

School New Partner Orientation Part 2 Guide & Checklist


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

1. **Educational User:** Can request and manage clinical placements and manage clinical requirements for students and instructors.
2. **School Data Manager:** Can manage the clinical requirements for students and instructors including assigning students and instructors to placements.



The TCPS PlacementPro Sandbox

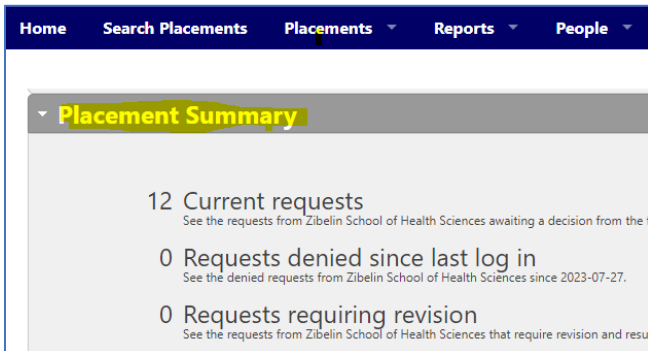
A component of the online introduction to PlacementPro is the Sandbox. Here you can assume your role for a school known as Z School. All the data in the Sandbox is “play” data so you cannot hurt anything if you enter a request wrong or set up a student or instructor with missing data. The Sandbox provides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

<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 and 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. **You may see some warnings or duplicate users on the top of the Sandbox HOME Screen when you log in related to other new users playing with the system. Scroll down past these until you see the Placement Summary!**



<p>Checklist:</p> <p><input type="checkbox"/> All 5 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. Instructor list 5. The phone number for Facility Contact <p>Knowledge Check: Where would you edit your contact information? (Hint: Editing Your Information!)</p>
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Sandbox Stop #2

The goal of the second Sandbox Stop is to USE the tool to request placements from Z Facility. Remember that there are user guides for Navigating, Searching, and Requesting Placements available!

<p>Checklist:</p> <p><input type="checkbox"/> All 3 completed!</p> <p><input type="checkbox"/> Got it!</p>	<p>Using the PlacementPro Sandbox, find the following:</p> <ol style="list-style-type: none"> 1. Search for an OPEN placement at Z Facility 2. Select a placement from the Placement Grid and request it for Z School 3. Request a placement not already listed for Z Facility. <p>Knowledge Check: When is it OK to Request a New Placement using this button? (Hint: Review Searching for Open Placements!)</p> <div data-bbox="933 1627 1477 1879" data-label="Image"> </div>
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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"/> All complete!</p> <p><input type="checkbox"/> Nailed it!</p>	<p>Using the PlacementPro Sandbox:</p> <ol style="list-style-type: none">1. Add an Instructor for ZSchool.2. Add an Instructor to an assigned placement.3. Release and assigned placement. <p>Knowledge Check: When should you release a placement? (Hint: Review Releasing a Placement!)</p>
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Decision Point: Do you need Clinical Requirements Management Training?

YES – continue to the next page.

NO - Write down your completion code shown on the screen here:

You will need this code AND Clue # 2 below when requesting your LIVE PlacementPro Account!



Clue#2 = 10 Minute Rule

Clinical Requirements Management Training

The PlacementPro Sandbox is the perfect place to practice your CRM skills.

CRM Sandbox Stop #1 provides a choice on how you will put data into PlacementPro.

While it is not necessary to do it both ways, it is an option:

1A uses the CRM Spreadsheet and 1B covers manual data entry.

CRM Sandbox Stop #1A – Using the Spreadsheet to Enter Students/Instructors

The goal of the first Sandbox Stop is to familiarize yourself with Step 2 of the CRM Process. The CRM process is a component of the CRM Packet! Choose Stop #1A or #1B based on how you chose to enter Student/Instructor data.

Remember that others can see this information, so use a fictitious name and data to protect your real student and instructor data!

Checklist:	
<input type="checkbox"/> All 4 completed!	Using the CRM Spreadsheet, complete the following: <ol style="list-style-type: none">1. Add a fictitious Student or Instructor to Row 2 including school, role, first and last name, and student/employee ID. NOTE: For the Sandbox, enter ZSchool as the school name.2. Add a Requirement to the individual.3. Add a Background Check or Drug Screen and set the status to Passed.4. Upload the spreadsheet to the Sandbox!
<input type="checkbox"/> Found it!	Knowledge Check: What decision must you make in Step 2 of the CRM Process? (Hint: CRM Step 2!)

CRM Sandbox Stop #1B – Entering Students/Instructors Directly into PlacementPro

Remember that others can see this information, so use a fictitious name and data to protect your real student and instructor data!

Checklist:	
<input type="checkbox"/> All 3 completed!	Using the PlacementPro Sandbox, complete the following: <ol style="list-style-type: none">1. Add a Student or Instructor.2. Add a Requirement to the individual.3. Add a Background Check or Drug Screen and set the status to Passed.
<input type="checkbox"/> Found it!	Knowledge Check: What decision must you make in Step 2 of the CRM Process? (Hint: CRM Step 2!)

CRM Sandbox Stop #2

The goal of this Sandbox Stop is to add various requirements directly into PlacementPro. Remember that there are CRM user guides for each step in PlacementPro under Help→Contents!

<p>Checklist:</p> <p><input type="checkbox"/> All 3 completed!</p> <p><input type="checkbox"/> Got it!</p>	<p>Using the Student or Instructor you added in the first Sandbox Stop, complete the following:</p> <ol style="list-style-type: none">1. Assign your student or instructor to a ZFacility Placement using an assigned placement.2. Add an N95 Respirator Mask Fit Test date to clear the missing requirement.3. Upload a Document – there is a sample driver’s license file you can download on the screen. Or use any document that does not reflect real data! <p>Knowledge Check: What step in the process displays a facility’s clinical requirements in the individual’s digital record? HINT: Look at Step 2C in the CRM Process!</p>
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CRM Sandbox Stop #3

The goal of this Sandbox Stop is to add various requirements directly into PlacementPro and review them for completion. Remember that there are CRM user guides for each step within this packet!

<p>Checklist:</p> <p><input type="checkbox"/> All 4 completed!</p> <p><input type="checkbox"/> Got it!</p>	<p>Continue using the individual you have been working within the PlacementPro Sandbox to complete the following:</p> <ol style="list-style-type: none">1. Add the missing Training Completion2. Add any missing Requirements.3. Mark Requirements, Documents, & Training as Complete4. Mark your review as "complete" on the Individual's Placements Tab - remember this is CRITICAL! <p>Knowledge Check: When might I need to MERGE two individuals’ records in PlacementPro? (Hint: See Duplicate Individuals in the training!)</p>
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Sandbox Stop #4

The goal of this Sandbox Stop is to monitor for facility approval/denial and do a quick knowledge check!

<p>Checklist:</p> <p><input type="checkbox"/> Nailed it!</p> <p><input type="checkbox"/> Piece of cake!</p> <p><input type="checkbox"/> Got it!</p>	<p>Knowledge Check:</p> <p>Where do you monitor for student or instructor approval by the facility? (Hint: Review Tracking the Vetting process!)</p> <p>What should you do IF an individual is rejected by the facility? (Hint: Review Dealing with Rejection!)</p> <p>When do you do a Term Reset? (Hint: Review Maintaining Data: Archiving & Term Resets!)</p>
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Write down your completion code shown on the screen here:

You will need this code AND Clue # 2 below when requesting your LIVE PlacementPro Account!

Clue#2 = 10 Minute Rule



**Return to the TCPS
Orientation Page to request
your LIVE PlacementPro
account in Step 3!**