# ProjectConcert Instructions

PRECEPTOR AND CLINICAL AGENCY ONBOARDING

I. Navigating to the Preceptor & Clinical Agency Onboarding Format

On the left navigation bar:

1. Click on the "Experience" dropdown
2. Click on the "New" function
3. Select the "Preceptor & Clinical Agency Onboarding" format from the Format dropdown
4. For a detail video walkthrough of the function, click on the 'need help' button to watch a tutorial
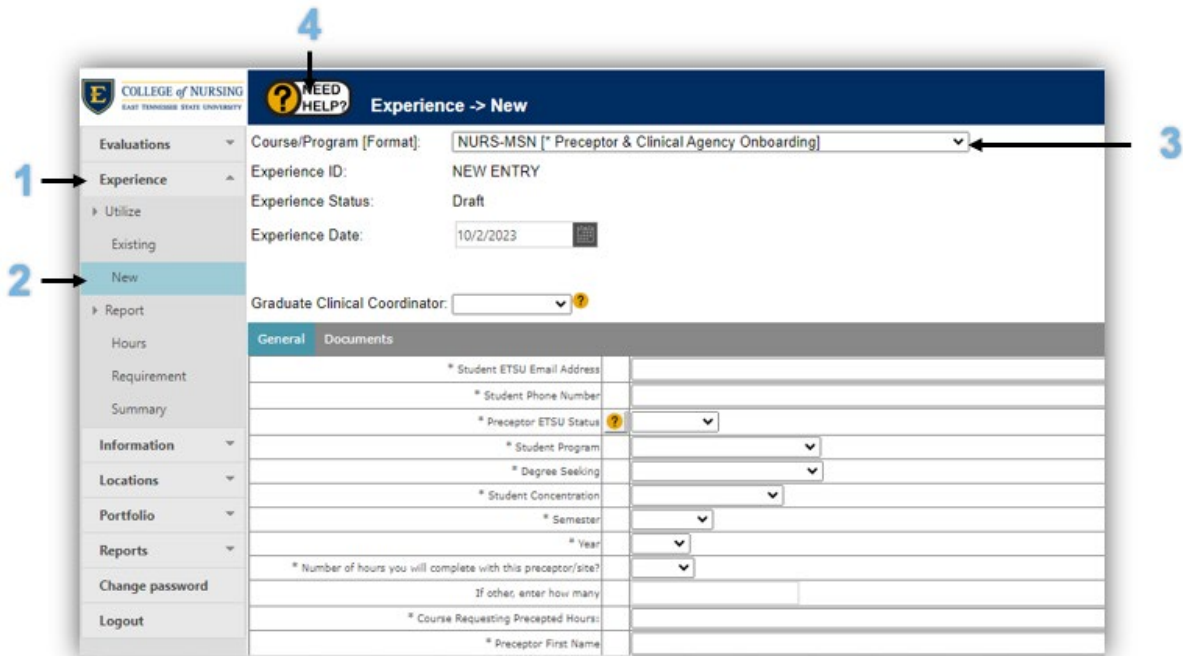
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II. Completing the Preceptor & Clinical Agency Onboarding Format

5. Hover you mouse over question mark icons to load more information
6. Select your Graduate Clinical Coordinator from the dropdown
7. Complete all details required in the General tab

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8. Click on the Documents tab to upload a Completed Paper/PDF Preceptor & Clinical Agency On-Boarding form. Preceptor CV or other documents can be attached as well.

NOTE: You must save your entry at least once before attaching a document. This is indicated by red text that will read "You must Save the entry before attaching documents."

The Save and Submit options will be found at the bottom of the page:

9. Select how you want the page to render after you Save / Submit

NOTE: You must make this selection BEFORE you click the save or submit button

10. Click Save to save your work
11. Click Submit to submit your entry to make it eligible for approval or rejection

NOTE: The system will check if all required items are completed. If not, you will be notified what items are incomplete. In these cases, please complete the required items and submit again.