Tip Sheet

Every successful Rotation in mCE must complete the following steps.

Step 1.) **University** Submits a Slot Requests to the Hospital
Step 2.) **University** Resolves Conflicts
Step 3.) **Hospital** Approves and Resolves Final Conflicts
Step 4.) **Student/University** - Registration/Payment for the student account
Step 5.) **University** Schedules the Student(s)
Step 6.) **Student/University** - Compliance/Onboarding
Step 7.) **University/Hospital** - Final Check in the Rotation Manager

Pre-Step: Log in and set account preferences

1.) Navigate to https://myclinicalexchange.com
2.) Click on "School Staff – Login here" button in the bottom, left of the page.
3.) Click the "Forgot Password?" link.
4.) The system will prompt you for your log in ID which is your e-mail address from your University
5.) Enter the 5-digit number you see in the middle into the empty "Security Code" box at the bottom.
6.) Click **Email Password** (NOT Change Password) and the temp password will be sent to your e-mail inbox
7.) Go back to the log in page and enter your log in ID (your e-mail) and the password that was sent to you. Then click **Login.**
8.) Once you log in, click the **cog wheel** icon in the upper right corner to select which e-mails you would like to receive from mCE. Whichever e-mails you select, don't forget to click "Save my e-mail preferences"!

Step 1: University submits a Request

1.) From the Home Page, click on the yellow button on the upper right labeled **Request New Slots**
2.) A pop up window will appear for you to select the Organization (Hospital) and Program where you want to request slots.

a. Please select what type of program you are submitting the student to for their clinical rotation.

b. If you do not see the appropriate Program OR Hospital in the menus please DO NOT select something "close enough". Instead 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. Then click **Search** to find the appropriate matches
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. 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. Then scroll to the bottom and click **Submit Request**.
7.) 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).
8.) Continue using your search on the left side of the screen to find more slots, select them, and Submit Requests.

9.) When you are done, click **Close** and the system will redirect you to the Home Page.

a.) 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: University 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 particular 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.
    a. 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 have the ability to 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 3: Registration/Payment for the student account

You can either have the students register/pay on their own OR the University can register/pay on behalf of the student. Please e-mail support@myclinicalexchange.com and let us know which route you would like to go and we'll send more information.

The price for students is $36.50/year. It does not matter how many Rotations the student does within that year, the price is for one year of active use.

Step 4: Scheduling Students and Instructors

When you are doing you're scheduling, you'll 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**.
3.) Step 1 of 3: Select more slots
    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.
4.) Click **Continue to Schedule Students**
5.) Step 2 of 3: Add Students
    a. 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.

   b. 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.
   c. Click the **Add Students →** button in the middle of the page to transfer your selected students to the box on the right.
   d. Click **Continue to Plan Units**.

6.) Step 3 of 3: Build Rotation
   a. Add details about the student group at the top
   b. 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 don't see the Instructor you want to add click **Clear** and then click **Create Instructor**.
   c. 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.

7.) Click **Save as Draft** if you want to save the work you've done thus far and you're not ready for mCE to email the students yet.

8.) Click **Finalize Schedule** when you're done. 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. 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 5: Compliance

You may have your students enter their own 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.) Hover over the search icon in the upper right corner and click **Student**
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.) 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, "Renewal Date" then you need to enter the <u>future</u> 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
7.) If a supporting document is required, the box will say "Missing Supporting Document".
   a.) Check mark the box(es) to the left of the item(s) you want to upload a document against.
   b.) Click the **Associate Document** button.
   c.) A pop up window 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.) When the file has uploaded, you will see the file name on the far-right column.
8.) Click **Save**

Approving/Declining information the student has entered

1) 1) On your Home Page, there will be a yellow bar across the top with a link that reads, "**You have pending compliance - Items by one or more student(s) for review; Click here to continue.**". Click on this link.
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 checklist** to begin viewing the submitted data.
4) On the far left, you can select items by checking off the boxes in the column. If no box appears, then the student did not submit anything for that item.
5) The *Old Value* column is the data currently being shared with the Rotational Hospital(s). This is information that either you have approved in the past or have entered yourself.
6) The *Submitted Value* column is the information the student is submitting to you for review.
7) The *Submitted Docs* column will show any new documents the student has uploaded for review.
8) You can click on the document name to open it and make sure it's correct.
9) If you approve of the information and documents that the student has entered:
    a. Check the box next to the item(s)
    b. Enter your comments, if any, in the box at the bottom
    c. Click **Approve** on the bottom right.
    d. This will transfer each of the selected items in the *Submitted Value*/*Submitted Documents* column into the *Old Value* column. All previous data will be replaced and these items will appear on the student's checklist, which will cascade to their with the Rotational Hospital Checklist(s).
10) If you disagree with any item(s):
    a. Select one or more items by checking the boxes to the left
    b. Enter a note in the comments box
    c. Click **Decline** at the bottom right
    d. This sends the items back to the student for them to edit. It also means that selected data and documents submitted by the student did not transfer to the student's Hospital Checklist.

Please note that 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 6: 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.) In the upper left, click on the orange **sandwich** button to run a search to find particular rotations/students. Select from the drop downs as you'd like and click **Search.** Alternatively, you can use Quick Search by typing in the Request # or the Rotation # in the appropriate box and clicking the **magnifying glass** icon**.**
3.) Look at the list of students/instructors and check to see if they have a green "thumb up" or red "thumb down" to the far left of their name.
    1. A green thumb up means the student/instructor is ready for their rotation.
    2. A red thumb 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 thumb down, look under the person's name to see what items are still pending.
    i. Red exclamation – Compliance checklist is missing data, something has expired, or something will expire before the last day of the Rotation.
    ii. "D" with the slash A document needs to be uploaded
    iii. "C" with a slash An electronic consent is mising
    iv. Compass –an online orientation module is pending
    v. A+ an online test is pending
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 5 above) NOT HERE!!

2. **Documents**– check for any missing documents or consents.
    1. On the left side are 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 and 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 thumb up.

E-mail support@myclinicalexchange.com for assistance with ANY of these steps.