



# **Managing Setup Tables for Placing Agencies**

***A Guide for PC Local Administrators***

Updated: December 1, 2014

# Overview

**This guide is for HSPnet Placing Coordinators who have access at the level of *Local Administrator*.**

Users at this level are permitted to modify staff and student records, as well as the setup tables that define your educational Program.

Placement requests in HSPnet are dependent on setup tables that define each placement including the Placing and Receiving agencies involved, Program and Site information, and placement contacts. Setup tables are therefore critical for effective coordination of placements and for collecting accurate data to be used by your educational institution, by receiving sites, and by governing bodies and committees that are involved in practice education.

## Contents of this Guide:

### 1. Introduction to HSPnet Data Structure

- " Overview of Placing Agency SETUP tables
- " Overview of Receiving Agency LOOKUP tables
- " Managing setup tables for Placing Agencies

### 2. Staff / Users & Student Management

- " Staff Records & User Management
- " Student Records

#### Document Key:

PA . Placing Agency  
PC . Placing Coordinator

RA . Receiving Agency  
RC - Receiving Coordinator

DC . Destination Coordinator

**HSP**net

# 1. Introduction to HSPnet Data Structure

The diagram on the next page shows the high level structure of HSPnet data under the category of **Agencies**.

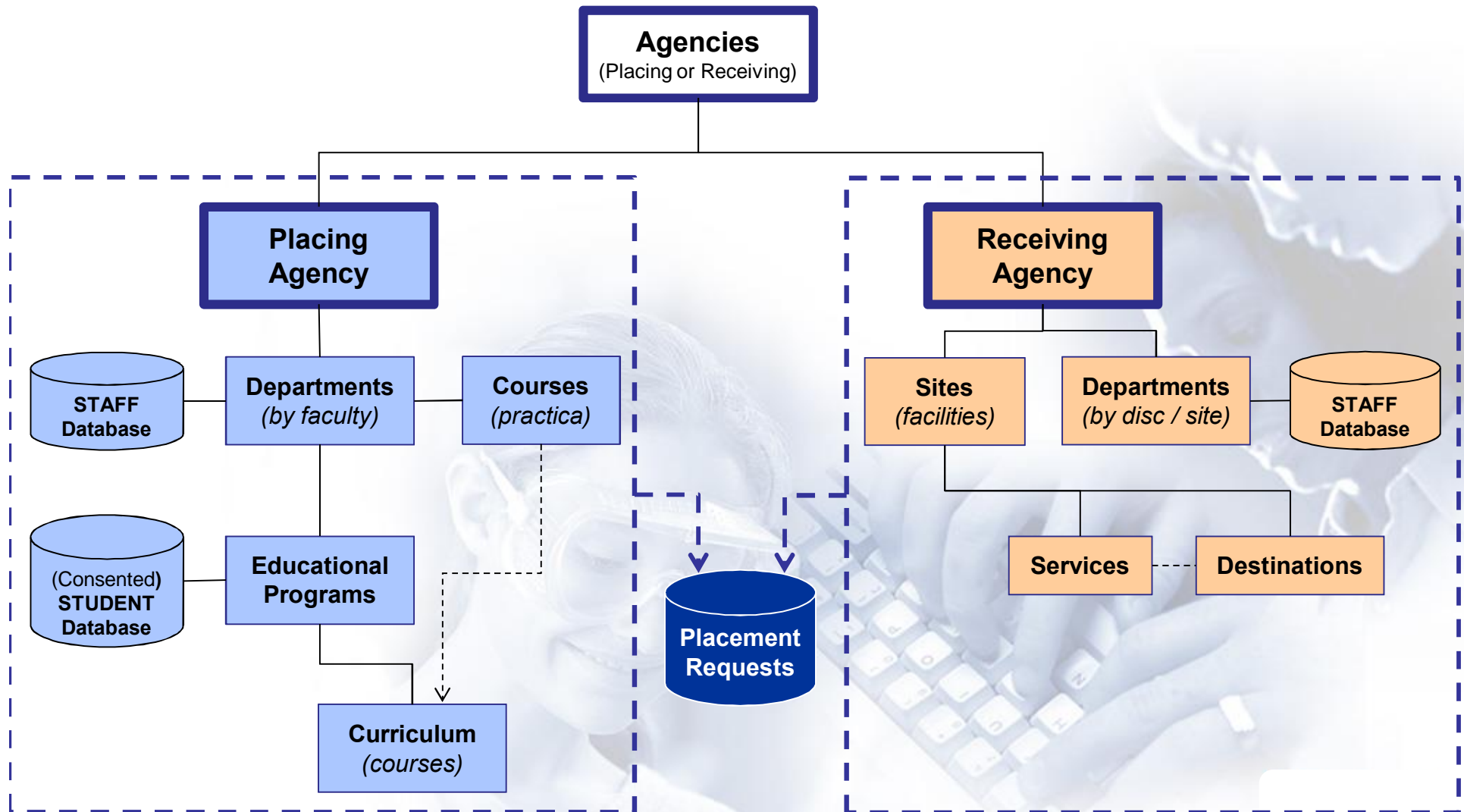
**PLACING Agencies (PA)** have the following data tables:

- “ **Students Database** . a single database per educational institution, containing all students who have consented to use of their personal information by an educational program
- “ **Departments** . a staff database, typically one for each faculty or discipline in a PA. Includes records for Placing Coordinators, Student Administrators, Instructors and Course Leaders, and managers such as a Dean or director.
- “ **Courses** (practica) . represents an educational requirement for a placement in a Program. Courses belong to a Department, since two Programs may use the same course (e.g. part-time and full-time programs).
- “ **Programs** . a set of educational activities leading to a degree or certification such as Bachelor of Nursing or Pharmacy Technician.
- “ **Curriculum** . the set of practicum courses that are required to complete an educational Program, organized by year (e.g. 1<sup>st</sup>, 2<sup>nd</sup>) and Term (e.g. Fall 2013).

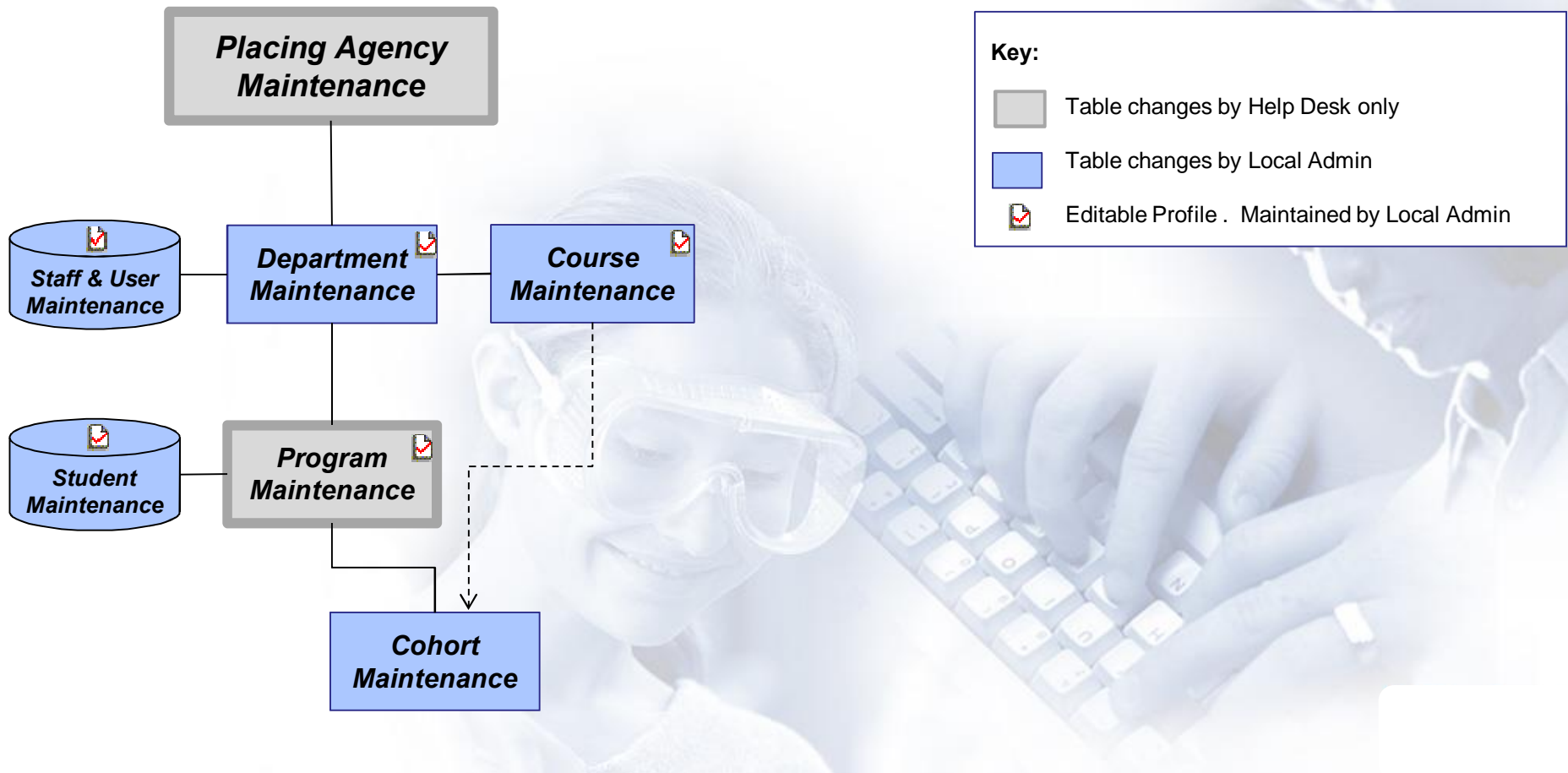
**RECEIVING Agencies (RA)** have somewhat different data tables:

- “ **Departments** . represents a staff database, typically one for each major site and/or discipline. Includes records for Receiving Coordinators, Destination contacts, and Supervisors/preceptors.
- “ **Locations** . separate but related tables for:
  - . Sites (e.g. ABC Hospital)
  - . Services (e.g. Home Care or Pharmacy), and
  - . Destinations (e.g. Community Mental Health Team or ICU)

# HSPnet Data Structure








# HSPnet Data Structure: Placing Agency SETUP Tables

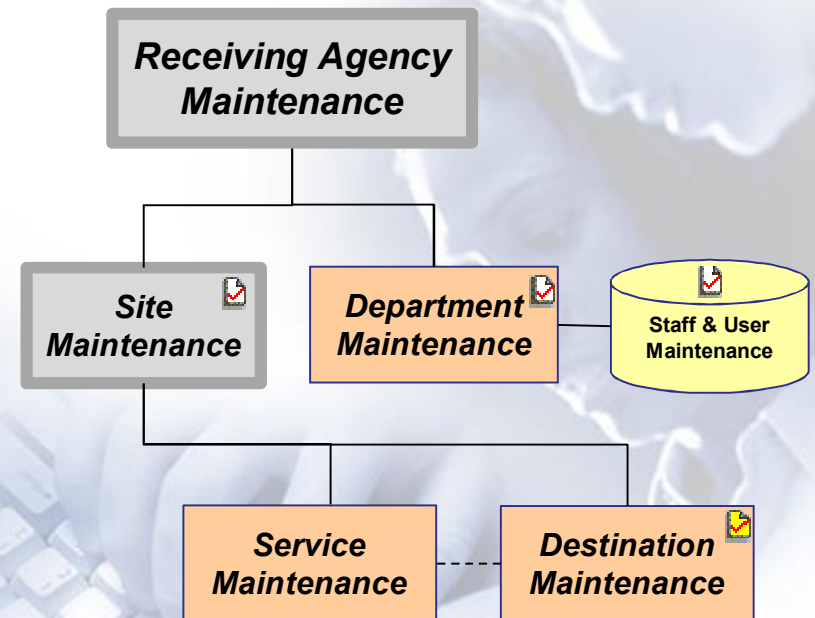




# HSPnet Data Structure: Receiving Agency LOOKUP Tables

## Key:

-  Table changes by Help Desk only
-  Table changes by RA Local Admin only
-  Edits by PC are permitted for non-user Sites
-  Read-only Profile
-  Editable Profile (by RC, DC, and by PC for non-user sites only)



# Managing Setup Tables: Department Maintenance

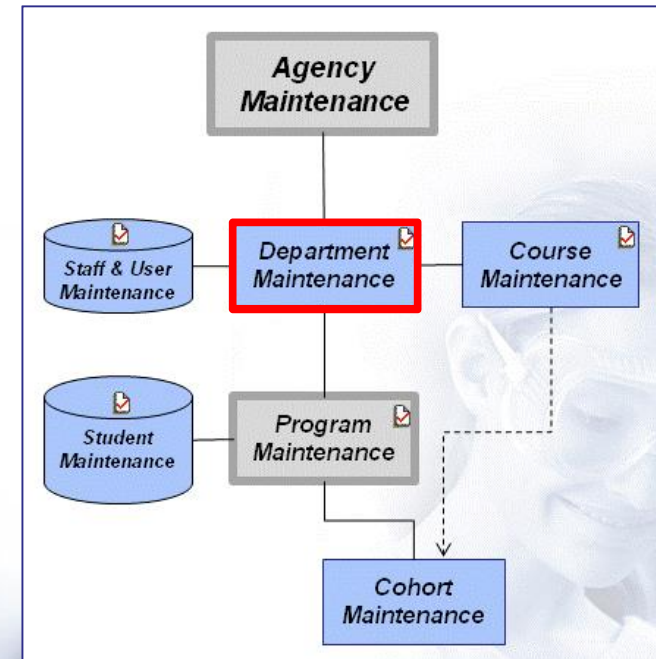
**Definition:** A *Department* in HSPnet represents a staff database within an organization.

In a Placing Agency, a Department encompasses:

- “ A single Faculty or School in the educational institution
- “ A set of related educational programs (e.g. PN Program, PN Refresher Program)
- “ A shared set of practicum courses, each of which is used by one or more programs.

## Guidelines for Setup of Departments:

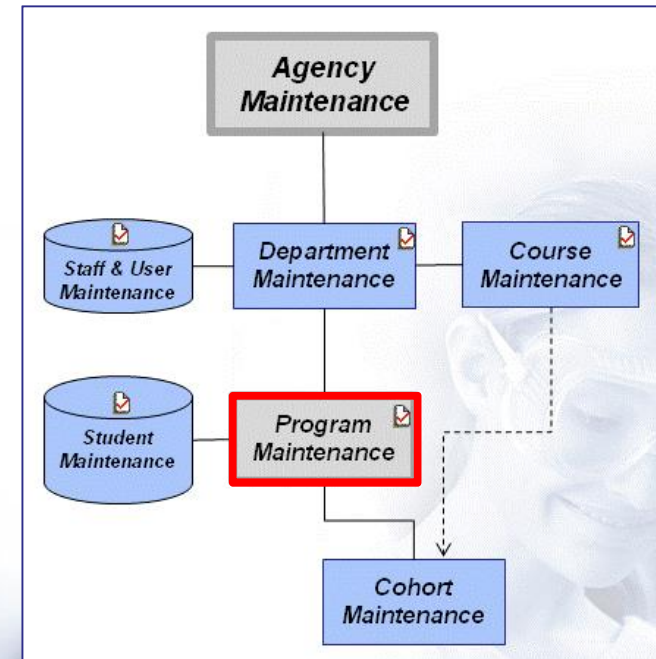
- “ HSPnet users are granted access to one or more Departments that must be structured to provide adequate separation of staff information. An HSPnet user should be permitted to access only those staff records that are within his/her organizational mandate. For this reason, large faculties are sometimes setup as separate departments, for example to maintain separate instructor databases and courses in Baccalaureate vs. Masters programs.
- “ *Each staff record should be entered in one department only*, and so a combined department may be required when staff frequently work in multiple programs.
- “ Local Administrators can add or edit Departments, as may be needed to split a large faculty into campus-specific staff databases. When a Local Administrator creates a new Department, it is automatically added to his/her access rights. However, only Help Desk is able to add Departments to other users in your Department.
- “ Each Department must identify one or two Department Contacts who will authorize new user accounts at the Local Administrator level. At least one Department Contact should be a non-user of HSPnet at a senior management level such as Dean or director. The second Department Contact may be an HSPnet user at the Local Administrator level, who may then authorize other Local Administrator users with the same access rights or less within her allowed Departments and locations.



# Managing Setup Tables: Program Maintenance

**Definition:** A *Program* in HSPnet is a set of placement courses for a given discipline/subdiscipline and program format. Examples of programs in HSPnet include:

Program Name	Discipline SubDiscipline	Program Duration / Format
BScN Collaborative Program	Nursing BScN	4 years Full time
BScN Distance Program	Nursing BScN	Up to 7 years Distance or part-time
MSc Physiotherapist	Rehabilitation Sciences Physiotherapist	4 years
Rehabilitation Assistant	Rehabilitation Sciences Assistant	2 years



The setup of Programs has important implications for:

- “ **Student privacy** - HSPnet users are setup to access one or more Programs, and students consent to use of their information in a specific program only
- “ **HSPnet costs** - The number of active Programs is used to calculate each province's share of the national budget.

For these reasons and to ensure data quality, only Help Desk is permitted to add new Programs or to modify the discipline / subdiscipline of a Program. In some cases, approval from your province's Lead Agency may be required before Help Desk can make changes on your behalf.

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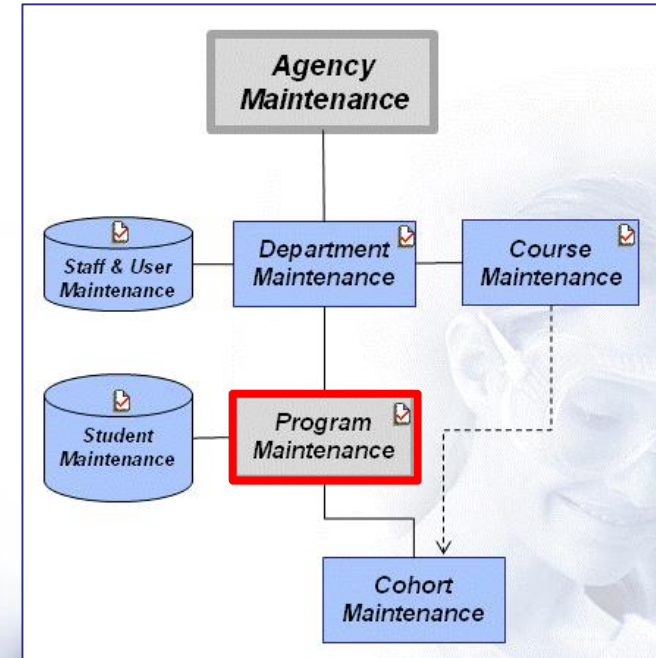
# Managing Setup Tables: Program Maintenance *(continued)*

## Guidelines for Setup of Programs:

- " Each educational Program has a **Discipline** (e.g. Nursing), **Subdiscipline** (e.g. Practical Nursing), and **Total Duration** in years (e.g. 4 years for a collaborative nursing program, even if students are enrolled in your school for only part of the total program).
- " **Dividing Programs into Cohorts** - Within a Program it is possible to setup different Cohorts, each representing students in different years of the program (e.g. September 2011 Entry or Grad 2015). Separate Cohorts may also be useful for:
  - . Separating placements by campus,
  - . Tracking students who follow an alternative curriculum (e.g. Elective/Thesis option),
  - . Tracking students who are %out of synch+or on leave, or
  - . Separating visiting students from another province.

All cohorts within a Program must have the same Discipline and Subdiscipline and Total Duration in years. Programs with different SubDisciplines or duration (e.g. 4 year program vs. accelerated 2 year program) must be setup as separate programs in HSPnet.

- " **Program Profile** - Each Program has an online profile that is visible to all users of HSPnet, and is a valuable resource for site contacts and supervisors/preceptors. The online profile can include descriptive information, a link to your public website, plus a program-specific address or logo for insertion into correspondence or placement request forms. Documents can also be uploaded to an online profile, such as a program brochure, evaluation forms, or supervisor handbook.



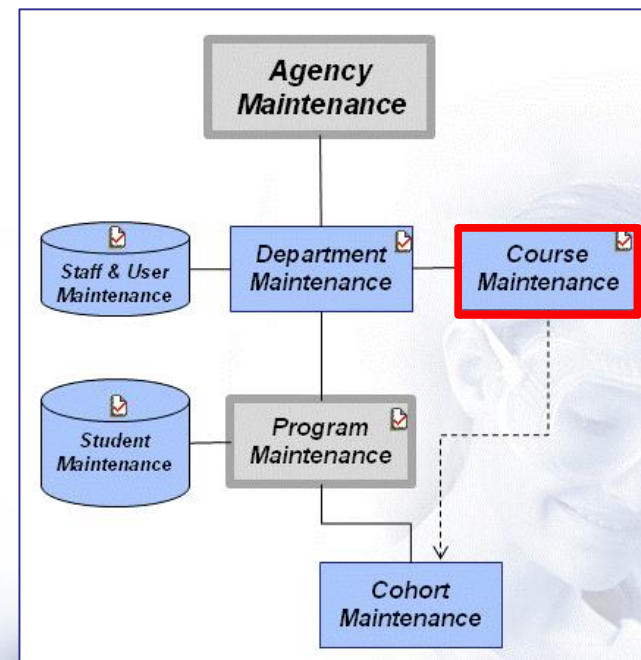
# Managing Setup Tables: Course Maintenance

**Definition:** A *Course* in HSPnet represents a practicum requirement for students in an educational program. A student can be assigned to only one placement per Course in HSPnet, therefore separate courses are required when students will be placed multiple times in the same Term.

Example: If students in Course PT100 will spend 6 weeks in a Medicine destination followed by 6 weeks in Surgery (in the same Term) with a different supervisor, then the Course should be setup as PT100Med and PT100Surg.

## Guidelines for Setup of Courses:

- “ A placement (Course) can be divided into multiple *Rotations* so that students are placed at different times within the Term.
- “ Each course requires the following mandatory information:
  - . Full name of the Course plus a Short Name (e.g. PT400)
  - . Placement type - e.g. Preceptorship, instructor-led Group, or Project
  - . Shifts and Hours if known, or total placement Duration if shifts vary
  - . Scheduling needs - e.g. multiple 6-week rotations
- “ **Course Profile** - Each Course has an online profile that is visible to all HSPnet users, and is a valuable resource for Destination Coordinators and supervisors/preceptors. Documents can also be uploaded to the Course Profile, but documents should be generic enough to apply to all students in the Course.



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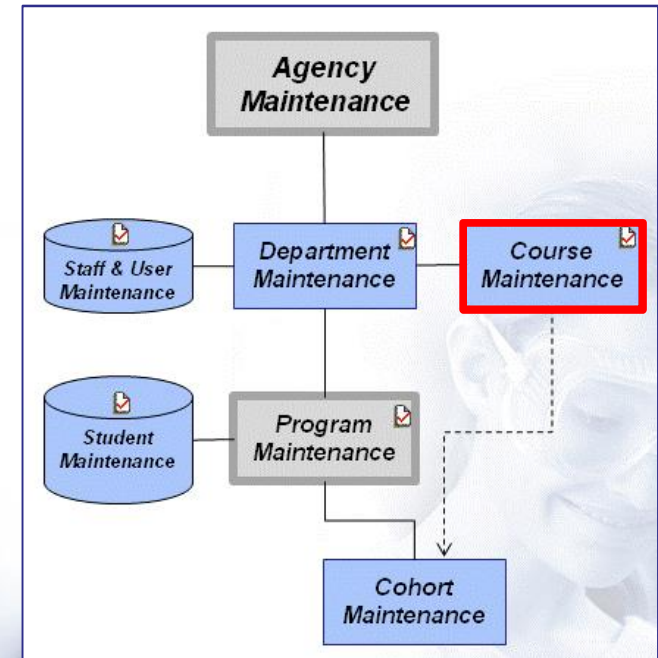
# Managing Setup Tables: Course Maintenance *(continued)*

## Making Course Changes:

Note that editing an existing Course (e.g. to correct the course name or short name) *affects all past, present and future placements in that course.*

To make a course change that is effective at a point in time . for example if the requirement for course PT305 changes from 100 hours to 200 hours per student:

- “ Rename the existing course from PT305 to PT305X to flag that it is being discontinued
- “ Create a new course for PT305 with placement Duration of 200 hours, and add this course to any Cohorts that require this version of the course
- “ When all placements in course PT305X are completed, retire ( 🗑 ) the discontinued Course.






# Managing Setup Tables: Cohort Maintenance


**Definition:** A *Cohort* is defined in HSPnet as a group of students who are enrolled in an educational program, and who advance together through placements and (usually) graduate at the same time. Examples include students in the 2nd year of a 4-year program, or students in the new intake for Fall 2014.

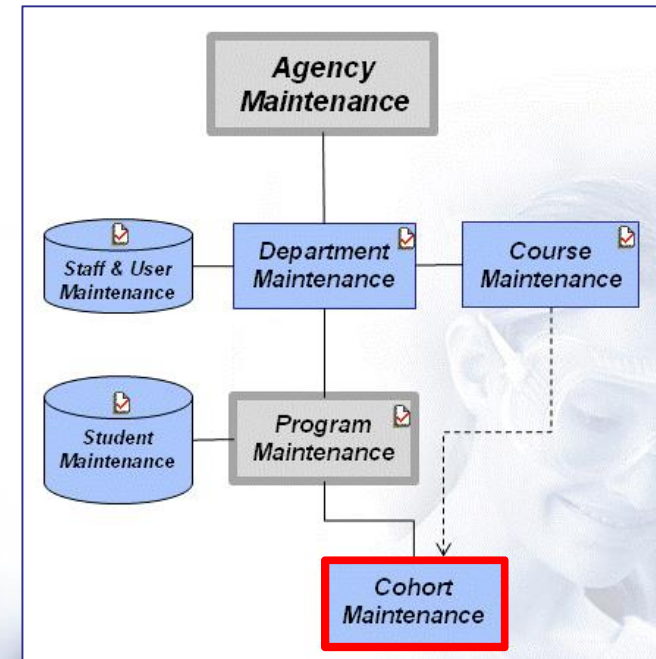
Note: Students who start a program together in one Cohort may not all progress at the same rate. As a result of a student leave or course failure, a student may start in one cohort (e.g. Entry Fall 2013) but later join another Cohort (e.g. Entry Fall 2014) that is graduating later than her original Cohort.

## Guidelines for Setup of Cohorts:

- “ Cohorts can be created at the time of creating placement requests, or they can be created in advance when a new intake occurs, for all required courses to graduation.
- “ Copying Cohorts - Whenever possible, use Copy  to duplicate courses by term from an existing Cohort, rather than building a new Cohort on a term-by-term basis.

## Maintaining Cohorts over time:

When all placement courses for a Cohort are completed, and all “housekeeping” is done to update student hours and cancel unused placements, a Cohort should be archived  to improve screen performance and avoid unintended changes to the wrong courses / students. An archived cohort can be viewed at any time by selecting the radio button for “Archived Cohorts, and it can be un-archived to add it back to your “Active Cohorts”.



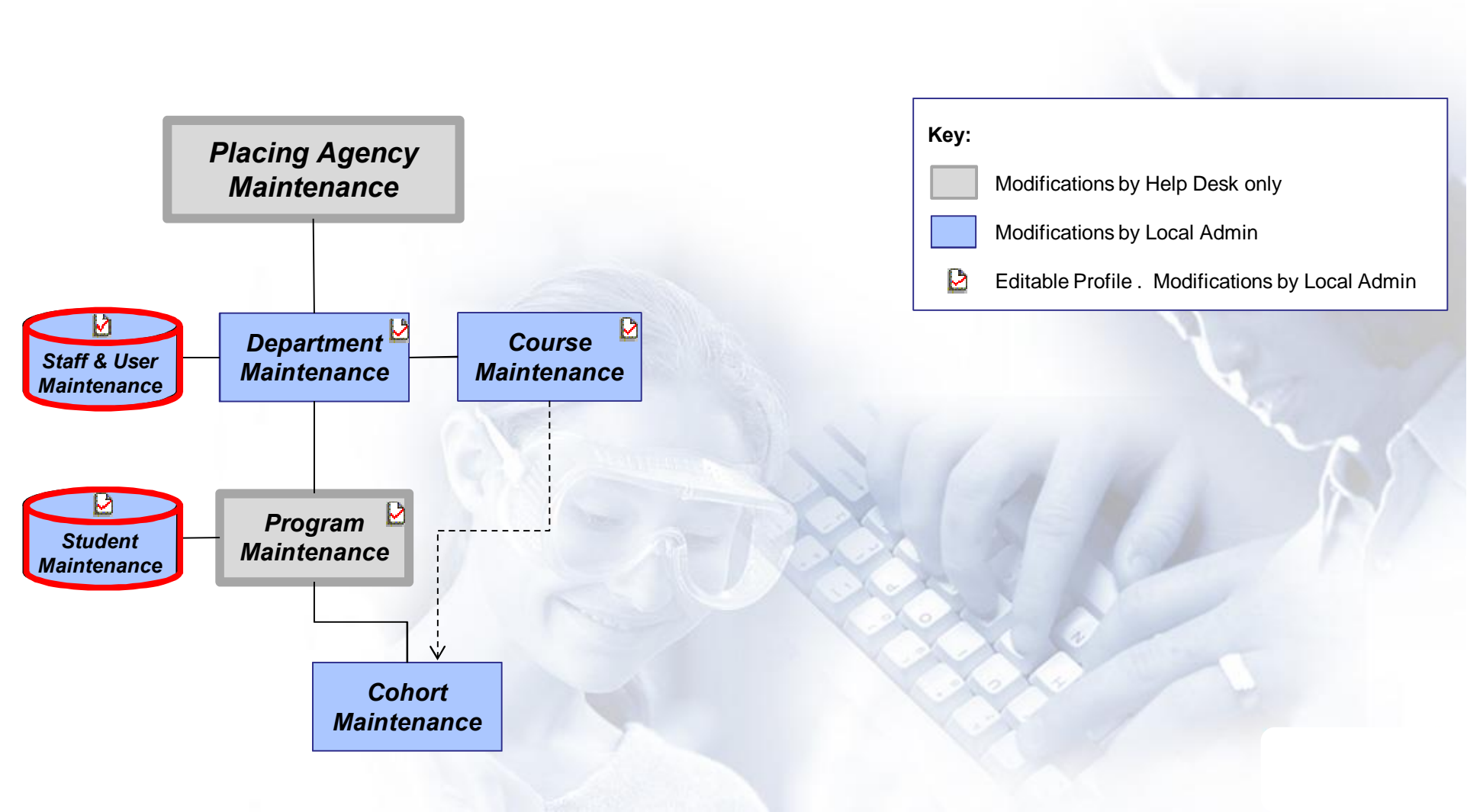
### Cohort Maintenance

Current View




Department:	Nursing	Program:	NursePract	Course Leader:	ALL
Term:	ALL	Course:	ALL	Cohort Name Contains:	
View:	<input checked="" type="radio"/> Active Cohorts <input type="radio"/> Archived Cohorts		Sort courses by:		Start Date
<input type="checkbox"/> Sort					



## 2. Staff / Users and Student Management



**Key:**

-  Modifications by Help Desk only
-  Modifications by Local Admin
-  Editable Profile . Modifications by Local Admin

Modifications by Help Desk only


■ Modifications by Local Admin

 Editable Profile . Modifications by Local Admin



## 2. Staff & User Maintenance

Each record in **Staff Maintenance** has the following mandatory fields:

- “ First and last name
- “ Role - e.g. Placing Coordinator, Student Administrator, or Instructor / Course Leader. Note an individual can have more than one role - e.g. a PC can also be an instructor.

HINT . view the Glossary  to determine the appropriate role(s) for each staff member.

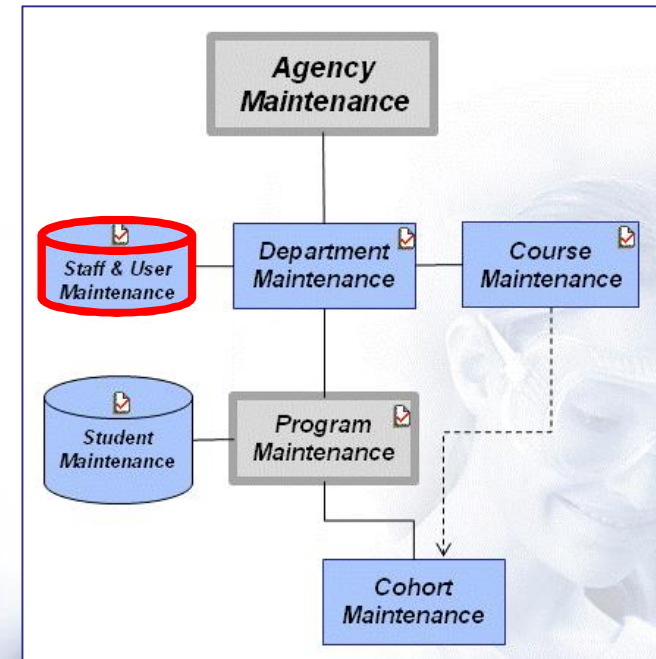
In addition to staff names and role, the following *additional fields* are *highly recommended* to support communications within and between agencies:

- “  Email address
- “  Office phone including local/extension (L)

*Only business contact information may be entered unless you have staff consent to enter their home email address or phone number in HSPnet.*

Local Administrators are permitted to edit accounts in **User Maintenance** for staff in their allowed Departments. User accounts may be created on a "need to know" basis only, based on the individual's organizational role (e.g. PC or Instructor) and limited to Programs in which they are *involved on a day-to-day basis*.

User access is determined through a combination of *Role* + *Access Level* + *Special Settings*. PC Local Administrators are permitted to create user accounts at the Regular level, which may be adequate for PC users who need to create and manage placements. However Local Administrator access is needed if they manage student records or need to change setup tables (e.g. course profiles). Only Help Desk can promote a PC Regular user to be a Local Administrator, upon email authorization from their Department Contact.



### STAFF / USER ROLE:

Determines which screens may be accessed, and add/edit rights on each

e.g. PC,  
Course Leader

+

### ACCESS LEVEL

Determines the ability to change setup information and staff/student records

e.g. Local Administrator,  
Regular

+

### SPECIAL SETTINGS

Additional restrictions on data access

e.g. View only,  
Hide Students

For more information, see the Quick Reference Guide *Managing User Access*.

# Staff & User Maintenance:

## User Access Levels & Settings

### STAFF / USER ROLE:

*Determines which screens may be accessed, and the add/edit rights on each screen*

#### Placing Agency Roles

Placing Coordinator (PC)	Creates/Sends requests, manages and assigns students/instructors
Student Administrator	Maintains student records and enrollments
Course Leader	Monitors placements and student/instructor assignments
Instructor	Leads groups and/or acts as facilitator or liaison at receiving sites
Group Instructor	Supervises students on site in Groups; cannot view student names

#### Receiving Agency Roles

Receiving Coordinator (RC)	Monitors/redirects incoming requests; may respond for the site
Destination Coordinator (DC)	Responds to incoming requests; assigns supervisor/preceptor
Staff Administrator	Manages staff records including preceptors; may monitor student employment applications
Supervisor	Supervises assigned students

#### Other Roles

Content Author	Maintains content templates (Guidelines, education Agreements) for adoption by agencies
Content Manager	Adopts content templates, with or without changes, for local use by programs/sites
Policy Access Level (PAL)	Accesses reports that include aggregate or de-identified data only

### ACCESS LEVEL

*Determines ability to add/edit setup tables and staff/student records*

#### System Administrator (SysA)

- creates/manages user accounts at all levels
- adds/edits setup tables and entries in filters and dropdowns

#### Local Administrator (LocA)

- creates/manages user accounts with Regular or View Only access
- add/edits customizable setup tables
- accepts/declines requests for allowed sites and disciplines

#### Regular Access

- Read only for staff/users (except DC's who may edit preceptors)
- views setup tables
- accepts/declines requests within allowed sites and disciplines

### SPECIAL SETTINGS

*Additional access restrictions*

#### View Only

- View-only access for allowed screens, regardless of user role


#### Hide Students

- Student names are withheld on all screens regardless, of placement status

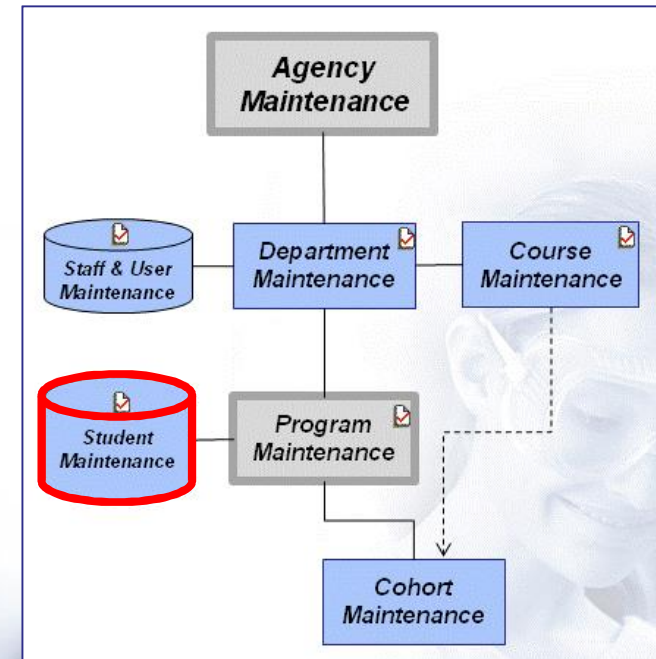
# Managing Setup Tables: Student Maintenance

Each record in **Student Maintenance** has the following mandatory fields:

- “ First and last name
- “ Student number (issued by your educational institution)
- “ Consenting program in HSPnet

In addition, entry of a student's email address  (issued by your educational institution) is *highly recommended* to support distribution of placement information to students by users in your educational program.

Students entered in the database must be enrolled into their Cohort as the first step of the placement cycle (see the Quick Reference Guide *Placement Cycle Overview for Placing Coordinators* for instructions on individual enrollment vs. upload of a student list).



Additional resources on managing student records in HSPnet:

- “ Policy Application Guide 3.2 - *Identified Purposes and Ensuring Consent for Data Collection, Use and Disclosure*
- “ Student Consent Forms . customized for your Program and available in the **Program Maintenance** screen
- “ Quick Reference Guides:
  - ó *Staff & Student File Uploads*
  - ó *Managing Sections for Students (dividing large cohorts into sub-sets or Sections)*
  - ó *Student Prerequisites*