



Health Sciences Placement Network
Réseau de gestion des stages en sciences de la santé

Staff & User Maintenance Screen Placing Agencies February 25, 2022



Learning Outcomes

- Maintain staff records
- Create user account
- Manage access rights

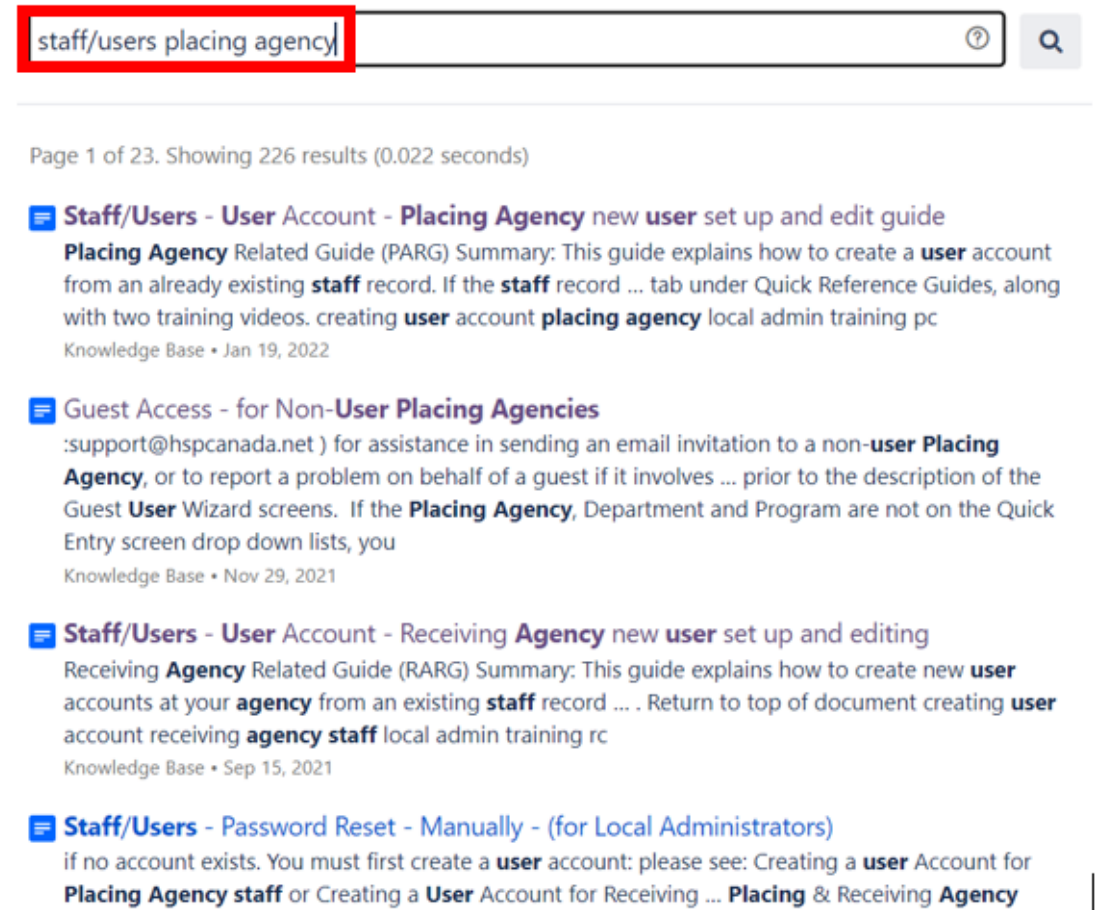


- Not covered:
 - Staff profiles
 - Training
 - First login
 - Change password

Resources

- Knowledge base
 - PA new user set up and editing
 - Search for staff
 - Deactivate & reactivate
 - Password reset
 - Create (or edit) a new staff record

 **Help/Support**
Knowledge Base



staff/users placing agency

Page 1 of 23. Showing 226 results (0.022 seconds)

- Staff/Users - User Account - Placing Agency new user set up and edit guide**
Placing Agency Related Guide (PARG) Summary: This guide explains how to create a **user** account from an already existing **staff** record. If the **staff** record ... tab under Quick Reference Guides, along with two training videos. creating **user** account **placing agency** local admin training pc
Knowledge Base • Jan 19, 2022
- Guest Access - for Non-User Placing Agencies**
:support@hspcanada.net) for assistance in sending an email invitation to a non-**user Placing Agency**, or to report a problem on behalf of a guest if it involves ... prior to the description of the Guest **User** Wizard screens. If the **Placing Agency**, Department and Program are not on the Quick Entry screen drop down lists, you
Knowledge Base • Nov 29, 2021
- Staff/Users - User Account - Receiving Agency new user set up and editing**
Receiving Agency Related Guide (RARG) Summary: This guide explains how to create new **user** accounts at your **agency** from an existing **staff** record Return to top of document creating **user** account receiving **agency staff** local admin training rc
Knowledge Base • Sep 15, 2021
- Staff/Users - Password Reset - Manually - (for Local Administrators)**
if no account exists. You must first create a **user** account: please see: Creating a **user** Account for **Placing Agency staff** or Creating a **User** Account for Receiving ... **Placing & Receiving Agency**

Questions? Feedback? Request?

- Email to: support@hspscanada.net



Quiz

- Role of placing coordinator
- Missing editing tools

What could be the issue?

? quiz ?

Local Administrator Role

- Update configuration: courses, sessions and cohorts
- Manage staff records & user accounts (incl. user access rights)
- Provides assistance users in their department(s)
 - Logging into the system;
 - & updating passwords.

Staff & User Maintenance

Current View

Agency: BrainLight Department: HealthSc Last: % First: Clear All

Placing Agency Roles:

☒ Placing Coordinator ☐ Instructor ☐ Student A

☐ Group Instructor ☐ PA Policy Access Level ☐ Staff Adm

☐ IT Provisi

Search Filter:

☒ HSPnet users only ☐ Show Inactive Staff ☐ DeptC only

☒ Active accounts only

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

[Upload Staff File to database](#)

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)
<input type="checkbox"/>	Cortez	Patricia			HealthSc		PC
<input type="checkbox"/>	Halliday	Johnny			HealthSc		PC
<input type="checkbox"/>	Pitt	Brad			HealthSc		PC
<input type="checkbox"/>	Suzuki	David		778-896-6352	HealthSc		PC, Instr

Departments

- Contain staff records

Nursing	Early Childhood Education	Pharmacy Technician Program
Staff records for Nursing	Staff records for ECE	Staff records for Pharmacy

Staff & User Maintenance

Current View

Agency: BrainLight Department: HealthSc Last: First: Clear All

Placing Agency Roles:

☐ Placing ☒ Group It

☐ Instructor ☐ Student Administrator

☐ PA Policy Access Level ☐ Staff Administrator

☐ IT Provisioning

Search Filter:

☐ HSPnet users only ☐ Show Inactive Staff ☐ DeptC only

☐ Active accounts only

Search

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

[Upload Staff File to database](#)

No matches were found. Refine your search criteria and try again to avoid adding a duplicate record, or click Add to create a new staff record. +

Winning Lottery!

- Department contacts:
 - Individual may authorize new user accounts on behalf department; typically senior manager; may or may not be HSPnet user.

Staff & User Maintenance

Current View

Agency: BrainLight Department: HealthSc Last: % First: Clear All

Placing Agency Roles:

☐ Placing Coordinator ☐ Instructor ☐ Student

☐ Group Instructor ☐ PA Policy Access Level ☐ Staff

☐ IT Person

Search Filter:

☐ HSPnet users only ☐ Show Inactive Staff ☒ DeptC only

☐ Active accounts only

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

[Upload Staff File to database](#)

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)
<input type="checkbox"/>	Fernandez	Vicki			HealthSc		DeptC
<input type="checkbox"/>	Simmons	Peter		456-785-9632	HealthSc		DeptC

Department Maintenance

Edit entry

Name Health Sciences *

Short Name HealthSc *

Department Contacts Simmons, Peter (HealthSc) * Fernandez, Vicki (HealthSc)



















Record vs User Account

■ Record

- Contact information
- HSPnet role
- No need to log into HSPnet

■ User Account

- User ID
- Access rights
- Login process

✓		Last	First	Middle	Phone	Dept	Home Dest.	Role(s)			
<input type="checkbox"/>		Bardot	Brigitte			 HealthSc		Instr			  
<input type="checkbox"/>		Binoche	Juliette			 HealthSc		Instr			  
<input type="checkbox"/>		Lalonde	Martin			 FoodNutr		Instr			

Maintenance | Search Record

- All
- Role
- Department

Staff & User Maintenance

Current View

Agency: BrainLight

Department: ALL

Last: tremblay

First:

Clear All

Placing Agency Roles:

☐ Placing Coordinator

☐ Instructor

☐ Student Administrator

☐ Group Instructor

☐ PA Policy Access Level

☐ Staff Administrator

☐ IT Provisioning

Search Filter:

☐ HSPnet users only

☐ Show Inactive Staff

☐ DeptC only

☐ Active accounts only

Search

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

To Add/Edit a staff record, change the Department filter from 'ALL' to a specific Department, or click the GoTo Department button from the list of staff.

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)
<input type="checkbox"/>	Tremblay	Pierre			HealthSc	Instr	

Maintenance | Add Record

Avoid duplicates

- All
- Inactive
- Select department
- Plus sign to add

The screenshot displays the 'Staff & User Maintenance' interface. On the left, there's a 'Current View' section with filters for Agency (BrainLight), Department, and Placing Agency Roles. Below this is a search filter and a table of staff records. The table has columns for selection, email, last name, first name, and middle initial. Two records for 'Lopez' are visible. A red box highlights the 'Edit entry' form for the first Lopez record. The form includes fields for Names (Last: Lopez, First: Mark), Prev. Last Name, Preferred First Name, Title, Employee Number, HSPnet ID (HSP2888), Email (test@hspnetcanada.net), Office Phone, Mobile device, Office Alt Phone, Mobile device, Fax, Educ./Profess. Designation, and checkboxes for 'Use filters for Governing Organization' and 'Include this person as Department Contact (to authorize new users)'. Below the form is a section titled 'Placing Agency Roles' with checkboxes for Placing Coordinator, Student Administrator, Instructor (checked), Group Instructor, Staff Administrator, Course Leader, and Allow this user to assign/reassign students. A red box highlights the 'Placing Agency Roles' section. At the bottom right, there's a blue bar with a red box around a plus sign icon. The HSPnet logo is in the bottom right corner.

Staff & User Maintenance

Current View

Agency: BrainLight Department: Placing Agency Roles: ☐ Placing ☐ Group

Search Filter: ☐ HSPnet

Search on all or part of the individual's last and first name

[Upload Staff File to database](#)

✓	Last	First	M
<input type="checkbox"/>	Lopez	Jennifer	
<input type="checkbox"/>	Lopez	Je	

Edit entry

DO NOT CHANGE NAMES for this individual except to correct spelling or if their different contact person, then select a different individual from the dropdown or c dropdown.

Names: Last: Lopez * First: Mark

Prev. Last Name: Preferred First Name:

Title:

Employee Number: HSPnet ID: HSP2888

Email: test@hspnetcanada.net

Office Phone: Mobile device

Office Alt Phone: Mobile device

Fax:

Educ./Profess. Designation:

☐ Use filters for Governing Organization

☐ Include this person as Department Contact (to authorize new users)

Placing Agency Roles

☐ Placing Coordinator ☐ Student Administrator

☒ Instructor ☐ Group Instructor ☐ Staff Administrator

☐ Course Leader ☐ Allow this user to assign/reassign students

☒ x

Clear All

☐ Student Administrator

☐ Staff Administrator

☐ IT Provisioning

Search

PC

HSPnet

Maintenance | Inactivate Record

- Department
- Head icon
- Inactivate record
 - Select reason
 - Save

Staff & User Maintenance


Deactivate Staff

Deactivate: Tremblay, Pierre

Reason: No longer in position/agency ▼

Comments:


☒ ☐

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)	+
<input type="checkbox"/>	Tremblay	Pierre			HealthSc		Instr	

Report Staff Listing

- Reporting > Report Menu
- Staff
- Department
- Role
- CSV File for Excel

Agency	Department	FirstName	MiddleName	LastName	HSPnetID	Phone	Fax	Email
BrainLight	Health Sciences	Brigitte		Bardot	HSP2678			lise.lalonde@phsa.ca
BrainLight	Health Sciences	Juliette		Binoche	HSP2782			test@hspcanada.net
BrainLight	Health Sciences	Mark		Lopez	HSP2888			test@hspnetcanada.net
BrainLight	Health Sciences	Marilyn		Monroe	HSP2682			lise.lalonde@phsa.ca
BrainLight	Health Sciences	David		Suziki	HSP2638	778-896-6352		lisegypsy@gmail.com
BrainLight	Health Sciences	Gordon		Thomson	HSP2681			test1@hspnet.ca
BrainLight	Health Sciences	Pierre		Tremblay	HSP2887			test@hspcanada.net



Report Menu

Location

PR Ref#

Quick Entry

Content Services

Reporting

Queue

Report Menu

© hspcanada.net - PHSA - All rights reserved. Ver
Currently switched to: Brad Pitt (LocalAdmin - Brain
Last Login: Mar 23 2020 9:30AM Pacific Time

Maintenance | Sometimes ...

- *Instructor assigned to course*

Warning:

You are deactivating a user that is currently listed as the Course Leader in the following active Cohort entries:

HealthSc / BScN / BSN / Spr/Sum22 / NRSG3242PH

You must identify a replacement Course Leader for each course BEFORE deactivating this individual.

Hide

Maintenance | Show

- Inactive staff

Staff & User Maintenance

Current View

Agency: BrainLight

Department: HealthSc

Last: tremblay

First:

Clear All

Placing Agency Roles:

☐ Placing Coordinator

☐ Group Instructor

☐ Instructor

☐ PA Policy Access Level

☐ Student Administrator

☐ Staff Administrator

☐ IT Provisioning

Search Filter:

☐ HSPnet users only

☒ Show Inactive Staff

☐ DeptC only

☐ Active accounts only

Search







Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

[Upload Staff File to database](#)

✓		Last	First	Middle	Phone	Dept	Home Dest.	Role(s)	+
<input type="checkbox"/>		Tremblay	Pierre			HealthSc		Instr	

Maintenance | Reactivate

- Red head icon
- *Are you sure you want to activate this staff record?*

✓		<u>Last</u>	<u>First</u>	Middle	Phone	Dept	Home Dest.	Role(s)	+
<input type="checkbox"/>		Tremblay	Pierre			HealthSc ⇄		Instr	 
<input type="checkbox"/>		Tremblay	Pierre			HealthSc ⇄		Instr	 

PC & Instructor Roles

- User account for each
- KB: *Staff/Users – User Account – Multiple roles: best practice set up on HSPnet for combined PC and Instructor roles*

Staff & User Maintenance

Current View

Agency: BrainLight Department: HealthSc Last: tremblay First:

Placing Agency Roles: ☐ Placing Coordinator ☐ Instructor

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)	+
<input type="checkbox"/>		Tremblay	Pierre		HealthSc		PC, Instr	

Search Filter: ☐ HSPnet users only ☐ Show Inactive Staff ☐ DeptC only
☐ Active accounts only

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.
[Upload Staff File to database](#)

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)
<input type="checkbox"/>		Tremblay	Pierre		HealthSc		PC
<input type="checkbox"/>		Tremblay	Pierre		HealthSc		Instr

Quiz

- What is needed before creating a user account?

What is first step?

? ? ? ?
quiz
? ? ? ?

Activate User Access

- Existing record
- Key icon

Staff & User Maintenance

Current View

Agency: BrainLight Department: HealthSc Last: lopez First: Clear All

Placing Agency Roles:

☐ Placing Coordinator ☐ Instructor ☐ Student

☐ Group Instructor ☐ PA Policy Access Level ☐ Staff Adr

☐ IT Provis


Search Filter:

☐ HSPnet users only ☐ Show Inactive Staff ☐ DeptC only

☐ Active accounts only

Search on all or part of the individual's last and/or first name. Enter '%' to search for all individuals in a role.

[Upload Staff File to database](#)

✓	Last	First	Middle	Phone	Dept	Home Dest.	Role(s)
<input type="checkbox"/>	Lopez	Jennifer		666-908-4567	HealthSc	PC	

User Maintenance

- User ID
- Email Address
- Next

User Maintenance

Lopez, Jennifer
666-908-4567

[User Account Information](#)
[User Access Authorization](#)
[Copy Access Rights](#)
[Departments](#)
[Programs](#)
[Review and Save](#)

User Account Information

Recommended User ID format is the first initial plus last name - e.g. jsmith

User ID:

Email:

Level:


☒ User ID Enabled

Last Login: Never

☐ Restrict to View Only

☐ Hide Student Names

☐ Require this user to repeat the mandatory orientation



Access Authorization

- Who
- Why
- Next

User Maintenance

Lopez, Jennifer
666-908-4567

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[Departments](#)
[Programs](#)
[Review and Save](#)


User Access Authorization [Help](#)

Authorized by: Fernandez, Vicki (Dept Contact) *

Reason: New User *

Date: Feb 23/22 *

Comments:

< Previous Next > 

Copy Access Rights

- Same access: departments & programs
- Select User
- Checkmark
- Email
- Close window

User Maintenance

Lopez, Jennifer
666-908-4567

[User Account Information](#)
[User Access Authorization](#)
[Copy Access Rights](#)
[Departments](#)
[Programs](#)
[Review and Save](#)

Copy Access Rights

Copy from Existing User: Ball, Jann (HealthSc) ✓

Or click "Next" to skip this step.

< Previous Next >

Select Access Departments

- Home
- Select “not allowed”
- To “allowed”

User Maintenance

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666-908-4567

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Departments
[Programs](#)
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Departments

SYSADMIN users: Approval from a Department Contact is required before adding new d user's access rights. Document the approval received in "User Support Comments".

☐ allow all
☒ select from list:

not allowed

Admin
AdvMedNurs
FoodNutr

allowed

HealthSc (Home)

>>
<<

add all remove all

NOTE - Home department must be allowed

< Previous Next >

Select Access Programs

- All or from *list*
- Select from “not allowed”
- To “allowed”
- “add all”
- Next

User Maintenance

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Programs
[Review and Save](#)

Programs

☐ allow all
☒ select from list:

not allowed

HealthSc: BScN

add all

>>

<<

allowed

remove all


< Previous Next >

Review & Save

- Click Save
- Email
- First login

User Maintenance

Lopez, Jennifer
666-908-4567

[User Account Information](#)
[User Access Authorization](#)
[Copy Access Rights](#)
[Departments](#)
[Programs](#)
 [Review and Save](#)

Review and Save

Departments:	HealthSc (Home)
Programs:	HealthSc:BScN


< Previous

Save

Cancel

 |

Close Window



Deactivate User Access


- Key icon
- Uncheck
- Save

User Maintenance
Tremblay, Pierre

[User Account Information](#)
[Copy Access Rights](#)
[Departments](#)
[Programs](#)
[Review and Save](#)


Save Changes

User Account Information
Recommended User ID format is the first initial plus last name - e.g. jsmith

User ID: 

Email:

Level: ▼

☐ **User ID Enabled** 

Last Login: Never

☐ Restrict to View Only

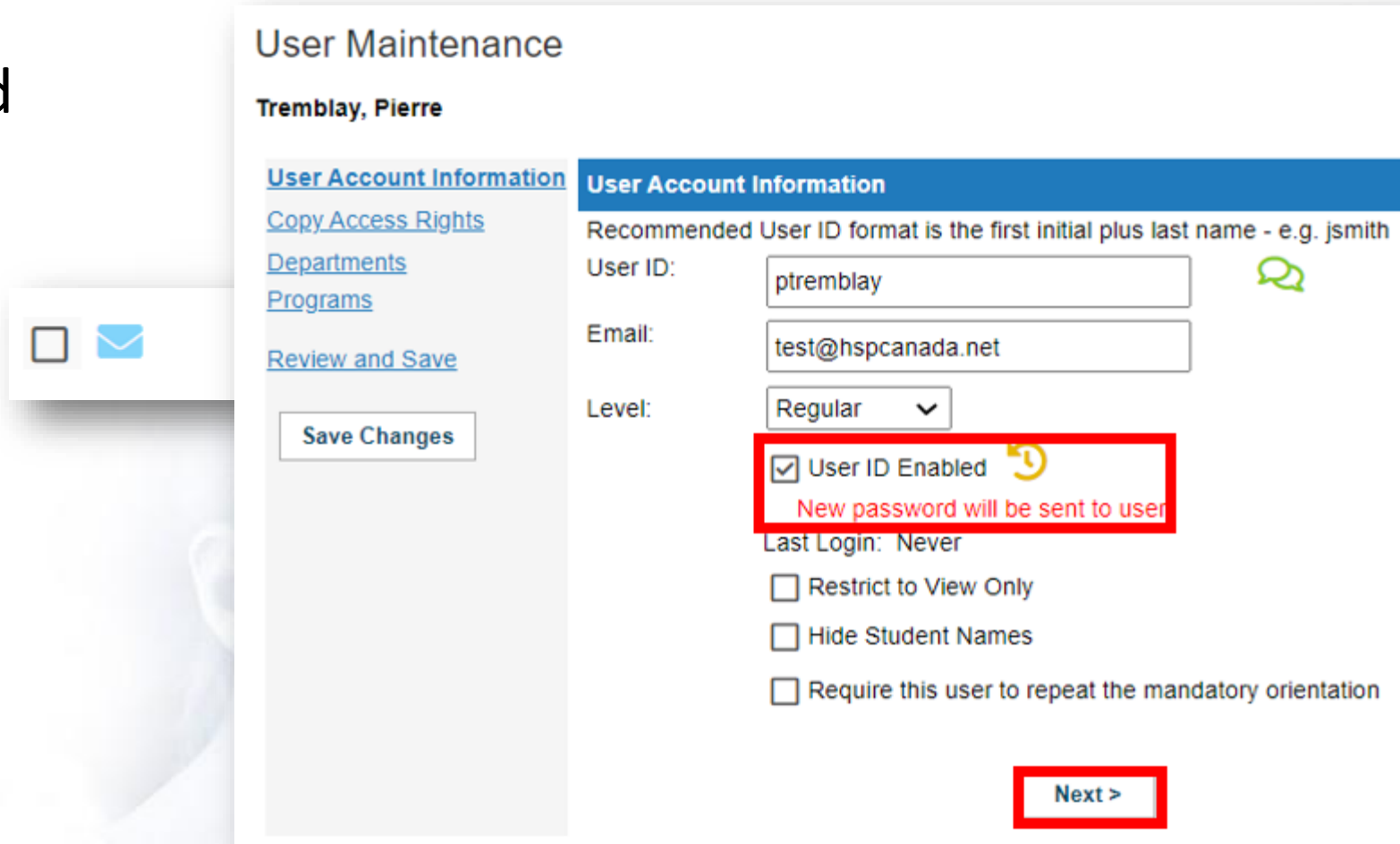
☐ Hide Student Names

☐ Require this user to repeat the mandatory orientation

Next >

Reactivate User Access

- Key icon
- User ID enabled
- Authorization



User Maintenance

Tremblay, Pierre

[User Account Information](#)

[Copy Access Rights](#)

[Departments](#)

[Programs](#)

[Review and Save](#)


[Save Changes](#)

Recommended User ID format is the first initial plus last name - e.g. jsmith

User ID:

Email:

Level:

☒ User ID Enabled 

New password will be sent to user

Last Login: Never

☐ Restrict to View Only

☐ Hide Student Names

☐ Require this user to repeat the mandatory orientation

[Next >](#)

Consideration | Access to users

- Student Guides – First login Video

- Account Overview
- Releasing your email for RA
- Print my placement history
- Document upload

- Instructor Role – Workflow Guide

- HSPnet Overview
- First Login
- Access for instructors



Summary

- Create user accounts
- Manage user rights
 - Record
 - Need to know
 - Unique User ID
 - Avoid duplicates
 - Inactivate
 - Inactivate
 - Reactivate





Thank you!

- Email to: support@hspcanada.net

thank you!

