Tip Sheet

Every successful Rotation in mCE must complete the following steps.

Step 1.) **University** logs in and sets account preferences
Step 2.) **University** Submits a Request to the Hospital
Step 3.) **Hospital** Approves
Step 4.) **Student/University** - Registration/Payment for the student/instructor account
Step 5.) **University** Schedules the Student
Step 6.) **Student/University** - Compliance/Onboarding
Step 7.) **University/Hospital** - Final Check in the Rotation Manager

Step 1: Log in and set account preferences

1.) Navigate tohttps://myclinicalexchange.com
2.) Click on "University Login" at the bottom, left of the page.
3.) Click the "Forgot Password?" link.
4.) The system will prompt you for your login ID which is your e-mail address from your University
5.) Enter the 5 digit number you see on the left into the empty box on the right.
6.) Click **Email Password** (NOT Change Password) and the temporary password will be sent to your e-mail inbox.
7.) Go back to the login page and enter your login ID (your e-mail) and the password that was sent to you. Then click **Sign In.**
8.) Once you log in, click your name 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 2: University submits a Request

1.) From the Home Page, click on the orange button on the upper right labeled **New Request**
2.) ALL items marked with a are REQUIRED before you can submit this Request.
3.) Make sure to watch the following:

SUBMIT A NEW REQUEST TO:
Only Organizations that you have a contract with will appear in the drop-down menu at the top.

PROGRAM (Upper left side of Request screen)
Choose from the drop down menu what academic program your students are enrolled in at your University.

OVERSIGHT USERS (Bottom left side of Request page)
You only need to add ONE person in this area.
Against the "Course Instructor" or "Clinical Coordinator" options (line 1 or 3) add a "Point of Contact."
Against the "Clinical Instructor" option (line 2), add anyone accompanying the student on the Rotation.

ROTATION DETAILS (Right side of Request page)
PROGRAM
Please select what type of program you are submitting the student to for their clinical rotation. If you do not see the appropriate Program in the drop down menu for the Hospital to which you are submitting your Request, please contact the Hospital and ask them to add the correct Program.

OPENINGS
Enter the number of students for which you are requesting a rotation.

TOTAL HOURS PER STUDENT

Enter the total number of hours you want each student to work before the end of their clinical rotation.

COMMENTS

You may add any extra comments to the Request which will be seen by the Organization when the request is submitted.

4.) Click **Submit for Approval** to submit the request to the Organization. If the form is incomplete, the system will return an error message telling you what required items are still missing.

5.) If you are not yet ready to submit a request or need to verify additional details about this request, you can click on **Save as Draft.** Clicking **Save as Draft** does not submit the request to the Organization but saves it where you have stopped. Clicking **Save as Draft** would be a useful tool to utilize to enter in the basic information of the request, and then access a calendar to select a specific schedule.

6.) If you have properly entered all required information, the system will redirect you to the Home Page, and you will see your Request listed there.

Step 3: The Hospital Approves

Make sure your "New Rotation" auto e-mail is check marked so that you receive a notification from mCE and can move onto the next step.

Step 4: Registration/Payment for the student/instructor account

You can 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 will 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 just for one year of active use.

If the Hospital you are partnering with also uses mCE to track Instructors, the same directions apply as above. Let us know if you want the Instructors to register/pay OR if you prefer to pay on their behalf. The price for Instructors is $18.50/year.

Step 5: Scheduling Student

1.) From the home page, in the far right column labeled 'Schd,' click on the underlined **0** of the rotation you want to begin scheduling.
2.) Across the top are details about the approved Rotation from the Hospital
3.) Look to the bottom left side of the page; use the Search Box to find the student's mCE account.
   a.) You can expand or limit your search using the parameters OR
   b.) Just click the orange **Search** button to see ALL active students loaded in the system.
   c.) If you are looking for a specific student and they are NOT showing up in your searches, the registration/payment step was probably skipped. E-mail support@myclinicalexchange.com for assistance with this.
4.) Select the students you want by clicking the check mark box next to their names
5.) Click **Schedule Student**
6.) The selected students will appear on the left side of the screen.
7.) Click **Close** to return to the Home Page. If you have scheduled students into all available slots, the Request will "disappear" from your Home Page.

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 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
    h.) 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 up 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.

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 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 dark blue bar near the top of the screen that says "Search Criteria Show." Click on the "Show" 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 – Compliance checklist 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 upload documents to the Hospital

   iii. "C" with a slash Student needs to give electronic consent

   iv. Compass – student needs to complete an online orientation module

   v. A+ student needs to complete an online test

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."

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