

A User Guide to

Maintaining your Mentor Register on PEP



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**WITH
PLYMOUTH
UNIVERSITY**

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1 Introduction

The mentor register stored on PEP is a large database that holds all mentor details that **every** Trust inputs.

All users have access to **part** of this database; any mentors that are linked to placement areas that you can view via PEP. For example, if you are a PDT Clinical Lead for Plymouth Hospitals NHS Trust, you will have access to all mentors associated with any placement within this Trust.

This is **your** mentor register so please ensure the data you input is correct and that every field is completed.

1.1 Live Mentor Register

The Live Mentor Register for each placement is automatically displayed when you open that placement area (this is because the default setting is to show only active mentors). By selecting 'Show all mentors', as circled below, you can view all mentors linked to this placement regardless of their status.

The screenshot shows the PEP system interface for the placement 'PEP TEST UNIT'. The 'Mentors/Educators Register' tab is selected. Under the 'Linked Mentors' section, the 'Show all mentors' radio button is circled in red. Below this, there is a table of linked mentors.

Directorate/ Team	Surname	Forename	Job Title	Mentor Status	FT/ PT	Professional Registration/ Type of Practitioner	Qualification	Date Qualification Obtained	Triennial Review Status	Next Review Date		
	Test	PEP	Team Leader	Sign Off Mentor		Nurse Adult	ENB998	22/02/2007	Active	04/08/2017	02/11/2015	Unlink

1.2 Mentor Status

All mentors have a status:

- **Active** – a mentor that is available to mentor students (for Nursing and Midwifery mentors, mentors must be up to date with mentor update and triennial review to be active)
- **Deactive** – a mentor that out of date to mentor students (for Nursing and Midwifery mentors, mentors who are not up to date with mentor update or triennial review, the system will automatically be deactive)
- **Archived** – this status is for mentors who are unavailable to mentor (i.e. on maternity leave, long term sick etc.) or who are no longer a mentor

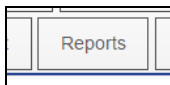
1.3 Assigning a Mentor to Student

Mentors can be assigned to a student. The system has been set with restrictions so only mentors that meet the criteria below will allow you to assign them:

- The mentor status is active for the duration of the placement
- The mentor is not already linked to three students (three students to one mentor is the maximum)

1.4 Reports

Mentor reports can be accessed through the Hosts section of PEP, by clicking to view any placement area, and clicking on the Reports button



Before you run your report, please select whether you want the report to run for all placements you have access to or just the one that you are currently viewing.

A light gray rectangular box containing the text "Choose Report Source" on the left, followed by a vertical line separator and two radio button options: "Run report for selected PEP" (which is selected) and "Run report for all user's PEPs".

- **Hosts without active mentors** – this report will display all placements without any active mentors attached
- **Live Mentor Register** – displays all active mentors with up to date mentor updates and triennial review
- **Mentor / Educator Full list – Excel** – displays all mentors regardless of their status
- **Out of Date Mentors** – displays all mentors that are out of date (useful for mail merge to alert mentors to upcoming mentor sessions)
- **Sign Off Mentor List** – displays all sign off mentors regardless of status

1.5 Automated Emails

Auto emails will be sent to mentors:

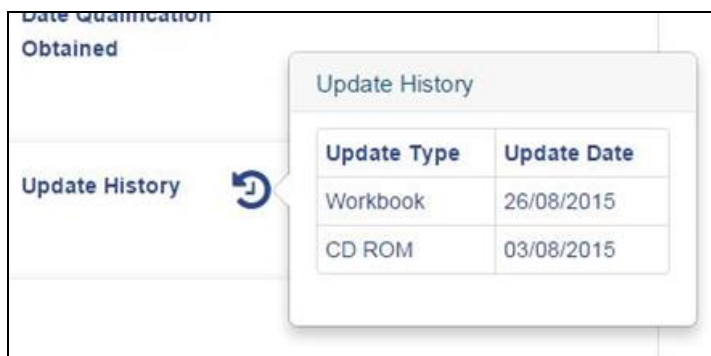
- 8 weeks before their mentor update is due
- 8 weeks before their triennial review is due
- When a student has been assigned to be mentored by them
- When a student has been removed from being assigned them

1.6 Out of Date Mentors

When mentors are out of date for mentor update or triennial review their status automatically changes to deactive. They are no longer able to be assigned to students and will no longer appear in the live mentor register. As soon as they have completed an update they will automatically revert back to active.

1.7 Mentor Update History

You can now view historical data for your mentors to ensure they are not completing every annual update online (mentors should not be completing an update online two years in a row). This is available if you hover your mouse over the update history icon as below, the previous updates will show.



2 How to Add a Mentor

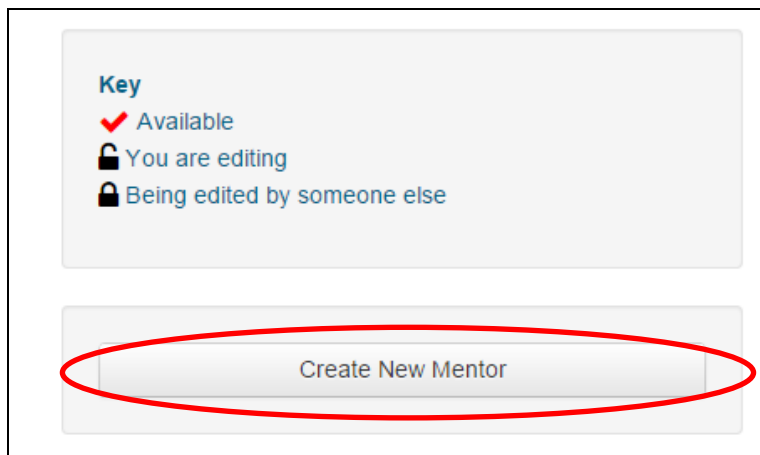
- Click on the Mentors section



Before you create a new mentor, please ensure that the mentor does not already exist. To do this, enter the mentor surname in the search field, tick both Active and Deactive status and click Search.

If the mentor you are searching for does not appear, then you should create a new mentor. If the mentor does appear, then skip to section 7.5 – How to Amend Mentor Details.

- Click on Create New Mentor



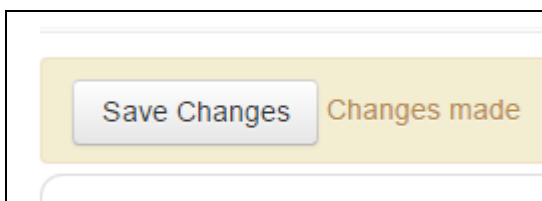
- Enter your mentor information in the fields. Please ensure that you populate every field.

Create New Mentor/Educator

Forename	<input type="text" value="Test"/>	Surname	<input type="text" value="Test"/>
Email	<input type="text" value="pepsupport@plymouth.ac.uk"/>	Status	
Job Title	<input type="text" value="Team Leader"/>	FT/PT	<input type="text" value="Please Select"/>
Professional Registration/ Type of Practitioner	<input type="text" value="Nurse Adult"/>	Mentor/Educator Type	<input type="text" value="Sign Off Mentor"/>
Mentor Information Pack Sent	<input type="text"/>	Archive Mentor	<input type="checkbox"/>
Mentor/ Educator Preparation/ Qualification	<input type="text" value="HEAB370"/>	Level	<input type="text" value="Degree"/>
		Date Qualification Obtained	<input type="text" value="03/06/2012"/>
Type of Update	<input type="text" value="Face to Face"/>	Update Completed	<input type="text" value="02/08/2015"/>
Next Update Due Date			
Date joined local Mentor Register or Triennial Review Completed	<input type="text" value="11/05/2015"/>	Next Triennial Review Due Date (3 Years)	

The due dates for mentor update and triennial review will be populated automatically from the actual dates you enter.

- Once all your mentor information has been entered click on 'Save Changes'.



- Now you need to link the mentor to a host (without linking the mentor to a placement they will not appear on any reports). Click on the Link Mentor to hosts button:

Mentor Name	TEST TEST		
Current Sequence	1	Creation Date	24/06/2015
Mentor Info	Linked Placements	Reports	
Linked Hosts			
No hosts currently linked.			
Link Mentor to hosts			

- Once you have found your host, click 'Link'

Link to this host
Link

Your mentor is now linked to the placement area and will appear on the mentor list.

3 How to Amend Mentor Details

- Click on the Mentors section



- Enter the mentor surname in the search field, tick both Active and Deactive status and click Search.

A search form for mentors. It includes fields for 'Forename:' and 'Surname:' (containing 'Test'). Below these are checkboxes for 'Status:' with 'Active' and 'Deactive' selected, and 'Archived' unselected. There are also radio buttons for 'Current Edit Status:' with 'All' selected. A 'Practice Environment:' field is present. At the bottom right, there is a blue 'Search' button and a grey 'Clear Search' button. Red circles highlight the 'Surname:' field, the 'Active' and 'Deactive' checkboxes, and the 'Search' button.

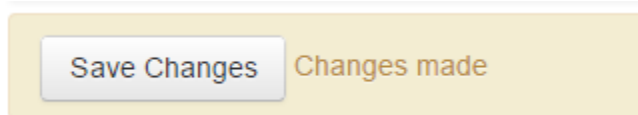
- When you have found your mentor, click on 'Check Out' as this will allow you to make your changes.

Check Out Status	Mentor's Name	Mentor Status	Update Completed	Checked Out To	View	Check Out	Undo Check Out	Check In	Triennial Review Due	Next Mentor Update Due	Status
✓	Test, PEP	Sign Off Mentor	02/11/2014						04/08/2017	02/11/2015	Active

- Select whether you want to make changes to the Mentor Information or the Linked Placements the mentor is linked to as shown below:



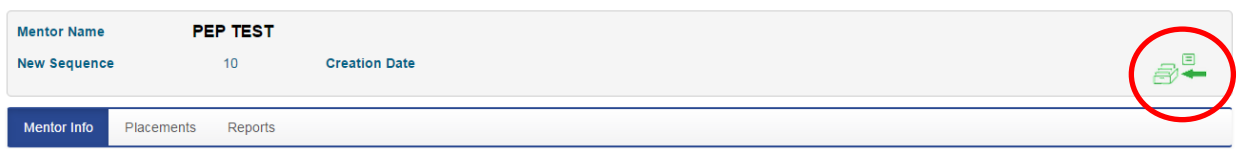
- If you make changes to the mentor information, when you have made your changes, click on the Save Changes button



- If you make changes to the placements the mentor is linked to, go back to the Mentor Info page to 'Check In' the mentor.



- Check the mentor back in by clicking on the green arrow in the right corner.



4 How To Delete a Mentor

There is no delete functionality as all records are kept for audit purposes. Instead, please tick the Archive mentor box and check in (follow guidance in section 3 How to Amend Mentor Details).

Forename	<input type="text" value="Mentor"/>	Surname	<input type="text" value="Test"/>
Email	<input type="text"/>	Status	Active
Job Title	<input type="text" value="Mentor Trainer"/>	FT/PT	<input type="text" value="FT"/>
Professional Registration/ Type of Practitioner	<input type="text" value="Nurse Adult"/>	Mentor/Educator Type	<input type="text" value="Please Select"/>
Mentor Information Pack Sent	<input type="text"/>	Archive Mentor	<input type="checkbox"/>

4.1 What if a mentor is on maternity leave / long term sickness?

If a mentor is unavailable for a long term reason, you need to archive them – follow instructions for section 4 How To Delete a Mentor.

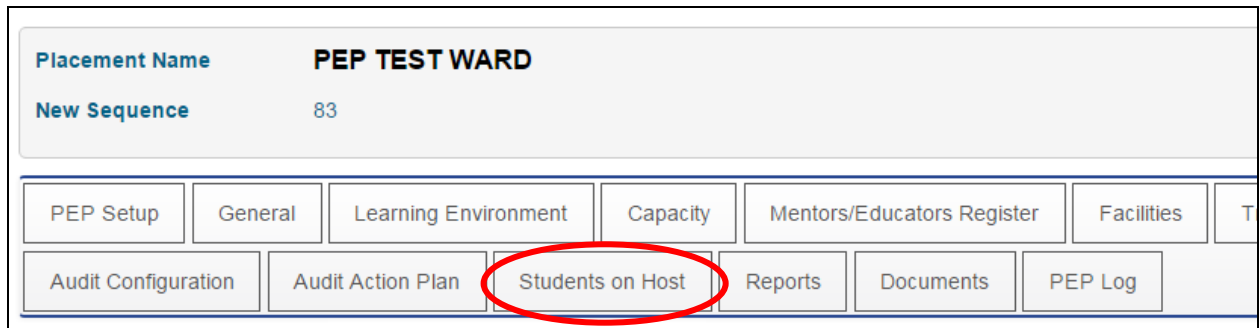
5 How to Assign a Mentor to a Student

NB only users with edit access are able to assign mentors to students

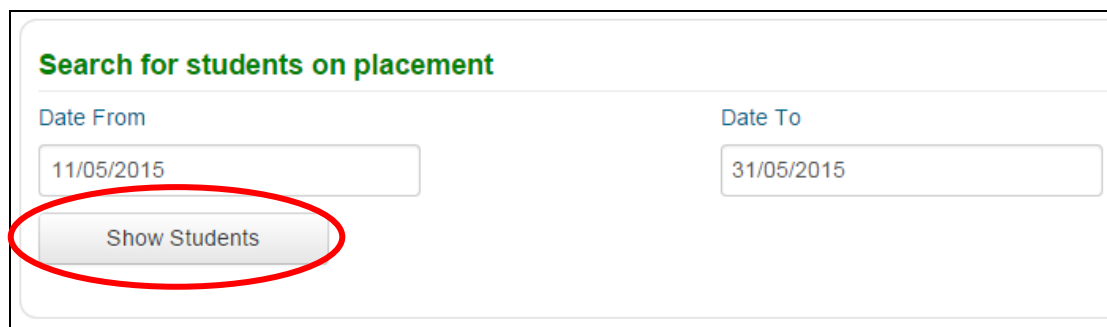
- Search for the placement area you wish to assign mentors for, and click 'Check Out'



- Click on 'Students on Host'



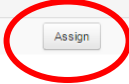
- Enter the dates you wish to search for students and click 'Show Students'



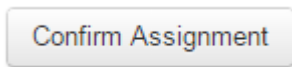
- Click on 'Assign' to see the active mentors available to mentor this student

Student Details								
Student Name	Cohort	Date from	Date to	Experience (Category)	Mentor Name	Days	Mentor/Educator	
+ Mouse, Mickey, Mr (M)	S12 NUR BSC	02/03/2015	24/05/2015	NUR - MEDICAL		Please click here	Assign	

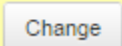
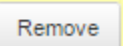
- A list of active mentors will appear below the student. Choose from the list and click 'Assign'

Assignable Mentors		
Mentor Name	Status	
Test, PEP1	Active	

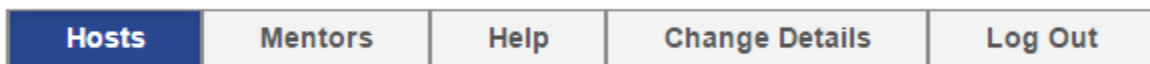
You will be asked to confirm the assignment, please check the details and if you're happy, click 'Confirm Assignment'



- The mentor has now been linked to the student. You can change the mentor or remove the mentor from the student by clicking either the Change or Remove button as shown below.

Mentor/Educator
Test, PEP1
 

- When you have finished assigning mentors to students, please 'Check In' the placement area, by clicking on Hosts, and then the green arrow





- An automated email will be sent to the mentor if they are assigned to a student, or removed from being assigned to a student. This will tell the mentor the dates of the placement and the name of the student – see below for an example:

Dear PEP TEST

This email is to inform you that the following student has been assigned to you:

Student Name: MICKEY MOUSE

Placement: PEP TEST WARD

Placement Dates: 2015-03-31 - 2015-04-30

Category: NUR - COMMUNITY

Regards,
PEP Support

6 Help

If you need further assistance, please email pepsupport@plymouth.ac.uk and a member of the team will get back to you.