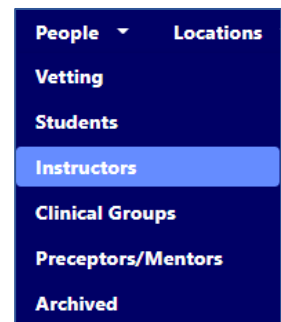# Managing Instructor Data

Users: Educational & Data Managers

Educational Users & Data Managers may add instructors to the system and assign them to placements as needed. By adding instructors to the system, you have a quick way to assign and monitor instructor assignments. Once an instructor is in the system, their name, and contact information is available in the Placement Screen for quick assignment to both requests and placements.

Once an instructor is assigned to a placement, that facility may also view their contact information and any clinical requirements that have been added to PlacementPro.

Use the People→Instructors link on the menu bar to add and edit all Instructors for your school. They may be added individually or in bulk through the file import process like importing students. Like Students, Instructor information may also be exported or imported as needed. Once Instructors are in the system, they will remain there going forward until they are archived by the school.

Adding an Instructor

As the Educational User or Data Manager for your school, you will need to add instructors to PlacementPro. **This process allows Educational Users to select the Instructor when requesting or updating a placement.**

To Add instructors, click on the **Other Button** to reveal the Add button from the Instructors Index screen.

Click the Add Instructor button.

To initially set up a new instructor, the only required fields are the First Name, Last Name, and Email. The school name will be added by default unless you have multiple programs of study or campuses If this is the case, click on the dropdown School field to pick the appropriate program/campus for this instructor. The addition of credentials provides users with specific information about the instructor that is sometimes needed. The Employee ID is necessary to track online orientation for clinical instructors.

Click on Create.

You will then see the initial digital record for Minnie Mouse in this situation. Note that the Contact Tab has a Red Status Light! This means there is no phone number in the system for Minnie.

New Instructor

First Name *
Last Name *
Credentials
Email *
Role   Instructor
Employee ID
School *
           Create
required

Minnie Mouse

General		
Status History	First Name *	Minnie
Organization	Last Name *	Mouse
Contact ●	Credentials	DPharm
Licensure ●	Email *	MMouse@zschool.edu
Documents ●	Role	Instructor
Requirements ●	Employee ID	ZS6581
Training ●	Review	Pass Fail
PCodes ●		Save
	required	

Minnie Mouse

General	Contact Numbers		
Status History		Type	Number
Organization		*No results found.*	
Contact ●	Type	Number	
Documents ●	Mobile ∨	615-123-4567	Add

Click on the Contact Tab to Add an office or mobile phone number of both. When you have at least one contact number added, go back to the General Tab and click on SAVE! The Red Contact light will change to Green!
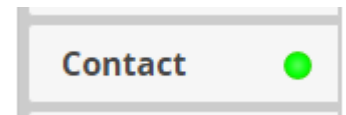
Contact ●

On the index page, you will also see that any Instructors without contact numbers are in Red; or the number of contact numbers in the system is listed. This is a quick way to clean up Instructors that may have been entered before this was a required field!

Actions	First Name	Last Name	Credentials	email	Contact Numbers
🔳📄📝🔒	Mary Sue	Benton	MSN, PhD	msbenton@strain.edu	1
🔳📄📝🔒	Wiley	Coyote		wc@zschool.edu	
🔳📄📝🔒	Jerry	Davis	RRT	jd@zschool.edu	1
🔳📄📝🔒	James	Fitzhugh	MSN, PhD	jf@zschool.edu	
🔳📄📝🔒	Cyndi	Gracelli	RRT	cgracelli@zschool.edu	2

Adding Licensure information

This data can be added in the Licensure Tab. PlacementPro provides a great tool for tracking Instructor licensure and the system will automatically send reminders 30 days before expiration, and upon expiration.

You can enter any clinical requirement data into the Instructor record, just as you would a student. This includes Licensure Verification that is required by some facilities each year. Select the type of License under the Description, enter the number, and effective date. Click on Add.

If a licensure type is not listed that you need, please contact your Data Manager. Related to licensure, many facilities require that the license has been verified online via the appropriate State Healthcare Licensing Boards to ensure continued licensure and that the license is in good standing. This verification is done via their website. You can document annual verification using the Requirements Tab. See CRM Step 4A for instructions!

See CRM Step 4A to edit and add clinical requirement data (Documents, Requirements, & Training) – just access the PEOPLE→Instructor instead of PEOPLE→Students.

Uploading Instructor Data

If you have >10-15 instructors, they can be added to a spreadsheet for importing. You can download a template using the Import/Export Button.
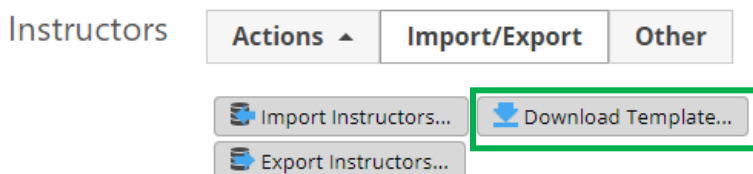

You may also upload instructor data via a spreadsheet using the Instructor Upload spreadsheet.

Enter the information based upon the column headers where each row is an instructor. BE CAREFUL not to add spaces after the data. This is a frequent cause for failed uploads and emails not being sent appropriately.

- School = the school name abbreviation as listed in PlacementPro. If you are unsure of exactly how the school is listed, click on your name in the upper right corner of PlacementPro and click on Configure. Click on the Organization Tab to find the abbreviation! Again, if you are assigned to more than one program of study or campus, you will see all organizations you are assigned to on this screen.
- Name – first and last
- Email
- Send Email – Enter the number one (1) if you want the individual to receive emails from PlacementPro; enter a zero (0) if not.
- Employee ID – the unique identifier for the individual in the school information systems. This is not a required field.
- Enter the contact numbers based upon location: office, mobile, pager, home, & other.
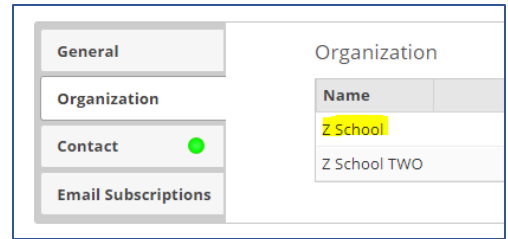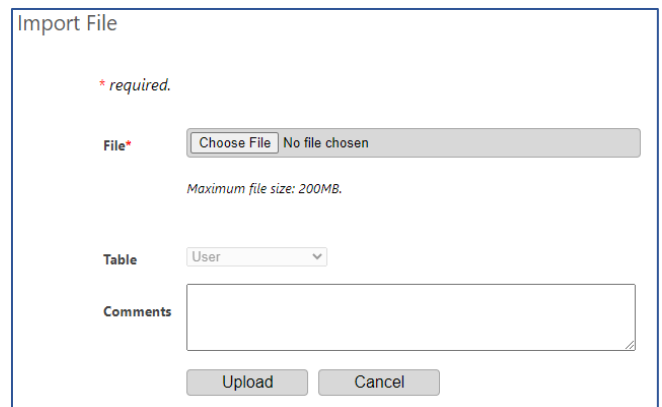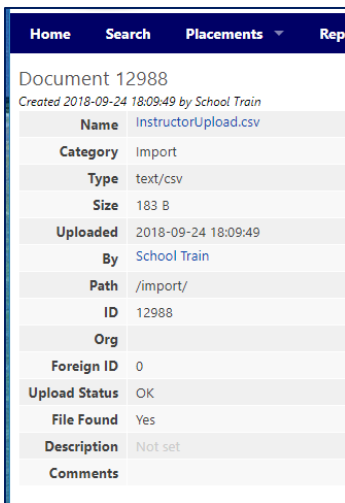
Save your file to your desktop for easy access.

Return to the Instructor Index page (PEOPLE→Instructors) and select the Import/Export Button again.
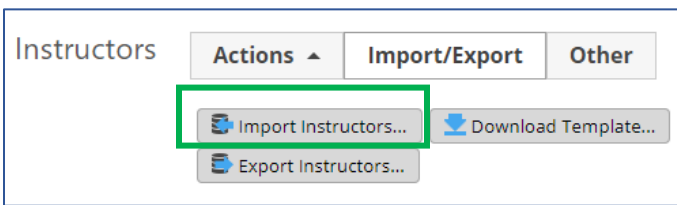
You will be prompted to navigate to Choose the File and then click on Upload.

A successful upload will result in the following screen:

If you get an Import Warning, you need to go back to your spreadsheet to update it as indicated. The warning will tell you what row the error is on and what the problem is. If you cannot easily determine what is wrong, contact your Data Manager.
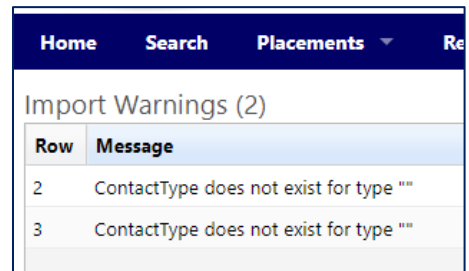
Return to the Instructor Index page and you will see your instructors in the list!

Managing Instructor Data

Once the Instructor has been created in the system, you may add/update Instructor Data in the same manner as Student Data related to Documents, Requirements, and Training. (See Step 2 and Step 4 CRM User Guides) **The Instructor may NOT edit their own requirements.** This information must be entered by the Educational User or Data Manager either individually or in a bulk upload using Excel.

Don't forget to save your update to the Instructor's information. The SAVE button is on the GENERAL Tab.

Assigning instructors to placements will also add PCodes to their individual profiles. PCodes for Instructors **are not** added through the tabs but can be reviewed.

Expanded Access: Instructors can also have access to PlacementPro to assist with the management of student data for students assigned to their clinical groups. If you need your instructors to have this access, please contact TCPS to have their access expanded and schedule training for the instructor(s).
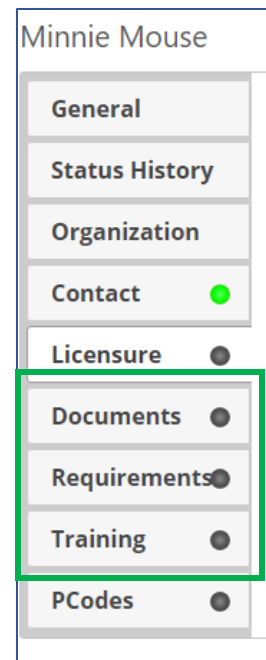
Assigning Instructors to Placements

Once your instructors are in the PlacementPro system, they can easily be assigned to placements via the placement screen like students. Instructors can be added to placement requests if the instructor is known at the time of the request, or just before the beginning of the term.

1. Go to the PlacemetnPro Home page.
2. Click on the Assigned placements without Instructors or Students
3. Find the specific placement in the Placement listing.
4. Click on the UPDATE icon in the Action column.
5. Once the placement detail view opens, scroll down the screen to the SCHOOL section. Note the Instructor field.
6. Click on the down arrow in the Instructor field to open the dropdown menu.
7. Select the appropriate instructor.
8. Click Add
9. Scroll to the bottom of the screen and click on UPDATE.
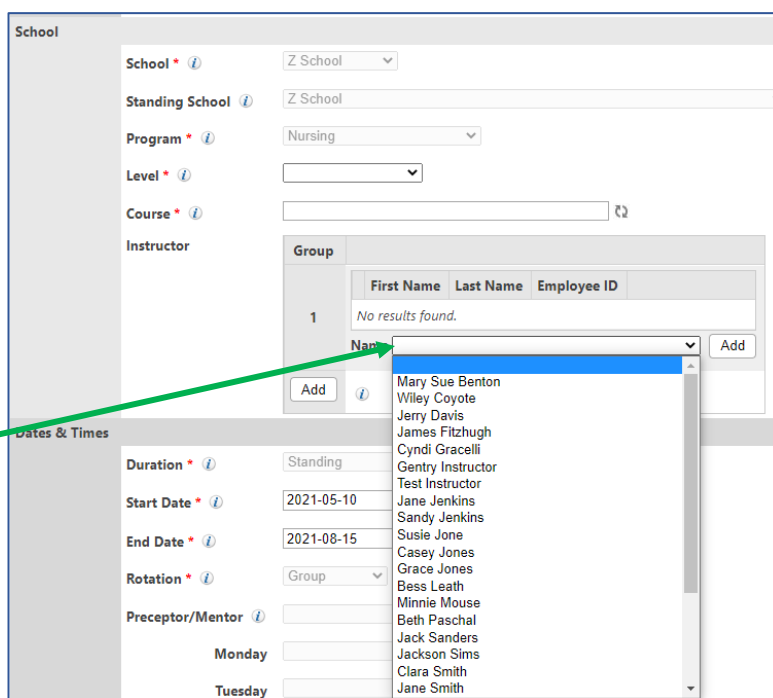
If you go to the instructor record, the PCode of the placement will be listed in their PCode tab.

If two or more Instructors will be onsite for the duration of the placement, you can add additional instructors as needed. If you need to add multiple instructors based upon different groups of students, click on the ADD button under Group 1 to add another instructor. You'll have the opportunity to enter the dates this Instructor and group will be onsite. **REMEMBER: Assigning Instructors, like with students opens the instructor's clinical requirement record to the assigned facility. Once the placement ends, the facility's access to the requirements is removed.**

Archiving Instructors

Instructors may be archived if they no longer need access to the PlacementPro system or leave the organization. From the Instructor Index page, click on the ARCHIVE icon next to the instructor's record you wish to archive.

If an Instructor returns to the school, you may un-archive them using the PEOPLE→Archived menu to see the list of all Archived Users. Select the returning Instructor and click on the Reactivate Selected Button!