CHAPTER 8. PLACING AGENCY - USING THE OUTBOX

This section explains how to use your Outbox to:

- Review the status of Placement Requests
- Edit Placement Details prior to sending Requests to Receiving Agencies, or after they have been sent
- Add a New Destination (to send a request to more than one agency)
- Add a Linked Destination (to split a placement across two or more destinations)

Review Status of Placement Requests

To review the status of Placement Requests in your Outbox**:**

1. Select **INBOX / OUTBOX** from the left navigation.

2. Set the **Current View** to focus on which placements you wish to review depending on your Agency's role:

Change your Current View

Placing Agencies: Set **FROM** to your agency by selecting your agency from the dropdown (**TO** Agency will automatically default to ALL.)

Narrow your Current View

3. Narrow down your **Current View** to focus on only a subset of the Placement Requests you are permitted to Access for your Role. This may be as broad or as granular as a specific ward at a destination.

4. Use the calendar dates to view the placements for a specific period of time. By clicking on the calendar you may see all the placements that took place between the start and end dates. To be more specific on your view, use the status filters to remove cancelled, declined, etc., to find exactly what you are looking for.

Filter on Course and Placement Type

5. To further filter a view by including only Placement Requests for a specific course, click **Course** in the header row of the table to produce a dropdown of Courses in your Program. Select a Course from the dropdown and the screen will automatically refresh to show a list of Placement Requests for that Course only.

The "Currently Displaying" status line above the Outbox Placements table shows the current filters set.

6. To further filter a view by including only Placement Requests of a specific type (such as Project), click **Type** in the header row of the table to produce a dropdown of placement types for your Program. Select a placement Type from the dropdown and the screen will automatically refresh to show a list of Placement Requests of that type only.

Once you are satisfied with your view of the data, review the core information available in the Outbox:

Core Placement Information	• **Status of Request**	New, Sent, Confirmed, etc.
	• **Course**	Short name/number
	• **Type**	Project, Preceptorship, Fieldwork, etc.
	• **Start/End Dates**	From Course Profile
	• **Days**	e.g. – MTW, MTWRF, Various
	• **Time**	Start of shift
	• **Student name**	Or 👥 if anonymous or unnamed
	• **From**	Placing Agency
	• **Department**	Or School
	• **To Site**	Receiving Agency
	• **Service**	e.g. Surgery, Medicine, ICU
	• **Dest**	Destination – e.g. 2S, OR, ER, CPE8

Placement Icons   Each Placement Request has icons that allow you to:

🔗   **Add Linked Destination** for placements that are to be shared across two or more destinations. For example, a Group request of 8 students may be split across a Group placement of 5 that is linked with 3 Alternate Experience placements.

ℹ️   **View Details** of a Placement Request (see below)

✏️   **Edit** the Site, Service, and Destination of a Placement Request of any type, and for Group placements to edit the Group Size and Alternate/ Observation flag.

➕   **Add a Placement Request** for the same Student (if known) or Placement Request (if unnamed – see below). This allows you to send a request to two or more Agencies for their consideration.

View Placement Details   To view Details for a Placement Request, click ℹ️ to open the Details popup window, which provides the following information:

> 💡 Click the **Course** hyperlink to view the full Course Profile.

• **Program/Course Information** – Placing Agency and Department (school), Program name, Course number and name, and Duration of Placement.

• **Placing Agency Contacts** – Name and links to contact information for Program Coordinator, Instructor, and Course Contact if known.

> 💡 Click the **Student** hyperlink to view the full Student Profile.

• **Student Information** – Name and other contact information (if released, otherwise shown as 👥 if placement is anonymous or unnamed.

• **Receiving Agency Contacts** – Name and links to contact information for Placement Coordinator, Service Contact, Destination Contact(s), and Student Contact (Supervisor or Preceptor) if known.

Placement Details
Popup

View Placement
Details
(continued)

- **Placement Information**– Start/End dates and times, Days of the week, Duration and hours/shifts, Conditions, and Comments.

- **Placement Request History** – Including date and nature of changes to Status (e.g. New, Sent, Accepted, etc.), Agency and initial of HSPnet user making the change, and description of change.

Edit Placement
Details

You can update any of the following fields in the Placement Information box:

> If you enter the number of Shifts and Hours per shift, the placement Duration will be calculated automatically.

- Start/End Date
- Start/End Time
- Days of the week
- Hours and Shifts
- Duration
- Conditions (typically to be used by the Receiving Agency)
- Comments
- Placing Agency Contacts (Placement Coordinator, Instructors)
- Project Title (for projects)

Add New Placement Request Follow these steps to "clone" a Placement Request for sending to more than one agency for consideration, such as when a request for a surgical placement can be sent to two different hospitals:

1. Select **INBOX / OUTBOX** from the left navigation.

2. To add a new Placement Request to an existing request, either named (student is known) or unnamed (student is not yet assigned), click ✚ to "clone" the request. This action creates an identical Placement Request that can be used to "shop around" the request to more than one destination.

3. Enter the new Agency, Service and Destination (if known), and click to Save.

Add Linked Destination Follow these steps to add a Linked Destination, such as when a Placement is to be shared across two destinations. For example, a Group Placement may be split across multiple destinations by adding one or more *linked* Alternate Observation Experiences.

1. Select **INBOX / OUTBOX** from the left navigation.

2. To add a new Linked Destination for a Placement Request, click 🖉 to create a new Destination linked to the original Placement Request.

3. Enter the new Destination and click ✔ to Save.

Share Placement Across Two Destinations To edit the start/end dates, Duration hours, or other information, click 🛈 to edit Details (see above). For example:

- Edit start and end dates of two linked Placement Requests if a student is to spend part of their placement in one destination and then transfer to another destination. In this situation, you should also edit Duration hours for each Destination to ensure appropriate credit for student contact hours at each.

Split Group Across Two Destinations Follow these steps to split a group across two Destinations

- Click 🖉 to edit each linked Destination. Change the Group Size fields of each Destination to share the total number of students. For example, to share a Group(8) students across two Destinations, set the Group Size in each linked Destination to Group(4). Click ✔ to Save.

- To identify one or more of the linked destinations as an Alternate or Observation Experience, click 🖉 to edit the linked destination and select the "Alt/Obs" checkbox. Click ✔ to Save. The words "Alt/Obs. will appear beneath the "Group(x)" entry.