



Quick Start Guide for Clinical Coordinators

Please Note: This Quick Start Guide is not meant to replace the User Guide, but as a supplement with details about the specific Bon Secours Mercy Health process.

Resources available to help learn about CastleBranch Bridges (CBB):

- a. <https://login.castlebranch.com/login>
- b. CB Bridges University – Self-guided training videos



- CB Bridges Support: **888.723.4263** or email cbridgescustomersupport@castlebranch.com
- [CB Bridges Bon Secours Mercy Health User Guide](#) – detailed instructions pertinent to scheduling clinical rotations for your undergraduate nursing students at a BSMH facility. ***All responsibilities below are covered in detail in this User Guide (UG).
- For any scheduling or specific questions for your BSMH Facility Coordinator, please reach out to them directly, or email: BSMH-Undergraduate-Nursing-Student-Resource@Mercy.com



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Group Experiences

1. Requesting an Opportunity and Submitting a Group Request (User Guide p. 11-16):

- a. Review available opportunities under Clinical Placement > Group Placement > My Opportunities
- b. Place requests for opportunities
- c. Monitor placed requests for acceptance or decline (UG p. 15)

2. Creating a Group Experience from the reservation: (UG p. 22-25)

When your request is accepted by the Facility Coordinator, you need to create a Group Experience to add the students, instructor, and Facility Coordinators.

***** You MUST create the Group Experience from the Reservation in order for students to receive the clinical requirements for provisioning and access.*****

- a. Edit Group Experience Name (UG p. 25)

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

Example: 23453 BSMCON SMH 2N

3. Managing & Publishing a Group Experience:

- a. Add Facility Coordinator, clinical instructor, and students to Group Experience (UG p. 27-31)
- b. Publish Group Experience. (UG p. 32).

Publishing will create an automatic notification email that is sent to all individuals you added to the experience and will populate their required checklist items.

4. Reviewing Documents – Clinical Coordinators must review documents (checklist items) to ensure student and instructor compliance with requirements and expectations. (UG p.33-35).

*****Clinical Coordinators may appoint an instructor to monitor student completions, but only a Clinical Coordinator may monitor Instructor Completions.*****

- a. CBB Checklist requirements:
 - FCRA Agreement
 - Consent to Share Information
 - FERPA Consent





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- b. First BSMH Checklist: These items **require approval** from the Instructor/Clinical Coordinator (as determined by the school).
 - BSMH Confidentiality and Security Agreement
 - BSMH Student/Instructor Form
 - BSMH COVID-19 Form: Manufacturer and date of vaccination
 - BSMH COVID Upload (picture of vaccination card)
- Once these are approved by the Instructor or Clinical Coordinator, the student/instructor information will integrate with our Workday (HR/LMS) system to create a student/instructor account. The student/instructor will receive instructions to log in via email. They must then log in to Workday to complete their learning modules.
- c. Second BSMH Checklist: Only the Flu information **requires approval**.
 - BSMH Undergraduate Nursing Student Workday Attestation (confirming their completion of the learning modules)
 - Student and Instructor Agreement
 - BSMH Flu Form: Manufacturer and date of vaccination
 - BSMH Flu Upload: upload an image of your vaccine card/record

Please Note: If it is not currently “Flu Season,” students and instructors may leave this item blank/incomplete. As Clinical Coordinator, you will need to “Override – Complete” this item for their CBB Process to be complete. Instructors are also able to override items for students. **Flu Season is considered between October and May.**

Guidelines for Reviewing Documents: (UG p. 35).

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



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IMPORTANT! ALL students and the instructor must fully complete all BSMH checklist items prior to entering the hospital for the first day of clinicals. It is the school's responsibility to ensure that all students are complete. Any students that have outstanding items must be removed from the experience.

***** All students and instructors must be fully compliant to attend clinicals at BSMH. Clinical Coordinators should ensure all member are "Green" in Pro-Advantage Tracker prior to the scheduled start date.*****

Checklist Item Status	<u>Membership Status</u>
	0 Pending Memberships

Checklist Item 	Status
BSMH Confidentiality and Security Agreement	 Complete
BSMH COVID Upload	 Complete
BSMH COVID-19 Form	 Complete
BSMH Student/Instructor Form	 Complete

Checklist Item 	Status
BSMH Flu Form	 Complete
BSMH Flu Form Upload	 Overridden - Compl
BSMH Student/Instructor Agreement	 Complete
BSMH Undergraduate Nursing Student Workday Attestation	 Complete





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Individual Experiences (User Guide pages 16-21)

***All BSMH individual opportunities are created with “generic” preceptors. Facility Coordinators will work with Nursing Leadership to identify and place students with qualified preceptors. Facility Coordinators will communicate details and contact information to you for each placement. Students are able to plan and schedule with their designated preceptor to complete their required clinical hours.

1. Submit Request (UG p. 18-19)
 - a. Your local facility coordinator will approve or decline your request and will provide additional details in the message feature.
 - b. If declined, they will suggest another possible placement for your student.
 - c. If accepted, you will need to create an individual experience for the student.

2. Create Individual Experience from the Reservation (UG pages 23-27)

*****You MUST create the Individual Experience from the Reservation in order for students to receive the clinical requirements for provisioning and access.*****

- a. A request may be submitted without selecting a student – HOWEVER, a student will need to be added before the request can be approved by the Facility Coordinator. (UG p. 19)

Pro Tip! Use the “Plan” feature to facilitate the placement of multiple individual requests! (UG p.16)

3. Publish the Individual Experience:
 - a. Following the same process as the Group Experience, publishing the Individual Experience will generate a notification to the student. The student will then receive the same Checklist Items and follow the same process as above - requiring all the same approvals and monitoring as described in Step 4 in Group Experience.

IMPORTANT! ALL students must fully complete all BSMH checklist items prior to entering the hospital for the first day of clinicals. It is the school’s responsibility to ensure that all students are complete. Any students that have outstanding items must be removed from the experience.



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Workday Required Learning Modules:

Instructor:

Program Name	Workday Course Name	Approx Minutes	Frequency
<u>BSMH Nursing Instructor Orientation Program</u>	WD Epic Inpatient Nurse eLearning Module	105	Once
	BSMH Omnicell Patient Care in a Profiled Environment (Inpatient Areas)	45	Once
	BSMH Omnicell Anywhere RN Nurse Training Standalone (Inpatient Areas)	15	Once
	Student Clinical Orientation	30	Once
<u>BSMH Annual Nursing Instructor System Mandatory Training:</u>	2023 New-Hire COVID-19 Attestation: Self-Monitoring of Symptoms	5	Annually
These modules are updated each year.	2023 New-Hire HIPAA and PHI Training	50	Annually
	2023 New-Hire Code of Conduct Training	15	Annually
	2023 New-Hire Compliance Corporate Education	40	Annually

Student:

Program Name	Workday Course Name	Approx Minutes	Frequency
<u>BSMH Undergraduate Nursing Student Orientation</u>	BSMH Epic Undergraduate Student Nurse eLearning	67	Once
	Student Clinical Orientation	30	Once

Student Modules cont.





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<u>BSMH Annual Undergraduate Nursing Student System Mandatory Training:</u>	2023 New-Hire COVID-19 Attestation: Self-Monitoring of Symptoms	5	Annually
These modules are updated each year.	2023 New-Hire Compliance Corporate Education	30	Annually
	2023 New-Hire HIPAA and PHI Training	50	Annually
	2023 New-Hire Code of Conduct Training	15	Annually

Trouble Shooting and Tips:

- Documents that are accepted by CBB include jpegs, pdfs, and png files, and must be less than 5 MB.
 - Instruct students to crop image to include only the card, often background images increase the file size and may cause uploading challenges.
- Students report difficulty completing a checklist item, may require you to “Reset” the item:

Steps to Reset Checklist Items:

1. From Dashboard click on review documents (far right)
2. Change the status from pending to incomplete and hit filter
3. On far left, type in students name and hit enter
4. Click on requirement you wish to reset
5. Hit reset under document view screen
6. This will allow the open button on the requirement to repopulate (takes just a minute) for student to resubmit
7. Student will need to correct their image and resubmit

Questions or concerns? We are here for you!

BSMH-Undergraduate-Nursing-Student-Resource@Mercy.com

