

## Reviewing and Vetting Clinical Requirements via the Student/Instructor Snapshot

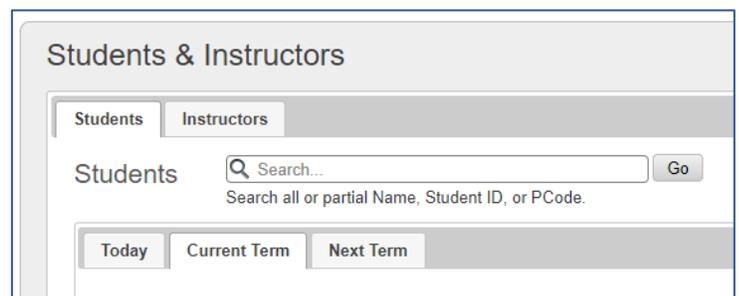
**Users:** Clinical and HR Users

Student and Instructor clinical requirements may be reviewed by Clinical Users and HR Users from the HOME screen of PlacementPro via the Student/Instructor Snapshot located below the Placement Data Links.

**Policy Decision:** How often will you vet students/instructors coming to your facility? Each Term or Each Academic Year. If you will review students each term, please do a Term Reset (user guide is available) at the beginning of each Term. If you will vet once/year, you will only need to do a Term Reset on August 1 each year. Term resets will clear facility approvals for active students. Previous approvals will be held on an individual's PCode Tab for historical purposes.

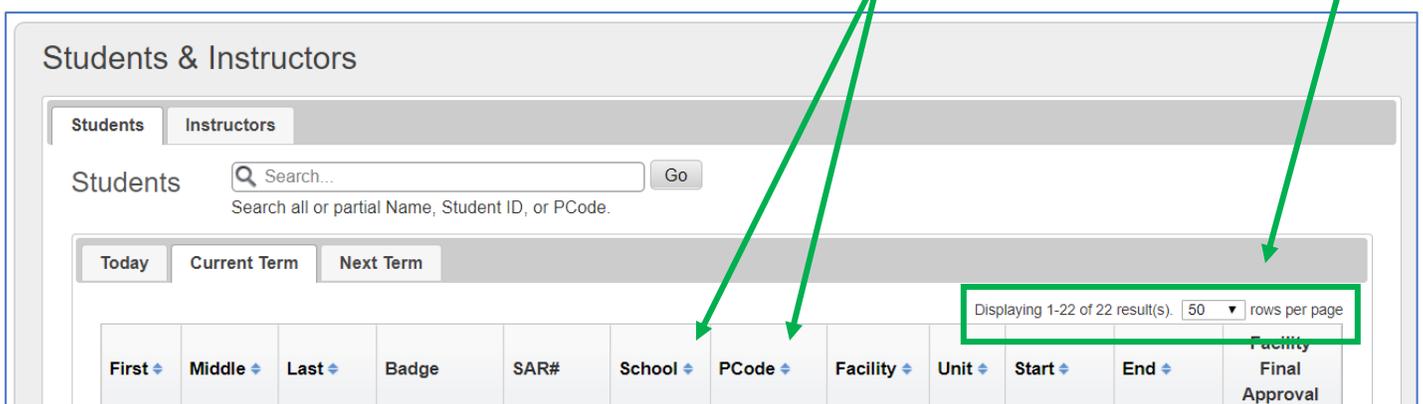
**Snapshot Views Tabs:** The View Tabs work the same for Students and Instructors.

- The **Today Tab** will show any student or instructor that is in the facility today. Precepted students that follow a staff member's schedule will be visible in the Today Tab based upon the Start/End dates.
- The **Current Term Tab** will show all students or instructors that are assigned to a facility for the current term.
- The **Next Term Tab** will show all students or instructors that are assigned to a facility for the next term. This view is useful toward the end of a term when students are being assigned to next term placements. Functionality on the Current Term and Next Term tabs are identical.
- The **Search Bar** may be used to search for a specific student or instructor. Typing in a partial or full name, Student/Employee ID, or PCode will find related individuals.



### Reviewing & Vetting Clinical Requirements: Use the Current Term Tab.

The default view for individuals on these tabs is 50 per page. **This is the optimum number to view at any one time to update and display data in a timely manner.** Pagination and display rows per page are available when the total number exceeds 50. Sorts are also available for data display as indicated by the blue sort arrows in column headers.



**Tip:** At the beginning of the term, sort by Start Date to quickly see which students/instructors need to be vetted first.

## Using the Vetting Screen

The PEOPLE→Vetting Screen will also display approval/denial/suspension status. Similar to the Index page, this screen offers more flexibility with sorting such as by facility approval status. The view can be switched between Students and Instructors and terms as needed.

First	Middle	Last	Badge	SAR	School	PCode	Facility	Unit	Rotation	Start	End	Facility Approval	Suspended	Documents	Requirements	Training	PCodes
Alicin		Armstrong	123987	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-06-14	2021-08-15	2021-06-16		2	4	1	3
Clark	W	Griswold	Not set	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-05-10	2021-06-12	2021-07-21		2	5		3
Mickey		Mouse	Not set	Not set	Z School	ZT21-3017	Z Facility	Unit 2	Precepted	2021-05-10	2021-08-15	TBD		1	1	3	1
Alicin		Armstrong	123987	Not set	Z School	ZT21-3048	Z Facility	ICU	Group	2021-05-10	2021-08-15	2021-06-16		2	4	1	3
Bugs		Bunny	Not set	Not set	Z School	ZT21-3048	Z Facility	ICU	Group	2021-05-10	2021-08-15	Updated		1	10	3	2

To Review or Vet Students & Instructors, use the following steps:

1. Click anywhere on the row within the Snapshot or Vetting Screen displaying either the student/instructor information. A popup Update window will display the individual's clinical requirement information as entered and reviewed by the school.

2. Use the tabs to navigate the various requirement categories: **Documents, Requirements & Training.** Content under each category should reflect the clinical requirements as specified in the organization's clinical affiliation agreement.

Bugs Bunny  
Placement at Z Facility

- Status
- Status History
- General
- Organization
- Documents ●
- Requirements ●
- Training ●
- Licensure ●
- PCodes ●

Requirements Complete: Yes School Train, 2021-01-26 14:32:41

Type	Event	Date	Expiration	Status	N
Expiration	Tetanus, Diphtheria, and Pertussis: TDAP Date	2020-02-05	2030-02-05	OK	11
Expiration	Influenza: Influenza Vaccination	2020-10-01	2021-08-01	OK	E:
Expiration	Influenza: Influenza Vaccination	2019-10-04	2020-08-01	Superseded	E:
Expiration	TB Screening: TB Skin Test	2020-08-01	2021-08-01	OK	uj
Expiration	TB Screening: TB Skin Test	2019-03-01	2020-03-01	Superseded	uj
Expiration	AHA HCP BLS Course	2019-11-11	2021-11-11	OK	A
Screening	Background Check Review	2019-08-12	—	Pass	
Screening	Drug Screen Review	2019-09-09	—	Pass	
Health	HepB: HEP-B Review	2021-01-18	—		Si
Health	MMR: MMR Immunization or Titer	2020-02-05	—		

- a. The Green or Red Status lights on the various tabs indicate that the school has reviewed the individual and determined that the information is complete. Grey status lights indicate that the school did not review the information OR failed to mark a category tab as complete.
- b. Under Requirements, look for a Green Status by each requirement that expires (TB, CPR Card, etc.) Background Checks and Drug Screens will be listed as Pass or Fail. **If an individual has failed one of these requirements, use your normal procedure for reviewing the details of this failed requirement.**
- c. Under Training, individuals should at a minimum completed the current academic year's TCPS FERPA & Confidentiality Agreement, a General Orientation appropriate for their role (Nursing, MD & PA; Healthcare, OR Non-Clinical), and the orientation for your facility.
- d. **LICENSURE** – If you require licensure information for clinical instructors and students pursuing more complex practice programs of study to be submitted via PlacementPro, this information will be in the Licensure Tab. If you require Licensure verification that the license is in good standing, this is a requirement and should be listed in the Requirement Tab.

3. Once your review is complete, click on the Status tab to indicate approval or rejection as appropriate.
  - a. The Background Check and Drug Screen is only marked approved here IF the report was reviewed within YOUR facility and approved or rejected. Selecting Approved or rejected will open a text field for the name of who made this decision.

- b. If you deny an individual, you may select the reason based upon the requirement category or based upon past employment.

- c. For missing information, please note what is missing in the Comment Section!

- d. **Rejecting an individual will send an automated email to the school to alert them of your rejection. You do not need to contact the school!**

4. **OPTIONAL:** You may also enter a badge number or other reference identification such as a code for accessing information systems as needed. Contact your Regional Data Manager if you would like to have your reference name replace the "SAR#".
5. **Suspensions** are used AFTER an initial approval. These are covered later in this user guide!
6. Click Save to complete your review and close the Update window.

**Note:** Students assigned to multiple placements within a single facility will be approved/rejected for all placements with a single review.

For Health System/Corporate Users: Students can be approved/rejected for any of the assigned placements in other related facilities by clicking on the additional facility in the status screen.

Below the Final Approval buttons, you will note that if the student/instructor is assigned to any other of the corporate facilities, a check box will be displayed next to the facility name. To approve students/instructors for these facilities as well, click on the checkboxes. Click Save to complete the vetting process.

## Tracking Review/Vetting Process

The Student/Instructor Snapshot and Vetting Screen will display your progress under the Facility Final Approval column.

	Facility Final Approval
01	2018-02-15
01	2018-02-02
01	Updated
01	2017-12-05
01	2018-02-21
01	
01	2018-02-15

**Approval Indicators:**

Red = Rejected Date

Green = Approved Date

Yellow = Previously rejected data has been updated and is ready for another review.

Grey = Facility Review not completed or required

## Previous Approval/Denial of Students/Instructors

Clinical and HR users may review any past approved placements for students/instructors by using the Status History tab.

Approvals are valid until the Facility decides to reset approval status – typically with the new academic year or term. **Remember, this is a facility decision.**

[See the Facility New Term Resets User Guide](#)

Status	Status History
General	
Organization	
Documents <span>●</span>	
Requirements <span>●</span>	
Training <span>●</span>	
Licensure <span>●</span>	
PCodes <span>●</span>	

Date	Item	Status	By	At	R
2021-07-22 16:21:31	Suspension Reset	Reset	School Train	Z Facility	
2021-07-22 15:58:41	Suspended	Yes	Facility Train	Z Facility	Re
2021-06-16 21:41:48	Suspended	No	Facility Train	Z Facility	
2021-06-16 21:41:48	Final Approval	Yes	Facility Train	Z Facility	
2021-01-27 13:48:16	Final Approval	No	Facility Train	Z Facility	Re
2021-01-07 16:56:21	Final Approval	Reset	Facility Train	Z Facility	
2020-12-30 10:17:33	Suspended	Yes	Facility Train	Z Facility	Re
2020-04-24 10:16:44	Final Approval	Yes	Facility Train	Z Facility	
2019-09-12 15:09:54	Final Approval Reset	Updated	School Train	Z School	
2019-09-12 15:09:03	Final Approval	No	Facility Train	Z Facility	Re
2019-08-21 15:18:04	Training	Pass	School Train	Z School	
2019-08-21 15:11:44	Documents Complete	Yes	School Train	Z School	

For subsequent terms, if you want to quickly review assigned individuals for expired requirements, use the Vetting Screen! Each assigned individual (toggle between student or instructor views) and review their Documents, Requirements, and Training columns for red cells in the table. Out of date requirements will be flagged as RED cells in the appropriate column if a requirement has expired since the last approval. Even if the School has marked the tab complete, expired data will turn the cell RED.

So ... if you see RED, you need to look at the individual!

Documents	Requirements	Training	PCodes
2	4	1	3
2	5		3

## Suspending a Student or Instructor for Missing or Expired Requirements

Students and Instructors may be suspended during their clinical placement for failing to meet or maintain ongoing requirements. Expired requirements and missing Flu Immunizations are the most frequent reason for suspension. Since many placements in the fall begin before the Flu Immunization deadline of October 1, facilities can review for this requirement during October (or after a deadline date they have communicated directly to the school). If they find a student or instructor has not had this critical requirement added, they can suspend the individual.

To find missing data such as Flu Immunizations, you can run a report for all students/instructors that are missing this requirement. If you need assistance running this report, reach out to your Regional Data Manager! From there you can suspend them individually using the Suspended button on the Status screen of the individual.

### Status

Badge:  Facility Train, 2020-04-24 10:16:44

SAR:

Background Check:

Drug Screen:

Final Approval:   Facility Train, 2021-06-16 21:41:48

Suspended:   Facility Train, 2021-07-22 15:58:41

Reason:

Requirement:

Comment:

First	Middle	Last	Badge	SAR	School	PCode	Facility	Unit	Rotation	Start	End	Facility Approval	Suspended
Clark	W	Griswold	Not set	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-05-10	2021-06-12	2021-07-21	
Alicin		Armstrong	123987	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-06-14	2021-08-15	2021-06-16	Yes

School users will get an automated email when an individual is suspended, and it will be visible on the Student/Instructor Snapshot and Vetting page!

When the missing requirement is added, PlacementPro will lift the suspension automatically removing the red Suspended Yes warning on the Student/Instructor Snapshot and Vetting Screen.

First	Middle	Last	Badge	SAR	School	PCode	Facility	Unit	Rotation	Start	End	Facility Approval	Suspended
Clark	W	Griswold	Not set	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-05-10	2021-06-12	2021-07-21	
Alicin		Armstrong	123987	Not set	Z School	ZT21-3016	Z Facility	Unit 2	Precepted	2021-06-14	2021-08-15	2021-06-16	