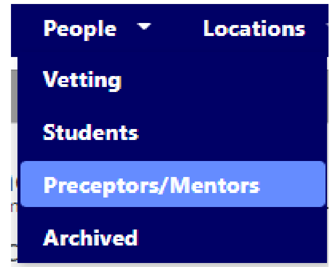
Preceptor Data

Users: Facility

Preceptor/Mentor Data

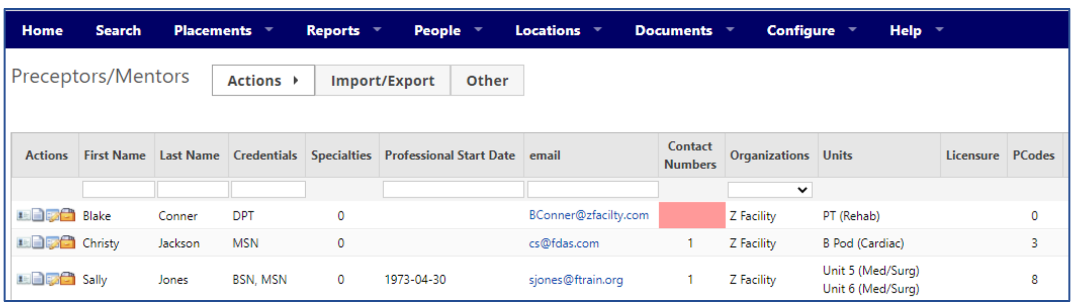


Facility users may add preceptors/mentors to the system and assign them to precepted placements as needed. By adding preceptors to the system, you have a quick way to assign and monitor preceptor assignments. Once a preceptor is in the system, their name is available in the Placement Screen to quick 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!

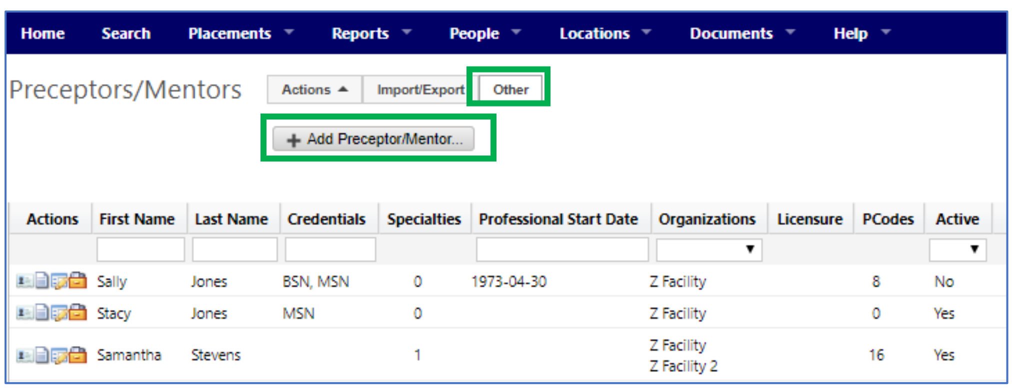
Adding Preceptors

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.

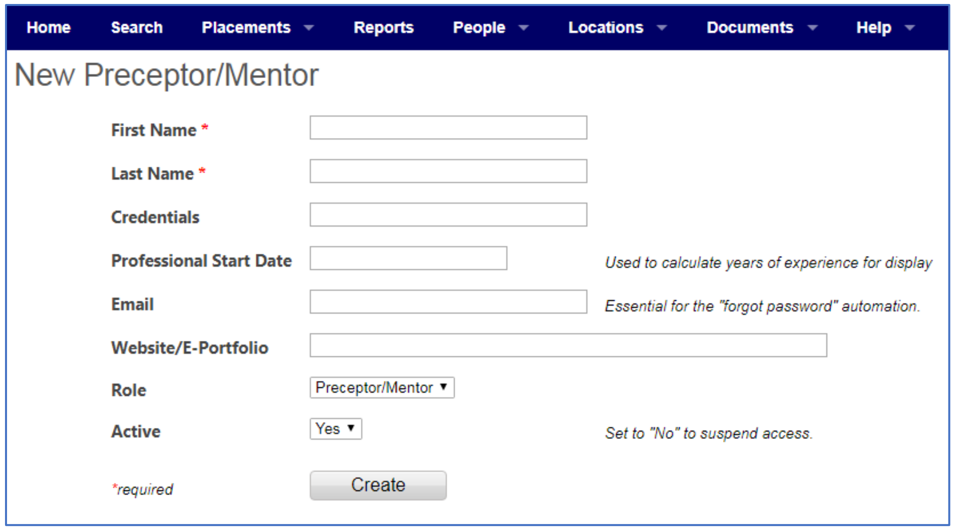
Any Preceptors that have been added in the past will be visible on the Preceptors/Mentors index screen. If none are in the system, the index screen will be blank.



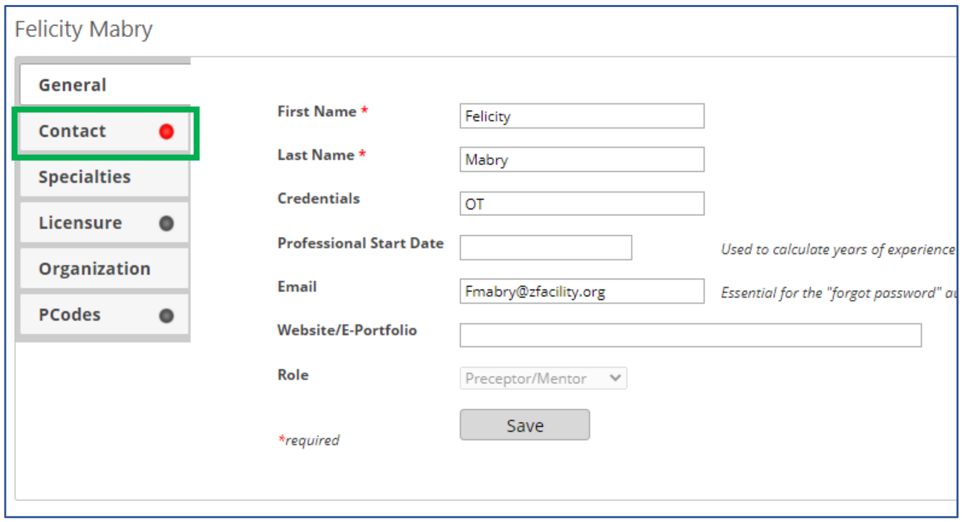
To add one, click on OTHER and then the Add Preceptor/Mentor button to access a user import form.



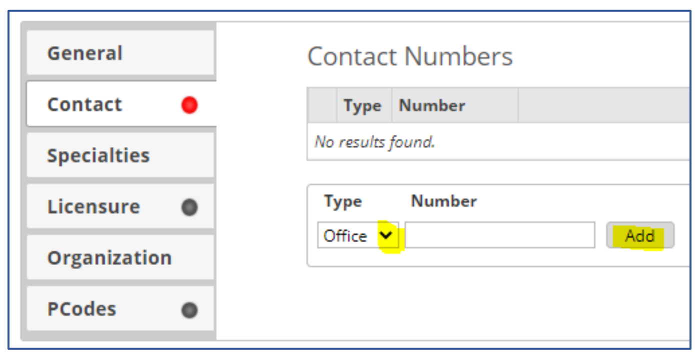
Enter the Preceptor's name and other information and then click on Create. You can always come back and edit this information if you are missing some components.



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.

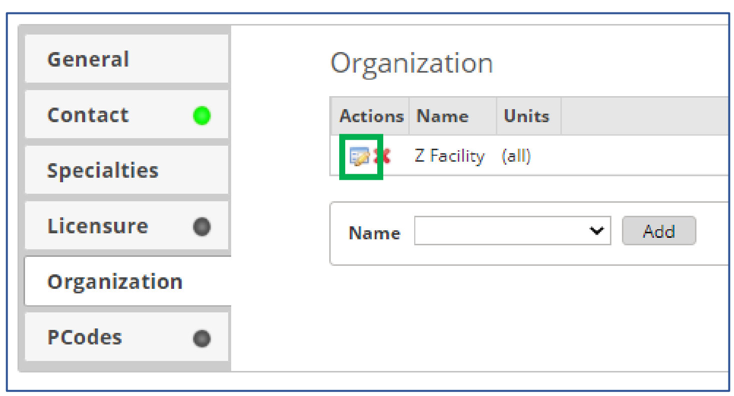


Click on Contact to add telephone information. The contact number defaults to OFFICE, but use the dropdown menu to find other options. Enter the number and click on Add. The Red status light will change to green once there is a phone contact for the Preceptor.

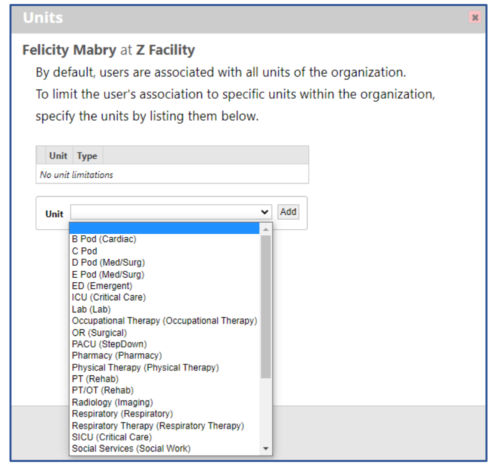


To assign the Preceptor to a specific department or nursing unit, click on the Organization Tab.

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

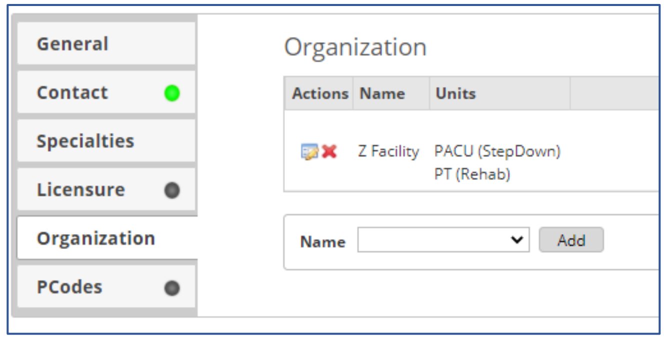


From the popup screen, select the unit/department where the Preceptor is based. Click Add.



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.

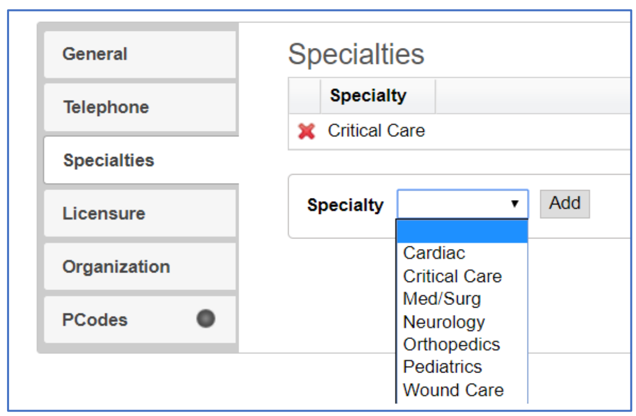


Once you have entered the Units/Departments, return to the General Tab and SAVE.

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:

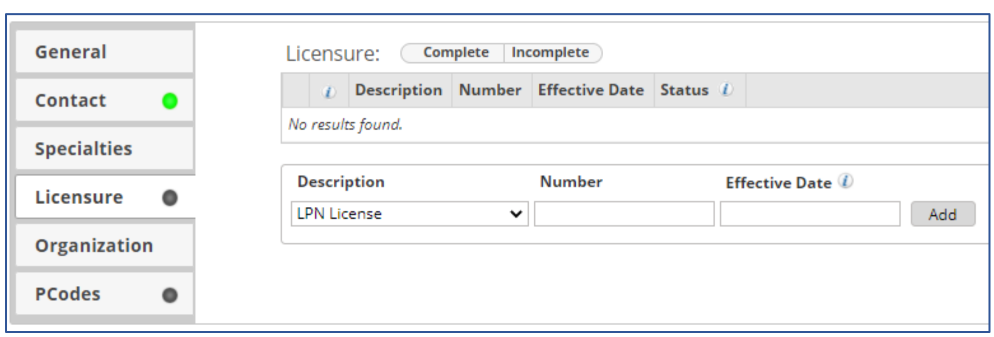
Click on the Specialties Tab to add specialties this preceptor may have to share with students. If you need another specialty added, contact your Regional Data Manager to have it added to the list!



Add Licensure Information:

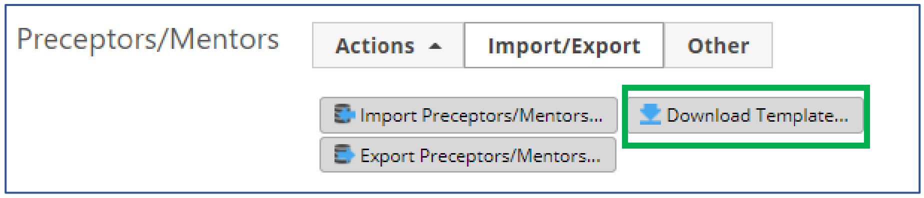
Using the Licensure Tab, choose the appropriate license from the dropdown menu. If you need a license added, please reach out to your Regional Data Manager!

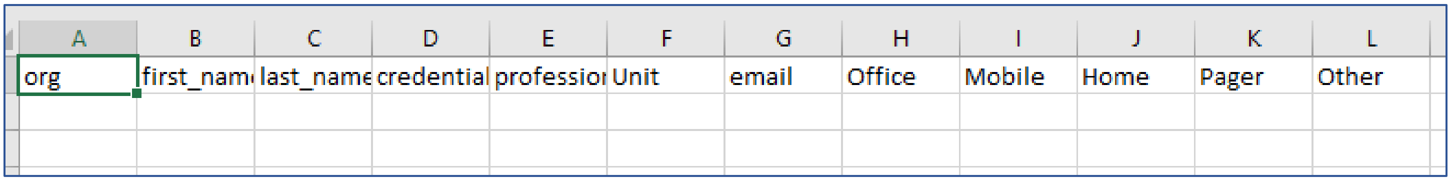
Enter the Number and **EFFECTIVE** Date of the license and click on ADD!



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.





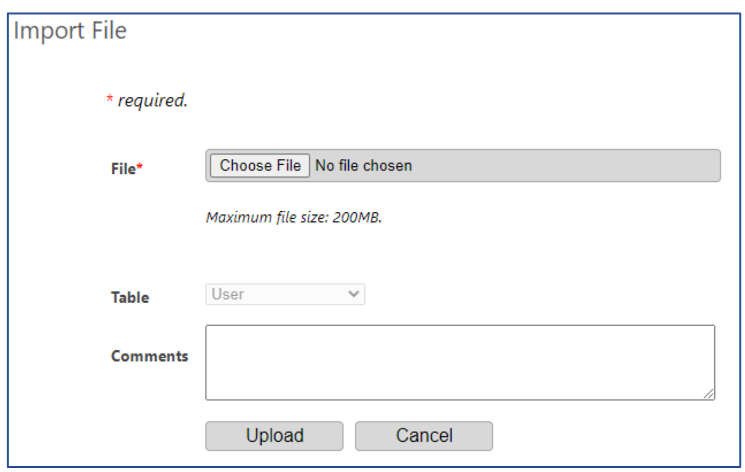
Enter the information based upon the column headers where each row is an instructor. Expand the columns to be sure you are entering data under the correct header. BE CAREFUL not to add spaces after the data. This is a frequent cause for failed uploads and emails not being sent appropriately.

- 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.

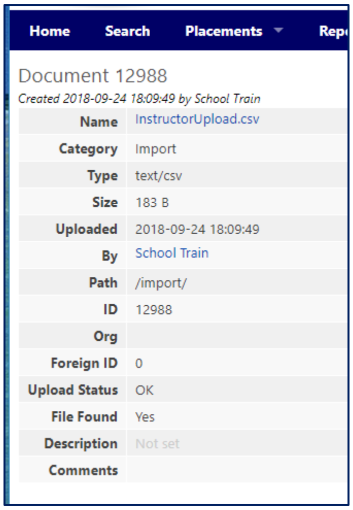
Save your file to your desktop for easy access.

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

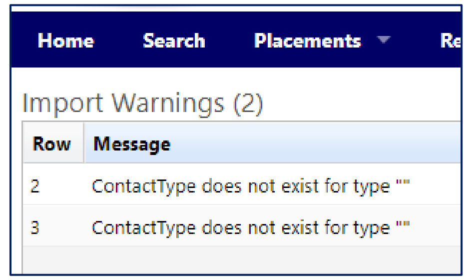
You will be prompted to navigate to Choose the File and then click on Upload.



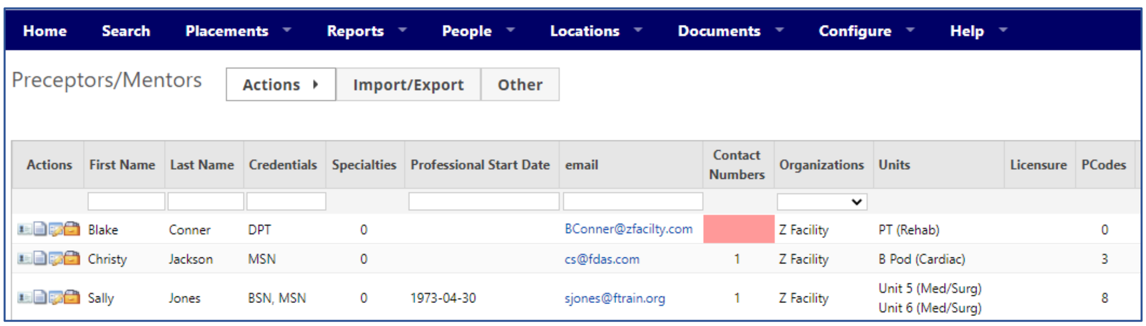
A successful upload will result in the following screen:



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.



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

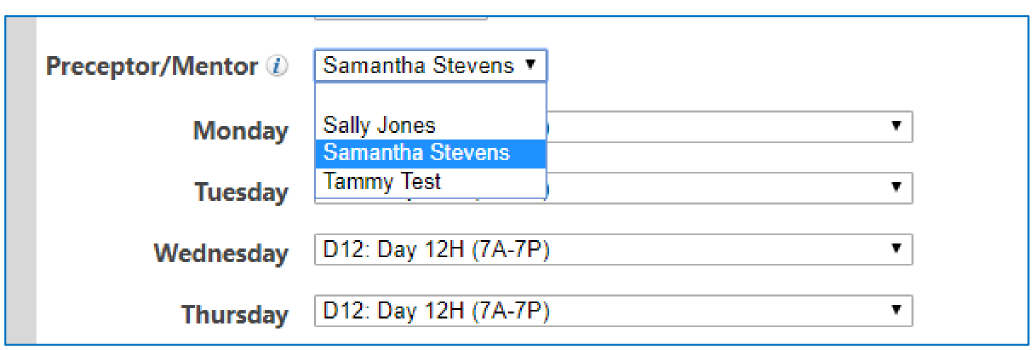


Column headers can be filtered as needed when working with a large number of individuals. Located on each row in the index is an Actions column with a variety of tools. These icons are used for the following tasks **left to right**:

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

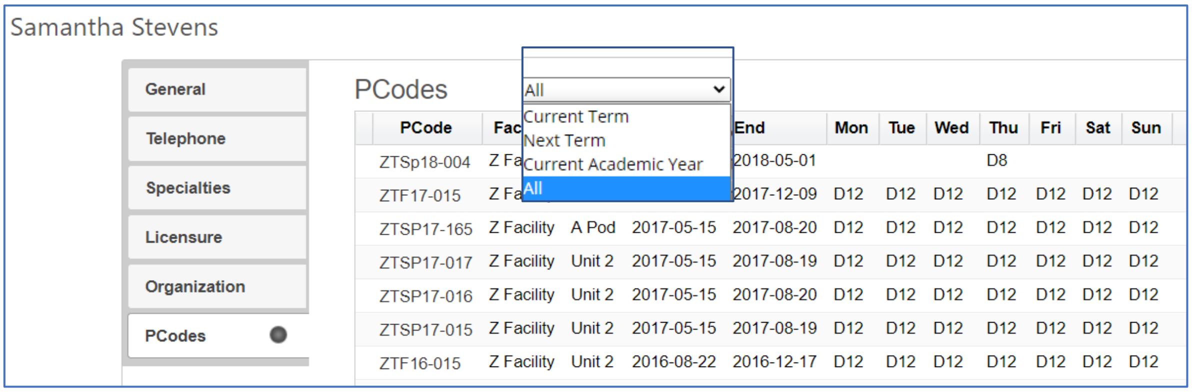
Assigning Preceptors/Mentors to Placements

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



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.



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.