

Electronic Student Permit Checking User Guide (version 1.1)

As per your program requirements, prior to being accepted into a clinical placement you are required to complete a pre-placement qualification process. This process is often referred to as Clinical Placement Permit Checking or Student Permit Checking.

To this end, Synergy Gateway Inc. (Synergy) has been contracted by your school to conduct this mandatory requirement through our **Electronic Student Permit Checking (ESPC)** services for its students.

What are clinical placement requirements and why are they necessary?

Clinical placement requirements are specific health related documents necessary for clinical placement agencies to ensure it is safe for students to work in their setting. Specific requirements are broken down by a student's school and program. Health record checks are also necessary and are often a requirement from the Occupational Health and Safety Act of Ontario. Health record checks can include immunization history, vaccinations, and blood work.

What is ESPC?

Synergy Gateway has a proprietary platform called "Verified" which is used by thousands of students across Ontario for the purpose of providing us with their school's clinical placement requirements for verification and validation. This process of providing requirements and having them validated by Synergy is known as '**Electronic Student Permit Checking**' or '**ESPC**'. Traditionally, students would book an in-person appointment with us or their school to participate in a 15 minute in-person encounter to review and validate these requirements. With the introduction of ESPC, Synergy Gateway has eliminated the need for you to attend an in- p e r s o n appointment and allows you to book a Student Permit Checking appointment from the comfort of your home.

What is Verified?

Verified is a proprietary platform specifically designed to assist students in preparing for their clinical placements. Verified is available through secure username and password (login instructions are emailed to your school email account). Verified allows students to:

- Upload required documents for review by the Synergy Gateway Team of trained nurses
- Book your Electronic Permit Checking appointment (ESPC)
- Securely access a digital archive of clinical placement requirement documents



- Receive notification of expiring requirements
- Access to a personalized dashboard which updates your current clinical placement status and pending/expiring requirements

How to access Verified?

To gain access to your Verified account, your school has provided Synergy Gateway with your basic profile information. This information has been used to create an account for you in Verified. You will have received an email prompting you to login to your Verified account and update your password.

What is the Synergy Help Desk?

Synergy Gateway has created the Synergy Gateway Help Desk, a proven solution that supports thousands of student inquiries. The help desk is a great line of communication between the student and the Synergy Gateway team. Students also have access to our knowledge base centre, which includes common questions and inquiries.

Before you book your ESPC Appointment:

- Confirm that you have received login credentials for Verified. This information has been emailed to the email address associated with your Verified profile. If you cannot locate this information in your general inbox, then please check your junk/spam folder. If you still are unable to locate your login credentials, please open a Help Desk ticket by visiting: www.synergyhelps.com
- Know when your clinical start dates are so that you can book your ESPC appointment accordingly.
- Make sure you have reviewed what your clinical placement requirements are and have planned out when and how you will be completing them. It is important to remember that some requirements may take an extended time to complete. Refer to your program permit document and please plan accordingly.



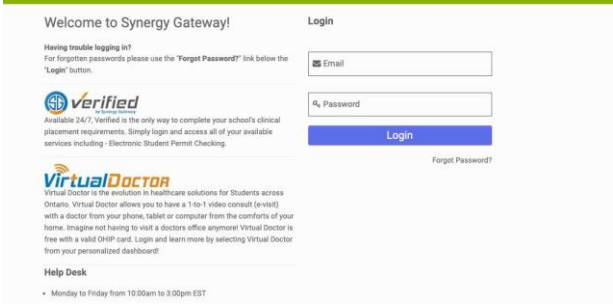
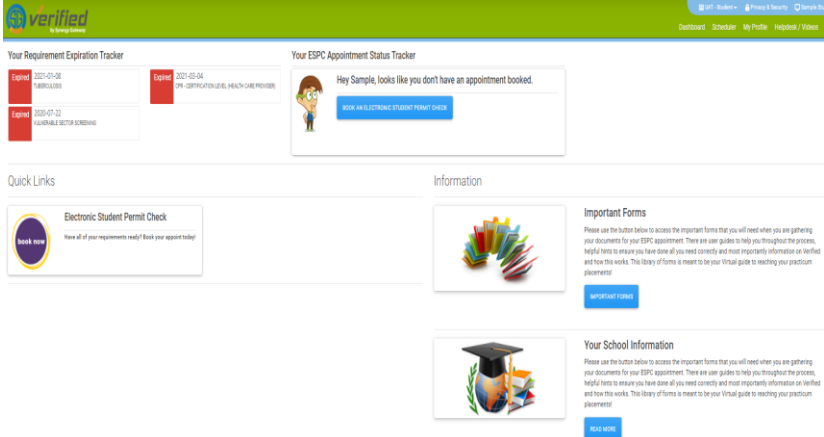
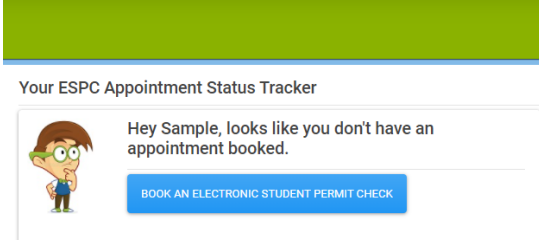

Important Note:

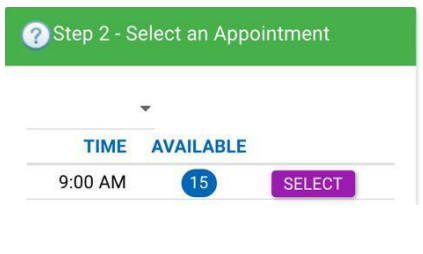
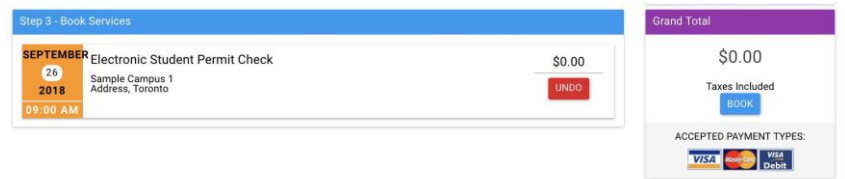
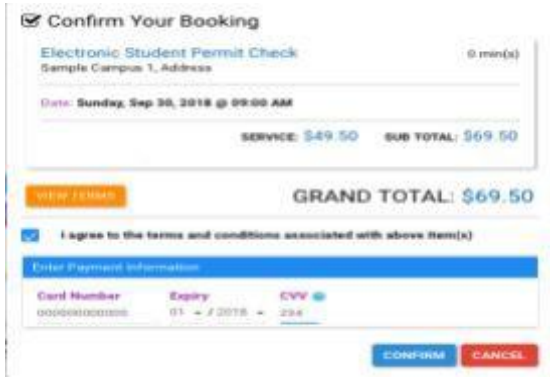
1. Your required clinical placement documents and supporting documents must have your name and student number clearly written on them before being uploaded to Verified.
2. Please only upload original documents.

Video User Guides:

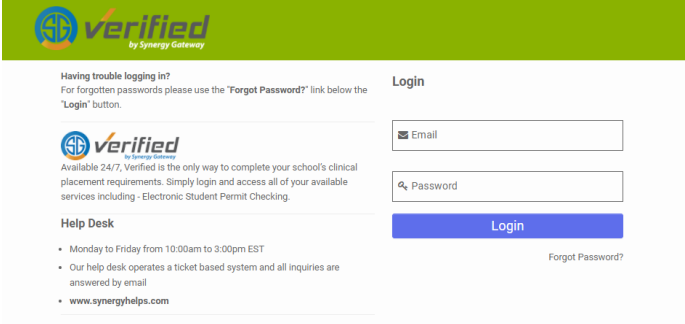
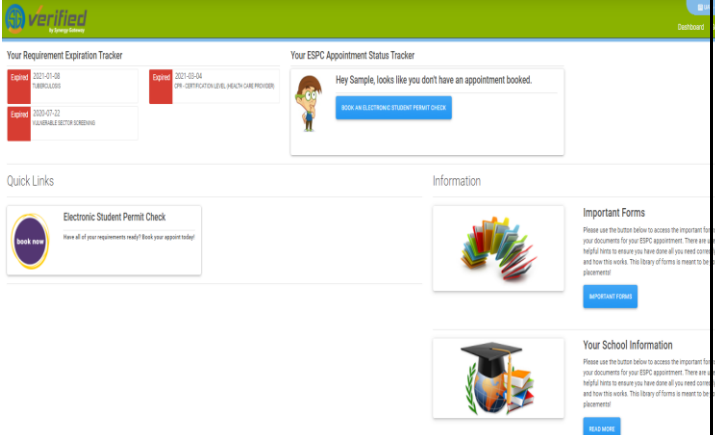
To assist students, we have created specific user guides on how to access and use Verified. To access any of these videos, simply navigate to the Information section of your Verified account and select Helpdesk/Videos from the menu.


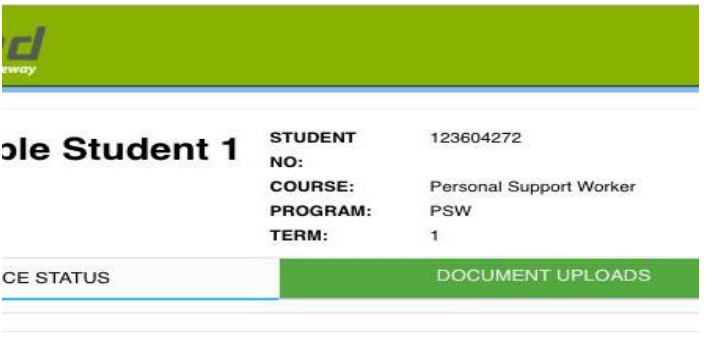
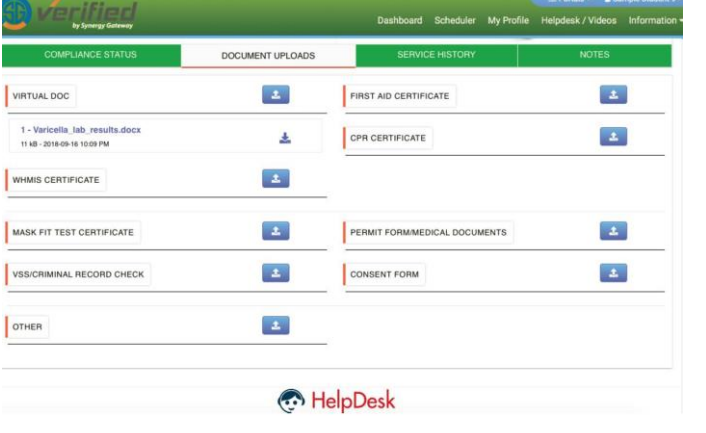
Please follow the steps below to complete your ESPC appointment

Item	Description	Image/Graphic
Log In	Login to Verified using the login credentials emailed to you from Synergy to your SCHOOL EMAIL address Example: samplestudent@sampleschool.ca	
Student Dashboard	On this page you will find important information regarding services, fees, status updates and the ability to book services via the scheduler button	
Book ESPC Appointment	Select the Book an electronic student permit check button from the dashboard.	
	STEP 1: <ul style="list-style-type: none"> Select the DATE (note the cost of the service) 	

	<ul style="list-style-type: none"> Click the PURPLE select button next to your chosen appointment <p>Hint:</p> <ul style="list-style-type: none"> Make sure to select an appointment date far enough in advance which will allow you to have all of your requirements ready and ahead of clinical deadline 	
	<p>STEP 2:</p> <ul style="list-style-type: none"> Use the “Time” dropdown to search by a specific hour of the day The “Available” column shows you how many appointments are remaining for that time. Click the purple “Select” button next to your chosen time 	
	<p>STEP 3:</p> <ul style="list-style-type: none"> Review your selected appointment: Service, Location, Date, Time, Duration, Cost Make note of the “Grand Total” cost. This cost will include the cost of the service and any additional past service fees: no show, late cancel, late reschedule Click the blue “BOOK” button 	
	<p>STEP 4:</p> <ul style="list-style-type: none"> Appointment Confirmation box will open Read the service “Terms” by clicking on the orange “View Terms” button Note that you must select “I agree to the terms and conditions associated with the above time(s)” checkbox to book your appointment. ENTER your payment information Select ‘CONFIRM’ 	

Please follow the steps below to Upload Clinical Permit Documents

Item	Description	Image/Graphic
Document Identification	<ul style="list-style-type: none"> • Please clearly print your NAME is on EVERY PAGE of DOCUMENTATION that you upload to Verified. • Please ensure that IF you are uploading a VSS/POLICE CHECK, that the SEAL IS VISIBLE when you upload the document 	
Log In	<p>Login to Verified using the login credentials emailed to you from Synergy to your SCHOOL EMAIL address</p> <p>Example: samplestudent@mail.utoronto.ca</p>	
Student Dashboard	<p>On this page you will find important information regarding services, fees, status updates and the ability to book services via quick link buttons</p>	

<p>My Profile</p>	<p>From the Dashboard you can access your student profile.</p> <ul style="list-style-type: none"> Select the My Profile tab (top right of the page) 	
<p>Document Uploads</p>	<p>Once your profile is open you will need to go into the appropriate area to upload your clinical permit requirement documents.</p> <ul style="list-style-type: none"> Select the Document Uploads Tab 	
<p>Select your Section</p>	<p>In the Documents Upload area you can select the appropriate section that your clinical requirements will go under.</p> <p>For example: Lab Results would go in the Virtual Doc Section</p> <ul style="list-style-type: none"> A “File Manager” window will open. You can drag and drop document files to this window or you can browse for a file by clicking on “Browse” Button Once the file is uploaded a green bar will indicate that the files have successfully uploaded Scan entire pages so that no documents are cut off 	
<p>ESPC Status</p>	<p>A status update will be provided via email to the email address associated with your Verified profile up to two business days after your ESPC appointment.</p>	

Student Status:

Your current status can be found in the “My Profile” tab of your Verified account. Scroll down on the “Main” tab page of your profile and you can view what your overall status is, along with information on when requirements will expire.

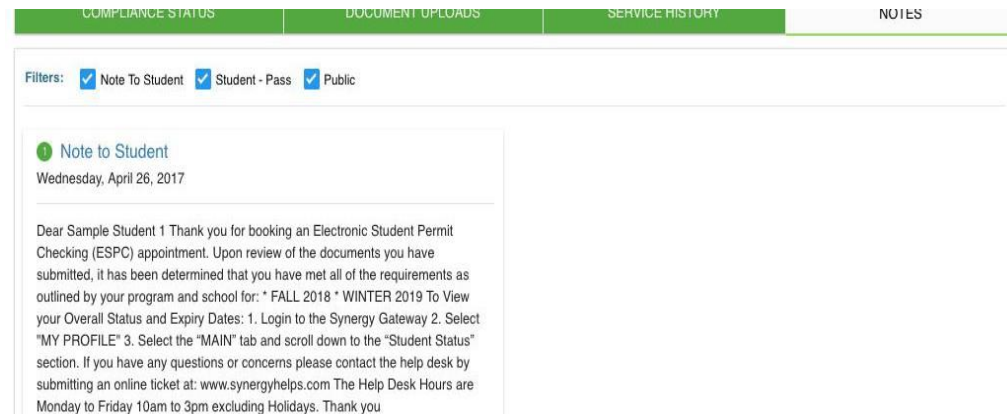
Your “Overall Student Status” will be one of the following:

Status	Definition
PASS/Conditional Pass	You are cleared to attend the clinical placements
FAIL	You are missing requirements and/or have invalid document(s). You are not cleared to attend clinical placement (Synergy will provide you with instructions on what is needed for you to fulfill your requirements and upload instructions).
EXPIRED	One or more of your requirements has expired. You are no longer eligible to attend clinical placement
PENDING	Synergy needs more information from you. You are currently not eligible to attend clinical placement

Notes:

Notes can be accessed from the “My Profile” page in your Verified account.

The Notes feature is where you can view any communication that was sent to you by Synergy regarding your ESPC appointment. This information is also emailed to the email address associated with you Verified account.



The screenshot shows the 'NOTES' tab selected in a navigation bar. Below the navigation bar, there are filter options: 'Note To Student' (checked), 'Student - Pass' (checked), and 'Public' (checked). A single note is displayed with the following content:

Note to Student
Wednesday, April 26, 2017

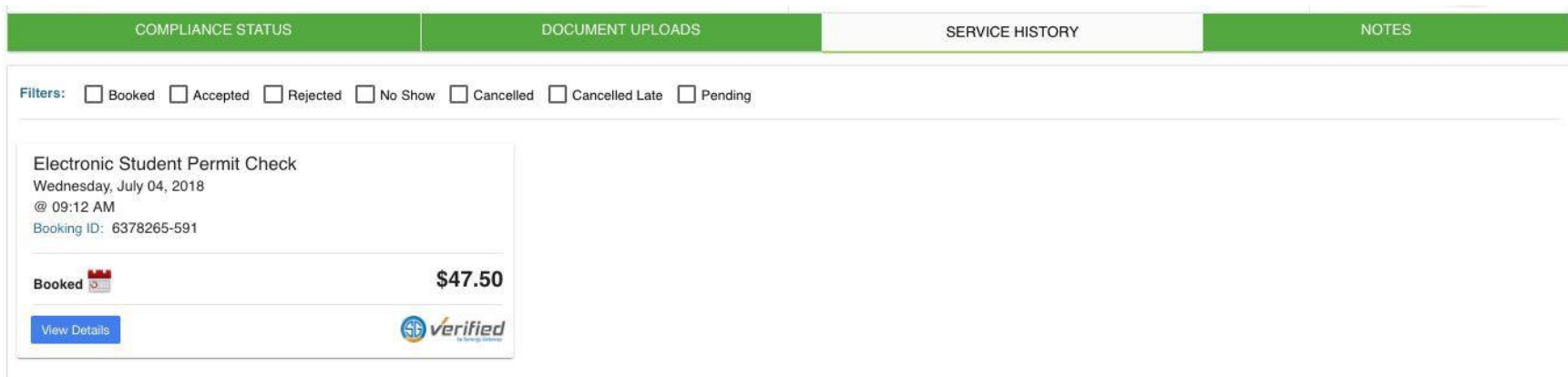
Dear Sample Student 1 Thank you for booking an Electronic Student Permit Checking (ESPC) appointment. Upon review of the documents you have submitted, it has been determined that you have met all of the requirements as outlined by your program and school for: * FALL 2018 * WINTER 2019 To View your Overall Status and Expiry Dates: 1. Login to the Synergy Gateway 2. Select "MY PROFILE" 3. Select the "MAIN" tab and scroll down to the "Student Status" section. If you have any questions or concerns please contact the help desk by submitting an online ticket at: www.synergyhelps.com The Help Desk Hours are Monday to Friday 10am to 3pm excluding Holidays. Thank you

Transactions:

Log into your Verified account, click on “My Profile” and then select the Green “Service History” Tab

This is where you can see what appointments have been booked, cancelled, rescheduled, and completed.

Please note, the “Payment” amount owing displayed here will be updated once the ESPC service is COMPLETED (pass or fail). Receipt of the payment confirmation email is sufficient to establish that you have made your payment successfully..



The screenshot shows the 'SERVICE HISTORY' tab selected in a navigation bar. Below the navigation bar, there are filter options: Booked, Accepted, Rejected, No Show, Cancelled, Cancelled Late, and Pending. A single transaction is displayed in a card format:

- Electronic Student Permit Check**
- Wednesday, July 04, 2018
- @ 09:12 AM
- Booking ID: 6378265-591
- Status: **Booked** (with a calendar icon)
- Amount: **\$47.50**
- Buttons: [View Details](#) and the Verified logo.

Important Forms and other information:

Log into your Verified account and click on the “Information” tab.

The “**Important Forms**” tab will give you access to any forms you may need for the appointments you have booked through Verified such as your consent form, permit document, waiver form etc.

- Simply click on the information tab and select “Important Forms” from the drop down menu.
- Here you can select from a range of forms, download and print.

Information



Important Forms

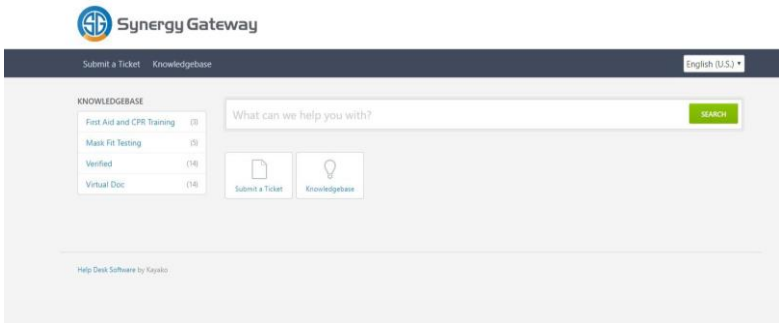
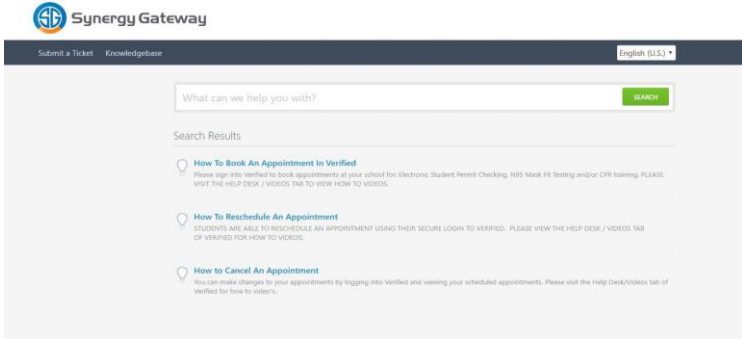
Please use the button below to access the important forms that you will need when you are gathering your documents for your ESPC appointment. There are user guides to help you throughout the process, helpful hints to ensure you have done all you need correctly and most importantly information on Verified and how this works. This library of forms is meant to be your Virtual guide to reaching your practicum placements!

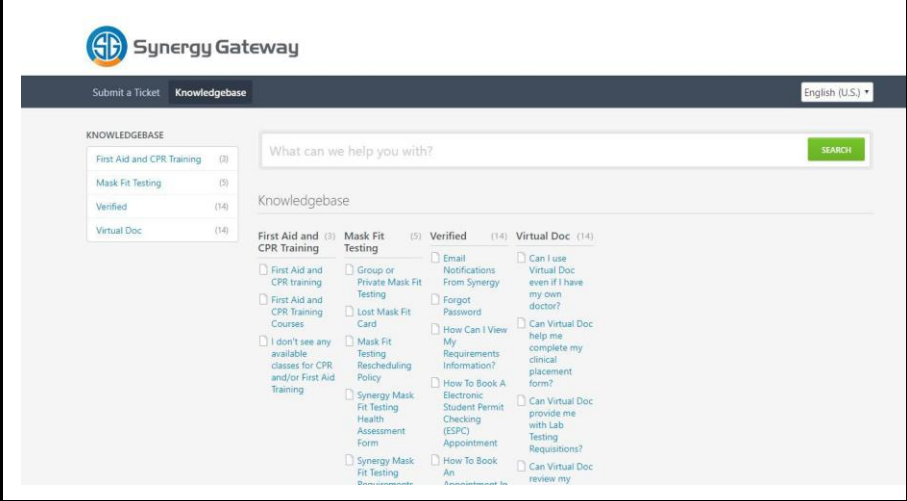
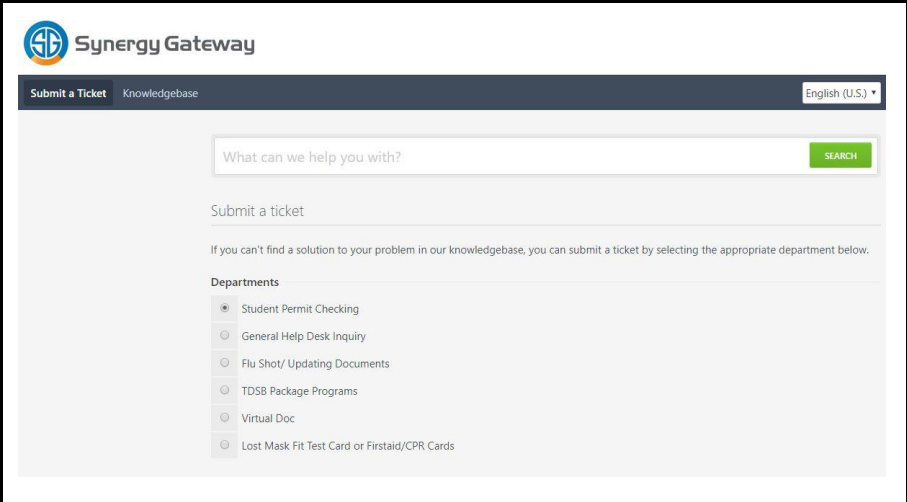
[IMPORTANT FORMS](#)

Synergy Help desk:

The Help Desk is available Monday to Friday from 10:00am to 3:00pm EST (excluding statutory holidays). Our Help Desk operates on a ticket based system and all inquiries are answered by email. Please note that the Help Desk cannot book, cancel or reschedule student appointments.

In addition to our email-based Help Desk, you have access to our “Knowledge Base” library. Here you can view answers and solutions to common questions and/or issues.

<p>Help Desk</p>	<p>Click here synergyhelps.com or open the above URL in your web browser</p> <p>This will open the Synergy Gateway Help Desk home page</p>	 <p>The screenshot shows the Synergy Gateway Knowledgebase interface. At the top, there is a navigation bar with 'Submit a Ticket' and 'Knowledgebase' links, and a language dropdown set to 'English (U.S.)'. Below this is a search bar with the placeholder text 'What can we help you with?' and a green 'SEARCH' button. To the left of the search bar is a 'KNOWLEDGEBASE' section with a list of categories: 'First Aid and CPR Training' (0), 'Mask Fit Testing' (0), 'Verified' (16), and 'Virtual Doc' (16). Below the categories are icons for 'Submit a Ticket' and 'Knowledgebase'. At the bottom, it says 'Help Desk Software by Kayako'.</p>
<p>Search Bar</p>	<p>The Search Bar can be used for students who have questions or inquiries about Synergy Gateway Services.</p> <p>Use the search bar to type in a keyword or question</p> <p>Example: How to book a ESPC Appointment or a keyword such as 'appointment'</p>	 <p>The screenshot shows the Synergy Gateway Knowledgebase search results page. It features the same navigation bar as the home page. The search bar contains the text 'What can we help you with?' and the 'SEARCH' button. Below the search bar, the 'Search Results' section is visible, showing three results with lightbulb icons: 'How To Book An Appointment In Verified', 'How To Reschedule An Appointment', and 'How To Cancel An Appointment'. Each result includes a brief description of the content.</p>

<p>Knowledge Base</p>	<p>Students can click on the Knowledge Base tab and select from a range of services Synergy offers. Each service is divided into ‘popular areas of interest’</p> <p>Students can select their topic of choice and get detailed information on common questions and concerns</p>	 <p>The screenshot shows the Synergy Gateway Knowledgebase interface. At the top, there are navigation links for 'Submit a Ticket' and 'Knowledgebase', and a language dropdown set to 'English (U.S.)'. Below the navigation is a search bar with the placeholder text 'What can we help you with?' and a green 'SEARCH' button. To the left of the search bar is a 'KNOWLEDGEBASE' sidebar with a list of categories: 'First Aid and CPR Training (8)', 'Mask Fit Testing (5)', 'Verified (14)', and 'Virtual Doc (14)'. The main content area displays a grid of search results under the heading 'Knowledgebase'. The results are organized into four columns: 'First Aid and CPR Training (8)', 'Mask Fit Testing (5)', 'Verified (14)', and 'Virtual Doc (14)'. Each column contains a list of search results with checkboxes, such as 'First Aid and CPR training', 'Group or Private Mask Fit Testing', 'Email Notifications From Synergy', and 'Can I use Virtual Doc even if I have my own doctor?'.</p>
<p>Submit a Ticket</p>	<p>If you are unable to find the answer from your search or the knowledgebase center you can Submit a Ticket to our team.</p> <ol style="list-style-type: none"> 1. Click on ‘Submit a Ticket’ 2. Click the department that pertains to your question or concern 3. Enter all required information and type in your message 4. Click on ‘Submit’ at the bottom of the page <p>Remember: Failure to enter all required information may result in your request taking longer to process</p>	 <p>The screenshot shows the Synergy Gateway 'Submit a Ticket' form. At the top, there are navigation links for 'Submit a Ticket' and 'Knowledgebase', and a language dropdown set to 'English (U.S.)'. Below the navigation is a search bar with the placeholder text 'What can we help you with?' and a green 'SEARCH' button. Below the search bar is a section titled 'Submit a ticket'. Underneath this section is a message: 'If you can't find a solution to your problem in our knowledgebase, you can submit a ticket by selecting the appropriate department below.' Below this message is a section titled 'Departments' with a list of radio button options: 'Student Permit Checking' (selected), 'General Help Desk Inquiry', 'Flu Shot/ Updating Documents', 'TDSB Package Programs', 'Virtual Doc', and 'Lost Mask Fit Test Card or Firstaid/CPR Cards'.</p>