PLATINUM PLANNER

Preceptor Guide

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www.platinumplanner.com

PLATINUM EDUCATIONAL GROUP

Platinum Planner User Guide

Platinum Planner is an online web application tool for Clinical Management. This site has been created exclusively for EMS Educators and Students. We know the site has a lot of functionality behind it, so we have provided this guide to help you through the process of learning the site so you have the tools you need to use it effectively and confidently.

As always, Platinum Educational Group provides exceptional customer service along with this guide. We are ready to help you whenever or wherever you need it by phone or email. We also provide ongoing live help webinars for you or your group. Do not hesitate to call us if you are unable to find the answers, we will be happy to take care of any questions you may have!

Phone: 616.818.7877
Help requests: https://platinumed.zendesk.com/anonymous_requests/new

To provide you with our very best customer service, we always welcome any comments or feedback you can provide to improve the Platinum Planner web site and/or its functionality and usefulness to you.

Sincerely,
Doug Smith & Thomas Gottschalk
Platinum Educational Group

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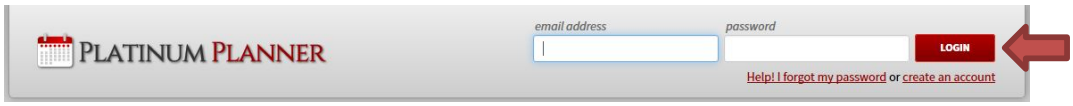
Getting Started

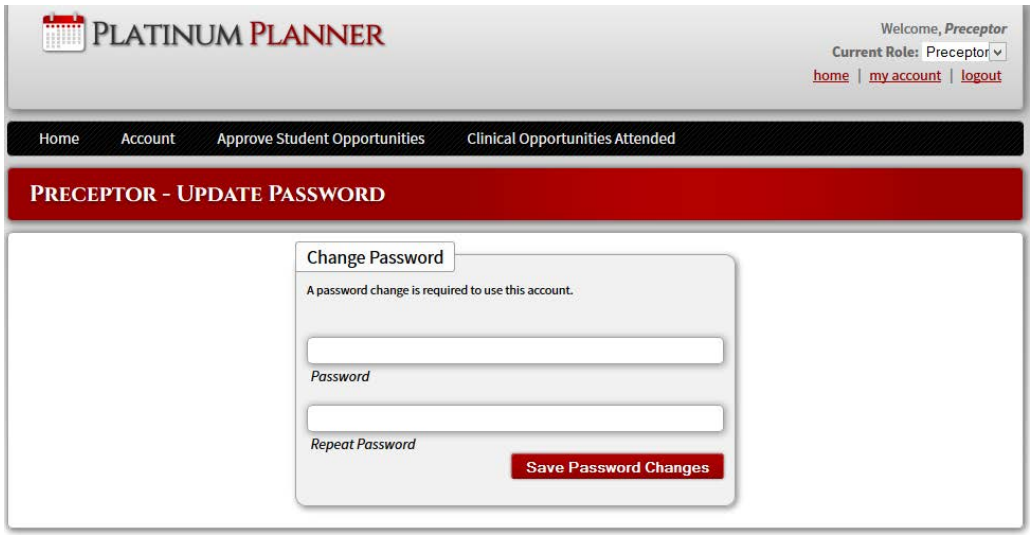
PRECEPTOR LOG-IN

Go to www.platinumplanner.com.

If you were given a password, login with your email and assigned password.



If a school or student created your account without a password enter your email and click the login button, you will be greeted with and update password screen.



If you do not have a password, enter a new password to use as access to the site.

HOME

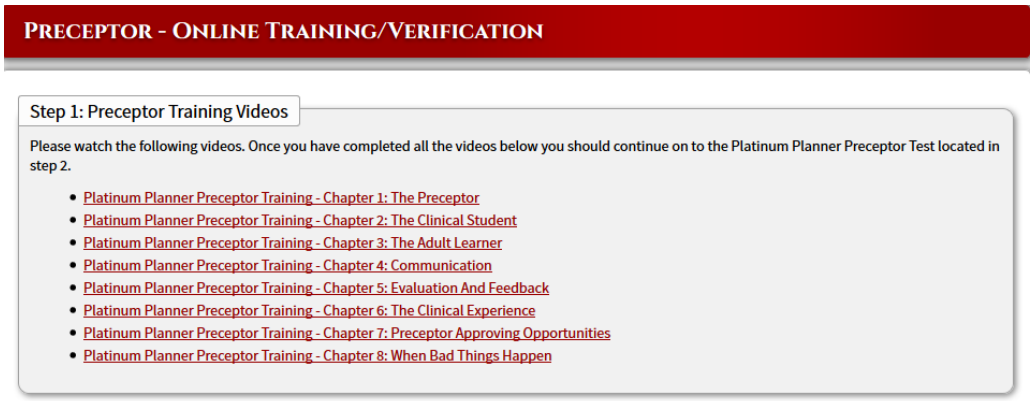
Congratulations you are now able to get started as a preceptor with PlatinumPlanner.com!

On your home page you will see 3 panels. The first panel is **Items which may require your attention**, then **Preceptor Home Options** and an **Additional Account Information** panel.

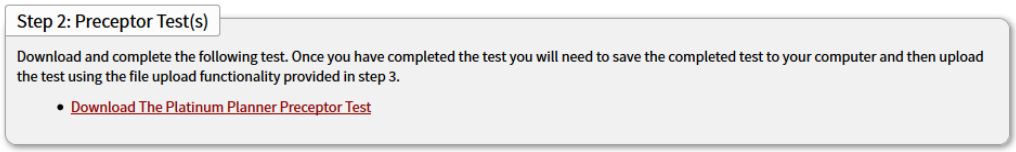
Online Training/Verification

If this is the first time you have logged in as a preceptor you will see that you have not completed the online training/verification process.

If you are ready to being your training, click the link to go to the **Preceptor – Online Training/Verification** page.

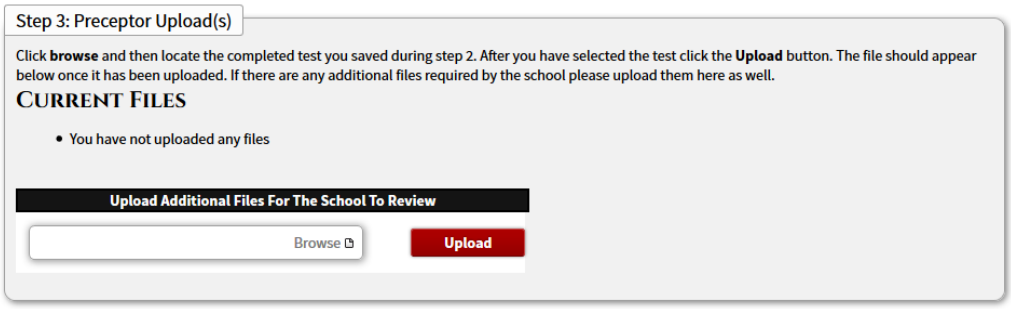


You will see the following links to videos. Once you have viewed all the videos you will then continue to the **Platinum Planner Test** located in **step 2**.



It is important that you download this test to your computer and rename it. Then you can open it in the full version of adobe reader. If you do not have adobe reader, you can download it here.

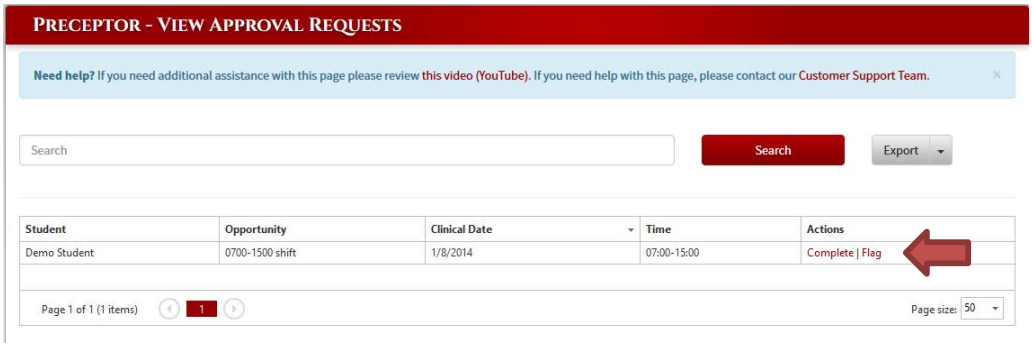
Please Note: You will not be able to use the built in chrome pdf editor because it will not save your information.



Once you have downloaded the test and opened it in Adobe reader, you will then take that test and upload it in **step 3**. If a school created your account, they will need to verify you as a preceptor for their school.

Approve Student Opportunities

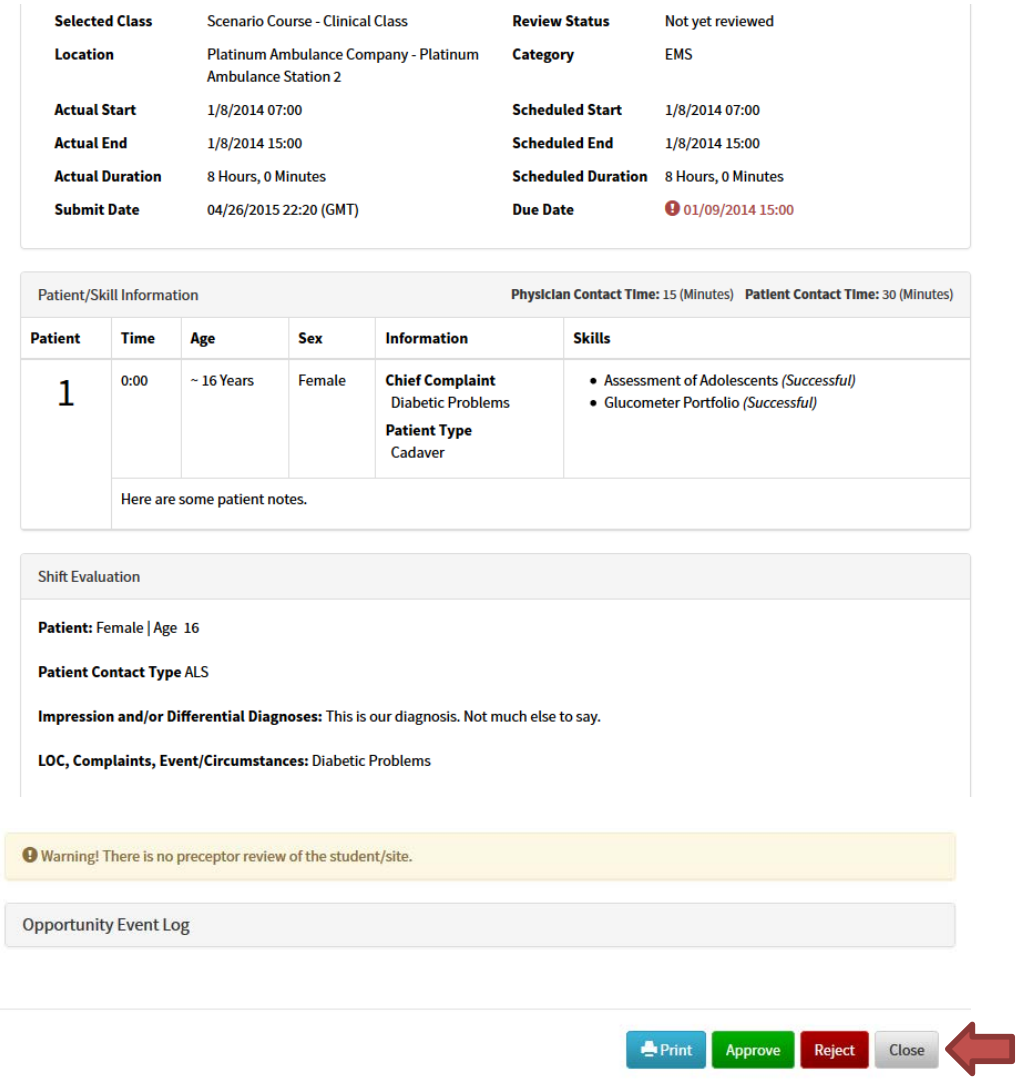
On the **View Approval Requests** page you will see all student paperwork that the student selected you as the preceptor on.



Click the **Complete** link in the actions column.

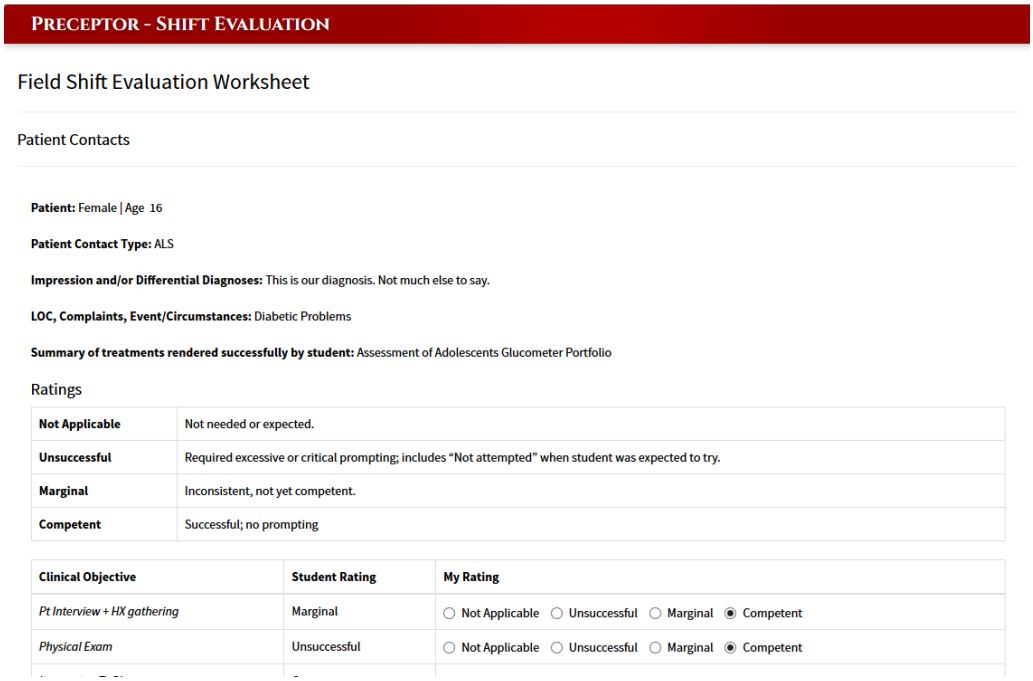
You will see the **Evaluation Information**, **Patient/skill information**, **Shift evaluation** and any student **documents** they attached to the opportunity.

Please Note: If you click **Flag**, (due to a disciplinary problem) an email will be sent to the teacher letting them know the student was flagged by you. The teacher will then need to unflag this student for them to use PlatinumPlanner.com or their account will be disabled. Please only use this feature if you absolutely have to.



After reading through the student's paperwork you can choose to **approve** or **reject** this student's paperwork. You can also **print** the paperwork by clicking the **print** button.

If you **approve** or **reject** the student paperwork you will be taken to the **Clinical Shift Evaluation Worksheet**, where you will complete a more detailed assessment of the student.



PRECEPTOR - SHIFT EVALUATION

Field Shift Evaluation Worksheet

Patient Contacts

Patient: Female | Age 16

Patient Contact Type: ALS

Impression and/or Differential Diagnoses: This is our diagnosis. Not much else to say.

LOC, Complaints, Event/Circumstances: Diabetic Problems

Summary of treatments rendered successfully by student: Assessment of Adolescents Glucometer Portfolio

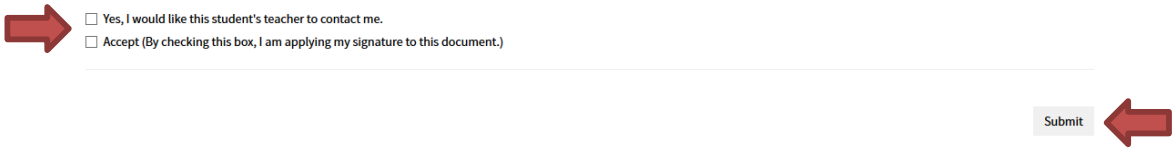
Ratings

Not Applicable	Not needed or expected.
Unsuccessful	Required excessive or critical prompting; includes "Not attempted" when student was expected to try.
Marginal	Inconsistent, not yet competent.
Competent	Successful; no prompting

Clinical Objective	Student Rating	My Rating
Pt Interview + HX gathering	Marginal	○ Not Applicable ○ Unsuccessful ○ Marginal ◉ Competent
Physical Exam	Unsuccessful	○ Not Applicable ○ Unsuccessful ○ Marginal ◉ Competent

Fill out all the information regarding the student opportunity.

On the very bottom of the page you will see 2 checkboxes.



☐ Yes, I would like this student's teacher to contact me.
☐ Accept (By checking this box, I am applying my signature to this document.)

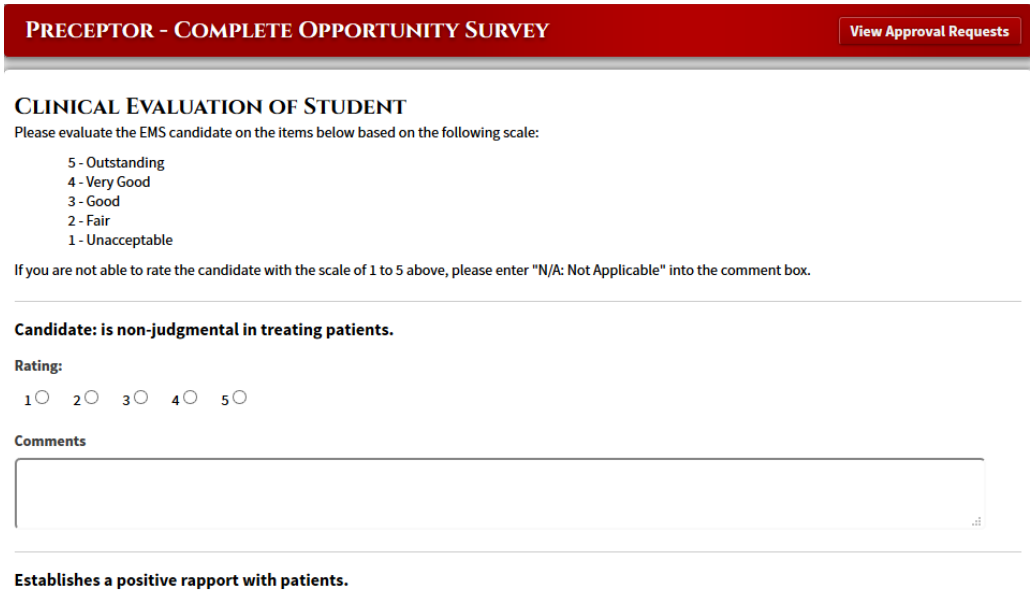
Submit

Click either **Yes, I would like this student's teacher to contact me**.

Or the **Accept (By checking this box, I am applying my signature to this document.)**

Then click the **Submit** button to complete your review.

You will then be asked to complete a **Clinical Evaluation of the Student**.



After you are done with the survey, click the **Submit** button to submit the evaluation.

The student paperwork will disappear once you have completed both forms.

If you **reject** the student paperwork the student is notified that the paperwork was rejected.

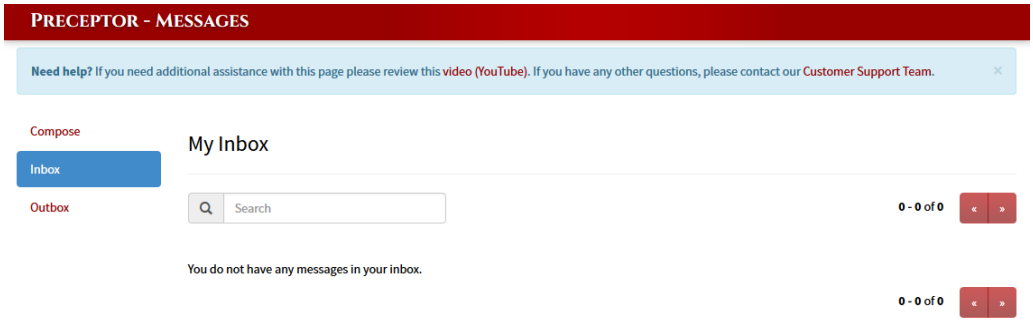
Clinical Opportunities Attended

The Clinical Opportunities Attended page lets you view all opportunities you have attended.

You can **Search** in the list for an opportunity or export your list of opportunities by click the **Export** button.

Messages

This new system gives you the ability to send a message to any users associated with you in PlatinumPlanner.com. In addition, you can see all incoming and outgoing messages associated with your account.



Inbox

Your **inbox** will show by default, showing all recent messages in your inbox.

If you need to find a specific message, type in a keyword of that message into the **Search** box.

Click on any message in your inbox to see more details or to reply to the message.

Compose

To **compose** a new email, click the Compose link from the left hand menu.

In the compose message page, click the Add button to find the person you would like to send your email to.

Click the checkbox next to the user you want to send your email to. The users will appear in the "To:" textbox on the top of the page.

Once you have found the person or people you would like to send emails to, type in the Subject of the email along with your Message of 1000 characters or less, and click the **Send** button.

Outbox

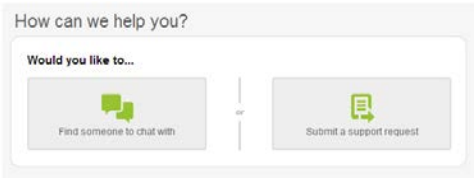
After you have composed and sent a message, you will see that email show in your **Outbox**. Double click on that email to show the details of the message you sent.

If you need to find a specific message, type in a keyword of that message into the Search box.

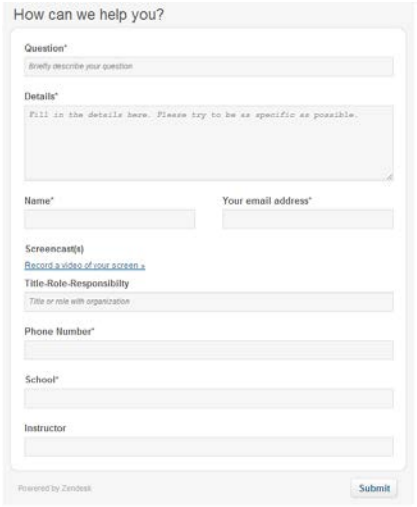
HELP

Platinum Educational Group is always available to help you with Platinum Planner. If you have any questions or feedback regarding the site, please let us know! Click on the **Help** tab on the far left of the site.

You can choose to **chat** with a customer service representative or you can **submit a support request**.



To **chat** with a customer support person, they just have to be online. If an agent is online you will be able to chat and resolve your issue by filling out the following and clicking the **Begin Chat** button.

Note: If you are descriptive with your information, we can find you in the system quickly and give you a faster response!

To **submit a support request**, fill in all of the information below and click the **Submit** button.