

Facility New Partner Orientation Part 2 Guide & Checklist

Welcome back for Part 2: Introduction to PlacementPro!

In this section of New Partner Orientation, you will complete the **Introduction to PlacementPro**, our clinical placement management tool. There are three types of users for facilities:

1. **Clinical User:** Can manage placements and clinical requirements for students and instructors.
2. **HR User:** Can only review the clinical requirements for students and instructors. This user level cannot respond to placement requests.
3. **Department Director User:** Can manage placements for their specific department/unit and see/vet clinical requirements for any student/instructor assigned to their area of responsibility.


If you are also completing the Clinical Requirements Management (CRM) Training as a component of this orientation, you will use the last part of this guide. There is NOT a separate guide for facility users related to CRM.



The TCPS PlacementPro Sandbox

A component of the online introduction to PlacementPro is the Sandbox. Here you can assume your role for a facility known as Z Facility. All the data in the Sandbox is “play” data so you cannot hurt anything if you approve/deny a request wrong or set up a preceptor with missing data. The Sandbox provides you with a place to get comfortable with the tool before working with live data in PlacementPro.

Technical Requirements:

<p>Checklist:</p> <p><input type="checkbox"/> Browser Check</p> <p><input type="checkbox"/> Sandbox Login</p>	<p>Go to the Sandbox and log in. Make sure you are using an approved browser:</p>  <p>Link: https://sb-tcpsplacement.com All login information is case-specific!</p> <p>You will be sent access information in one business day after receiving the initial welcome & instructions to access New Partner Orientation from Liz@tcps-us.com. This email will alert you that your account has been set up in the SANDBOX and provide instructions for your first login. This is a precursor for your account creation in the LIVE PlacementPro following training. If you have not received this, please check your SPAM/JUNK mail first. If you still do not have it, please reach out to her via email.</p>
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The Online Orientation and related Resources will guide you through the basics of logging into the PlacementPro system and provide you with an overview of key components you will see on the screen. Periodic Sandbox Stops will allow you to work with the Placement Data and/or individual data.

Sandbox Stop #1

The goal of the first Sandbox Stop is to familiarize yourself with the main HOME screen and Menu Bar.

<p>Checklist:</p> <p><input type="checkbox"/> All 6 found!</p> <p><input type="checkbox"/> Found it!</p>	<p>Using the PlacementPro Sandbox, find the following:</p> <ol style="list-style-type: none"> 1. Current Requests 2. Assigned Placements for this academic term 3. Student Instructor Snapshot 4. Preceptor list 5. The phone number for School Contact 6. User Guides for PlacementPro <p>Knowledge Check: Where will you find placement data from last year? (Hint: Review the Menu Bar!)</p>
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Sandbox Stop #2

The goal of the second Sandbox Stop is to USE the tool to respond to requests from Z School. Remember that there are user guides for Navigating and Managing Placements available!

<p>Checklist:</p> <p><input type="checkbox"/> All 2 completed!</p> <p><input type="checkbox"/> Got both covered!</p>	<p>Using the PlacementPro Sandbox, find the following:</p> <ol style="list-style-type: none"> 1. Respond to a request in the system for Z Facility. 2. Add a Precepted Placement for one of the Z Facility Departments. <p>Knowledge Check: If you see the number 2 or greater in the Request column when reviewing requests, what does this mean? (Hint: Placement Grid Definitions!)</p> <p>How do you respond to a duration of Request Standing? (Hint: Approving a Placement 1!)</p>
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Sandbox Stop #3

The goal of the third Sandbox Stop is to manage your requests and assigned placements AND enter an instructor into the system. Remember that there are user guides for Managing Placements and Adding Instructor Data available! Here you can get creative and add an instructor to the system. Remember that others can see this information, so use a fictitious name and data to protect your real instructor data!

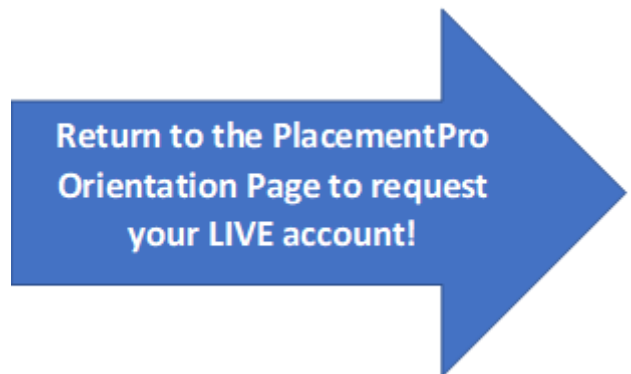
<p>Checklist:</p> <p><input type="checkbox"/> Both Completed</p> <p><input type="checkbox"/> Nailed them both!</p>	<p>Using the PlacementPro Sandbox ...</p> <ol style="list-style-type: none">1. Add Preceptor2. Assign a Preceptor to an Assigned Precepted Placement <p>Knowledge Check:</p> <p>How will the school know who the Preceptor is for a placement AND find contact information? (Hint: Adding Preceptors Part 4!)</p> <p>What happens with a Preceptor leaves the facility? (Hint: Adding Preceptors Part 5!)</p>
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Write down your completion code as shown on the screen here:

You will need this code when requesting your LIVE PlacementPro Account!



Clue#2 = 10 Minute Rule



CRM Sandbox Stop - If you reviewed the CRM Training, this last Sandbox Stop is for YOU!

The goal of this Sandbox Stop is to USE the tool to approve and reject individuals based on their clinical requirements. Remember that there is a user guide for this task!

<p>Checklist:</p> <p><input type="checkbox"/> All 5 completed!</p> <p><input type="checkbox"/> Got these covered!</p>	<p>Using the PlacementPro Sandbox, complete the following:</p> <ol style="list-style-type: none">1. Review the Student/Instructor Vetting Screen.2. Approve an individual for a placement.3. Deny an individual for a placement.4. Review the Student/Instructor SnapShot.5. Do an Individual Term Reset for YOUR student or instructor that you approved. <p>Knowledge Check:</p> <p>How do I see an individual's clinical requirements? (Hint: Using the Vetting Screen)</p> <p>If I see an individual on the snapshot that has Yellow and Updated in the Facility Final Approval column, what should I do? (Hint: Tracking the Vetting Process!)</p> <p>How can I sort student or instructor data by school and rotation? (Hint: Review Using the Vetting Screen!)</p>
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Related Policy Decision: How often will you vet individual students/instructors coming to your facility?


Each Term ... or... **Each Academic Year**?

If you will review students each term, please do a Term Reset at the beginning of each Term. If you will vet once/year, you will only need to do a Term Reset on or about August 1 each year. Term resets will clear facility approvals for active students and instructors. Previous approvals will be held on an individual's Placements Tab for historical purposes.

A new academic year brings on the need to again review student and instructor requirements who had been previously assigned to the facility to ensure any needed updates have been completed.

The timing of the RESET is your choice. Be sure and reset your students and instructors. There is a User Guide on Term Resets in PlacementPro under HELP-->Contents! If you have questions, please reach out to your Regional Manager!

Remember you will need your completion code and Clue #2 to request your LIVE PlacementPro account in Part 3!



Return to the TCPS Orientation Page to request your LIVE PlacementPro account!