotations. Leadership and Precepted placements are not monitored for conflicts due to the nature of these placements.

Like the Duplicate Request screen, Conflicting placements will be listed in the alert box at the top of the update request screen. You may toggle between the placements that are conflicting if you need more information than is displayed on the screen.

While the system may warn of a potential conflict, the request may not be a conflict with the facility. This feature will alert you of <u>all other potential placements that involve a unit on a given day</u>. **To override the conflict – you must CHECK the OVERRIDE CONFLICT checkbox before approving the placement!**

Review the changes to the OPEN placement against the Request highlighted in YELLOW to see what changes have been made and the potential conflict with the other placement(s).

You may choose to override the placement conflict by clicking on the Override Conflict box and Approve the Request. If you do not wish to override the conflict, then DENY the request. It is always helpful for schools if you can include comments as to why the request has been denied.

CAUTION: When a conflict is noted and no decision is selected, but UPDATE is clicked – the request is deleted and no changes are recorded. ALWAYS make sure that a decision is chosen before selecting UPDATE!

Released Placements

When a school needs to release a Placement, you will receive a request with the duration set to RELEASE PLACEMENT. You should see the existing placement and the request so you may compare the information. Standing Placements will by default only be released for the current term.

Duration ⓘ	Release Placement ▾
Start Date * ⓘ	2013-09-01
End Date * ⓘ	2013-12-14
Rotation * ⓘ	Group ▾

Based upon your preference, you may:

Open the placement for other schools to use for this term only.

- Leave the Open Original Placement Checkbox checked.
- Click on Released and Update.

Close the placement for this term only.

- Uncheck the OPEN Original Placement.
- Change the Status to Approved and Update.

Status ⓘ	Release Requested ▾	Current Status
	○ **Released**	
	☑ **Open Original Placement**	
	If this box is checked, the original placement will be opened for other schools. If unchecked, the original placement will be closed.	
Comments		

Update

Created 2013-09-21 14:03:40
Modified 2013-09-21 14:03:40 by School Train
Released 2013-09-21 14:03:40 by School Train

If the school has permanently released the placement, the Standing School will be blank

Adding New Placements

To add new placements there are two choices: entering placements individually or via an Excel upload by the Site Administrator.

1. To add 5 or fewer placements, it is usually more efficient to use the Add New Placement button at the top of the placement grid – or – use the Add a new placement link from the Home Page just below your Released Placement link.
2. Enter the placement data via the placement data form.

3. To add >5 placements, it is usually more efficient to use a placement grid in Excel to enter the data since redundant data may be easily copied. A New Placement grid is available in the HELP Documents or available from the Site Administrator.

   There are instructions within the Spreadsheet to guide your data entry. Submit your completed file to the Site Administrator for upload.

Closing & Opening Placements

From time to time it becomes necessary to close a placement opportunity due to staffing, renovation, census fluctuations, etc.

1. Search for the placement(s) that you need to close.
2. Update the placement using the Update Icon in the Action Column
3. **If the placement is assigned to a school, please call the school and discuss options that may be available.**
4. Change the Status to CLOSED.
5. Enter the reason for closing in the comments box
6. Click on Update.
7. The placement can now be viewed under CLOSED Placements.

When it is time to re-open a Closed placement:

1. Click on your CLOSED Placements from the Home page.
2. Update the placement using the Update Icon in the Action Column
3. If the placement was assigned to a school, please call the school and alert them that the placement is now available again to determine if it should be re-assigned to the school – OR - Opened for requests.
   a. Change the Status to APPROVED to assign it back to a school.
   b. Change the Status to OPEN to re-open the placement for requests.
4. Remove any comments that no longer pertain to the placement.
5. Click on Update.
6. The placement can now be viewed under Approved or OPEN Placements.

If you have more than 10 placements to close/open at any one time, contact your Regional Data Manager to have them closed in bulk. You will need the PCodes of each placement that should be closed/opened.