Platinum Planner is an online web application tool for Clinical Management. 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
STUDENT SIGNUP

Student Signup is done at my.platinumed.com. If you need assistance with signing up please refer to the PlatinumEd - Student User Guide.

HOME

The Student Home page provides alerts, *Items which may require your attention*, a Getting Started section, a Current Schedule area, a Messages and Reminders, a News area and an Additional Information area.

CALENDAR

The Calendar shows you details of the events (and classes) you have been associated with in the system.
You can filter the calendar by opportunities, classes and sites/locations. You can see the month, week or day you need to view. Click the Search button once you have selected your filter choices.

You can also export the calendar to PDF by clicking the Export to PDF button next to the Search button.

To view more details click on a calendar item. To add a calendar item, click the Add Calendar Item button. You will see details similar to this example. Click off of the page to hide the details.

CLASSES

My Classes

Click on the My Classes link. This page will show you all of the classes you are currently enrolled in.

Click on the Detail link to see more information about the class you are enrolled in such as the course, start and end dates and times, class type, skills, instructors and documents.
As a student, you may need to complete lab opportunities for your class. When you go to the My Labs page you will see Upcoming, Ready to Document, Submitted, Approved, Rejected and the All tab.

The top blue links listed: View Basic Competency Progress, View Basic Competency Scenario Progress, View Individual Progress and View Individual Scenario Progress are the sequence of learning progression. Each group of skills are there to help you monitor your progress performing each skill successfully and will visually show you when you have completed the skill(s) needed in each area to progress to the next.

Click the Edit Documentation link in the actions column to begin documenting the lab.

Note: If you have no labs in the ready to document tab, look at the upcoming tab for labs created for you by your instructor.
If you need to edit the lab details, click the **Edit Details** button.

Skills pre-selected by your instructor will be visible on the **Skills Performed Tab**.

If you need to add or remove a skill, click the **Add/Remove** Skills button.

Expand out the skill and fill out each attempt with the required patient information, form(s), signatures(if required) and if you were **Successful** or **Unsuccessful** at performing the skill in your lab. Click **Save** to view your attempt and continue.

Click the **Forms** tab to see any additional forms attached to the lab that your instructor has created for you to complete.

Click the **Lab Documents** tab to attach any lab documents to the lab.

When you are ready to submit the lab, click on the **Submit Lab** tab and click the **Submit Documentation** button.
You will then see this lab listed in your **Submitted** tab on the **Manage Labs** page.

**Add/Create A Lab**

To add a new lab, click on the **Create A New Lab** button on the upper right of the red header.

After you click the **Add New Lab** button you will go to the **Student – Add Lab** page to create your new lab.

Select your class, give your lab a name and select your lab date. Click the **Create New Lab** button.

**Skills Performed tab**

Click the **Add/Remove Skills** button to add skills to the lab you are creating.
Search for a **Skill Name** or choose a classification or grouping for the skill to narrow down results. Once you have found the skill(s) needed, click on the skill(s) that you will complete or have completed in this lab. They will be added to the **Skills Performed** tab. Click **Close** to proceed.

See **Legend** for the color classification of the skill. If a skill is dark gray it is locked. If a skill is incomplete it is gold. If a skill is optional it is blue. A completed skill is green.

Expand out the skill and fill out each attempt with the required patient information, form(s), signatures(if required) and if you were **Successful** or **Unsuccessful** at performing the skill in your lab. Click **Save** to view your attempt and continue.

Click the **Forms** tab to see any additional forms attached to the lab that your instructor has created for you to complete.
Click the **Lab Documents** tab to attach any lab documents to the lab.

Any lab documents that associate with the skills that you have performed will be included in the **Class Lab Documents** section.

If you are required to upload lab documents of your own to submit, you can drag and drop or click to upload your document into the green section of the page.

The **Submit Lab** tab is your final tab of the documentation process. Please note that once you submit your documentation, that you will not be able to make any modifications to this documentation unless it is returned to you by your instructor.

When you submit your lab, it will now appear on your **Student - Manage Labs** page under the **Submitted** tab and no longer on the Ready to Document tab.

**Available Labs**

Click the **Available Labs** link to find new labs available for your lab class.

Select your **Lab Class** from the dropdown to see any available labs that you can sign-up for. You can also search by **Date** or by **Title** or **Location**.

Once you find the lab you would like to sign up for, click the **Sign-Up** link in the Actions column.
You will see a new window with your lab details. Click the **Sign-up** button to sign-up or click **Close** to go back.

Once you have clicked the sign-up button, your lab will be added in your Manage Labs area.

**Note:** If the lab is not set to auto-accept by your instructor, the lab will show in the **Pending** tab until your instructor has accepted you into the lab.

**Peer Reviewed Labs**

If your peer selected you to peer review their lab, you will see the peer review under the **Ready to Review** section. Any **Upcoming**, **Submitted**, **Approved**, or **Rejected** labs you will need to or have to peer review will show in the corresponding tab.

Click the **Edit Documentation** link to edit the peer’s documentation.
Review the documentation by looking over **Skills Performed**, **Forms** and **Lab Documents**.

Once you have reviewed the lab, click the **Submit Lab** tab. If you have any comments add those in the optional message section.

Click the **Submit Documentation** button and choose to send the documentation to either the student you are peer reviewing or your instructor(s).

**Class Lab Documents**

The **Class Lab Documents** area contain pdfs of all lab documents that are available to your School. Click on the link to download a pdf to your computer.

**SCENARIOS**

**Peer Review**
If you are enrolled in a class that is a scenario class, the **Scenario** menu item will show on the top menu.

Click on **Scenarios**, then choose **Manage Scenario Documentation** to begin a peer review for your scenario class. The peer that you are reviewing documentation for will show in the **Student** column.

When you go to the Manage Scenario Documentation page you will see **Upcoming**, **Ready to Document**, **Returned**, **Submitted**, **Completed** and the **All** tab.

Click on any of the tabs (shown above). If you have no Scenarios yet, you will not see anything listed in the tabs.

Click the **View** link to view the scenario.
Click the Document link in the actions column to begin documenting the Scenario.

Forms

The Forms tab contains the form(s) you need to complete for the peer review you are documenting. Under Evaluator Type, choose Peer.

Answer all information, give your evaluator signature and if the peer was successful.

Note: Once you Submit your peer documentation to your instructor you will not be able to edit the documentation unless your instructor returns the documentation back to you for changes.

Skills

The Skills tab will show any skills you have added that were used during the scenario.
Click the **Add/Remove Skill(s)** button to search or filter skills.

**Lab Documentation: Add/Remove Skills...**

This window is used to toggle skills used during a lab. You can search/filter skills using the options below. Click on a skill to add it to this lab. Click again if you want to remove it from this lab. You will not be able to add locked skills to a lab.

Click the skill to add it to the scenario. Click again if you want to remove it from this scenario.

**Note:** You will not be able to add locked skills to a scenario.
The **Documentation** tab allows you to drag and drop or click to upload any documents associated with the scenario.

Once you have completed the documentation for your peer you can either **Save** **Changes** or **Submit** your documentation to your instructor. If you choose to **Save Changes** you can come back and edit the documentation until it is complete.

You can view the documentation you submitted for your peer in the **Submitted** tab. You can view any returned documentation by your instructor for your peer in the **Returned** tab. Once your documentation for your peer has been completed, it will show in the **Completed** tab.
To view your progress, click on the blue buttons showing **View Pathologies Progress** or **View Scenario Progress** at the top of the page. You will see a graph that shows your progress in each skill with green showing completed and yellow showing pending.

**OPPORTUNITIES**

**My Opportunities**

The top blue links of **View Clinical Progress** and **View Live Progress** are the sequence of learning progression. Each group of skills are there to help you monitor your progress performing each skill successfully and will visually show you when you have completed the skill(s) needed in each area to progress to the next. Click on the blue buttons to view skills. If a skill has a lock symbol next to it, click on it to see the skill prerequisites.

You will see the **Upcoming, Ready to Document, Returned, Submitted, Approved, Rejected** and **All** tabs with your opportunities.

**Upcoming Tab**

The **Upcoming** opportunity tab shows you opportunities you have scheduled from your available opportunities that are upcoming, so you can view the details of your opportunities and plan your schedule in advance. You can see details for this opportunity by clicking the **Details** link.

**Ready to Document Tab**

The **Ready to Document** tab is the default tab and shows all shifts you have completed and are able to enter your documentation on. You can begin completing your paperwork by clicking on the **Begin Documentation** link. Follow the begin documentation section instructions (below) for help.
Returned Tab

The **Returned** tab contains all opportunities returned to you to from your instructor. Click on the **Details** to see the details of your opportunity. Click the **Fix Documentation** link to go back to your documentation and fix the information that your instructor requested you to fix. Submit the documentation back to your instructor and it will go to your **Submitted** tab.

Submitted Tab

The **Submitted** tab displays all shifts that are pending instructor approval. You can see details for this opportunity by clicking the **Details** link.
The View Documentation link goes to a page that gives you your evaluation information and patient/skill information you entered.
Approved Tab

The **Approved** tab displays all shifts that have been approved by your instructor. Any shifts that are displayed here that have been approved by your instructor are included in your progress report. If you failed, it will not be included.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Opportunity</th>
<th>Location</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/26/2013</td>
<td>16:00 - 20:00</td>
<td>ER Shift</td>
<td>Metro Hospital - ER</td>
<td>Details</td>
</tr>
<tr>
<td>6/30/2013</td>
<td>05:00 - 09:00</td>
<td>ER Shift</td>
<td>Metro Hospital - ER</td>
<td>Details</td>
</tr>
<tr>
<td>7/14/2014</td>
<td>08:00 - 16:00</td>
<td>0000-2000 shift</td>
<td>Norfolk Fire and Rescue - EMS</td>
<td>Details</td>
</tr>
</tbody>
</table>

You can see details for this opportunity by clicking the **Details** link.

**Opportunity: 0700-1500 shift**

The **View Documentation** link goes to a page that gives you your evaluation information and patient/skill information, documents for your review.
Rejected Tab

The **Rejected** tab contains all documentation that has been rejected by your instructor. Can you see the **Details** or **View Documentation**.

All Tab

The **All** tab shows all opportunities from all the tabs combined.

Available Opportunities

This page will allow you to view opportunities that apply to a class that you have enrolled in.
Select your **Class** from the dropdown (class is only field required to search) and/or the **date, title, location** or **preceptor** to view the opportunity or opportunities to are looking for. Click the **Search** button.

The **Category Selection** tab allows you to filter opportunities by **category**. Click on any of the available categories to filter. A checkmark will show next to the selected categories.

The **View Hours Progress** tab gives you a preview of your progress so you are aware of opportunities that you may still need to complete for your class.

You will see a list in the **Available** tab. Click **Sign-Up** or **Details** in the actions column to sign up for the opportunity. If you are already in the opportunity, it will not show in the list of available ones.

If the opportunity is not set to auto-accept, the opportunity will show in the **Pending** tab until your instructor or the site has accepted your request. Once it is accepted, you will receive an email and the opportunity will show in the **Available** tab.
Sign-up for Available Opportunities

When you click Sign-Up, it will either take you to **Create Opportunity** page or the **Request Site Access** page.

![Request Site Access](image)

If you get the **Request Site Access** page you will need to show immunization documentation before you are able to sign-up for the opportunity. Click on the green section or drag and drop your documentation into the green box, then click the **Request Authorization** button. You will then be brought back to your **Find New Opportunities** page.

**Note:** If you are signing up for a **Shift Based Opportunity**, you will not need to go through the additional steps below. The system will look for availability automatically for this opportunity and add you to it. If your instructor has chosen to manually accept students to the opportunity, you will need to wait for your instructor to accept you to the **Shift Based Opportunity** you selected. You will receive an email once you have been accepted.

**Note:** This opportunity will not appear in your Calendar until it has been accepted.
The **Site Details** of the opportunity will show in the top area with a map.

The **Opportunity Scheduler** will show you the first available date you can start, along with how long the opportunity will be scheduled for.
Click on a time to go to the opportunity (in green) and verify the opportunity details.

Click the **Sign Up** button to sign up.

The opportunity has been scheduled and the system will take you back to the **Find New Opportunities** page so that you can schedule more opportunities.

**BEGIN DOCUMENTATION**

When you click on the **Begin Documentation** link you will be brought to the **Clinical Opportunity Documentation** Overview page.

**Overview**

**Information**
Click **Select Preceptor** to select the preceptor assigned to this clinical from the dropdown box. If you do not see your preceptor, you can create a new one by selecting the **New** button.

For schools with numerous preceptors, your dropdown for selecting preceptors on this page will change. You will only see preceptors previously used in the dropdown. If the preceptor you need is not in the list, click the **Search** button next to **New** to find the preceptor.

Type in the preceptor first name and/or last name and/or email address to find the preceptor in the system. Click the **Select** button next to the preceptor needed in the list.

The preceptor you selected will show on the information page.

**Note:** You will only have the ability to create a new preceptor if it has been enabled for your course and the shift is not a “Field Internship Capstone Shift.”
Click **Save Changes** button.

The **Attendance** tab allows you to check-in to a clinical or schedule breaks into your clinical.

Click the **Check-In** button to check into your clinical. The prompt will tell you that you have checked in and will change to check-out. Press the **Check-Out** button when you are ready to check out.

Click the **Add Break** button when you would like to break from your clinical.

Enter your break **Title** and the **Start/End Dates** and **Times**. Click **Submit** to enter your break.

Click the **Save Changes** button on the top right of the page.

**Patients**

Click the **Add Patients** button to add a patient.
Select the **Patient Information** from the dropdowns and add any notes, then select the skill or skills performed and if they were **Successful**, **Attempted** or **Observed**.

The **Skills Performed** area will show the corresponding skill and status.

Click **Save** to save your patient information.

**Time:** Click on the time to set a time for when you observed this patient.

**Age:** You can be as detailed as needed with the age of the patient. This is specific because you may be observing a newborn that is only 2 hours old.

**Sex:** Male/Female/Unknown.
**Chief Complaint:** Click the dropdown to select the patient’s chief complaint.

**Skills observed, attempted or successful:** Select the skill from the dropdown menu, then select whether you observed, attempted or were successful with the skill. If you were involved with multiple skills, keep choosing skills until you have entered all of them.

If you need to make any changes to a patient, click **edit patient**. If you need to delete the patient, click **delete patient**.

**Patients (Paramedic Appendix G Course Only)**

**Note:** If you are a student in a *Paramedic Appendix G Course*, you will see an **Add Live Skill** button on the top of your **Patients** page. This button is for documenting live skills in the opportunity.

Click the **Add Live Skill** button. Let your **Time** default to the current time or click the calendar icon to set a time, add any **Live Skill Notes**, add the skill or **Skills Performed** from the dropdown and the status of **Successful, Attempted** or **Observed**.
The **Skills Performed** area will show you the skill chosen and the status. Click the **Save** button to save your live skill information.

### Forms

This page lists all forms for your opportunity that you need to complete from your School or Instructor.

Click on a form to expand the area, then click the **Fill out Form** button.

### Documents

This page allows you to download instructor provided documents. Click on the link for the document you want. Your browser will begin a download. Once the download is complete, click on the file to open.

**Note:** If you have questions about the forms on this page, please consult your instructor for more information.
If you downloaded a file, you should now save your file in a location on your computer. Try to name your file so that you can easily identify it when/if you need to upload it back into this area.

To upload your file, click or drag and drop it to the green area. After your file has been uploaded, you will see your file listed to download or delete right above the browse box.

Submit

Congratulations, you have completed the necessary steps and can now submit your clinical documents to your instructor. If you would like to write an optional message to your instructor, you can do that in the message area.

Have your Preceptor sign to confirm your presence.
Click on the **Submit Documentation** button. The documentation will show in the **submitted** tab on the My Opportunities page.

**Resume Documentation**

If you do not want to proceed to completing your clinical documentation, you can close out your browser at this point and come back to it to resume. When you come back into the site, go to the **My Opportunities** page and click on the **Begin Documentation** link next to your clinical to resume.

**Fix Documentation**

If your instructor does not accept your clinical documentation, they may choose to send it back to you for correction. You will get an email notifying you that your instructor has sent this back to you to fix. To find the opportunity you need to fix, go into the **Opportunities** page. You will see **Fix Documentation** next to your opportunity.

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**Submitted tab**

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**Note:** This option will only show if you exited your documentation before submitting it.
The **Submitted tab** means that you have submitted your documentation for review. The opportunity will now have a **View Documentation** link next to it.

The **Approved tab**

Once your instructor completes your paperwork on their end, the status for this opportunity will change to **Approved** and show in the Approved tab.

**Preceptor Access**

This area shows all preceptors associated with your school who have completed training as a **Field Internship** preceptor. If you would like to give access to any of the preceptors listed, this will allow them to view how they and other preceptors have evaluated you in the "**Clinical Evaluation of Student**" worksheet for Field Internship opportunities.

**STUDENT - PRECEPTOR ACCESS**

Preceptor Search

```
enter the name or email of the preceptor you want to search for
```

Instructor, Demo

Click on the circle until it turns green and shows a checkmark inside of it. You have now given the preceptor(s) access.
De-select the circle to remove access for the preceptor, if desired.

**MESSAGES**

The **Messages** area allows you to receive and send messages from within the Platinum Planner system.

To create a message, click **Compose**, select the **Add** button to add the person or people you would like to send a message to.
The tabs will specify the role of the person. Click on each tab and either look through the list or type the name of the person you want to send a message to. Click the checkbox and the name will appear in the “To: box.”

Enter your Subject and Message, then click the Send button on the bottom of the screen. You will see the message sent in your Outbox. Any new messages will display in your Inbox.

REPORTS

Progress Report

You have the ability in Platinum Planner to run a Progress Report on yourself to see your skill progress.

You will need to at least select a Course to run this report. Click the Run Report button to run the report.
You will see a detailed report with information on your hours and skills. Click on any of the skill progress detail links to see more information about the skills you have performed.

If you see a lock symbol next to skills, that means that the skill(s) have a prerequisite skill that needs to be performed before the skill is available. Click on the skill to view the skill information and prerequisite.
Scroll down to the bottom of the page and click the Print Pdf button to print or save this report as a .pdf file.

National Registry Portfolio Progress

If you have participated in a Scenario class, you will also be able to run a National Registry Portfolio Progress Report.

If you have a scenario class, this report will run when you select it from the Report page. It will give you detailed information about your scenario classes and the skills you have successfully attempted. Click on a portfolio lab skill to view more details.

Scroll to the bottom of the screen and select the Print button to print or save this report as a .pdf file.

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 button on the footer on your dashboard.

Type in your help topic into the Help text box and click the search icon or hit enter.
You will see the top results of your help topic from our Knowledge Base to help you answer your question.

If you need additional help, click the **Contact Us** button to get a Customer Support Advocate to help you.