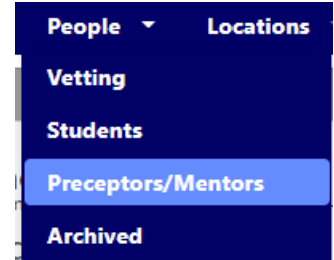


Preceptor Data

Users: Facility

Preceptor/Mentor Data

Facility users may add preceptors/mentors to the system and assign them to precepted placements as needed. By adding preceptors to the system, you have a quick way to assign and monitor preceptor assignments. Once a preceptor is in the system, their name is available in the Placement Screen to quick assignment to precepted placements. By adding contact information, the schools will automatically have access to this information, limiting the need for additional phone calls and emails!



Adding Preceptors

Preceptors may be added individually or in bulk through a file import. Remember to request an upload grid if you want to load all preceptors at one time. Click on the PEOPLE → Preceptors/Mentors link on the main menu bar.

Any Preceptors that have been added in the past will be visible on the Preceptors/Mentors index screen. If none are in the system, the index screen will be blank.

Actions	First Name	Last Name	Credentials	Specialties	Professional Start Date	email	Contact Numbers	Organizations	Units	Licensure	PCodes
	Blake	Conner	DPT	0		BConner@zfacility.com		Z Facility	PT (Rehab)		0
	Christy	Jackson	MSN	0		cs@fdas.com	1	Z Facility	B Pod (Cardiac)		3
	Sally	Jones	BSN, MSN	0	1973-04-30	sjones@ftrain.org	1	Z Facility	Unit 5 (Med/Surg) Unit 6 (Med/Surg)		8

To add one, click on OTHER and then the Add Preceptor/Mentor button to access a user import form.

Actions	First Name	Last Name	Credentials	Specialties	Professional Start Date	Organizations	Licensure	PCodes	Active
	Sally	Jones	BSN, MSN	0	1973-04-30	Z Facility	8		No
	Stacy	Jones	MSN	0		Z Facility	0		Yes
	Samantha	Stevens		1		Z Facility Z Facility 2	16		Yes

Enter the Preceptor's name and other information and then click on Create. You can always come back and edit this information if you are missing some components.

Home Search Placements Reports People Locations Documents Help

New Preceptor/Mentor

First Name *

Last Name *

Credentials

Professional Start Date Used to calculate years of experience for display

Email Essential for the "forgot password" automation.

Website/E-Portfolio

Role

Active Set to "No" to suspend access.

*required

In the next screen, you can fill in some more details about this preceptor and at a minimum enter **contact information** and assign the preceptor to a department or unit within the facility using the tabs on the side of the screen.

Felicity Mabry

- General
- Contact** ●
- Specialties
- Licensure ●
- Organization
- PCodes ●

First Name *

Last Name *

Credentials

Professional Start Date Used to calculate years of experience

Email Essential for the "forgot password" automation.

Website/E-Portfolio

Role

*required

Click on Contact to add telephone information. The contact number defaults to OFFICE, but use the dropdown menu to find other options. Enter the number and click on Add. The Red status light will change to green once there is a phone contact for the Preceptor.

Contact Numbers

Type	Number
No results found.	
Office <input type="text" value=""/>	<input type="text"/>

To assign the Preceptor to a specific department or nursing unit, click on the Organization Tab.

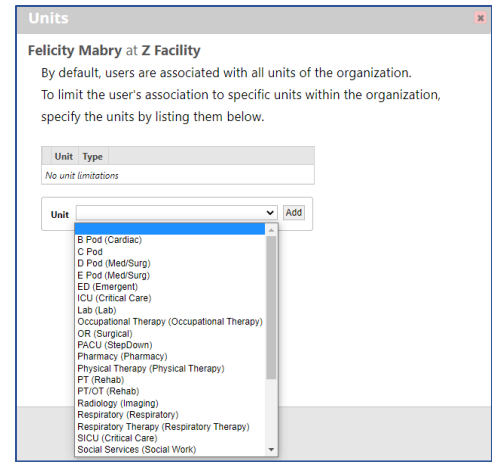
Use the UPDATE icon to access the different locations within the facility.

Organization

Actions	Name	Units
<input type="button" value="Update"/>	Z Facility	(all)

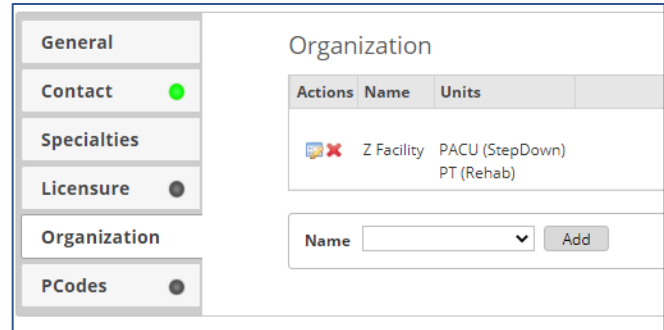
Name

From the popup screen, select the unit/department where the Preceptor is based. Click Add.



If you have a Preceptor that works in multiple areas, continue selecting as many units/departments as applicable.

Close the popup to return to the Preceptor's update screen and you will see the different departments listed.

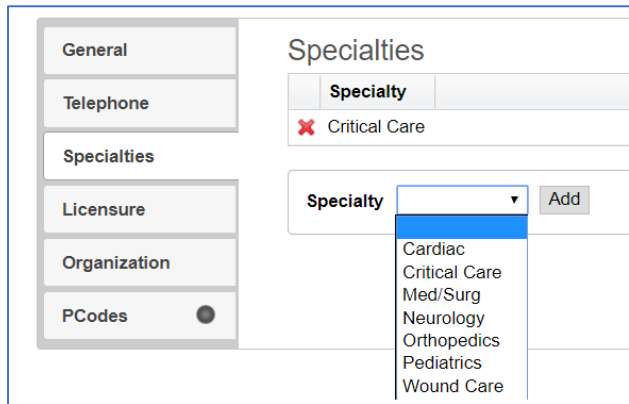


Once you have entered the Units/Departments, return to the General Tab and SAVE.

The remaining tabs on the update screen for preceptors have other information that may or may not be needed. Add the following as needed.

Add Preceptor Specialty Information:

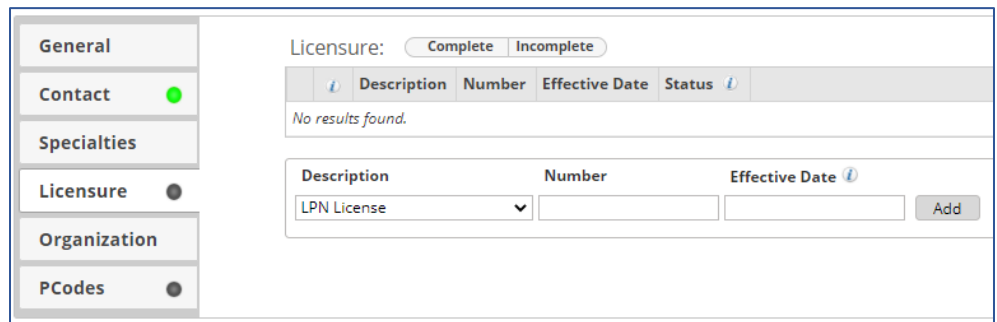
Click on the Specialties Tab to add specialties this preceptor may have to share with students. If you need another specialty added, contact your Regional Data Manager to have it added to the list!



Add Licensure Information:

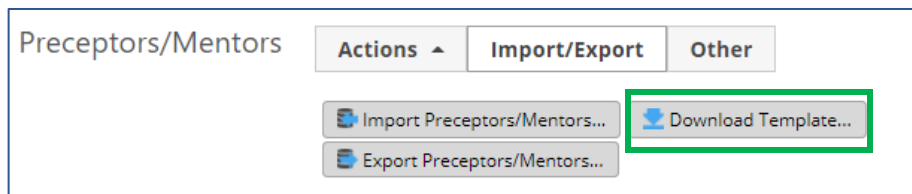
Using the Licensure Tab, choose the appropriate license from the dropdown menu. If you need a license added, please reach out to your Regional Data Manager!

Enter the Number and **EFFECTIVE** Date of the license and click on **ADD!**



Importing Preceptors/Mentors

You may also add all your preceptors using the Import/Export button on the index screen. Download the spreadsheet template and enter the individual data row by row.



A	B	C	D	E	F	G	H	I	J	K	L
org	first_name	last_name	credential	profession	Unit	email	Office	Mobile	Home	Pager	Other

Enter the information based upon the column headers where each row is an instructor. Expand the columns to be sure you are entering data under the correct header. BE CAREFUL not to add spaces after the data. This is a frequent cause for failed uploads and emails not being sent appropriately.

- Org = the facility 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
- Credentials – Some programs of study require a specific educational/licensure credential, such as a BSN or RRT. Enter this information as appropriate to the individual.
- Professional Start Date – this is sometimes required to compute years of experience.
- Email
- Office, Mobile, Home, Pager, Other – enter the appropriate numbers as available. Leave blank any column that is not needed.

Save your file to your desktop for easy access.

Return to the Preceptor/Mentor Index page (PEOPLE→Preceptors/Mentors) and select the Import/Export Button again.

You will be prompted to navigate to Choose the File and then click on Upload.

The screenshot shows the 'Import File' dialog box. It has a title bar 'Import File'. Below the title bar, there is a note '* required.'. The 'File*' field has a 'Choose File' button and 'No file chosen' text. Below this, it says 'Maximum file size: 200MB.'. The 'Table' field is a dropdown menu with 'User' selected. The 'Comments' field is a text area. At the bottom, there are 'Upload' and 'Cancel' buttons.

A successful upload will result in the following screen:

Document 12988	
Created 2018-09-24 18:09:49 by School Train	
Name	InstructorUpload.csv
Category	Import
Type	text/csv
Size	183 B
Uploaded	2018-09-24 18:09:49
By	School Train
Path	/import/
ID	12988
Org	
Foreign ID	0
Upload Status	OK
File Found	Yes
Description	Not set
Comments	

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.

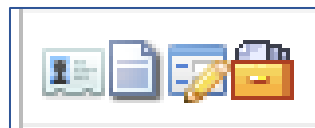
Import Warnings (2)	
Row	Message
2	ContactType does not exist for type ""
3	ContactType does not exist for type ""

Once you have Preceptors/Mentors in the system, you will see them listed individually on the Index screen.

Preceptors/Mentors											
Actions Import/Export Other											
Actions	First Name	Last Name	Credentials	Specialties	Professional Start Date	email	Contact Numbers	Organizations	Units	Licensure	P Codes
	Blake	Conner	DPT	0		BConner@zfacility.com		Z Facility	PT (Rehab)		0
	Christy	Jackson	MSN	0		cs@fdas.com	1	Z Facility	B Pod (Cardiac)		3
	Sally	Jones	BSN, MSN	0	1973-04-30	sjones@ftrain.org	1	Z Facility	Unit 5 (Med/Surg) Unit 6 (Med/Surg)		8

Column headers can be filtered as needed when working with a large number of individuals. Located on each row in the index is an Actions column with a variety of tools. These icons are used for the following tasks **left to right**:

1. Contact information
2. A Printable Report
3. Update Record
4. Archive the individual.



Assigning Preceptors/Mentors to Placements

Preceptors are assigned through the placement detail screen from a dropdown list of all preceptors associated with the unit/department of the placement.

Preceptor/Mentor ⓘ	Samantha Stevens ▼
Monday	Sally Jones ▼
Tuesday	Samantha Stevens ▼
Wednesday	Tammy Test ▼
Thursday	D12: Day 12H (7A-7P) ▼

To see a list of all placements that the preceptor has been assigned, return to the Preceptor/Mentor index screen and use the Update Icon to view the preceptor details.

Using the PCode Tab, all assigned placements can be viewed from the Preceptor Information. The PCode itself is a link and when clicked will go to the placement detail screen. The PCodes can be filtered by Current Term, Next Term, Current Academic Year, and ALL.

Samantha Stevens

General

Telephone

Specialties

Licensure

Organization

PCodes ●

PCodes

PCode	Fac	Current Term	Next Term	Current Academic Year	End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
ZTSp18-004	Z Fa				2018-05-01				D8			
ZTF17-015	Z Fa				2017-12-09	D12	D12	D12	D12	D12	D12	D12
ZTSP17-165	Z Facility	A Pod		2017-05-15	2017-08-20	D12	D12	D12	D12	D12	D12	D12
ZTSP17-017	Z Facility	Unit 2		2017-05-15	2017-08-19	D12	D12	D12	D12	D12	D12	D12
ZTSP17-016	Z Facility	Unit 2		2017-05-15	2017-08-20	D12	D12	D12	D12	D12	D12	D12
ZTSP17-015	Z Facility	Unit 2		2017-05-15	2017-08-19	D12	D12	D12	D12	D12	D12	D12
ZTF16-015	Z Facility	Unit 2		2016-08-22	2016-12-17	D12	D12	D12	D12	D12	D12	D12

Archiving Preceptors/Mentors

As roles change, you may need to archive a preceptor to remove them from your active list.

Before you archive a Preceptor/Mentor, make certain that they are NOT assigned to a current or future placement. Assign another preceptor to the placement first!

Once you have un-assigned the individual as a preceptor for a placement, from the Preceptor Index screen, click on the “file drawer icon by the preceptor’s name. You will be prompted to make sure you want to delete the preceptor. Click on OK to delete.

