Slot Based Rotations Tip Sheet

Every **successful** rotation in mCE must complete each of the following steps.

Step 1.) **School** submits slot requests to their partner hospital
Step 2.) **School** resolves conflicts
Step 3.) **Hospital** approves and resolves final conflicts
Step 4.) **Student and/or school** register and pay for an account
Step 5.) **School** schedules the student(s)
Step 6.) **Student and School** complete the compliance and onboarding information
Step 7.) **School and hospital** review the student compliance for accuracy

Initial Login and Account Settings

1. Navigate to the mCE homepage. Click on "School Staff Login here".
2. When the page loads, click "Forgot Password?". When the page loads, enter your school issued email address and the displayed security code. Click "Send Email".
3. In your school inbox you should see an email from do-not-reply@myclinicalexchange.com. Click on the link provided to be directed to a screen where you can update your password.
4. Navigate back to the homepage, enter your email address, new password, and click, "Login".
5. Once you've logged into your account, click on the grey cogwheel at the top right to access your account settings.
6. When the page loads, scroll down to see a list of automatic emails available on the platform. Check mark the box next to the ones you'd like to see and click "Save my e-mail preferences".

Step 1: School Submits Slot Requests

1. From the homepage, click on the "Request New Slots" button in the upper right corner.
2. A pop-up window will appear. Select the hospital and rotational program where you want to request slots.
    a. Select the type of program you are submitting the student to for their clinical rotation.
    b. If you do not see the appropriate hospital or program in the menus, DO NOT continue forward. Contact support@myclinicalexchange.com and ask us to add what you need.
3. Click "Continue".
4. Use the search criteria on the left side of the page to search for slots by Unit, Shift, Period (start and end date), Days of the Week and/or Number of students. Click "Search".
5. The right side of the page will display groupings of slots.
    a. *Date:* the date the slots are available
    b. *Day:* the day of the week
    c. *Shift:* will give the shift time
    d. *# of Openings*: how many students the hospital can take on that Date/Shift listed earlier
    e. *# of Students*: how many students you are requesting to send to the hospital.
        i. This number will pre-fill in for you based on the search criteria you set above. You may delete the number in this column and enter a new number of your choice.
    f. *Department:* the overarching clinical area for the Unit
    g. *Unit:* the unit for the rotation
6. Check mark the slots you'd like to request.
7. scroll to the bottom and click, "Submit Request".

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8. A pop-up window will prompt for the “Student Program”. Choose what academic program your students are enrolled in at your University. Then select the “Student Level” (i.e. Level 1 or Level 2).
9. Continue using your search on the left side of the screen to find more slots, select them, and submit requests.
10. When you are done, click “Close” and the system will redirect you to the Home Page.
11. To see your submitted requests, click the yellow “sandwich” icon at the top left of the Home Page. Your Search Criteria will open to the left. At the bottom of the search criteria, change your “Status” from “Approved (Active)” to “Pending Approval Slots” and click “Search”.

Step 2: School Resolves Conflict

1. Go to the “Administration” menu at the top left and then select “Consortium Calendar”.
2. Use your “Search Criteria” to search within a date range, and limit to conflicts at a Hospital or search for conflicts by Program.
3. Click “Search”.
4. The Calendar will display all slot requests. Lines where the Slot ID number is in red are conflicting slot requests.
5. Use the Slot ID # to find the Slot on your Home Page to release the slot.
    a. On your Home Page, at the top left, enter the Slot ID number in the box and click the magnifying glass.
    b. The slot will appear on your Home Page where you can check mark the box to the far left.
    c. Scroll to the bottom of the page and click “Release selected slot(s)”.

Step 3: The Hospital Approves and Resolves Final Conflict

Make sure your “New Rotation” auto e-mail is check marked so that you receive a notification from mCE when your slots are approved, and you can move onto the next step. Hospitals can resolve conflicts on their side as well. If you are not able to resolve the conflict on your side, hospitals will make the decision on their end.

Step 4: The Hospital Approves and Resolves Final Conflict

There are **two** ways to gain an account in mCE:

1. Personal registration and payment
2. The school registers and pays on behalf of the user

Regardless of the which option you choose, please contact our Support Team at support@myclinicalexchange.com. Depending upon the option you pick, configuration settings may need to be impacted on the backend.

Please see below for pricing options:

- **Student**
    - 12 Months - $39.50
    - 18 Months - $59.50
    - 24 Months - $79

Step 5: Scheduling Students and Instructors

When you are doing your scheduling, you will want to think of your groups of students who go on rotation together. In this step, we are putting together the schedule for a clinical group/cohort under a single Clinical Instructor.

1. From the Home page, find at least one slot you want to start with though you may select multiple slots as well. Check mark the box(es) on the far-left side.
2. Scroll to the bottom and click “Schedule Students”.

<u>Step 1 of 3: Select more slots</u>

   a. Use the “Search” on the left side to find more slots. You may search by Program, Unit, Shift, Date Range and Days of the Week. Click “Search” to see all matching slots.
   b. Select the slot(s) you want by putting a check mark in the box(es) on the left.
   c. Click the **Add Units →** button in the middle of the page to transfer your selected slots from the left box to the box on the right side.
   d. Click “Continue to Schedule Students”.

Step 2 of 3: Add Students

   e. Use the “Search” on the left side to find student accounts. You may use the search parameters OR leave all search criteria blank to see a roster of all students who have an account.
   f. A list of students will display in the box on the left. Check mark the student(s) for this clinical group that you are wanting to put into the slots you selected in the step above.
   g. Click the **Add Students →** button in the middle of the page to transfer your selected students to the box on the right.
   h. Click “Continue to Plan Units”.

Step 3 of 3: Build Rotation

   i. Add details about the student group at the top
   j. Add anyone accompanying the students on this rotation in the “Clinical Instructor” box at the top right.
      i. Click the yellow icon with the **blue man** to search for the Instructor for this rotation.
      ii. If you do not see the Instructor, you want to add click “Clear” and then click “Create Instructor”.
   k. Use the Calendar Grid to set up the student’s schedule
      i. For a student/date combo, click inside the text box that says *Type unit name to select*.
      ii. A list of slot options will appear. Click on the one you want to add for this student on this date.

3. Click “Save as Draft” if you want to save the work you have done thus far and you are not ready for mCE to email the students yet.
4. Click “Finalize Schedule” when you are done.
   a. mCE will automatically email the student(s) a copy of the schedule you created AND link them up with the Hospital’s requirements so the student can begin working on compliance documents/modules/quizzes for their rotation.
   b. Until you click **Finalize Schedule** the student will have NO access to the Hospital requirements. Please note that you may still edit the schedule until the last day of rotation.

Step 6: Compliance

You may have your students enter their compliance information and submit for your approval, OR you may enter the student’s compliance information on their behalf.

Entering compliance information on behalf of the student

1. Click on the student with the magnifying glass icon in the upper right corner.
2. Use the search parameters to find the student you want to update
3. Click on the Student’s name on the left side to open their profile
4. Across the bottom are a row of tabs. Click on the “Checklist” tab.
5. In that tab will be two types of checklists. Find the University Checklist (this will have your University’s name in parenthesis after it) and click on the checklist to open it in edit mode.
6. Select the check mark boxes in the far-left column to verify that a student has completed items.
7. Put information in the Value column
   a. Usually, the system wants the date of when an item was accomplished or completed
   b. If it says "Expiry Date" then you need to enter the date that this item will expire
   c. You may also be able to add regular text such as the last four digits of the student's SSN
8. Wherever there is an “Add Document” button, you need to upload a document of proof for that item.
   a. Click the “Add Document” button.
   b. A pop-up window will appear. Click the “Browse” button.

   c. A second pop-up will appear with all your files and folders from your hard drive. Navigate to and select the file you want to upload by double clicking it.
   d. The file path name will appear in the box to the left of the "Browse" button.
   e. Click "Upload" to begin the upload process.
   f. When the file has uploaded, you will see the file name above the "Add Document" button on the checklist.
9. Click "Save".

Approving/Declining information the student has entered

1. On your Home Page, there will be a yellow bar across the top with a red sentence that says, "You have pending compliance items by one or more student(s) for review; Click here to continue." Click on the red sentence to open the queue and see which students have submitted data.
2. The student's name is listed on the left along with the checklist they submitted to you. Any comments from the student are on the right.
3. Click on a student's name to begin viewing the submitted data.
4. On the far left, you can verify items by check marking the box in the "Verified" column.
5. The Old Value column is the ACTUAL data being shared with the Rotational Hospital(s). The Old Value column contains the data/documents either input by yourself OR data you have accepted from the student in the past.
6. The New Value Column is the information the student is submitting to you for review.
7. The New Attachment column will show any new documents the student has uploaded to you.
   a. You can click on the document name to open it and make sure it is correct.
8. If you approve of all the items/documents that the student has entered, you may click "Approve" on the bottom right.
   a. Clicking approve will transfer ALL items from the New Value/New Attachment column into the Old Value column. All previous data will be replaced with the new data, and these items will appear on the student's ACTUAL checklist and be shared with the Rotational Hospital(s).
9. If you disagree with any items for any reason, enter a note in the comments box and click "Decline".
   a. Clicking decline sends the checklist back to the student for them to edit. It also means that NO data and NO documents submitted by the student have transferred to the student's ACTUAL checklist.

Note:

When a student submits their checklist to you for editing, their checklist locks and they CANNOT edit anything else until you either approve or decline what they have already submitted.

Step 7: Final Check in the Rotation Manager

1. From the Home Screen, click on the "Rotation" menu in the upper left corner and then select "Rotation Manager."
2. Find the three horizontal lines or 'sandwich icon' in the upper left-hand corner to expand a search box. Select from the dropdowns as you would like and click "Search".
3. Look at the list of students/instructors and check to see if they have a green "thumbs up" or red "thumbs down" to the far left of their name.
   1. A green "thumbs up" means the student/instructor is ready for their rotation.
   2. A red "thumbs down" means the student/instructor has one or more outstanding item to complete before they are ready for their rotation.
4. If there is a red "thumbs down," look under the student's name to see what items are still pending for this student.

    i. Red exclamation – <u>Compliance checklist</u> is missing data, something has expired, or something will expire before the last day of the Rotation.
    ii. "D" with the slash Student needs to <u>upload documents</u> to the Hospital
    iii. "C" with a slash Student needs to give <u>electronic consent</u>
    iv. Compass – student needs to complete an online orientation <u>module</u>
    v. A+ student needs to complete an online <u>test</u>

5. CLICK on the red thumbs down or green thumbs up, to open a pop-up window.
6. Across the top, there are tabs correlating to each of the Required Items (Compliance Checklist, Documents/Consents, Orientation, Tests). Click on each tab to view more information for each category.
    1. **Compliance**– anything flagged on the checklist needs to be looked at closely. Are there documents missing (it will say "Missing Supporting Document" in the document column.), has the item expired, will the item expire before the last day of the Rotation, have you verified items, attested?
        - ➢ REMEMBER if you need to make ANY edits, do it in the student profile (Step 6 above) NOT HERE!
    2. **Documents**– check for any missing documents or consents.
        1. On the left side is the list of documents the Hospital pushed to the students – these are the Master copies. Click on the document name to open it.
        2. In the middle is recorded the date and time the student gave consent to having read and understood the documents. IF the student has NOT consented, it will say "Consent Required" in that middle column.
        3. On the far-right side is the document upload area. If the student has uploaded a document back to the Hospital, you may click on the document name to open it up to view, save, or print it. Alternatively, you may click **Browse** and **Upload** to put in a document on behalf of the student.
    3. **Orientation**– make sure student has completed any/all. The date completed will be recorded for each module.
    4. **Testing**– make sure student has finished all tests. The date completed and the score will be recorded.
7. Click "Close" to close the pop-up window.
8. As the student completes each item, the symbols under the student's name will disappear. When every item is complete, the red thumbs down will turn into a green "thumbs up."