Clinical Placements Northwest

Education Coordinator Beta Website Guide

This guide walks Educational Coordinators through the typical workflow in the CPNW portal—from approving accounts and setting documentation standards to assigning students, reviewing requirements, and verifying that learners are ready for healthcare partners to review.

1. Getting started: your coordinator role

As an Educational Coordinator, you use the CPNW portal to manage student and faculty access, assign clinical placements, and confirm that requirements are complete before sites review records. The Dashboard is your main starting point each day.

When you sign in:

- Scan the Notifications panel on the right for new student messages, reminders about pending approvals, and platform announcements. Click a notification to show the enitre message.
- Use the Requirements shortcut on the left to open the Requirements builder, where you create or edit program-specific requirements.
- Open My Account to update your profile, security settings, or demographics, including your profile image.
- Expand the Admin menu on the left to reach your core tools: Review, Assignments, Reports, Users, and Background + WATCH Reports (The Background + WATCH Reports section is only for programs that have selected Checkr Background Check and/or CPNW WATCH).

Most of the steps in this guide start from the Admin menu or Requirements link on the Dashboard.

2. Approve account requests *(Read the full guide)*

Before students or faculty can begin requirements, their accounts must be approved.

1. From the Dashboard, expand the Admin menu and click Users.
2. Select the Account Requests tab to view pending requests tied to your programs.
3. For each request, review the user’s name, ID (if provided), email address, and program to confirm that it is a valid account request.
4. Use the radio buttons in the first three columns to choose:
    - Activate – immediately activates the account and sends the welcome email.
    - Return – returns the request to the applicant along with your instructions on what needs fixed.
    - Decline – immediately deletes the request and account from our system. The student will need to restart the registration process.
5. Revisit the Account Requests tab to activate accounts that were returned for revisions once students correct their information.

Best practice: Check this queue daily so students can move quickly into registration and compliance tasks, and document unusual situations in the notes field for fellow coordinators.

3. Set documentation expectations early *(Read the full guide)*

Clear expectations about documentation reduce back-and-forth during requirement review. Share the Accepted Documentation Formats standards with your cohorts and faculty:

Every document should stand on its own, showing at least:

- The student's full legal name matching their CPNW profile.
- The healthcare provider or lab name, plus contact information.
- The exam, vaccine, or lab title (for example, "MMR Titer").
- The date of service; for multi-dose series, each dose should be visible.
- The result or provider signature confirming completion.

Ask students to upload documentation using approved file types such as: PDF, DOCX, TXT, PPTX, XLSX, JPG, JPEG, or PNG. These formats preserve readability and work well in the Review and Docs tables.

Prepare students for common rejection reasons, such as:

- Missing one or more of the key data points above.
- Documents expiring shortly before a rotation begins (for example, TB or CPR expiring within about 30 days).
- Handwritten childhood immunization cards without signatures or official certification.
- Editable files downloaded from portals that could be altered after the fact.
- Screenshots that either omit the student name/date or include multiple students in one file.

Encourage students to preview their documents inside CPNW after uploading and to carefully read any rejection notes before resubmitting.

4. Build and maintain program-specific requirements *(Read the full guide)*

Use program-specific requirements to capture the exact forms, orientations, insurance, and licenses your students and faculty must complete.

1. On the Dashboard, click Requirements to open the Requirements table.
2. Review existing items and use Edit or Delete if you need to update or retire a requirement.
3. Click Create Requirement to build a new item, then complete the form:
   - Name – the title students and faculty will see.
   - Required By – which schools/programs must complete the requirement.
   - Category – choose Forms, Site Orientations, Insurance, or Licenses. Leave sub-category blank unless CPNW instructs otherwise.
   - Frequency – choose Once or Annual based on how often the item must be renewed.
   - User Type – target Students, Faculty, or both.
   - Abbreviation (Abbr) – a short code used in internal tables.
   - Status – keep Inactive while drafting; switch to Active when the requirement is ready to use.
4. Use the details panel to upload reference files and write clear instructions describing exactly what students must do or upload.
5. Use the "+ Add File" link on the right to attach documents for the students to download as part of the requirement.

You can update requirements at any time from the main table; changes take effect immediately for the programs you selected.

5. Create insurance requirements *(Read the full guide)*

Some affiliation agreements require students to carry liability insurance. You can translate those clauses into a digital requirement.

1. Create a new requirement and choose Insurance as the Category.
2. Name the requirement (for example, "Liability Insurance") and select the programs and user types (students, faculty, or both) it applies to.
3. Set the Frequency, usually Annual unless the agreement states otherwise.
4. Provide a clear abbreviation (such as "LIR") and set the Status to Active when you are ready to publish.
5. In the instructions, specify whether coverage is verified by the program (no student upload needed) or whether students must upload proof of individual coverage with policy details and an expiration date.

After you click Save, the insurance requirement appears in student and coordinator views and can be reviewed alongside other requirements.

6. Create license requirements *(Read the full guide)*

For faculty and graduate students who must submit healthcare licenses, use a License requirement.

1. Create a new requirement and choose Licenses as the Category.
2. Name the requirement (for example, "Healthcare License") and select the relevant programs and user types.
3. Set the Frequency (often Annual), pick an abbreviation (such as "HCL"), and set the Status to Active once you are ready for users to see it.
4. In the instructions, describe what details are required—for example, license type, issuing state, license number, expiration date, and supporting documentation.

After you click Save, students or faculty see a structured form for entering license details and uploading proof that satisfies your facility's affiliation agreement.

7. Assign students to clinical sites *(Read the full guide)*

Assignments unlock each healthcare site's requirements and tell clinical partners when students will arrive.

1. From the Dashboard, open the Admin menu and click Assignments.
2. To assign an individual student:
   - Search for the student using the search bar above the table or move between pages with the paginator below the table.
   - Click the + icon to create a new assignment row (do not repurpose old rows).
   - Select the clinical Location and unit/department if prompted.
   - Enter the rotation Start Date and End Date.
   - Click the save icon to store the assignment.

3. To assign a group of students:
    - Filter or page to find the appropriate students.
    - Check the box beside each student's name; once at least two are selected, the Assign Group button becomes active.
    - Click Assign Group, choose the facility and shared date range in the modal, and click Assign Group to save.
    - To adjust a block later, select the same students and use Edit Group to change the facility or dates.

Enter assignments as soon as rotation details are confirmed so students can begin working on site-specific onboarding requirements without delay.

8. Launch and monitor Background + WATCH reports *(Read the full guide)*

If your program selected CPNW's Checkr background check services and/or CPNW WATCH, you can initiate Checkr and CPNW WATCH reports from the Background + WATCH Reports table.

1. Confirm whether your program has this service by checking your service selection form or contacting support@cpnw.org. Only programs with the appropriate package or add-ons see Background + WATCH Reports.
2. To start both services for a student:
    - In the Background + WATCH table, select the checkbox next to the student's name.
    - Make sure both the Checkr and CPNW WATCH radio buttons are selected.
    - Click Initiate, then confirm in the modal to launch both requests.
3. To start a single service, select only the relevant radio button and click Initiate.
    - CPNW sends the student's name and email to Checkr, who invites the student and returns a report for review.
    - CPNW WATCH sends the request to the CPNW reviewer, who runs the check, uploads the result, and sets the status.
4. Review results and overrides:
    - Clean results are approved by reviewers.
    - If an issue is flagged, reviewers may reject the requirement. Coordinators can review the report, discuss with the student, and override the rejection if an exception is appropriate—or leave it in place, which may block the clinical assignment.

9. Review student submissions and communicate decisions *(Read the full guide)*

The Review Submissions table is your main workspace for monitoring requirement completion.

1. From the Dashboard, expand Admin and click Review.
2. The Review Submissions table shows each student with key details and a Status. Students with items in Submitted or In Review appear first with a Needs Review status.
3. Click a student's name or the View button to open their record. The modal displays program and school details, clinical assignments, and all CPNW Clinical Passport requirements. eLearning module statuses update automatically.
4. For programs with Document Verification Specialists (DVS), CPNW reviewers approve or reject Clinical Passport requirements. Programs without DVS handle these decisions themselves.

5. To review an individual requirement:

- In the modal, scan the Requirement Name and Status columns for items listed as In Review.
- Click a requirement to open its detail view, read any messages, and use the document links and eye icon to preview the upload.
- Choose Accept, Conditionally Approved (if available), or Reject, and click Save.
- When selecting Conditionally Approved or Reject, add a clear note so students understand what to fix or what conditions apply.

Students receive automated notifications when statuses change. Encourage them to read your comments and resubmit promptly if needed.

10. Verify students for clinical review *(Read the full guide)*

Once every Clinical Passport requirement (including all eLearning modules) is approved for a student:

1. Open the student in the Review Submissions table.
2. Click the Verification Complete button inside the student's requirement modal.

This action:

- Marks the Verified column with a green check in the Review table.
- Signals to healthcare facilities that the student's CPNW Clinical Passport requirements are ready for their review.

Use this step as your final internal confirmation before sites begin reviewing records for clearance.

11. Partner effectively with Document Verification Specialists (DVS) *(Read the full guide)*

If your program uses CPNW's Document Verification Specialists (DVS):

- Verify that the program and specific students are covered by the DVS service package; other programs you coordinate do not inherit DVS automatically.
- DVS reviewers validate health and safety submissions for Clinical Passport requirements, making sure each record includes the required data points and matches current standards.
- They keep Review statuses up to date and leave notes when documents must be resubmitted or when a coordinator decision is needed—such as positive TB results, in-progress immunizations, or conflicting documentation.

To partner effectively:

- Keep student assignment data current so reviewers can prioritize students whose rotations start soon.
- Encourage students to follow the Accepted Documentation Formats guidance and consolidate multi-page records into a single file.

Even if you do not have DVS services, you can adopt the same standards for your in-house requirement review process.

12. Getting help and adding additional coordinators

For quick answers to common questions, use the Educational Coordinator FAQs in the CPNW FAQ site.

Topics include adding additional coordinators, locating students who still need review, and understanding who handles background checks.

To add another coordinator to the programs you administer, email support@cpnw.org with the new coordinator’s name and email address. Support will send registration instructions and, after the account is created, can mirror your administrative permissions for the appropriate programs.

For any questions about services, requirements, or account access that are not covered in this guide, contact support@cpnw.org.

13. Daily checklist (quick reference)

As a quick reference, here is a suggested daily checklist for Educational Coordinators:

1. Sign in and scan Dashboard Notifications.
2. Approve new Account Requests in Admin > Users.
3. Check Admin > Review for students with Needs Review status and clear submissions.
4. Confirm that new assignments and rotation dates are entered in Admin > Assignments.
5. Monitor Background + WATCH Reports (if enabled) and follow up on flagged results.
6. Mark Verification Complete for students whose Clinical Passport requirements are fully approved.
7. Keep program requirements up to date and remind students of documentation standards.