HOW TO MATCH AN ORIENTEE WITH A PRECEPTOR

VERIFY THE FOLLOWING BEFORE YOU BEGIN:
- o The orient must have shifts scheduled in the Advanced Schedule View (ASV) in the ORI activity code
- o Primary preceptor must be scheduled in the Advanced Schedule View (ASV) in the WRK activity code for some of the same dates as the orient

STEPS FOR MATCHING AN ORIENT WITH A PRIMARY PRECEPTOR:
1. From the blue menu bar across the top select Assignments
2. Select Orientation
3. Type the Orient's last name and then select the tab key
4. When the *Orient's name displays in the field, select SUBMIT to open Orient Preceptor Matching
5. The Orient's name is displayed with a list of their scheduled shifts. Above the list of shifts is a Primary Preceptor box with a dropdown to select the primary preceptor – select the dropdown, select the primary preceptor, and then select Apply
6. The primary preceptor applied to each day displays in the Assigned Preceptor field, on the row for each shift that they are scheduled - if there are any blank boxes for Assigned Preceptor use the look up icon to select a preceptor for that shift
7. Select SAVE at the top right-side of the page – "Your changes saved" displays in red below the list of the orient's shifts

The preceptor/orient match will display at the top of the assignment sheet for each shift matched. The orient will also display with the preceptor assignments in the printed version of the assignment sheet.

WARNING MESSAGES:
- If the preceptor is already matched with a different Orient on any of the matched shifts, the other Orient's name and shift time will display in the Other Orient column and "Preceptor already assigned to other Orient" displays in the Warnings column
- If the selected preceptor's scheduled shift time does not match the Orient's scheduled shift the following warning displays: "Assigned preceptor's shifts (shift time) differs from Orient's shift"

*IF YOU ARE NOT ABLE TO FIND THE ORIENT'S NAME IN THE SELECT ORIENT FIELD CHECK THE FOLLOWING:
- That the orient is scheduled to ORI activity, if they are scheduled to WRK they will not display in the select Orient list
- Make sure the schedule is published - if the shifts are unpublished, then the Orient will not be available for you to match with a preceptor. Once the schedule is published the Orient will display for matching
- Verify the spelling of the name by going to Employees>employee

SEE SCREENSHOTS WITH NUMBERED STEPS ON THE NEXT PAGE

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Assignments

Assignments

📁 Assignments

   📄 Assignment Sheet

   📄 Unit Assignment List

2   📄 Orientation

   📄 Area Assignment Sheet

   📄 Orient Exception Report

   📄 Preceptor to Orient Assignment Report

Assignments > Orientation

Orientation

3

Select Orient   Ztrain119473, Mariana H

[Submit] **4**   [Cancel]

Assignments > Orientation

Orientation

Orient: Ztrain119473, Mariana   Primary Preceptor: **5** ⌄   [Apply]

Orient Shift Start	Orient Shift End	...ed Preceptor
10/04/2021 08:00	10/04/2021 16:30	
10/05/2021 08:00	10/05/2021 16:30	
10/06/2021 08:00	10/06/2021 16:30	
10/07/2021 08:00	10/07/2021 16:30	
10/08/2021 08:00	10/08/2021 16:30	

Dropdown list:
Ztrain104591 Tiffany
Ztrain105586 Jennifer R
Ztrain106293 Jennifer
Ztrain111090 Marissa F
Ztrain122646 Shakira T
Ztrain13206 Mona R
Ztrain26919 Cynthia L
Ztrain33782 Melissa V
Ztrain37751 Jan M
Ztrain42081 Candace T
Ztrain49814 Anetria A
Ztrain73922 Natalie A
Ztrain76130 Monia
Ztrain76943 Ronicka
Ztrain83045 Georgia M

Orient Shift Start	Orient Shift End		Assigned Preceptor	Other Orients	Warnings
10/04/2021 08:00	10/04/2021 16:30	[Remove]	Ztrain76130, Monia		
10/05/2021 08:00	10/05/2021 16:30	[Remove]	Ztrain76130, Monia		
10/06/2021 08:00	10/06/2021 16:30	[Remove]	Ztrain76130, Monia		**Example of a warning - you can leave the match or change the preceptor selected**
10/07/2021 08:00	10/07/2021 16:30	[Remove]	Ztrain42081, Candace T		Assigned preceptor's shift (07:30-16:00) differs from orient's shift.
10/08/2021 08:00	10/08/2021 16:30	[Remove]	Ztrain76130, Monia		

Assignments > Orientation
Orientation

Orient: Ztrain119473, Mariana   Primary Preceptor: [⌄]   [Apply]   The primary preceptor selected will be applied to each orient shift where the work date and the scheduled team matches.   **7** [Save] [Exit]

Orient Shift Start	Orient Shift End		Assigned Preceptor	Other Orients	Warnings
10/04/2021 08:00	10/04/2021 16:30	[Remove]	Ztrain76130, Monia **6**		
10/05/2021 08:00	10/05/2021 16:30	[Remove]			
10/06/2021 08:00	10/06/2021 16:30	[Remove]			
10/07/2021 08:00	10/07/2021 16:30				
10/08/2021 08:00	10/08/2021 16:30	[Remove]			

Employee find box:
[Find] Employee
Clear [   ]
Ztrain104591, Tiffany
Ztrain105586, Jennifer R
Ztrain106293, Jennifer
Ztrain42081, Candace T
Ztrain49814, Anetria A
Ztrain60246, Jennifer M
< Prev 1 Next > [Reset]

Your changes saved.