



---

BON SECOURS MERCY HEALTH  
CB BRIDGES™ USER GUIDE

## WELCOME TO CB BRIDGES™!

Thank you for being a part of our new clinical experience with **CB Bridges™**, designed to keep the entire clinical rotation process organized, on track, and on time — giving hospitals, schools and students more time to focus on what really matters.

**CB Pro Advantage Tracker** automates, tracks, and reports hospital-specific clinical onboarding and orientation requirements in real time. Documentation is customized to each hospital's exact requirements, allowing students to process site-specific documents in one convenient location.

Students get peace of mind through digitally confirmed **placement opportunities** and can stay on track with real-time updates on a **clinical schedule** calendar.

**\*\*\*\*Please Note:** As you review this guide, pay close attention to the sections marked with **“IMPORTANT!”** as these can affect your Clinical Placement requests being approved or declined. 168753

## GLOSSARY OF TERMS

**CB:** Abbreviation for “CastleBranch”

**CBB:** Abbreviation for “CB Bridges™”

**CORE:** Referencing our Castle Branch platform used for pre-clinical immunizations and paperwork, Background checks, Drug Tests etc.

**CB Wellness Center:** The location where students and faculty can track temperatures and infectious disease symptoms twice daily for your COVID-19 Compliance group experiences. Administrators will also have access to pull reports within this area.

**COVID-19 Compliance:** A service offered in CB Bridges™ that tracks and reports members temperatures and infectious disease symptoms twice daily for your COVID-19 Compliance group experiences.

**Clinical Experience (AKA Group Experience or Individual Experience) :** Must first be created in order to utilize any of the services within the CB Bridges™ platform, with the exception of Clinical Placement. Experiences are used to manage students and how they attend clinicals and may be created for groups or individuals.

**Checklist Item(s):** Orientation and/or onboarding documentation in which students complete to satisfy requirements set by the clinical site.

**Clinical Placement:** Allows schools and facilities to coordinate assigning students to open opportunities for experiential learning. The three CB Bridges™ Clinical Placement modules are Facility-Led Group Placement, School-Led Group Placement and Individual Placement.

- **Facility-Led Group Placement** is used for schools and programs who send groups of students to clinical facilities for clinical rotations. The Facility will provide what opportunities they have available by location and unit, and the schools can make requests as needed.
- **School-Led Group Placement ( not used by BSMH)** is used for schools and programs who send groups of students to clinical facilities for clinical rotations. The school will request what they need for clinical rotations for the facility to approve or decline.
- **Individual Placement** is used for schools and programs who send students individually to clinical facilities for one-on-one learning with a Mentor or Preceptor.

**Flex Fields:** A list of programs, courses and terms, determined by each school, to be used when creating group experiences, placement requests or clinical schedules. These options can be updated and edited as needed.

**Clinical Scheduling:** Clinical Scheduling enables users to schedule and assign clinical groups or individuals into facilities or units – all in one central location.

**Instructor:** Faculty or instructor for designated course

**Mentor:** An experienced practitioner who is a trusted counselor, guide, role model, and teacher – providing opportunities for personal and career development, growth, and support to the less experienced individual.

**Modules:** CB Bridges™ is broken up into different sections depending on what is needed for each program account. Modules consist of Pro-Advantage Tracker, Clinical Placement, Clinical Scheduling, Time Management, and Evaluations. Some programs choose to use only one module, while others use them in conjunction with each other.

**Onboarding:** This is the initial process and school program or facility location will go through to set up their accounts, attend initial training, complete a UMSA contract and be assigned a specific Bridges Onboarding Specialist.

**Orientation Due Date:** This is the date in which the clinical checklists will state they are due for all members within a clinical experience. Documentation can still be submitted before or after that date, however it will state overdue once the assigned date has passed.

**Partners:** The number of facilities that your CB Bridges™ account is associated with. This could be a representation of one, or multiple, locations per facility depending on setup.

**Platform:** Castle Branch is broken into two different systems called platforms.

1. The CastleBranch is a school-based platform consisting of students/instructors MyCB accounts and the Administrative portal where they can order things such as background checks, drug tests or school compliance.
2. CB Bridges™ is a clinical platform designed for schools to work with facilities to streamline their clinical experiences, create/approve placement requests, clinical schedules and complete clinical paperwork.

**Pro-Advantage Tracker:** Automates, tracks, and reports hospital-specific clinical onboarding and orientation requirements in real time – with student documentation customized to each hospital's exact requirements.

**Preceptor:** A certified/licensed professional who teaches and/or evaluates students in a clinical setting using an actual patient base.

- In CB Bridges, the title of “Preceptor” is used when requesting Individual Placement for a student. Those listed as a preceptor will appear under the role of “Mentor” within a clinical experience's members.

**UMSA:** Unified Master Service Agreement is the contract that is signed by all schools and facilities to gain access to CastleBranch under state laws and regulations.

**Units:** This will be the specific floor/area within a facility location that schools can request clinical placement rotations.

## TABLE OF CONTENTS

### 1. CLINICAL PLACEMENT

- a. Facility–Led Group Placement
- b. Individual Placement

### 2. CB PRO ADVANTAGE TRACKER

- a. Creating a Group Experience ( Clinical groups must be created off of an approved placement reservation, NOT under the My Bridges tab. Any clinical groups not created off the reservation will require a new group to be created, and documentation to be completed again by students.)
- b. Adding Members to Group Experience ( \*See Final Page)
- c. Reviewing Documents
- d. Creating Summary Reports in Pro Advantage Tracker
- e. Archiving and Unarchiving an Experience

### 3. CLINICAL SCHEDULING

### 4. BREAKDOWN OF CLINICAL COORDINATOR ADMINISTRATOR AND STUDENT PROCESS

### 5. CB COVID-19 COMPLIANCE ( OPTIONAL)

### 6. USER ROLES WITHIN CB BRIDGES™

### 7. CASTLEBRANCH CUSTOMER SUPPORT

### 8. BSMH ABBREVIATIONS

### 9. FACILITY COORDINATORS TO ADD TO EXPERIENCES\*

In this User Guide, you will learn how to: Request an opportunity and submit a request for Bon Secours Mercy Health. This includes:

**Creating a Placement Request for Bon Secours.**

Filling out the required fields in the request and determining the dates and times for your request.

**Create an experience off the reservation (hospital-approved request).**

Includes filling out the required fields in the request and determining the dates and times for your request.

**Create a shift off the experience.**

Includes how to save a shift and publish later or publish a shift right away.

## 1. CLINICAL PLACEMENT

Bon Secours Mercy Health will use two modules for **Clinical Placement** requests in **CB Bridges™**. The **Clinical Placement** module allows schools and facilities to coordinate assigning students to open opportunities for experiential learning.

- **Group Placement** is used for schools and programs that send groups of students to clinical facilities for clinical rotations. The group of students will be completing clinical rotations in the same unit together.
- **Individual Placement** is used for schools and programs that send individual students to clinical facilities to complete clinical rotations with a preceptor.

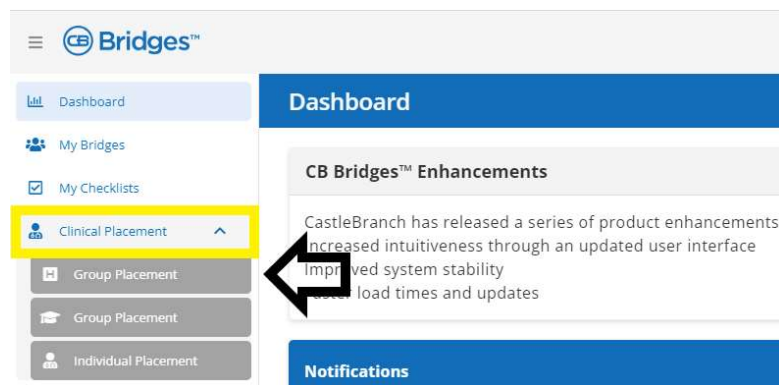
### IMPORTANT!

- Clinical Placement requests will be approved initially; however, groups will not be allowed to enter the facility until all clinical documentation for the group has been completed in CB Pro Advantage Tracker.

## a. FACILITY- LED GROUP PLACEMENT--REQUESTING AN OPPORTUNITY AND SUBMITTING A REQUEST

Requests are made by Clinical Coordinators. Instructors cannot make placement requests.

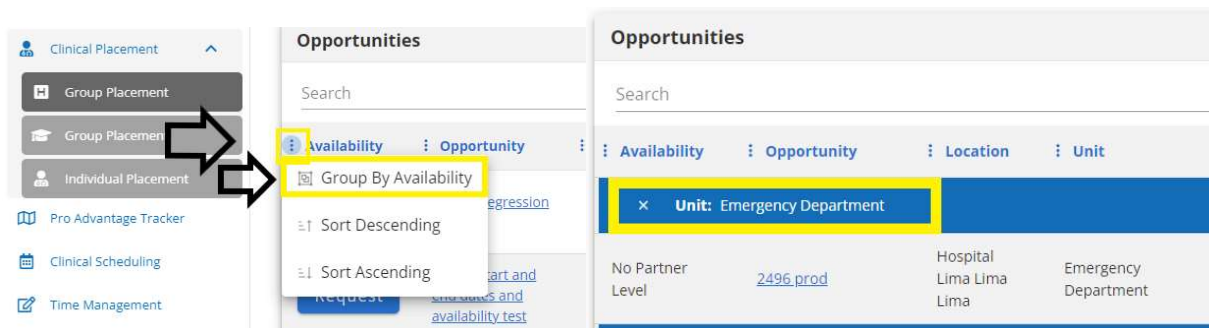
- Access the Group Placement module by selecting “Clinical Placement” and then “Group Placement” in the left navigation.



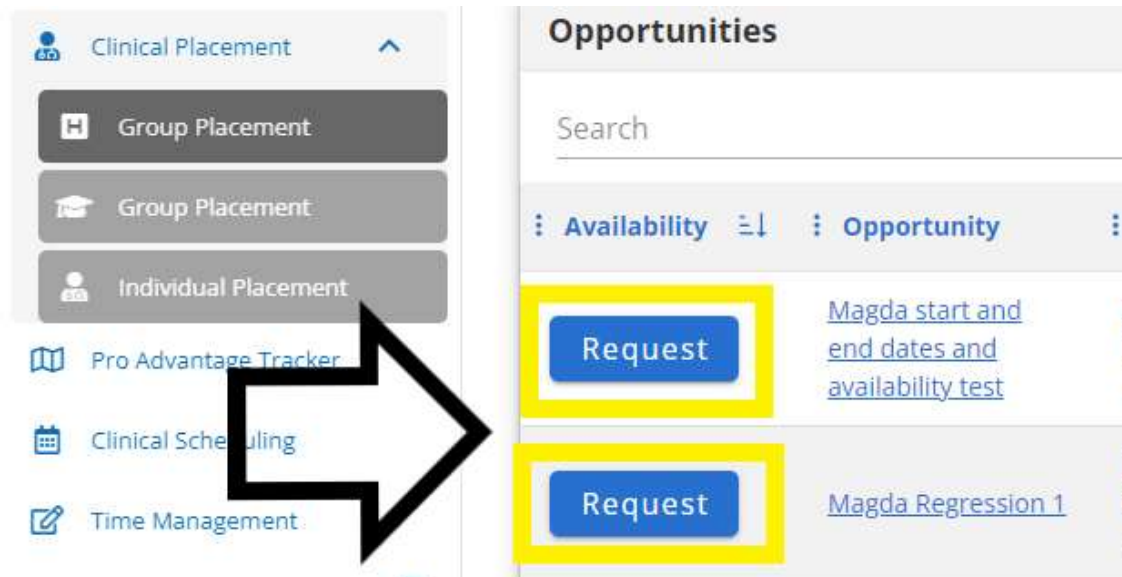
The **Opportunities** grid displays a list of all open opportunities.

*Please Note:* These opportunities are created by Bon Secours Mercy Health (BSMH) and indicate their availability for student clinical rotations by unit.

- To organize the list of opportunities, select the three vertical dots to the left of a column header and then select ‘group by...’.



- Select the appropriate “Request” button to create a new request. If there is a date listed in place of a “Request” button, this is to indicate when the opportunity will be available for submitting new requests.



- Provide the request details and enter the clinical rotation start and end dates.
- Select the specific days and times within the rotation start and end dates.

**IMPORTANT!** It is very important that the start date and end date of the Group Placement request is the actual date of the day the students are starting and ending at the facility.

**EXAMPLE:** If a Wednesday rotation, the start, and end date is to be the first and last Wednesday that group will be in the facility not just the date range.

**Please Note:** You can use the View Calendar option to view all available dates and times.

**Group Placement**

Request Opportunity

**Opportunity Details**

Facility: Google Zim LLC Guest Account - Google Zim LLC Guest Unit

Date Range: 05/01/2022 - 07/01/2022  
Days of the Week: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Time Range: 12:00 AM - 11:00 PM  
Number of Students: 10

**Request Information**

School: Google Zim University (Test Account) CCI

Course \*  
Select Course...

Program \*  
Select Program...

Term \*  
Select Term...

Number of Students:  
Select...

Instructor  
Select Instructor...

☐ Instructor Not in System

Comments

**View Calendar**



**Availability**

Start Date \* 05/01/2022 End Date \* 07/31/2022

**Days and Times**

Monday ☒ HH:MM AM To HH:MM AM

Tuesday ☐ HH:MM AM To HH:MM AM

Wednesday ☐ HH:MM AM To HH:MM AM

**Exceptions**

Choose Action  
Remove Day

Date

Add Exception

- Select “Request” to submit the request to the facility.

Request Cancel

**IMPORTANT!** Do not remove dates or add exceptions, if these dates are not available, please enter a request for only the available timeframe.

- The request will appear with a Pending status on the “Requests” tab.

Group Placement

Opportunities

Requests

Reservations

Calendar

Requests

Search

Start Date

Reservation Number

Status

Location

Unit

Students

Requested Hours per Student

113004

Pending

Guest Account

Hospital Unit

2

48

99176

Pending

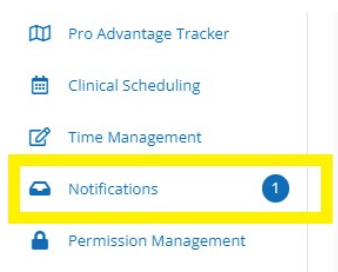
Guest Account

Hospital Unit

2

240

- When your request is reviewed by the facility and either **approved** or **declined**, you will receive a new notification in the “**Notifications**” section located in the left navigation.



- All **approved** or **declined** requests will appear under your “**Reservations**” tab.

Opportunities

Requests

Reservations

Calendar

Reservations

Search

🔍

Start Date

⌵

Reservation Number

⌵

Status

⌵

Location

⌵

Unit

⌵

Students

⌵

Reserved Hours per Student

112869

Reserved

Guest Account

Hospital Unit

4

198

110350

Reserved

Guest Account

Hospital Unit

2

2

- To view the details of your reservation, you can select anywhere on the Reservation’s column.
- An overlay window will appear on the right side of your screen, select “**Reservation Details.**”

### IMPORTANT!

- Clinical Placement requests will be approved however groups will not be allowed to enter the facility until **all clinical documentation** for the group has been completed in CB Pro Advantage Tracker.
- If your School no longer needs an accepted rotation, please cancel the request under the reservations tab.
- If an expected start date changes or the Group Placement Reservation needs to be changed to another unit at the same facility**
  - Cancel the Group Reservation
  - Create a new Group Reservation for correct dates and/or unit information.

**Group Placement**

Opportunities | Requests | **Reservations** | Calendar

**Reservations**

Reservation Number	Status	Location	Unit	Students	Reserved Hours per Student	School	Program	Course
112862	Reserved	Guest Account	Hospital Unit	4	198	University (Test Account) CCI	Nursing	NUR101
110350	Reserved	Guest Account	Hospital Unit	2	2	University (Test Account) CCI	Nursing	NUR102
110354	Reserved	Guest Account	Hospital Unit	2	8	University (Test Account) CCI	Nursing	NUR102
111195	Reserved	Guest Account	Hospital Unit	2	4	University (Test Account) CCI	Nursing	NUR102
112593	Reserved	Guest Account	Hospital Unit	2	30	University (Test Account) CCI	Nursing	NUR102

**Selection Details**

Start and end dates and availability test

Status: Reserved  
Response: [Redacted]  
School: [Redacted]  
Program: Nursing  
Course: NUR101  
Term: Fall  
Instructor: [Redacted]

**Reservation Information**

Location: [Redacted]  
Unit: [Redacted]  
Dates: Apr. 30th 2022 - Jun. 30th 2022  
Shift Times: 12:00 AM - 03:00 PM, 08:00 PM - 11:00 PM  
Days: Mon, Wed  
Students: 4  
Hours/Student: 198

**Group Experiences**

Create Group Experience  
**Reservation Details**

## b. INDIVIDUAL PLACEMENT

This module is used to request placement(s) for one-on-one students with a preceptor. Requests are approved with the understanding that all paperwork must be completed before students can enter the facility. In order for students to have computer access all documentation must be completed 2 weeks prior to start in Pro-Advantage Tracker.

## CREATING A PLAN

Plans are used to create a general guide for submitting multiple requests for the same group of students or course.

- Navigate to the “Plan” tab and select “Create Plan” on the far right to create a new plan.

**Individual Placement**

Preceptors | Requests | **Plans**

Filter

Group By: ☐ Course ☐ School ☐ Program

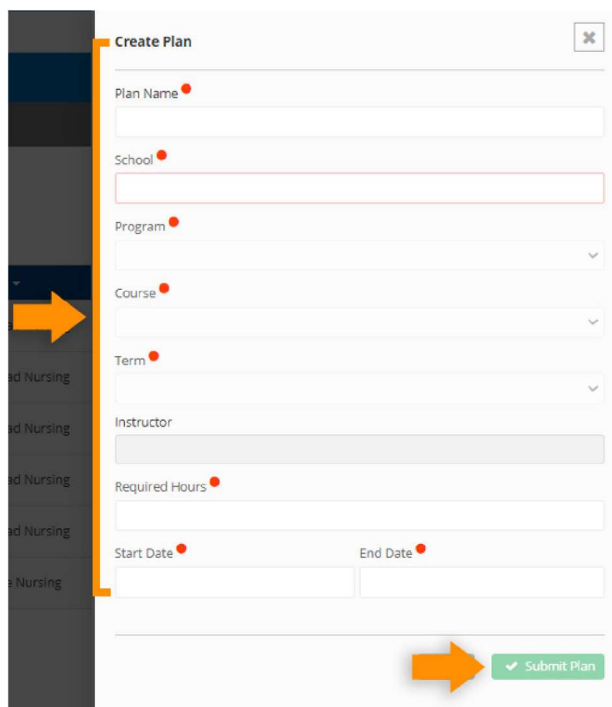
Plan name	School	Program	Term	
ADN Plan	CB Bridges DEMO school (EJH)	Undergrad Nursing	Summer	<a href="#">Edit</a> <a href="#">Delete</a>
BSN Plan	CB Bridges DEMO school (EJH)	Undergrad Nursing	Summer	<a href="#">Edit</a> <a href="#">Delete</a>
Nursing Plan	CB Bridges DEMO school (EJH)	Undergrad Nursing	Summer	<a href="#">Edit</a> <a href="#">Delete</a>

Create Plan

- An overlay window prompting you to fill out the details of your plan will appear on the right side of your screen.

*Please Note:* This will be used for multiple student requests, so it is best practice to set the date range to reflect the full length of the course. The required hours will be for each individual student, not the entire group. You can create as many plans as you wish and edit or delete them as needed.

- Select “[Submit Plan](#)” once you have confirmed the details.



## Searching and Requesting Preceptors

- The filters at the top of the page will narrow down the selection of preceptors.
- Each preceptor row represents the availability at a specific unit. If a preceptor is available at multiple units, a placeholder will be displayed in each unit respectively
- The preceptor details are added by Bon Secours Facility Coordinators.

Filters include:

FILTER TYPE	FILTER DESCRIPTION
Name	Name of the preceptor
Facility	Facility location of the available preceptor
Unit	Unit where the preceptor is available
Location	City and state of the preceptor's facility

- The Past Placements label represents the number of times that a preceptor has had an approved placement request within CB Bridges™.

Individual Placement



Preceptors

Requests

Plans

Create Request

Group By: ☐ Facility ☐ Unit

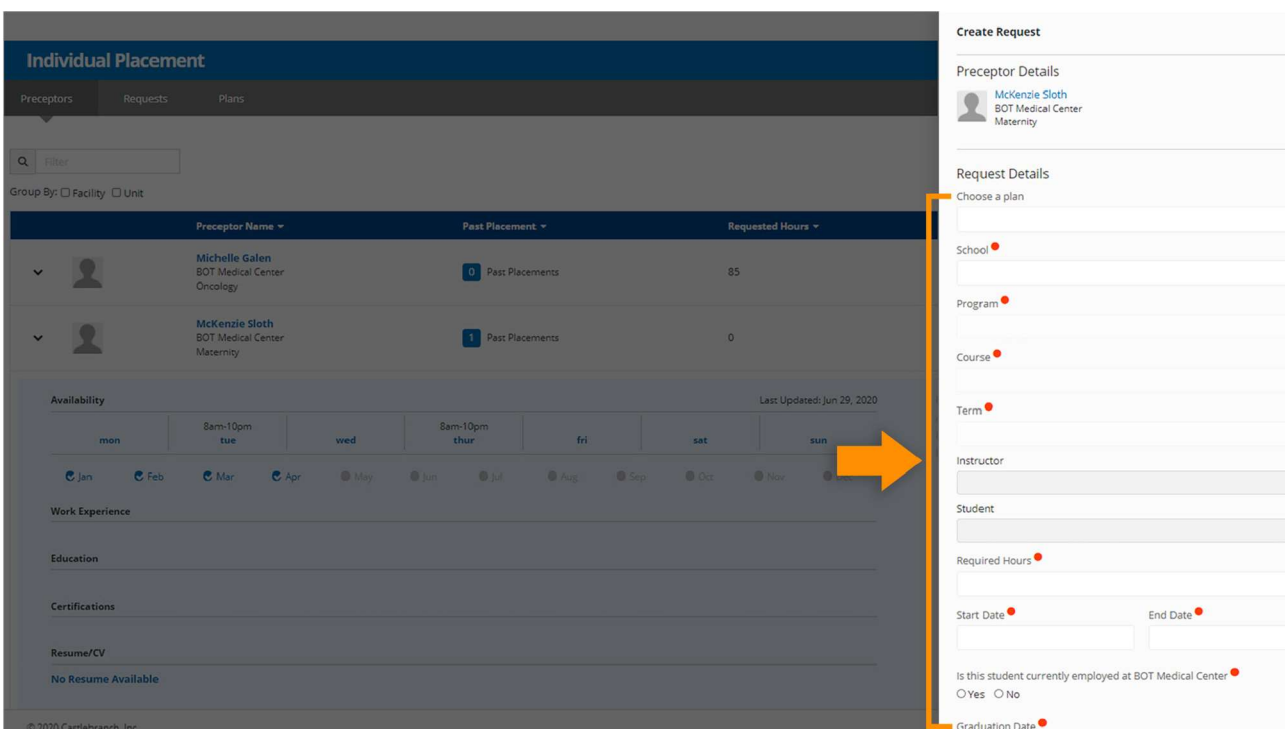
Preceptor Name	Past Placement	Requested Hours	Approved Hours	
<div>▼</div> <div>  <div>Michelle Galen BOT Medical Center Oncology</div> </div>	<div>0</div> <div>Past Placements</div>	85	0	<span>Submit Request</span>
<div>▼</div> <div>  <div>McKenzie Sloth BOT Medical Center Maternity</div> </div>	<div>1</div> <div>Past Placements</div>	0	0	<span>Submit Request</span>

- Once the user has chosen a preceptor placeholder for the unit and location they would like to request, the user can select “[Submit Request](#).” (If you do not know the shift timeframe (Day/Night) or prefer that the facility assign one, please enter a comment in the request to indicate this and submit the request with all other details provided.)

A request consists of:

FIELD	FIELD DESCRIPTION
School	School the student is attending
Program	Program the student is enrolled
Course	Course that the student needs the clinical/preceptor for
Term	Term or semester of the placement
Instructor	Faculty or instructor for designated course
Student	Student in which the request is for
Required Hours	Number of hours the student needs to complete with the Preceptor for that course
Start Date	Start of the clinical experience
End Date	End of the clinical experience
Is the student currently employed at the requested facility?	
Graduation Date (Mo/Yr)	Projected graduation date for the student
Comments	Open text to communicate with the preceptor or facility about the request

- An overlay window will appear to the right of your screen to initiate the request.



**Individual Placement**

Preceptors | Requests | Plans

Filter

Group By: ☐ Facility ☐ Unit

Preceptor Name	Past Placement	Requested Hours
Michelle Galen BOT Medical Center Oncology	0 Past Placements	85
McKenzie Sloth BOT Medical Center Maternity	1 Past Placements	0

**Availability** Last Updated: Jun 29, 2020

mon	tue	wed	thur	fri	sat	sun
Jan	Feb	Mar	Apr	May	Jun	Jul

**Work Experience**

**Education**

**Certifications**

**Resume/CV**  
No Resume Available

© 2020 Castlebranch, Inc.

**Create Request**

**Preceptor Details**

McKenzie Sloth  
BOT Medical Center  
Maternity

**Request Details**

Choose a plan

School

Program

Course

Term

Instructor

Student

Required Hours

Start Date

End Date

Is this student currently employed at BOT Medical Center  
☐ Yes ☐ No

Graduation Date

- When filling out the request information, you may either complete all sections manually or select your Plan to prefill most of these details.
- Once the request is submitted, BSMH Administrators, the requested preceptor, and their Facility Coordinator will have access to view the request. Prior to student being allowed in the facility, the student must complete all required documentation within [CB Pro Advantage Tracker](#). BSMH will routinely audit to ensure documentation is complete.

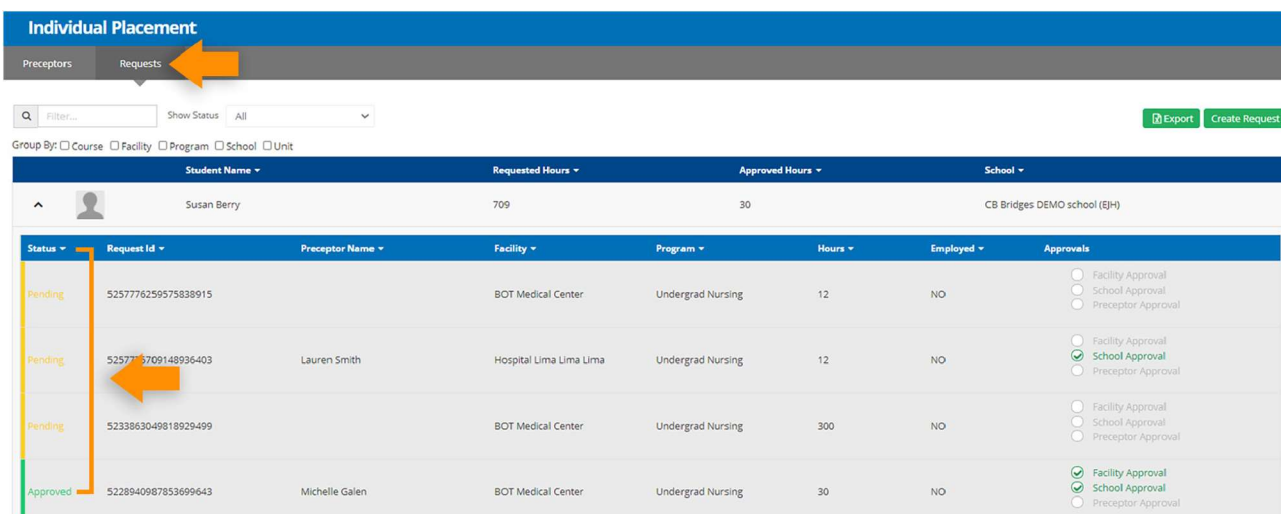
**IMPORTANT!** A request can be submitted without selecting a student — however, a student will need to be selected before the request can be approved.

- An [Individual Placement](#) request requires approval from one School Administrator and one BSMH Facility Coordinator. When the School Administrator submits the request, the school approval is automatic and only the Facility Administrator will need to take action.

Overall Statuses:

STATUS	STATUS DESCRIPTION
Pending	Either the School Administrator or the Facility Administrator has not approved the request.
Approved	The School Administrator and Facility Administrator have both approved the request.
Declined	Either the School Administrator or Facility Administrator has declined the request.
Canceled	The School Administrator cancels a request that had been automatically approved.

- To view request details, select a request under “Requests” tab.



**Individual Placement**

Preceptors Requests

Filter... Show Status All

Group By: ☐ Course ☐ Facility ☐ Program ☐ School ☐ Unit

Student Name	Requested Hours	Approved Hours	School
Susan Berry	709	30	CB Bridges DEMO school (EJH)

Status	Request Id	Preceptor Name	Facility	Program	Hours	Employed	Approvals
Pending	5257776259575838915		BOT Medical Center	Undergrad Nursing	12	NO	<input type="checkbox"/> Facility Approval <input type="checkbox"/> School Approval <input type="checkbox"/> Preceptor Approval
Pending	5257775769148936403	Lauren Smith	Hospital Lima Lima Lima	Undergrad Nursing	12	NO	<input type="checkbox"/> Facility Approval <input checked="" type="checkbox"/> School Approval <input type="checkbox"/> Preceptor Approval
Pending	5233863049818929499		BOT Medical Center	Undergrad Nursing	300	NO	<input type="checkbox"/> Facility Approval <input type="checkbox"/> School Approval <input type="checkbox"/> Preceptor Approval
Approved	5228940987853699643	Michelle Galen	BOT Medical Center	Undergrad Nursing	30	NO	<input checked="" type="checkbox"/> Facility Approval <input checked="" type="checkbox"/> School Approval <input type="checkbox"/> Preceptor Approval


- To display different views and groupings, the user can filter the requests by Facility, Unit, School, Program, and Course. The user can also filter by specific statuses: **Approved**, **Pending**, **School Approval**, **Pending Facility Approval**, **Pending Preceptor Approval**, or **Declined**. The search functionality allows the user to search for keywords within the request.

### Individual Placement

Preceptors
Requests
Plans

Show Status: All

Group By: ☐ Course ☐ Facility ☐ Program ☐ School ☐ Unit

	Student Name	Requested Hours
^ 	Susan Berry	709

Within the request, the **Facility Coordinator** can:

- View the details of the request
- Cancel the request (if the school has approved the request)
- Decline the request
- Send a message related to the request
- View a Clinical Experience created off of request
- View Individual Experiences created off of request

*Please Note:* Messages added to a request are visible to everyone associated with school or BSMH.


Preceptors

Requests

Plans

Show Status: All

Group By: ☐ Course ☐ Facility ☐ Program ☐ School ☐ Unit

	Student Name	Requested Hours
^ 	Susan Berry	709

Status	Request ID	Preceptor Name	Facility	Program
Pending	5257776239575838915		BOT Medical Center	Undergrad Nursing
Pending	5257775709148936403	Lauren Smith	Hospital Lima Lima Lima	Undergrad Nursing
Pending	5233863049818929499		BOT Medical Center	Undergrad Nursing
Approved	522894098753699643	Michelle Galen	BOT Medical Center	Undergrad Nursing
Pending	5228791578230782179		Hospital Lima Lima Lima	Undergrad Nursing
Pending	5198894084671502523		BOT Medical Center	Undergrad Nursing
Pending	5198325001534568483		Hospital Lima Lima Lima	Undergrad Nursing
Declined	522879332858938659	Michelle Galen	BOT Medical Center	Undergrad Nursing

Request ID: 5257776239575838915

Preceptor Details

Student Details

Request Details

Messages

Individual Experiences

Message

Name:

Facility:

Susan Berry

BOT Medical Center

Name:

School:

Program:

Course:

Term:

Instructor:

Start Date:

End Date:

Graduation Date:

Current Employee of BOT Medical Center:

Susan Berry

CB Bridges DEMO school (E

Undergrad Nursing

NURS 123

Summer

CB\_Senup\_BS26 Instructor

2020-06-26

2020-08-12

N/A

No

ID:

Location:

Unit:

Requested By:

Requested Date:

Updated By:

Last Updated:

5257776239575838915

BOT Medical Center

Observation

CB\_Senup\_BS26 Admin

Jun 26, 2020

CB\_Senup\_BS26 Admin

Jun 26, 2020

Approvals:

☐ Facility Approval
☐ School Approval
☐ Preceptor Approval

Submit Request

Edit Request

There are no individual experiences for this request.

Message

Submit Message Only

Cancel Request

Decline Request

21



## 2. CB PRO ADVANTAGE TRACKER

CB Pro Advantage Tracker is used to provide necessary clinical documentation for students and faculty, via clinical experiences, that is needed for clinical rotations at Bon Secours Mercy Health. Students will not be allowed to enter the facility until all clinical documentation for the group has been completed in CB Pro Advantage Tracker and verified by the Clinical Coordinator or Instructor.

### IMPORTANT!

- Clinical groups must be created off an approved placement reservation, NOT under the My Bridges tab. Any clinical groups not created off the reservation will require a new group to be created, and documentation to be completed again by students.
- Individual requests will be approved however the students will not be allowed to enter the facility until all clinical documentation for the group has been completed in CB Pro Advantage Tracker.

## CREATING A CLINICAL EXPERIENCE OFF OF A GROUP RESERVATION

**IMPORTANT!** Reservation must be approved before you can complete these steps (See above note)

- Your reservation is approved, now, its time to create your **Group or Individual Experience** off the reservation.
- **Group Placement:** Under the placement tab find your approved reservation
  - Click anywhere on the **Reservation Row**, which will cause a flyout window to populate on the right-hand side of your screen.

### Group Placement

- Opportunities
- Requests
- Reservations
- Calendar

#### Reservations

Reservation Number	Status	Location	Unit	Students	Reserved Hours per Student	School	Program	Course	Instructor
<a href="#">119289</a>	Reserved	BOT Medical Center	Cardiac	4	32	CB Bridges DEMO school (BOT TEAM)	Post Masters	Biology 2	CB, Inst
<a href="#">109405</a>	Reserved	BOT Medical Center	OR	5	3	CB Bridges DEMO school (BOT TEAM)	Graduate Nursing	Biology 2	
<a href="#">99240</a>	Reserved	BOT Medical Center	(BC)	2	39	CB Bridges DEMO school (BOT TEAM)	Graduate Nursing	NURS 500	Mar
<a href="#">103134</a>	Reserved	BOT Medical Center	ICU	3	210.5	CB Bridges DEMO school (BOT TEAM)	Radiology	Maternity	
<a href="#">117931</a>	Reserved	Bridges Medical Center	ED	3	28	CB Bridges DEMO school (BOT TEAM)	Post Masters	Biology 2	Erin

#### MSU Fall 2022

Status: Reserved  
 School: CB Bridges DEMO school (BOT TEAM)  
 Program: Post Masters  
 Course: Biology 2  
 Term: Fall  
 Instructor: CB\_Setup\_BS26 Instructor

#### Reservation Information

Location: BOT Medical Center  
 Unit: Cardiac  
 Dates: Sep, 5th 2022 - Sep, 30th 2022  
 Shift Times: 01:00 AM - 09:00 AM  
 Days: Mon  
 Students: 4  
 Hours/Student: 32

#### Group Experiences

Biology 2 Fall 119289 2022

[Create Group Experience](#)  
[Reservation Details](#)

- Click **Create Group Experience**. ( If an Individual Placement request, Click **Create Individual Experience**)

The screenshot shows the CB Bridges interface. On the left is a table with columns: Student, School, Program, Course, and Instructor. The table lists several reservations for 'CB Bridges DEMO school (BOT TEAM)' with programs like Post Masters, Graduate Nursing, and Radiology. On the right is a 'Selection Details' sidebar. It contains sections for 'MSU Fall 2022' (Status: Reserved, School: CB Bridges DEMO school (BOT TEAM), Program: Post Masters, Course: Biology 2, Term: Fall, Instructor: CB\_Setup\_BS26 Instructor), 'Reservation Information' (Location: BOT Medical Center, Unit: Cardiac, Dates: Sep, 5th 2022 - Sep, 30th 2022, Shift Times: 01:00 AM - 09:00 AM, Days: Mon, Students: 4, Hours/Student: 32), and 'Group Experiences' (Biology 2 Fall 119289 2022). Below the 'Group Experiences' section, the 'Create Group Experience' button is highlighted with an orange box, and the 'Reservation Details' button is below it.

- Your group experience will then autogenerate above the **Create Group Experience** button.
- Next, you will need to click on the Auto Generated Group Experience Name which includes your reservation number. This will redirect you to the Group Details.

This screenshot shows a close-up of the 'Reservation Information' and 'Group Experiences' sections. The 'Reservation Information' section lists: Location: BOT Medical Center, Unit: Cardiac, Dates: Sep, 5th 2022 - Sep, 30th 2022, Shift Times: 01:00 AM - 09:00 AM, Days: Mon, Students: 4, Hours/Student: 32. The 'Group Experiences' section shows 'Biology 2 Fall 119289 2022'. Below this, the 'Create Group Experience' button is highlighted with an orange arrow, and the 'Reservation Details' button is below it.

## a. CREATING A CLINICAL EXPERIENCE OFF OF AN INDIVIDUAL RESERVATION

**IMPORTANT!** Reservation must be approved before you can complete these steps (See note)

- **Individual Placement:** Under the requests tab click on your student name
- Click anywhere on the approved reservation, which will cause a flyout window to populate on the right-hand side of your screen.
- **Click Create Experience** on the bottom right of this window

The screenshot shows a table of reservations on the left and a flyout window on the right. An orange arrow points to the row for 'NP Preceptor & Lisa Name' in the table. The flyout window contains the following sections:

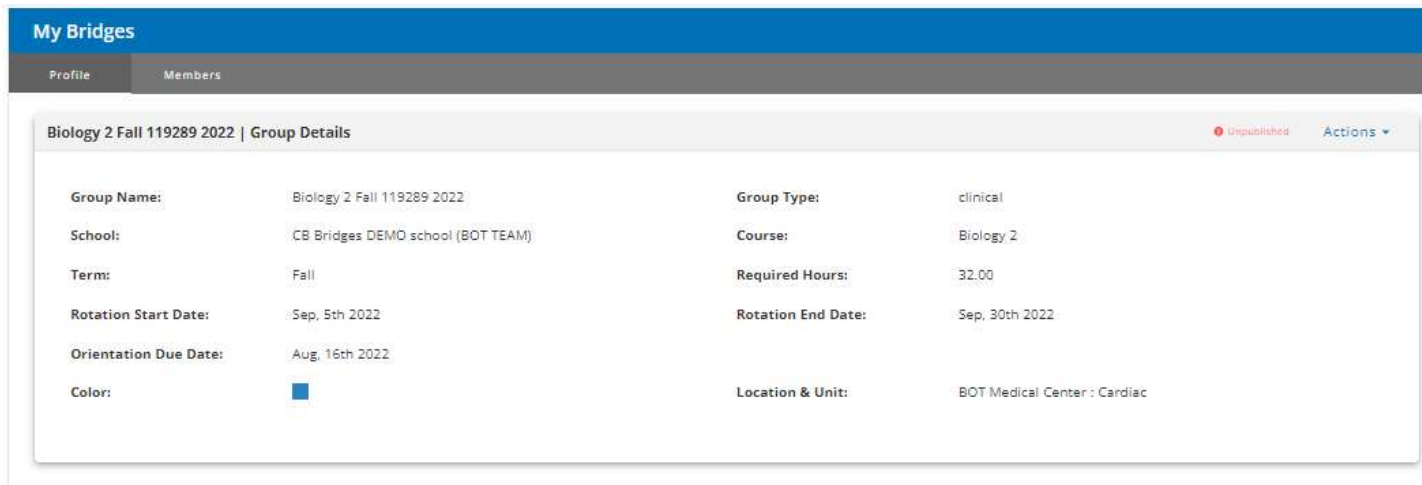
- Preceptor Details:** Name: NP Preceptor & Lisa Name, Facility: Cincinnati - Playground Account.
- Student Details:** Name: Aunt Bee, School: Bon Secours Mercy Health, Program: Demo Program, Course: Demo Course, Term: Fall, Instructor: N/A, Start Date: 2023-08-29, End Date: 2023-10-26, Reservation Date: May 2023, Current Assignments of Cincinnati - Playground Account.
- Request Details:** ID: 4466268182977444171, Location: Cincinnati - Playground Account, Unit: Advanced Practice Students, Requested By: Bon Secours DEMO Clinical Coordinator, Requested Date: Jan, 20th 2023, Updated By: Bon Secours Cincinnati Facility Coordinator, Last Updated: Jan, 20th 2023, Approved: This request requires additional approval. Status: Facility Approval (checked), School Approval (unchecked), Principal Approval (unchecked). There is a blue 'Edit Request' button.
- Individual Experiences:** There are no individual experiences for this request.
- Message:** A text area for sending a message.
- Buttons:** 'Submit Message Only' (blue), 'Cancel Request' (red), and 'Create Experience' (orange, highlighted with a red box).

- Next, you will need to click on the Auto Generated Individual Experience Name which includes your reservation number. This will redirect you to the Group Details.

The screenshot shows the 'Individual Experiences' section. An orange box highlights the auto-generated name: 'Aunt Bee Demo Course Fall 4466268182977444171 - 1689196484'. Below this is a 'Message' section with a large text area for sending a message. At the bottom, there are three buttons: 'Submit Message Only' (blue), 'Cancel Request' (red), and 'Create Experience' (grey).

## EDITING YOUR EXPERIENCE ( GROUP OR INDIVIDUAL )


- The View below is of the **My Bridges, Group Details** view once you have clicked on the experience name.



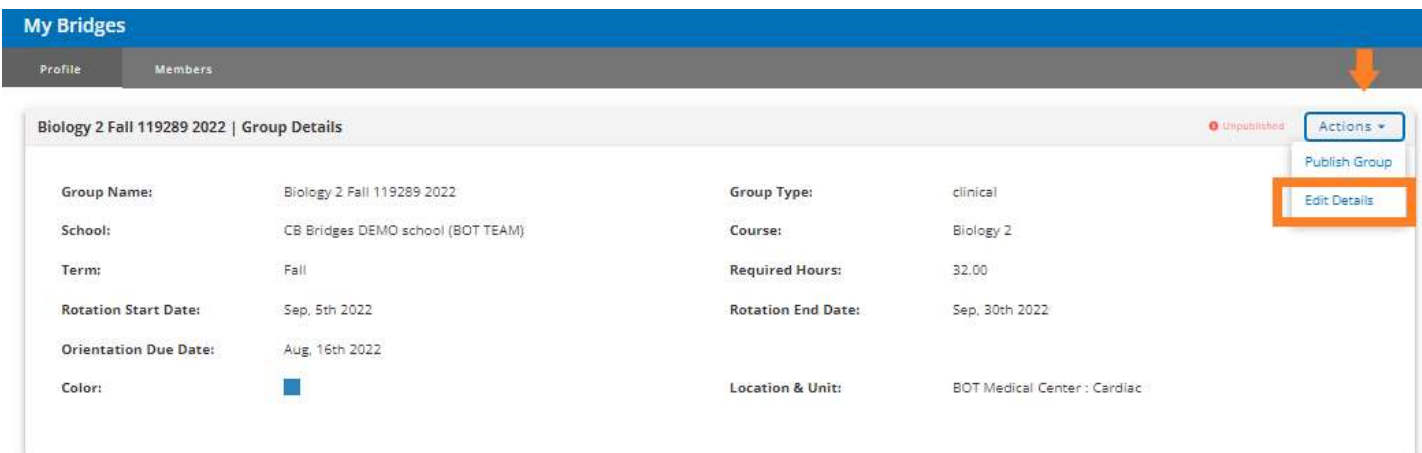
**My Bridges**

Profile Members

Biology 2 Fall 119289 2022 | Group Details Unpublished Actions

Group Name:	Biology 2 Fall 119289 2022	Group Type:	clinical
School:	CB Bridges DEMO school (BOT TEAM)	Course:	Biology 2
Term:	Fall	Required Hours:	32.00
Rotation Start Date:	Sep, 5th 2022	Rotation End Date:	Sep, 30th 2022
Orientation Due Date:	Aug, 16th 2022		
Color:		Location & Unit:	BOT Medical Center : Cardiac


- You can now **edit** the **Group Name** by clicking **Actions, Edit Details**.



**My Bridges**

Profile Members

Biology 2 Fall 119289 2022 | Group Details Unpublished Actions

Group Name:	Biology 2 Fall 119289 2022	Group Type:	clinical
School:	CB Bridges DEMO school (BOT TEAM)	Course:	Biology 2
Term:	Fall	Required Hours:	32.00
Rotation Start Date:	Sep, 5th 2022	Rotation End Date:	Sep, 30th 2022
Orientation Due Date:	Aug, 16th 2022		
Color:		Location & Unit:	BOT Medical Center : Cardiac

Actions

Publish Group

Edit Details

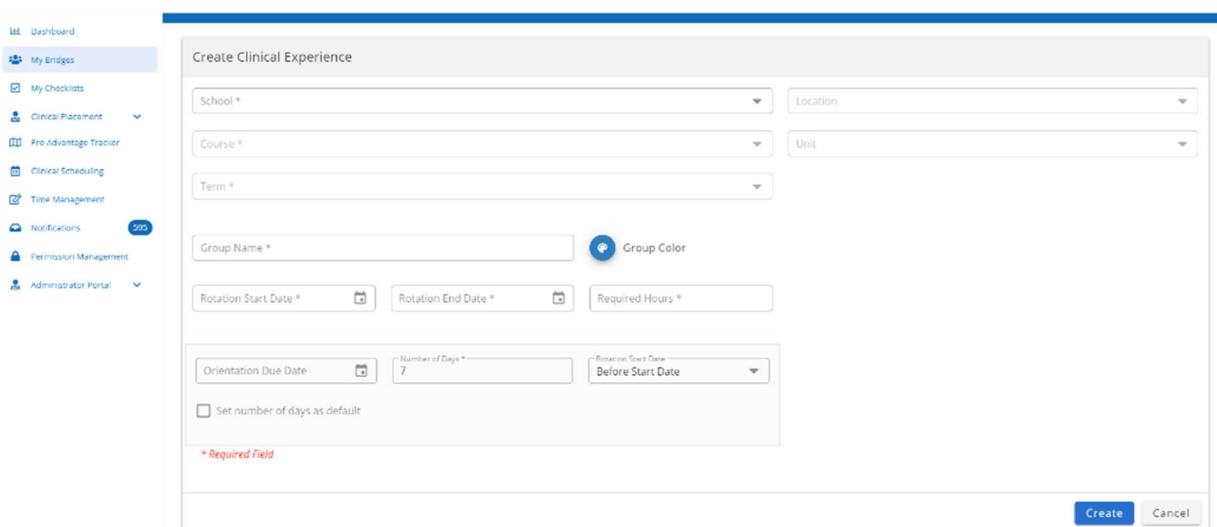
- Once you have entered your changes, click **Save**. Make sure to then add your members ( Students, Instructors and Facility Contacts) and publish when you are ready!

### IMPORTANT!

**Naming Convention for BSMH Group Experiences:** Reservation Number + School Name Abbreviation + Facility Abbreviation (See Appendix A) + Unit

**EXAMPLE:** 23453 BSMCON SMH 2N

- An Experience Color may also be selected at this time. The group color displays only on the [Clinical Scheduling](#) calendar in order to better organize and display multiple experience shifts.
- Apply a date range for the Clinical Rotation at the BSMH location by filling in the Rotation Start Date and Rotation End Date.
- Set the Orientation Due Date to 2 weeks prior to rotation start date.
- Select “Create.”

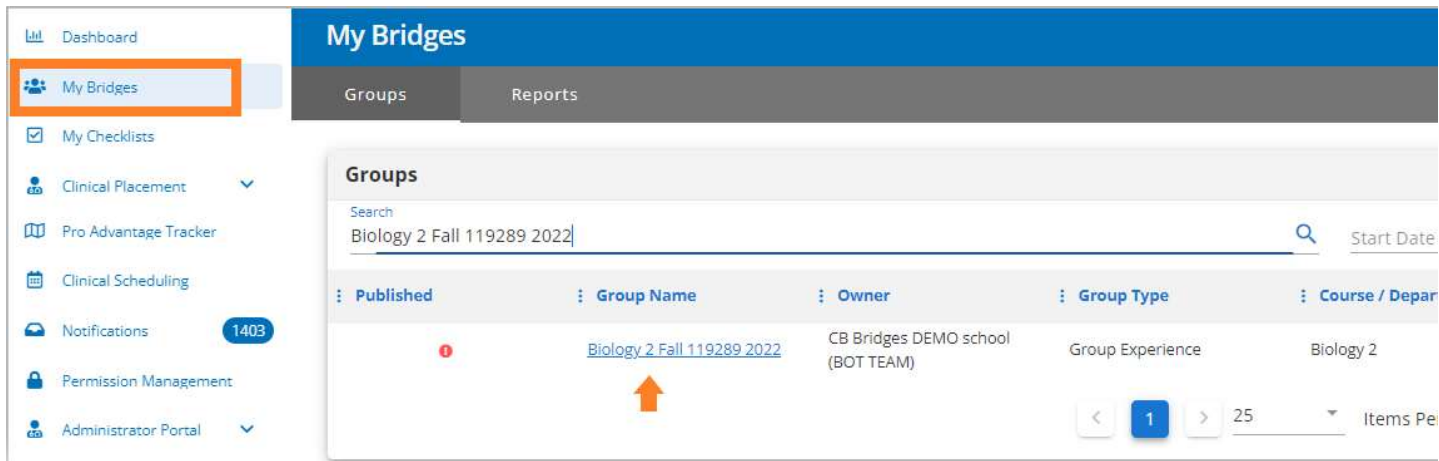


- The screen will refresh with a view of the unpublished Group Experience. Experience details may be edited from the Actions tab on the Experience Detail page and members can be added to and removed from experiences as necessary until the group is finalized.
- **Once your Group Experience is published you can only edit the Group Name, Group Color and Required Hours.**

**IMPORTANT!** If you are creating your first group experience, your **Actions** button will not appear under your My Bridges module. You will need to complete the FCRA Requirement located in the **My Checklist** tab. Once the FCRA Requirement is completed, the **Actions** button will appear.

- The FCRA Requirement is required every 90 days. In between that time, you can create as many group experiences as needed.
- Please see separate guide attached in email, which includes the steps on how to complete the FCRA Requirement.

**Quick Tip:** If you accidentally exit the view above, you can locate the experience by accessing your **My Bridges** tab and using the **Group Name** search function. Just click **on** the experience name, which will bring you to the **Experience Details**.




**My Bridges**

Groups Reports

**Groups**

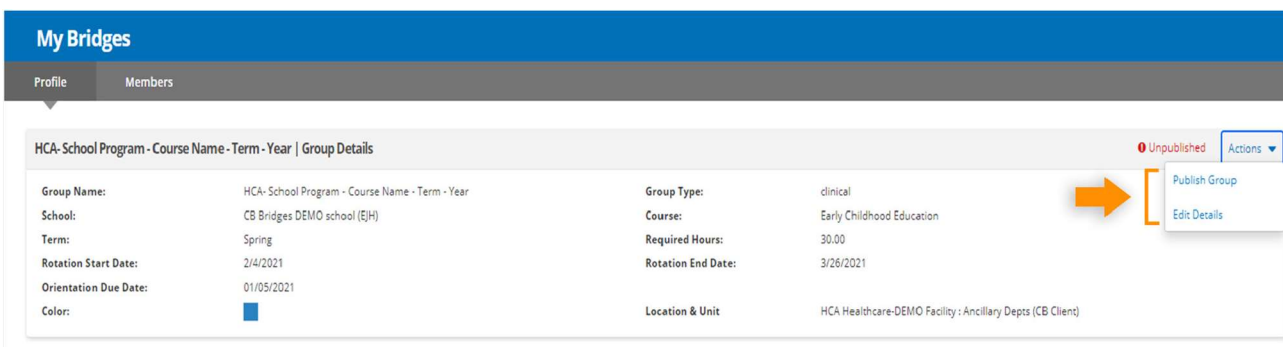
Search:  Start Date

Published	Group Name	Owner	Group Type	Course / Department
	<a href="#">Biology 2 Fall 119289 2022</a>	CB Bridges DEMO school (BOT TEAM)	Group Experience	Biology 2

1 25 Items Per Page

## IMPORTANT!

You MUST add the BSMH Facility Coordinators (appendix B) for the site of the clinical rotation to the experience for them to view details of each experience.




**My Bridges**

Profile Members

HCA- School Program - Course Name - Term - Year | Group Details

Unpublished Actions

<b>Group Name:</b>	HCA- School Program - Course Name - Term - Year	<b>Group Type:</b>	clinical
<b>School:</b>	CB Bridges DEMO school (EJH)	<b>Course:</b>	Early Childhood Education
<b>Term:</b>	Spring	<b>Required Hours:</b>	30.00
<b>Rotation Start Date:</b>	2/4/2021	<b>Rotation End Date:</b>	3/26/2021
<b>Orientation Due Date:</b>	01/05/2021		
<b>Color:</b>		<b>Location &amp; Unit:</b>	HCA Healthcare-DEMO Facility : Ancillary Depts (CB Client)

**Actions:** Publish Group, Edit Details

## B. ADDING MEMBER TO AN EXPERIENCE

- Before Adding a Member to or Publishing an Experience, the Experience creator must first read and agree to the latest version of the Fair Credit Reporting Act (FCRA) every 90 days.
- To do so, select “My Checklists” from the left navigation and follow the instructions on the FCRA Agreement card.

## IMPORTANT!

No further action may be taken on Experiences until this FCRA checklist item has been completed.

### My Checklists

Actions Needed | All Items

MEMBERSHIP

**FCRA Consent**

Effective Date: 11/24/2020  
Due: 11/24/2020  
Status: ❗ Incomplete

<b>Name:</b>	CB_Setup_BT02 Student2
<b>Group:</b>	Demo Test
<b>School / Organization:</b>	CB Training College - Meagan
<b>Site:</b>	Berkeley Medical Center - Emergency Department
You must consent to the latest version of the Fair Credit Reporting Act (FCRA).	
<b>Instructions:</b>	Read and consent to this document, then sign your name in the space provided.

Open
Item History

- To add a member, select “My Bridges” in the left navigation and select the Experience from the list.

- Dashboard
- My Bridges**
- My Checklists
- Clinical Placement
- Pro Advantage Tracker
- Clinical Scheduling
- Notifications
- Library
- Permission Management
- Administrator Portal

### My Bridges

Groups | Reports

Drag a column header and drop it here to group by that column

Published	Group Name	Owner	Group Type	Course / Department
<span style="color: red;">❗</span>	<a href="#">HCA - School Program - Course Name - Term - Year</a>	CB Bridges DEMO school (EJH)	Group Experience	Early Childhood Education
<span style="color: green;">✔</span>	<a href="#">COVID INTERNAL: BSN Students: Spring 2021</a>	CB Bridges DEMO school (EJH)	Group Experience	COVID-19 Compliance
<span style="color: green;">✔</span>	<a href="#">CB Bridges DEMO school (EJH) Roster</a>	CB Bridges DEMO school (EJH)	Organization	

- Select the “Members” tab to view a membership grid for this Clinical Experience.

### My Bridges

Profile | **Members**

HCA - School Program - Course Name - Term - Year | Members

Drag a column header and drop it here to group by that column

Name	Organization	Role	Membership Status
Pam Rhodes	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Michelle Kraft	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Tracy Harrell	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Sharon Brooks	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Tim Sloth	CB Bridges DEMO school (EJH)	Clinical Coordinator	Accepted

- Select “Manage Members” from the Actions dropdown menu.



**My Bridges**

Profile Members

HCA-School Program - Course Name - Term - Year | Members

Drag a column header and drop it here to group by that column

Name	Organization	Role	Membership Status
Pam Rhodes	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Michelle Kraft	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Tracy Harrell	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Sharon Brooks	HCA Healthcare-DEMO Facility	Facility Coordinator	Invited
Tim Sloth	CB Bridges DEMO school (EJH)	Clinical Coordinator	Accepted

Actions

- Manage Members
- Export to Excel
- Export to PDF

- A screen titled **Member Management** will appear.
- You will see a list of individuals you can add to your Clinical Experience on the left and a list of individuals that are currently part of your Clinical Experience on the right. Both lists can be searched using an individual's first or last name.

**Member Management for HCA-School Program - Course Name - Term - Year**

Available Members

Search...

Berry, Susan

ADD

REMOVE

Role: Student

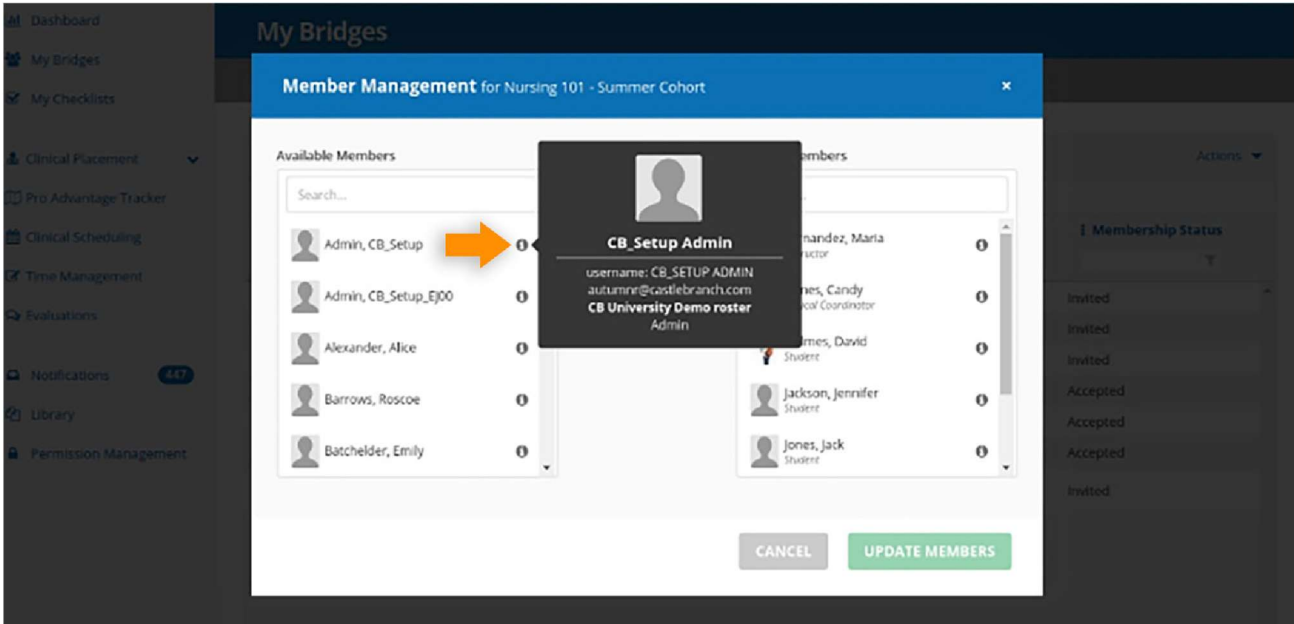
Current Members

Search...

- Student
- Brooks, Sharon  
Facility Coordinator
- Harrell, Tracy  
Facility Coordinator
- Kraft, Michelle  
Facility Coordinator
- Rhodes, Pam  
Facility Coordinator
- Sloth, Tim  
Clinical Coordinator

- To see additional information about a single member, hover over the “info icon (i)” next to their name.

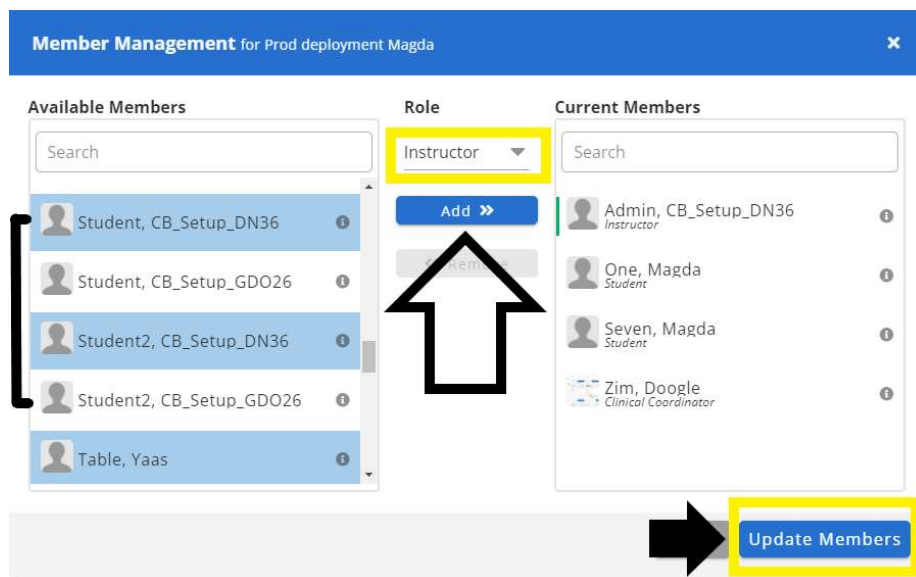




- Multi-select your students, choose the Role of Student, and select “[Add](#).” The student names will now appear under the Current Members column.
- You will need to repeat the above steps to add your BSMH Facility Coordinators, Instructors, and Clinical Coordinators.

### IMPORTANT!

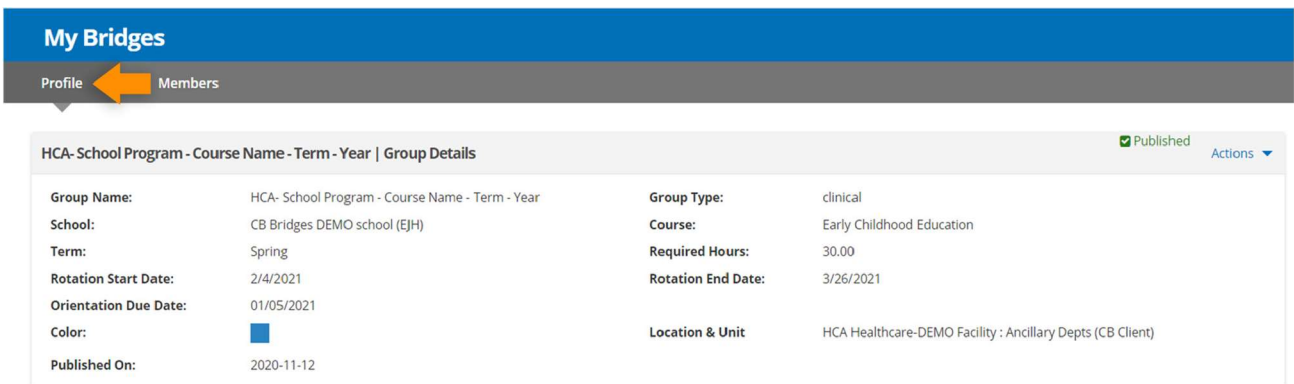
- You MUST add all necessary members to the Group Experience INCLUDING the Facility Coordinator (appendix B) for the Hospital Site for those members to have access to see these details.
- Once you have finished adding all members to the group, select “[Update Members](#).” Members will be added to the experience with their assigned roles.




- Clinical Experiences should contain an instructor and can contain multiple instructors. Unlike Clinical Coordinators, instructors and students **will need to place an order** to have functionality in [CB Bridges™](#).
- Any students attending clinicals should be added to the Experience.
- By default, the creator of the Experience is added to the group with the role of Clinical Coordinator. Additional Clinical Coordinators may be added as well to be able to view the details within the group. An experience must always have at least one assigned Clinical Coordinator.
- When all members have been added to an Experience, select “[Publish](#)” from the Actions menu on the experience Profile page. An unpublished experience will only be visible to Organizational Administrators and will not generate any action items for members. Once an Experience is published, it becomes visible to all members and any checklist items or other administrator actions such as the ability to schedule an experience become available.
- You will need to navigate to the Profile tab, which will take you back to the Group Experience detail page.

## IMPORTANT!


Now that all students, instructors, Clinical Coordinators, and Facility Coordinators who are involved with this particular BSMH clinical rotation have been added, the Group Experience can now be **published**.



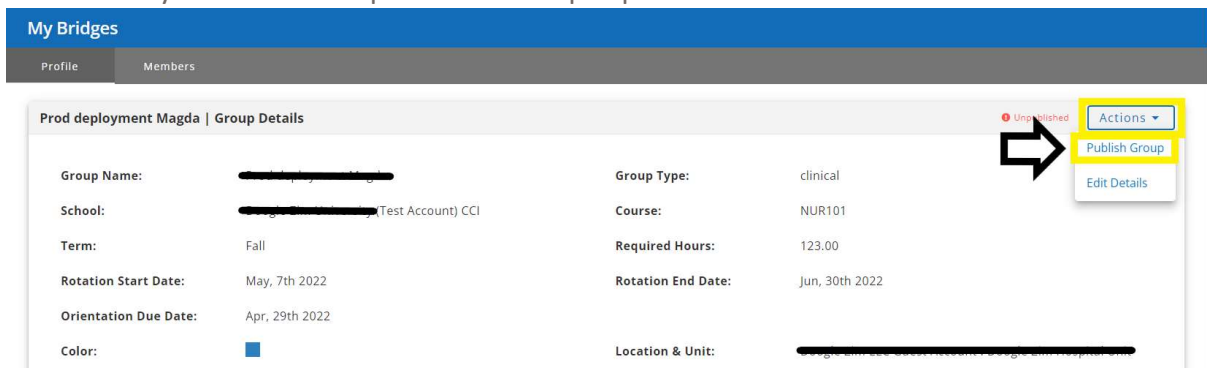
**My Bridges**

Profile  Members

HCA- School Program - Course Name - Term - Year | Group Details Published Actions

<b>Group Name:</b>	HCA- School Program - Course Name - Term - Year	<b>Group Type:</b>	clinical
<b>School:</b>	CB Bridges DEMO school (EJH)	<b>Course:</b>	Early Childhood Education
<b>Term:</b>	Spring	<b>Required Hours:</b>	30.00
<b>Rotation Start Date:</b>	2/4/2021	<b>Rotation End Date:</b>	3/26/2021
<b>Orientation Due Date:</b>	01/05/2021		
<b>Color:</b>		<b>Location &amp; Unit:</b>	HCA Healthcare-DEMO Facility : Ancillary Depts (CB Client)
<b>Published On:</b>	2020-11-12		


- Select Actions, then select “**Publish Group.**”
- A message will appear in a green banner saying the following: “*Success: Group publish in progress. You will receive a Notification when publishing is complete.*”
- You can refresh your screen to update the Group Experience status to Published.




**My Bridges**

Profile Members

Prod deployment Magda | Group Details Unpublished Actions

<b>Group Name:</b>	Prod deployment Magda	<b>Group Type:</b>	clinical
<b>School:</b>	Prod deployment Magda (Test Account) CCI	<b>Course:</b>	NUR101
<b>Term:</b>	Fall	<b>Required Hours:</b>	123.00
<b>Rotation Start Date:</b>	May, 7th 2022	<b>Rotation End Date:</b>	Jun, 30th 2022
<b>Orientation Due Date:</b>	Apr, 29th 2022		
<b>Color:</b>		<b>Location &amp; Unit:</b>	Prod deployment Magda (Test Account) CCI



- When a Group Experience is published, the Members are sent an email notification stating that their checklist has been added. This prompts the individuals to access their **CB Bridges™** account and begin completion of the site-specific requirements.
- BSMH Facility Coordinators will be able to log into their **CB Bridges™** account and monitor the progress of students completing the site-specific documents, as well as view the information once all students have completed the site-specific documents. The primary responsibility for ensuring documentation is completed remains with the academic partner.

### c. PRO-ADVANTAGE TRACKER- REVIEWING DOCUMENTS:

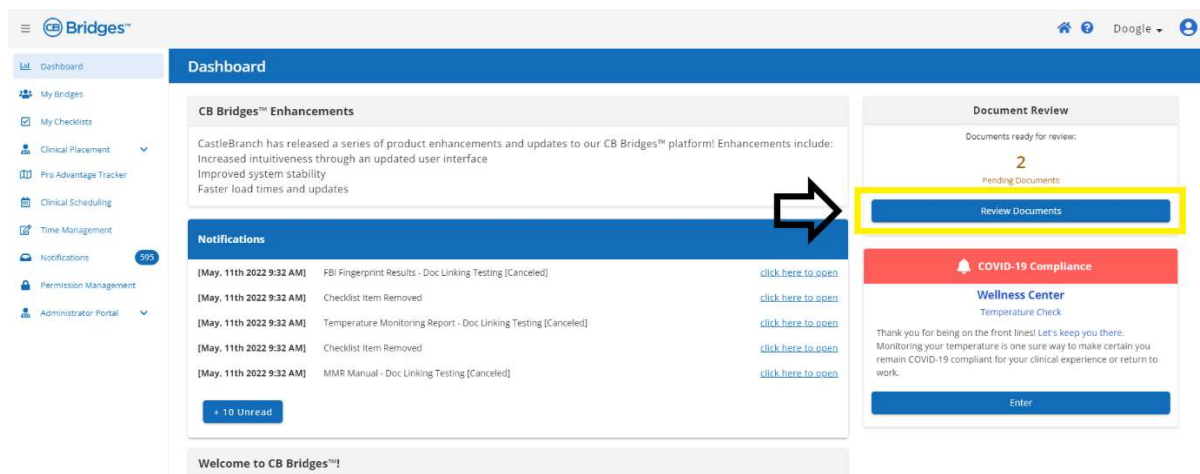
Most checklist items require the school administrators to review student documents within this module. You can choose to add CastleBranch review services at an additional cost to your student packages if you wish.

- A Clinical Coordinator **cannot** review their own submissions, only those submitted by the students and instructors
- An instructor role **cannot** review their own submissions or those of the Clinical Coordinator, only those submitted by the students.

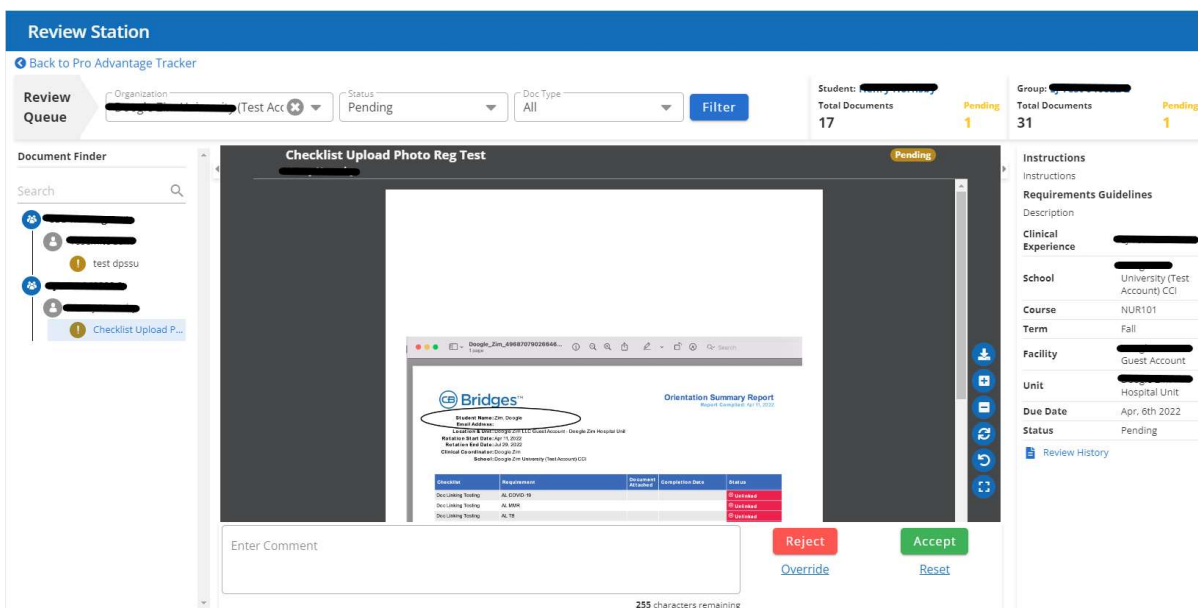
There are **two ways to review** in this module, from the dashboard screen or in Pro-Advantage tracker:

#### Option #1: From your Dashboard Screen

- On the far right of your dashboard screen you will see a box labeled “Document Review.”
- Click on “Review Documents” to access the review station

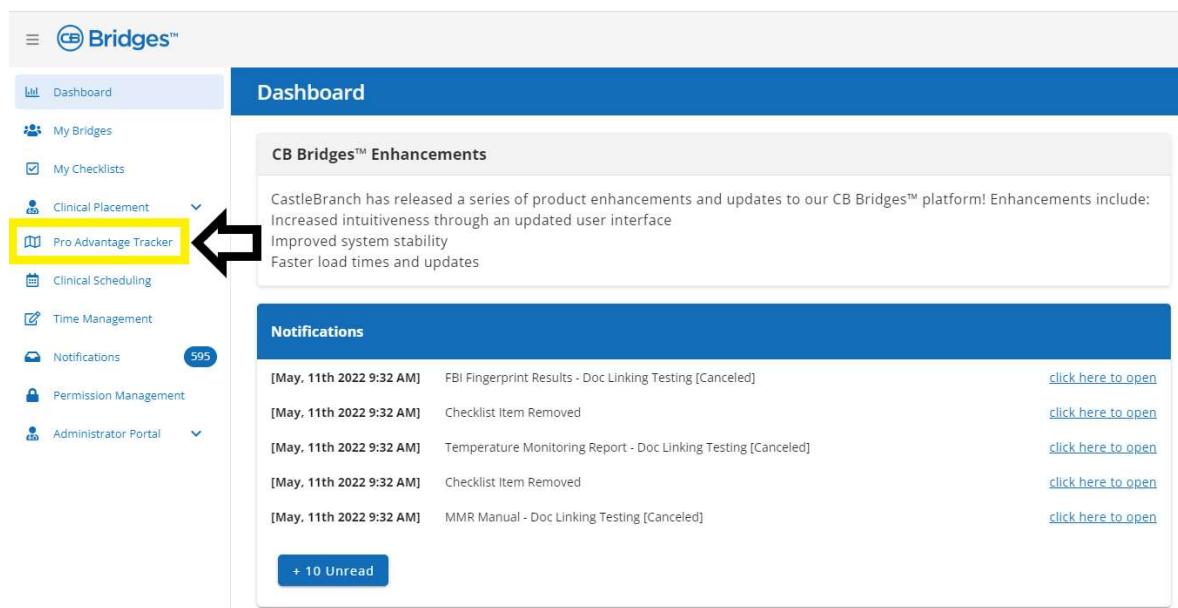


- The Review Station will show all pending documents regardless of the group experience for you to review all at once. As you see below, a copy of the document will be visible along with the facility guidelines to the right to assure you know exactly what is to be approved.

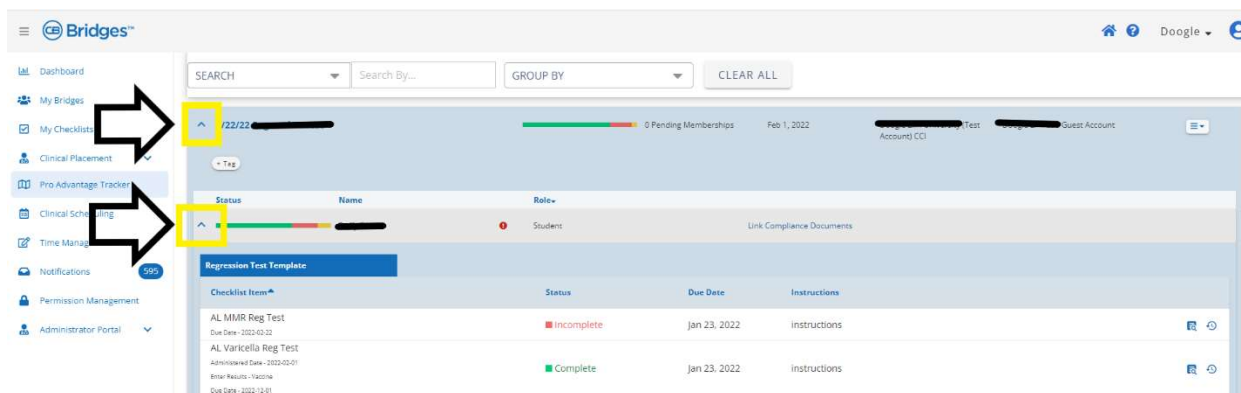


## Option #2: From Pro-Advantage Tracker module

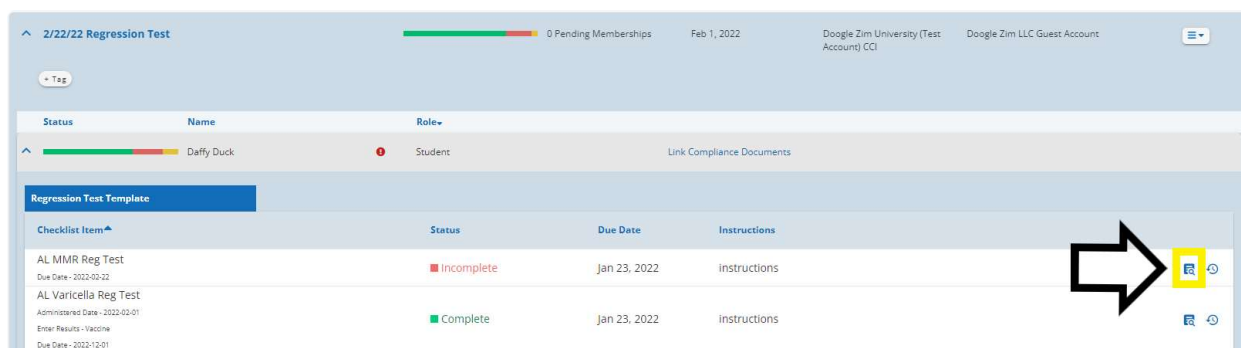
- Click on the Pro-Advantage Tracker module



- Click anywhere in the **clinical experience name column** to expand to view members of the experience.
- Click on a **member's name** to expand into further details of each checklist item associated with this facility location.



- Click the **Blue file with the Eyeglass** button next to each requirement to view an attached document, view the item history or to review or reset the requirement.

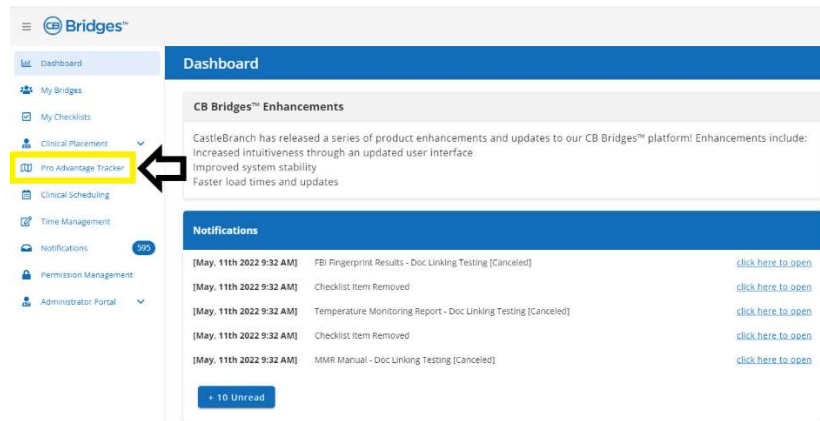


- You are now led to the Review Station where a copy of the document will be visible along with the facility guidelines to the right to assure you know exactly what is to be approved.

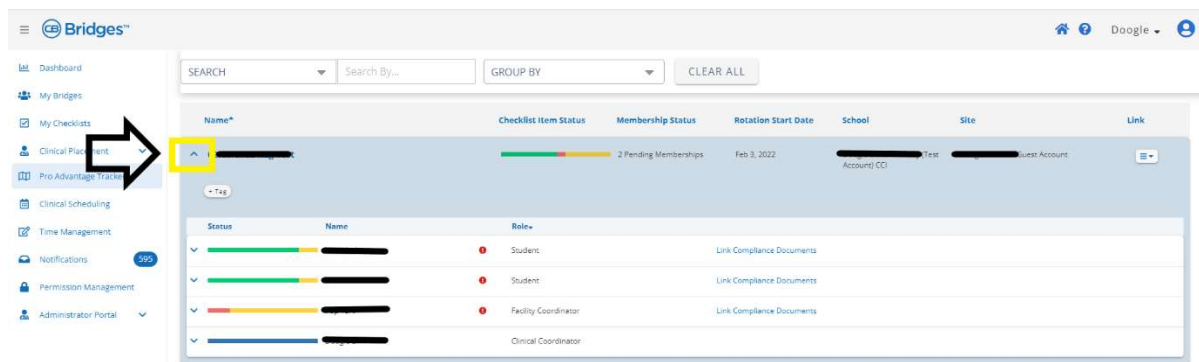
<b>Accept</b>	The document meets the guidelines provided by the facility
<b>Reject</b>	The document is missing information, illegible and/or does not meet facility guidelines
<b>Reset</b>	If the student submitted an incorrect document and needs to resubmit
<b>Override</b>	If the document is no longer required but needs to be marked complete

## d. CREATING SUMMARY REPORTS

- Select the “CB Pro Advantage Tracker” module in the left navigation.

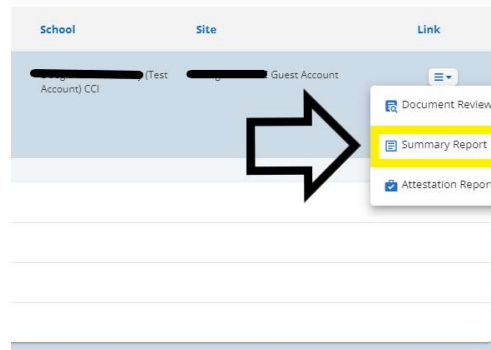


- Locate the Group Experience you wish to pull a report on and select the status bar to expand the details.



- Select the dropdown in the upper right area of the grid and select “Summary Report.”

*Please Note:* Selecting “Attestation Report” will pull an Excel spreadsheet with a summary of dates for linkable MyCB requirements ONLY. It does not attach any documents as in the summary report.



- A pop-up window will appear that will allow you to select all of the members and checklist items you wish to include

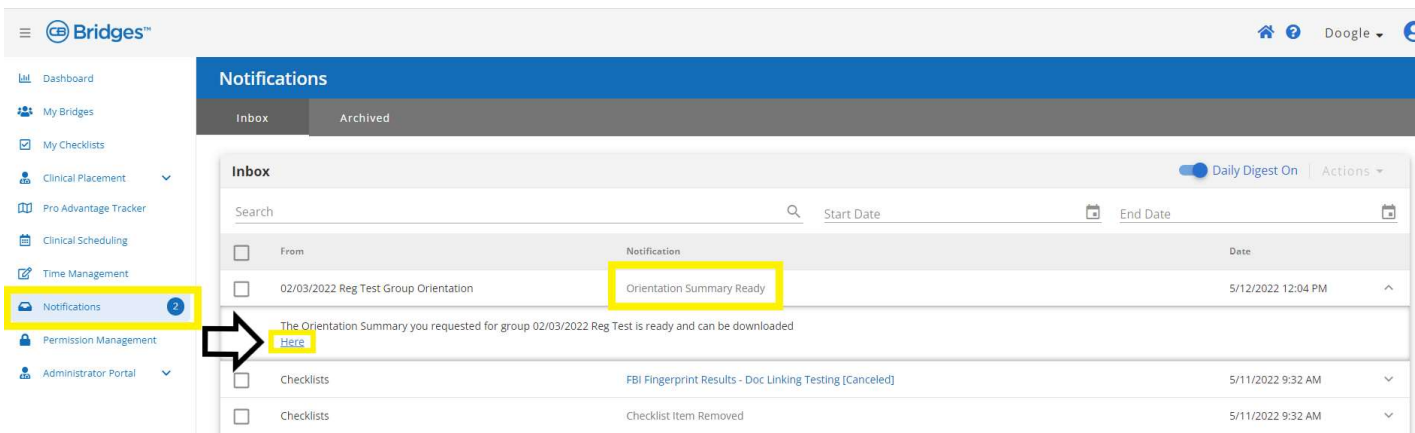
The 'Generate Summary Report' pop-up window is divided into two main sections: 'Select Members' and 'Select Checklist Items'.  
**Select Members:** Includes a search bar and a list of members with roles like 'Student', 'Faculty Coordinator', and 'Clinical Coordinator'. There is a 'Select All' checkbox at the bottom.  
**Select Checklist Items:** Includes a section for 'Doc Linking Testing' with checkboxes for 'AL MMR', 'AL TB', 'AL TDaP', 'AL COVID-19', 'Hep B', 'Immunizations: Annual Influenza', and 'Measles, Mumps, Rubella (MMR)'. There is also a 'Select All' checkbox.  
 At the bottom, there is a text field for 'Optional Password' and two buttons: 'CANCEL' and 'GENERATE SUMMARY REPORT'.

- At the bottom of the pop-up window, it will give you the option to a password to the report. This password would then be required when opening the report. If you do not wish to include a password, simply leave it blank.
- Select [“Generate Summary Report.”](#)





- The Summary Report will appear in the Notifications section. (Please allow ~15 minutes for this to populate.)



**Notifications**

Inbox Archived

**Inbox** Daily Digest On Actions

Search Start Date End Date

From	Notification	Date
02/03/2022 Reg Test Group Orientation	Orientation Summary Ready	5/12/2022 12:04 PM
The Orientation Summary you requested for group 02/03/2022 Reg Test is ready and can be downloaded <a href="#">Here</a>		
Checklists	FBI Fingerprint Results - Doc Linking Testing [Canceled]	5/11/2022 9:32 AM
Checklists	Checklist Item Removed	5/11/2022 9:32 AM

- Select the “[here](#)” link in the notification description to download the zip file. This will separate the reports by student with a Summary Report page and all attached documents that you requested.

## e. ARCHIVING OR UNARCHIVING

Once a rotation has concluded, the school Clinical Coordinator has the option to archive a clinical experience to remove the view of the past rotation. This helps to clear up the view for both the school and the facility to current rotations. Archiving hides the Experience from the **My Bridges** general grid view and removes the Experience from the **Pro-Advantage Tracker** listed Experience view for all members. The requirements, including documentation, will remain intact if ever unarchived.

### To Archive an Experience (Remove it from your view):

- Click "My Bridges" tab
- Click on the line ( NOT the name) of the Group you wish to archive
- A pop-up window will appear on the right
- Click "Archive Experience" in pop-up window

### To view Archived Experience:

- Click "My Bridges" tab
- Click "Views" drop down arrow on right
- Click "View Archived Experiences"

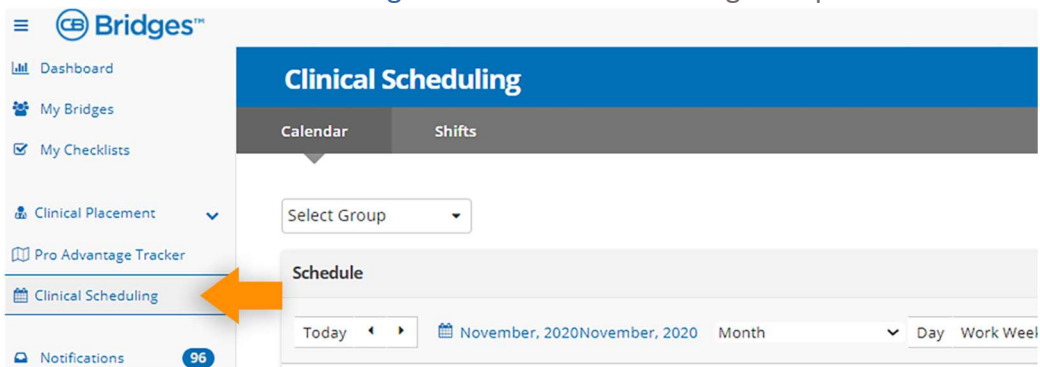
### To Pull Open OR Archived Experience Reports:

- Click "My Bridges"
- Click Reports tab
- Select Date Range
- Make sure the "List Archived Experiences" box is checked
- Click in the box field to select the Experience Name (This will pull all modules they are affiliated with)
- Choose the members you wish to view a report for
- Choose Either "Export all Reports or Choose your Selection/Module and Student to Export specific details"

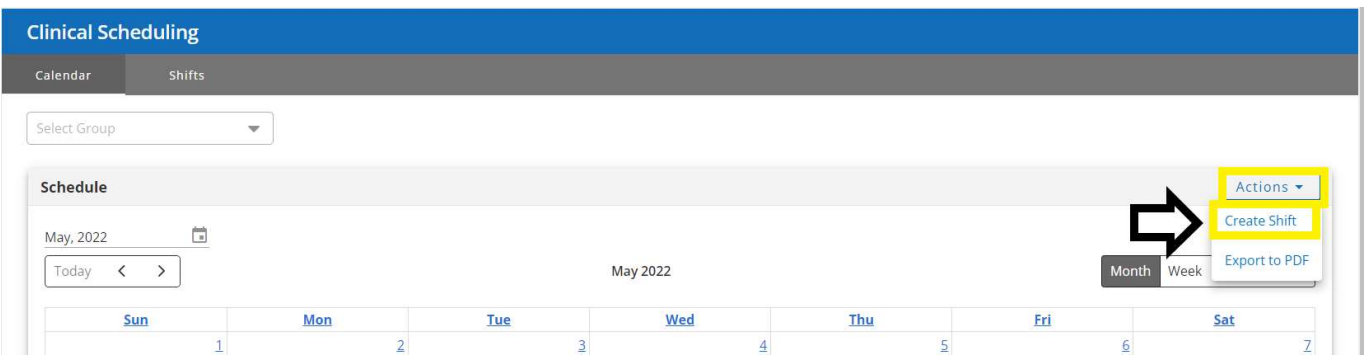
### 3. CLINICAL SCHEDULING

#### HOW TO CREATE A SCHEDULE

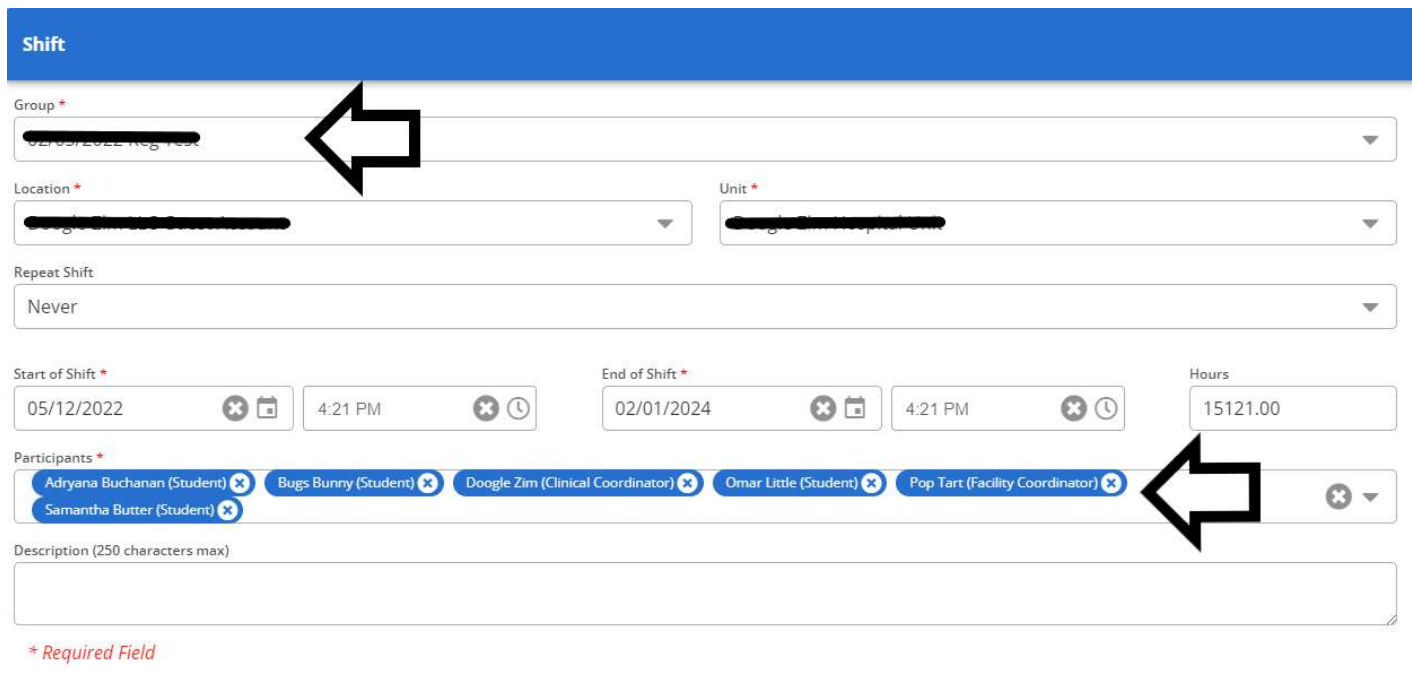
- Select the “Clinical Scheduling” module on the left navigation panel.




- Select the Actions dropdown in the top right area of your screen and select “Create Shift.”



- Select the Group Experience you wish to create a shift for from the dropdown menu. Group Experiences that have multiple reservations in the name can be used multiple times to reflect each Group Reservation
- Members of the Group will automatically populate in the participants section once the group has been selected. Only members of this group can be added and/or removed from this shift. **Please keep all BSMH Facility Coordinators and School Administrators on the participants section. Removing them, removes their visibility.**



**Shift**

Group \* 


Location \* Unit \*

Repeat Shift  
Never

Start of Shift \* End of Shift \* Hours

05/12/2022 4:21 PM 02/01/2024 4:21 PM 15121.00

Participants \*

Adryana Buchanan (Student) × Bugs Bunny (Student) × Doogle Zim (Clinical Coordinator) × Omar Little (Student) × Pop Tart (Facility Coordinator) × Samantha Butter (Student) × 

Description (250 characters max)

\* Required Field

- Double click on the day the new schedule will begin.
- A list of approved placement requests will display in the side panel as a guide for schedule creation.

**Please Note:** The side panel for placement details is only provided if you built your clinical experience directly off your placement reservation and not in the My Bridges tab.

- Provide the schedule details including the Location and Unit, how often the shift should repeat and shift hours. You can leave a note in the shift description for BSMH as needed.
- Any Member included in the Participants field when the schedule is published will receive scheduling notifications.

**IMPORTANT!** Please leave the Facility Coordinators and Clinical Coordinators in the participants section so that they can view this shift.

- The total number of hours for the shift is calculated based on the shift start and end times. Please pay close attention to AM vs PM to calculate the correct hours. If the hours total needs to be adjusted to reflect lunch and/or break time, the hours field may be edited.
- If you are **repeating a shift** the start and end date will both, be the first date you are starting the rotation.

Repeat Shift  
Never

Start of Shift \*  
05/12/2022

End of Shift \*  
02/01/2024

Hours  
15121.00

- Select “[Save](#)” to save a draft of the schedule or “[Publish](#)” to make schedule details available to all Experience members. **It is recommended to always publish.** Unpublished schedules will not be visible to Facility Coordinators.

**Shift**

Group \*  
[Redacted]

Location \*  
[Redacted]

Unit \*  
[Redacted]

Repeat Shift  
Never

Start of Shift \*  
05/12/2022

End of Shift \*  
02/01/2024

Hours  
15121.00

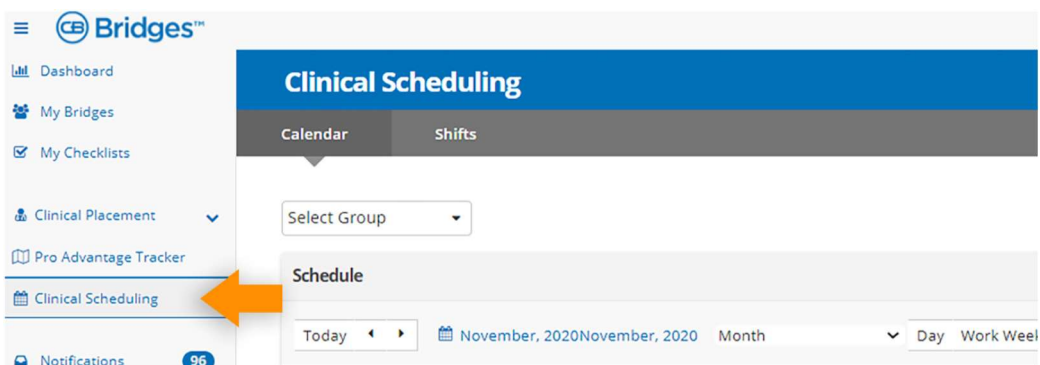
Participants \*  
Adryana Buchanan (Student) × Bugs Bunny (Student) × Doogie Zim (Clinical Coordinator) × Omar Little (Student) × Pop Tart (Facility Coordinator) ×

Description (250 characters max)  
[Redacted]

\* Required Field

## HOW TO MODIFY A SCHEDULE

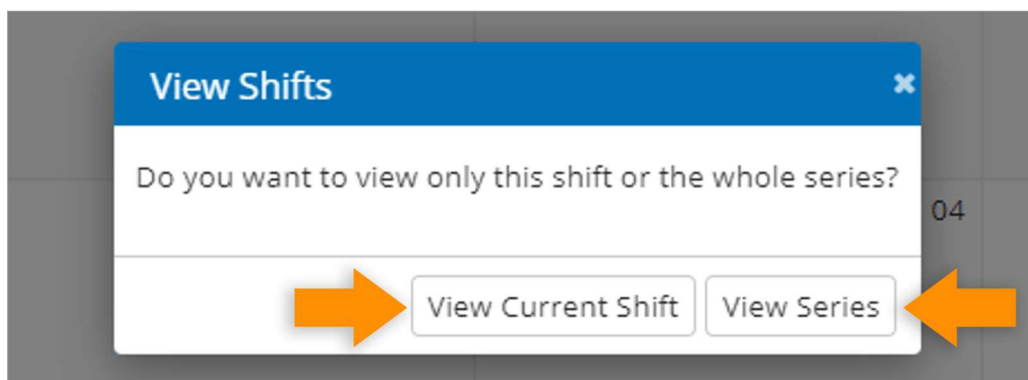
- Select the “Clinical Scheduling” module on the left navigation panel.



- Both unpublished and published schedules may be modified by the Clinical Coordinator. Unpublished schedules appear in the calendar highlighted in a lighter color, and published schedules will appear in the color selected during experience creation.
- If you would like to edit a single shift or entire schedule, double click any of the shifts in the calendar view. To edit a single shift, select “[View Current Shift](#).” To edit the entire schedule, select “[View Series](#).”

***Please Note:***

- Selecting “[Delete](#)” will remove either the series or the instance.
- Selecting “[Save](#)” will complete any updates that you have made.
- If the group is Published, notifications of any changes are immediately sent to all participants.



## 4. BEGINNING CLINICAL COORDINATOR ADMINISTRATOR AND STUDENT PROCESS

### Begin Administrator Process

- Log into [CB Bridges™](#) account.
- Select [CB Bridges™](#) tile in dashboard.
- Complete Terms of Use/E-sign.
- Select “[My Checklist](#)” to complete FCRA every 90 days. (This will appear after your first Group Experience is created.)
- Create Placement Request
- Create Group Experience under approved reservation ( **NOT My Bridges tab!**)
- Add your members to the Group Experience and “[Publish](#).” (This will associate checklist to students and send an email notifying them.)
- Provide the Package Code instruction sheet to students to place their order and complete their student process below.

### Begin Student Process

- Place a [CB Bridges™](#) order. (Package Code Instruction Sheet provided by Clinical Coordinator.) Students MUST use their email on their [myCB](#) account to sync accounts together. This may take up to 24 hours for syncing to complete.
- Log into [CB Bridges™](#) account.
- Select [CB Bridges™](#) tile in dashboard.
- Complete Terms of Use/E-sign.
- Select “[My Checklist](#)” to complete FCRA and FERPA every 90 days.  
(Additional checklist will then populate AFTER these are completed.)
- Complete Checklist items under “[Actions Needed](#)” tab.  
*Please Note:* Students can ALWAYS access their previous requirements.

## 5. CB COVID-19 COMPLIANCE

While BON SECOURS does not require the use of COVID-19 Compliance, it can be a helpful tool for monitoring your student temperatures and infectious disease screening. After onboarding for the new [CB COVID-19 Compliance](#) solution, it is important to ensure that the first steps of this process are running smoothly and as intended for safety purposes within the facility. Part of setting up programs for the facility is creating the Group Experiences. CB COVID-19 Compliance will be used for internal safety within a school or for the safety of students heading to a specific facility on a clinical rotation.

### CB COVID-19 Compliance: School ONLY

(Facility Coordinators will NOT have access to view.)

- When creating Group Experiences for internal use within your school, be sure to select your school as the location with the unit “COVID19.”
- To ensure your checklist is associated for [COVID-19 Compliance](#), select the Course “COVID-19 Compliance” and Term “Infectious Disease Screening.” Please use the additional [Getting Started](#) manual for further details on managing this group.

### IMPORTANT!

Naming Convention for Internal COVID Group Experiences: [COVID Internal: School Program + Term + Year](#).

### CB COVID-19 Compliance: Clinical Rotations at BON SECOURS

- [CB COVID-19 Compliance](#) can only be used at facilities that have been onboarded for this service. Please be sure that when creating Group Experiences, you are selecting your facility as the location. This will allow you to “Add” a Facility Coordinator Member. You will want to select the Course “COVID-19 Compliance” and Term “Infectious Disease Screening.”
- It is very important that you add your Facility Coordinator(s) as a member to every Group Experience created. The location and Facility Coordinator will both need to be added in order for the Facility Coordinator to have access to view the students’ documentation or status. Please reference user guide section: [Beginning Clinical Coordinator Administrator and Student Process](#).

### Notifications for COVID:

- The Clinical Coordinators will receive an email twice per day (midnight and noon in their respective time zones) including the number of non-compliant [CB COVID-19 Compliance](#) records.
- **Non-Compliant:** Missed temperature entry and/or a temperature entry that is feverish (100.0F / 37.7C or higher).
- **Students and Instructors:** Once users start recording temperatures, they will get a notification at 11 a.m. ET and 7 p.m. ET notifying them if they missed one day/night or have a HIGH temp (100.0F / 37.7C or higher) in the 14-day period of compliance.



## 6. USER ROLES WITHIN CB BRIDGES™

### Student:

- MUST place an order for functionality.
- Completes FCRA, FERPA and Consent to Share every 90 days.
- Tracks temperature and completes checklist items after the Clinical Coordinator adds them to an experience.

### Instructor:

- MUST place an order for functionality.
- MUST be added to an Experience by a Clinical Coordinator as an instructor.
- Completes FCRA, FERPA and Consent to Share every 90 days.
- Tracks temperature and completes checklist items after the Clinical Coordinator adds them to an experience.
- Monitors ONLY the Experiences they are added to.
- Does NOT have access to temperature reports in [Wellness Center](#) (only temperature monitoring checklist items).
- Does NOT have the ability to create Group Experiences or Add Members.

### Clinical Coordinator:

- Requested by another Clinical Coordinator to be added/provided access.
- No order needed.
- **IMPORTANT!** Provides ordering instruction guide containing package code to students.
- Completes FCRA every 90 days (under “[My Checklist](#)” tab).
- Can create Group Experiences/Add Members.
- **IMPORTANT!** Responsible for reviewing all checklist items.
- Has access to temperature reports in the [Wellness Center](#) and checklist items for all groups they create or are added to.

### Facility Coordinator:

- MUST be added by the school Clinical Coordinator to each Group Experience to be provided access to view checklist items and documentation.
- No order needed.
- Completes FCRA every 90 days (under “[My Checklist](#)” tab).
- Can NOT create Group Experiences/Add Members.
- Does NOT have access to temperature reports in [Wellness Center](#) (only temperature monitoring checklist items).

## 7. CASTLEBRANCH CUSTOMER SUPPORT

CastleBranch offers two help desks — one for you, and one for your students — as well as a library of FAQ videos to help along the way.

### Student Help Desk:

- CB Bridges™: 888.520.0520
- CB COVID-19 Compliance: 888.914.7279 ext.105 (students and administrators)

### Administrator Help Desk:

- CB Bridges™: 888.520.0520
- General Assistance: 888.723.4263 Option 2
- CB COVID-19 Compliance: 888.914.7279 ext.105 (students and administrators)

### In–Platform Assistance:

#### FAQ Video Libraries:

- CB Bridges™: FAQ videos for students, administrators, and preceptors (located on the dashboard of CB Bridges™ for ALL members).
- MyCB: FAQ videos for students using MyCB (located under the “Need Help?” menu in the top right of user’s MyCB).

#### FAQ User Guides:

- These guides offer step–by–step processes with screenshots to some of the common questions. Marked with a [question mark icon \(?\)](#) next to each member’s name on the top right of CB Bridges™.

#### Live Chat and Inquiries:

- This is a convenient alternative for students that may be unable to call for assistance. Students can chat with live Customer Experience Specialists or create support inquiries directly from their account. These features are designed so that students are able to choose the option that best suits their needs.
- Located under the “Need Help?” menu in the top right of user’s MyCB account.



A  CastleBranch Solution.

**Need Help?**

## 8. BON SECOURS ABBREVIATIONS:

FACILITY	ABBREVIATION
Cincinnati	
Anderson	MHA
Clermont	MHC
Fairfield	MHF
The Jewish Hospital	TJH
West	MHW
Greenville	
St. Francis Downtown	SFD
St. Francis Eastside	SFE
Hampton Roads	
Mary Immaculate Hospital	MIH
DePaul Medical Center	DMC
Maryview Medical Center	MMC
Southampton Medical Hospital	SHMH
Kentucky	
Lourdes	LRDS
Marcum and Wallace Hospital	M&W
Lima	
St. Rita's Medical Center	WCOH
Lorain	
Mercy Lorain	MLR
Allen Hospital	MAH
Richmond	
Memorial Regional Medical Center	MRMC
St. Mary's Hospital	SMH

Southside Medical Center	SMC
St. Francis Medical Center	SFMC
Rappahannock General Hospital	RGH
Richmond Community Hospital	RCH
Southern VA Regional Medical Center	SVRMC
Springfield	
Springfield Regional Medical Center	SRMC
Urbana Hospital	URB
Toledo	
St. Charles Hospital	STCH
St. Anne Hospital	STAH
St. Vincent Medical Center	SVMC
Tiffin Hospital	MHT
Willard Hospital	MHW
Defiance Hospital	MDH
Youngstown	
St. Elizabeth Youngstown Hospital	SEYH
St. Elizabeth Boardman Hospital	SEBH
St. Joseph Warren Hospital	SJWH

## 10. FACILITY COORDINATORS TO ADD TO EXPERIENCES:

Market	Facility Coordinator	Facility Coordinator
Youngstown	Caitlin Fee	<a href="mailto:CMFee@mercy.com">CMFee@mercy.com</a>
Richmond/Southside	Crystal Spiers	<a href="mailto:crystal_spiers@bshsi.org">crystal_spiers@bshsi.org</a>
Richmond/St Francis	Patty Morton	<a href="mailto:patricia_morton2@bshsi.org">patricia_morton2@bshsi.org</a>
Richmond/Southern Virginia	Felicia Snider	<a href="mailto:felicia_snider@bshsi.org">felicia_snider@bshsi.org</a>
Richmond/St. Mary's Primary	Samantha Parker	<a href="mailto:samantha_parker@bshsi.org">samantha_parker@bshsi.org</a>
Richmond/St. Mary's	Amber Szymanski	<a href="mailto:amber_szymanski@bshsi.org">amber_szymanski@bshsi.org</a>
Richmond/Memorial Regional Primary	Kyleigh Ferguson	<a href="mailto:kyleigh_ferguson@bshsi.org">kyleigh_ferguson@bshsi.org</a>
Richmond/Memorial Regional	Tracey Seward	<a href="mailto:tracey_seward@bshsi.org">tracey_seward@bshsi.org</a>
Richmond/Richmond Community	Kwame Smith	<a href="mailto:kwame_smith@bsdhsi.org">kwame_smith@bsdhsi.org</a>
Richmond/Rappahannock General	Kristie Duryea	<a href="mailto:kristie_duryea@bshsi.org">kristie_duryea@bshsi.org</a>
Richmond- All Locations	Lisa Rich-Womack	<a href="mailto:Lisa_RichWomack@bshsi.org">Lisa_RichWomack@bshsi.org</a>
Cincinnati/Fairfield	Laura Davis	<a href="mailto:LNLeeds@mercy.com">LNLeeds@mercy.com</a>
Cincinnati/West	Robin Fox	<a href="mailto:RXFox@mercy.com">RXFox@mercy.com</a>
Cincinnati/Clermont	Amy Jackson	<a href="mailto:AJJackson0@mercy.com">AJJackson0@mercy.com</a>
Cincinnati/Jewish	Kelli King	<a href="mailto:kking@mercy.com">kking@mercy.com</a>
Cincinnati/Anderson	Jennifer Riggs	<a href="mailto:JRiggs@mercy.com">JRiggs@mercy.com</a>
Toledo- All Locations	Lauren Fisher	<a href="mailto:LFisher@mercy.com">LFisher@mercy.com</a>
St. Vincent Only	Rosetta Gordon	<a href="mailto:Rosetta.Gordon@nationwidechildrens.org">Rosetta.Gordon@nationwidechildrens.org</a>
Toledo- All Locations	Kimberly Gillespie	<a href="mailto:Kimberly.Gillespie@mercy.com">Kimberly.Gillespie@mercy.com</a>
Lima	Tim Ricker	<a href="mailto:tjrick@mercy.com">tjrick@mercy.com</a>
	Samantha Maas	<a href="mailto:SMMaas@mercy.com">SMMaas@mercy.com</a>
		-
Lorain	Andrea Wetherill	<a href="mailto:AWetherill@mercy.com">AWetherill@mercy.com</a>
Greenville	Vanessa Pack	<a href="mailto:vanessa_pack@bshsi.org">vanessa_pack@bshsi.org</a>
	Tracelyn Barton	-
		-
Marcum & Wallace	Carla Wells	<a href="mailto:cswells@mercy.com">cswells@mercy.com</a>
Lourdes	Gary Harper	<a href="mailto:gharper@mercy.com">gharper@mercy.com</a>
		-
Springfield	Janice Walls	<a href="mailto:janice.walls@mercy.com">janice.walls@mercy.com</a>
	Sarah Ewing	<a href="mailto:SEwing@mercy.com">SEwing@mercy.com</a>

Hamton Roads/Maryview Medical Center	Robin Platt	<a href="mailto:robin_platt@bshsi.org">robin_platt@bshsi.org</a>
Hamton Roads/Southampton	Bettie Nichols	<a href="mailto:bettie_nichols@bshsi.org">bettie_nichols@bshsi.org</a>
Hampton Roads/Mary Immaculate Hospital	Pamela Bishop	<a href="mailto:pamela_sharp@bshsi.org">pamela_sharp@bshsi.org</a>