Users, Terms, Definitions & Logging into PlacmentPro℠

Content: User Roles, Key Terms, Grid Headers/Terms/Practices, Action Icons, Logging into PlacementPro
Users: All

User Roles

- **Generic Partner** – may search, view data, export, and run reports.
- **Data Manager User** – Add, edit students and instructors
- **Instructor User** – General Partner activities plus add and edit students.
- **Educational User** – Instructor activities plus request placements, edit some placement components, add students and data, add and edit Instructors.
- **Clinical User** - Partner activities plus add placements, make placement decisions, edit all placement components, add and edit preceptors, and approve/deny background/drug screens.
- **HR User** – review student data, and approve/deny background/drug screens.
- **Administrator** – has access to all tools needed to manage clinical placement data and users, import all levels of data, assign PCodes, and assign placement data in the final step of request approval.

Key Terms

- **Placement** – A clinical learning opportunity for students that is in a single patient care area for a single academic term. There are 5 types of placements with TYPE determining how many days of the week a placement may use.
    - Group – 1 day
    - Observation – 1 day
    - Management, Precepted, and Leadership – may use multiple days in the same week during the date span.
    - See Rotation in the section below for additional information.
    - A Placement Conflict is defined as the same unit, shift, date range, and day for group, observation, and management rotations. Leadership and Precepted placements are not monitored for conflicts due to the nature of the placement.
- **Partner** – Schools and Facilities who have a current partnership agreement on file with the licensing organization and have agreed to abide by the Partnership Bylaws and/or PlacementPro users' guidelines.

Grid Headers, Related Terms & Practices

- **PCode** – The unique identifier for a Placement consisting of a Facility code, year code, and Placement identification number. PCodes are assigned by the Site Administrator. Always refer to the PCode of a Placement when communicating about a Placement.
- **Status** – Used to denote the current state of a Placement. There are 8 different statuses used in the PlacementPro system:
    - Open – Available for request
    - Closed – Temporarily unavailable due to renovation, staffing, patient census, etc.

- Request – An Open placement that has been requested by one or more schools – OR a previously assigned placement that has been edited and needs review/approval by the facility.
- Denied – A request that has been denied by the facility. Comments may indicate the reason or direct the school to another alternative placement.
- Revise & Resubmit – A request that may be granted if it is resubmitted with the requested information – see the comments section for what is needed for resubmission.
- Approved – The facility has approved the request.
- Assigned – a Request has been fully approved by the Facility, updated to Placement status (with a PCode if needed) by the Site Administrator.
- Release Requested – a temporary status used to alert the facility that a school wants to release a placement.
- Released – a placement has been released by a school. This status will allow reports to be run that show the release date and released by information.

- **Requests** – Used to identify an OPEN Placement that has pending requests awaiting Facility approval. Additional requests may be made for this OPEN Placement and it is up to the Facility to determine which School will be awarded the Placement.
- **Conflicts** – Used to identify when a request is in potential conflict with another placement. These may be true conflicts or additional placements in the system for the same day/unit but during a different time frame. Noting the number of students/student groups on a given unit on a specific day is available to monitor for staff-student fatigue which can compromise patient safety.
- **Expired** – Used to identify a placement that occurred in the past based upon the End Date. These placements are also viewable using the History tab.
- **Region** – Schools and Facilities are assigned to their geographic region. Use the region to narrow search criteria to a given region. Regions can be configured to streamline searches.
- **Unit** – The name of a patient care area within a given Facility.
- **Unit Type** – Used to denote the general patient population for a Unit in a given Facility. If a Unit is being used as a Dedicated Education Unit (DEU) the Unit Type reflects this use of the Unit.
- **Program** – Used to identify the type of students that may use a Placement.
- **Facility** – Used to identify a PARTNER or Non-Partner Facility. Facilities listed with a –NP suffix are not partners and may not use the PlacementPro system for placement request activities. NP Facilities are only listed when submitted by a Partner SCHOOL to consolidate all Placement data in a single database.
- **School** – Used to identify a Partner or Non-Partner School. Schools listed with a –NP suffix are not partners and may not use the PlacementPro system for placement request activities. NP Schools are only listed when submitted by a Partner Facility to consolidate all Placement data in a single database.
- **Standing School** – Used to denote that a Placement has been released by a School that has been given a Standing Duration for a given Term. This Placement will be returned to the School for the next academic Term.
- **Level** – Used to denote the academic level of students assigned to a given Placement. Should additional levels be needed, please contact TCPS through the Contact Us link.   Levels may be specified as desired. Current Levels include:
  - HC1 – Students who are in their first year of a healthcare professional program of study.
  - HC2 – Students who are in their second year of a healthcare professional program of study.
  - HC3 – Students who are in their third year of a healthcare professional program of study.

- o HC4 – Students who are in their fourth year of a healthcare professional program of study.
- o HC: Grad – Students who are in a graduate-level healthcare professional program of study.
- o HC: Post Primary – Healthcare Professional in an advanced program of study.
- o HOSA – Students who are in High School and enrolled in a Health Occupations Students program of study.
- o N: APN/Grad – Students that are in an MSN or higher academic program of study.
- o N: CNL – Students who are in a Clinical Nurse Leader program of study.
- o N: DNP – Students who are in a DNP program
- o N: LPN to RN/BSN – Students who are LPNs and currently enrolled in an accelerated RN program of study.
- o N: PN - Students who are enrolled in a Practical Nursing program of study.
- o N: RN Refresh - Students who currently hold an inactive RN License and are enrolled in a Refresher Course aimed at reactivating their RN License.
- o N: RN to BSN – Students who are RNs and enrolled in a BSN completion program of study.
- o N: SN1 – Students who are in their first clinical term of a nursing program leading to RN Licensure.
- o N: SN2 - Students who are in their second clinical term of a nursing program leading to RN Licensure.
- o N: SN3 - Students who are in their third clinical term of a nursing program leading to RN Licensure.
- o N: SN4 - Students who are in their fourth clinical term of a nursing program leading to RN Licensure.
- o N: SN5 - Students who are in their fifth clinical term of a nursing program leading to RN Licensure.
- o N: SN6 - Students who are in their sixth clinical term of a nursing program leading to RN Licensure.

- **Course** – Used for Schools to identify the course number/brief title that the students will be taking related to a clinical placement.
- **Instructor** – Used by Schools to identify the instructor that will be responsible for students using a Placement. Schools must add their Instructors to the system to add the instructor name to a placement.
- **Duration** – Used to denote the duration of a placement. There are 2 durations used when a placement is approved for a school, and one duration used by the School to request a standing placement:
  - o 1 Term – denotes a Placement is assigned for a single academic term.
  - o Standing – denotes a Placement is assigned for this and future like academic terms (Spring, Summer, or Fall). Standing duration is granted by the Facility and may be revoked temporarily or permanently based upon Facility policy and/or School affiliation agreements, and/or failure of the School to maintain a good working relationship with the Facility. Facilities may or may not grant Standing status when requested.
  - o Request Standing – Use this duration when requesting a placement and would like the facility to consider Standing duration for the placement.
- **Year** – Denotes the year of the Placement. This is computed automatically based upon the START and END Dates of a Placement.
- **Term** – the academic term during which a Placement is available or used by a School. There are three academic terms recognized by the PlacementPro System – Spring, Summer & Fall. Schools can set their TERM dates to search for placements that occur within their terms. This will be helpful for schools that function on a modified academic calendar.
- **Start Date Placeholder** – The first date of the academic term is used as a placeholder until the True Start date is identified based upon when students will begin the placement. This is the date that is typically entered during Rollover denoting a full-term placement.
- **True Start Date** – the actual first date the student will be onsite for the placement.

- **End Date Placeholder** – The last date of the academic term is used as a placeholder until the True End date is identified based upon when students will begin the placement.
- **True End Date** - the actual last date the student will be onsite for the placement.
- **Rotation** – denotes the type of clinical Placement and the related instructor availability for the students.
    - Group - Students provide patient care based upon course outcomes; Instructor is with students.
    - Observation - Student will observe only; instructor is on-site.
    - Precepted - The student is assigned to a specific nurse and may follow the nurse's work schedule. The instructor is available, but not always on site.
    - Management - The student will serve as a "charge nurse" to oversee patient care by several students. The instructor is on-site.
    - Leadership - The student is assigned to shadow a facility leader to observe leadership activities. The instructor is available, but not always on site.
- **Days of the Week** - Shift codes will appear on the day of the week that the Placement is available. Group and Observation placements may only use one day/placement. Leadership, Management, and Precepted placements may use multiple days. Precepted placements that span M-SU indicate that the student will follow the preceptor's schedule and the actual shift each week will vary**. Shift Codes** include:
    - D/E8 - Day OR Evening 8 Hour shift
    - D/N12 - Day OR Night 12 Hour shift
    - D12 – Day 12H (7A-7P)
    - D8 - Day 8H (7A-3P)
    - D6 - 6H Time block TBD within 7A-3P
    - D4 - 4H Time block TBD within 7A-3P
    - E8 – Evening 8H (3P-11P)
    - E6 - 6H Time block TBD within 3P-11P
    - E4 - 4H Time block TBD within 3P-11P – often used following a D12 for 7P-11P
    - N8 – Night 8H (11P-7A)
    - N12 - Night 12H (7P-7A)
- **Time on Unit** – Schools may use this field to enter the actual time the students will be providing patient care if it is TBD or less than the listed Shift Code. Note that some facilities require this information to be entered for a decision to be made.   Time on Unit may not exceed the listed shift code by >30 minutes.
- **Precepted Hours** - denotes the total number of hours that a student will be with a preceptor during the assigned dates. This field should only be used when the rotation type is Precepted.
- **Preceptor** – Facilities may add the name of the preceptor and other related information to precepted placements to track preceptor assignments.
- **Total Students** – denotes the total number of students that will use the Placement during the assigned dates. This number is entered by the school.
- **Max Students** – denotes the maximum number of students that may use the Placement at any one time. This number varies by patient care area and is determined by Facility policy.

Action Icons

When an action is available related to data displayed such as placements or student data, there are 4 possible action icons that the user may use to interact with the data.

Printable Report

View Data

Update Data

Archive
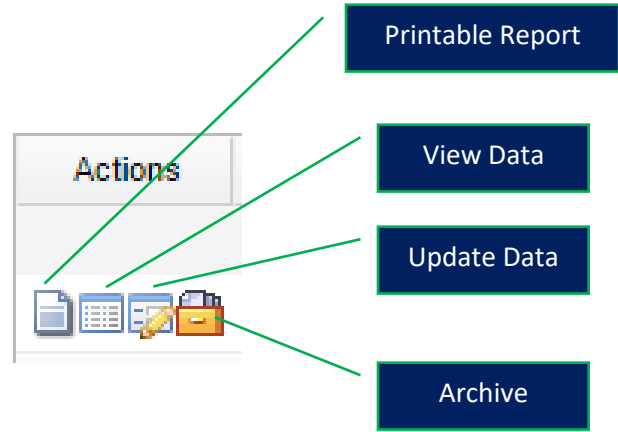
NOTE: The color palette of your screen may differ somewhat from the pictures used in this manual based upon the portal requirements of your organization!

Logging into PlacementPro

Access the TCPS PlacementPro^{SM} System either through the Partner Portal or by the direct link provided by the Site Administrator.


Log in using your Username & Password.

Your username will be your email address. You should have received an invitation to set your password from TCPS PlacementPro. If you forget your password, enter your username and click on the Forgot Password? link and an automated email will be sent to you that will allow you to reset your password.

User Home Pages

Based upon your login credentials, your home page will display the tools you need to use the system.

The General Partner Home Page is the Search screen.
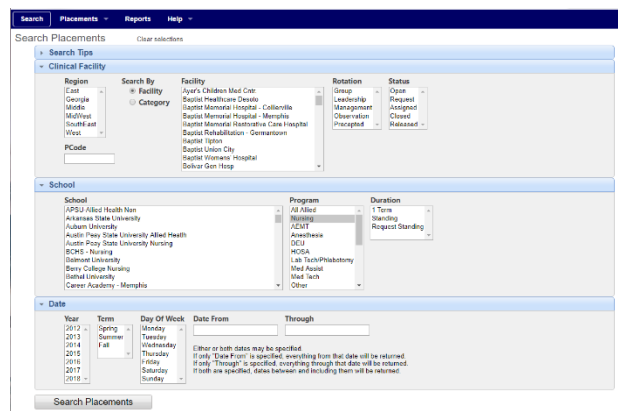
Educational User Home Page

Placement Summary

1 **Current request**
See the request from your schools awaiting a decision from the facility and the administrator.

0 **Denied requests since last log in**
See the denied requests from your schools since 2021-07-22.

0 **Requests requiring revision**
See the requests from your schools that require revision and resubmission for consideration.

0 **Requests approved by the clinical facility**
See the requests from your schools approved by the clinical facility and awaiting assignment by the administrator.

15 **Assigned placements**
See the placements for your schools assigned by the administrator.

14 **Assigned placements without students and instructors**
See assigned placements that do not have students and instructors.

0 **Released placements**
See released placements in the current term.

▸ **Students & Instructors**
▸ **Facilities Open/Closed for Requests**

Clinical Facility Home Page

Placement Summary

0 **Requests modified since last log in**
See the requests for your clinical facilities modified since you last logged in 2021-07-22.

1 **Request pending a decision**
See requests awaiting a decision from your clinical facilities.

0 **Requests requiring revision by school**
See requests requiring revision that are expected to be resubmitted by the school.

0 **Requests awaiting assignment by the administrator**
See requests approved by your clinical facilities that are awaiting assignment by the administrator.

0 **Denied requests**
See requests denied by either your clinical facilities or the administrator.

0 **Placements awaiting a PCode**
See new placements at your clinical facilities awaiting a placement code. Schools cannot see the opening until a placement code is assigned by the administrator

114 **Open placements**
See open placements at your clinical facilities. Schools will see the opening after a placement code is assigned by the administrator.

15 **Assigned placements**
See placements approved by your clinical facilities and the administrator.

14 **Assigned placements without students and instructors**
See assigned placements that do not have students and instructors.

1 **Closed placement**
See closed placements at your clinical facilities.

0 **Released placements**
See released placements in the current term.

Add a new placement...

▸ **Students & Instructors**
▸ **Term Capacity**

Additional sections of these Homepages may be opened using the arrow to the left of the section title

Data Manager & Clinical Facility HR User

| Home | Reports | People ▼ | Locations ▼ | Documents ▼ | Help ▼ |

Students & Instructors

| Students | Instructors |

Students 🔍 Search... [Go]
Search all or partial Name, Student ID, or PCode.

| Today | **Current Term** | Next Term |

Displaying 1-23 of 23 result(s). [50 ▼] rows per page

First ⬍	Middle ⬍	Last ⬍	Badge	SAR#	School ⬍	PCode ⬍	Facility ⬍	Unit ⬍	Start ⬍	End ⬍	Facility Final Approval
Alicin		Abernathy	F1234567890	12345	Z School	ZTSp18-002	Z Facility	Unit 2	2018-01-02	2018-05-01	2018-02-27
Frank		Fair	J12654	Not set	Z School	ZTSp18-002	Z Facility	Unit 2	2018-01-02	2018-05-01	2018-02-02
Betty		Bailey	Not set	321456789	Z School	ZTSp18-002	Z Facility	Unit 2	2018-01-02	2018-05-01	Updated
Charles		Calhoun	Not set	X1233654	Z School	ZTSp18-002	Z Facility	Unit 2	2018-01-02	2018-05-01	2017-12-05
David		Davis	ABC123	987654	Z School	ZTSp18-002	Z Facility	Unit 2	2018-01-02	2018-05-01	2018-02-21