Preceptor to Orient Assignment Report

Need a list of the Preceptors with assigned Orients or a report to send to Orients with their assigned preceptor for their schedule dates in orientation? Run the Preceptor to Orient Assignment Report!

Log into WFM and select Schedule Admin. From the blue toolbar across the top, select Assignments, and then select Preceptor to Orient Assignment Report, the parameter selections display.

Facts about the Preceptor to Orient Assignment Report

There are a variety of ways to run this report based on the parameters selected. Select information based on what you want to view or think about who this information is being sent to, examples:

1. Selecting the home team for the orient or preceptor will shorten the list of available orients/preceptors and make it quicker to find them when choosing select orients/preceptors.
2. You want to view the preceptors that have been assigned orients, go to the Preceptor field, using the lookup to find and select one or more preceptors
3. You want to view the orients schedules, go to the Orient field, using the lookup to find and select one or more orients
4. When searching for an orient, they display for <u>current shifts</u> where they are scheduled in the ORI activity and matched with a preceptor– #6 below lists a work-around to see past dates
5. When searching for a preceptor that is matched to an orient, they display with data if there is a <u>current match</u> in the system – #6 below lists a work-around to see past dates
6. There is a way to pull past data! If you are trying to see past matches for a preceptor or orient, you must place an employee in orientation for a future date and then match them with the preceptor. Once you have done that you can select the report, select the orient or preceptor and enter a past date for the start date based on the information you want to review. Past dates will display! *Do not forget to go to Orient and remove the match and then change the employee back to WRK or delete the shift*
7. The report displays in HTML when you select Go. You can change the output before or after the data displays by selecting the icon to run in a PDF or Excel. The icons display on the upper-fight side of the page.

Steps for Viewing or Printing the Orient Assignment Report (Report is available from Assignments, not My Reports)

<u>First scenario</u> – to view all orients matched with preceptors for home teams selected:

1. Select Preceptor to Orient Assignment Report, then select the home team or teams to view all employees in orientation, matched with a preceptor, do not select Include Sub Teams, the report will display by team, in alphabetic order of orients; you can change the Order By to Preceptor to display by team, in alphabetic order by Preceptor
2. Select the Start and End Dates to view, then select Go
3. To view in a format other than HTML, select the PDF or Excel icon, *these formats will be easy to print and send to orients and preceptors. If you are gong to edit the schedule before sending use Excel*

Second scenario – to view only select orient(s) or select preceptor(s)

1. Select Preceptor to Orient Assignment Report, then select the home team for employees in orientation, matched with a preceptor.
2. If you are wanting to view orients' schedules and who they are matched with, select orients from the Orient field or if you are wanting to view preceptors' schedules when they are matched with an orient, then select preceptors from the Preceptor field – You do not have to enter both, choose - enter orients or preceptors.
3. The report will display in alphabetic order by Orient unless you change the Order By to Preceptor, change if needed, then select Go.
4. To view in a format other than HTML, select the PDF or Excel icon, *these formats will be easy to print and send to orients and preceptors. If you are going to edit the schedule before sending use Excel*

TIPS:

o Run and print this report for orients and email to them so they know their preceptor for each shift.
o Run and print this report for Preceptors and email to them so they know they have an orient and who it is for each shift.
o It is recommended that preceptors, if calling out for a shift that they are assigned an orient, they report that they have an orient assigned to them for the shift. This way the orient can be assigned another preceptor before the shift starts.
o If a preceptor trades a shift where they are assigned an orient, they must notify the team's educator or leadership team, so the orient can be assigned a new preceptor or asked to move to the date the preceptor is now working.
o If you are tracking preceptor shifts, remember that you can pull past data if you schedule an employee to orientation for a future date and match them to the preceptor – you can then run the report with the end date of the shift you added and with a start date in the past of your choosing.

For assistance

o Access the WFM Help site from the Schedule Admin by selecting HELP on the blue toolbar across the top, then select Schedule Admin Toolbox
o You can also access the WFM Help site by going directly to the site at www.vumc.org/wfm
o Please do not hesitate to email us with any questions at wfm@vumc.org
o For urgent questions or issues please log a ticket with the VUMC Help Desk by calling 615-343-4357