

**InPlace Guidance**

**How to add and remove mentors on trainees placement records**

**How to change/update a mentor’s email address or name**

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# Add a mentor to a placement record

**Navigate to** [**InPlace**](https://www.edgehill.ac.uk/service/education-placements/) **and find the trainees placement record that you would like to add a mentor to.**

1. Once on the placement record, scroll to the bottom of the page to the Supervisors area.
2. Press **‘Add Supervisors’**

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1. A list of mentors and school contacts will appear under the Placement Supervisor Full Name column.

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**Names will be listed here**

1. Press **Select** on the mentor you would like to add.

If the mentor is not listed, follow steps under[**‘How to add a mentor if not listed’**](#_How_to_add)

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Name of mentor to add

1. The mentor will appear under selected.

Choose **Classroom Mentor** for Primary/Early Years. Choose **Curriculum Mentor** for Secondary/FE under supervisor relationship and press **Add Supervisors.**

Name of mentor to add

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**The mentor will now be added to the trainee’s placement record. If the mentor you’ve added is replacing another mentor, please also follow the steps in** [**‘Remove a mentor’**](#_Remove_a_mentor)

# How to add a mentor if not listed

If a mentor is not listed when following the steps in the section above, then an InPlace record may need to be created for the mentor.

A record only needs to be created once. If a mentor’s record has errors, then follow the steps in [Change/update a mentor’s email address or name](#_Change/update_a_mentor’s) instead of creating a new record.

**Navigate to** [**InPlace**](https://www.edgehill.ac.uk/service/education-placements/) **and find the trainees placement record that you would like to add a mentor to.**

1. At the top of the placement record, press the **agency** link. This will take you to the school’s placement record.

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1. Navigate to **Personnel**

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1. **Check the list of personnel to ensure the mentor does not already exist before adding a new record.**

For example, they may be recorded as Tom rather than Thomas/their name may be misspelt. If you find an existing record and want to change the mentors’ name/email, follow steps in [Change/update a mentor’s email address or name](#_Change/update_a_mentor’s) and do not create a new record.

If you cannot find any record for the mentor, please proceed to step 4.

1. Press **+Add Personnel** on the right-hand side

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1. Type the **full name** of the mentor you want to add

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6) Press **Add New Personnel**

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7) Enter the mentors **email address**

Choose a Type from the dropdown –

Choose **Classroom Mentor** for Primary/Early Years.

Choose **Curriculum Mentor** for Secondary/FE.

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1. Tick all 4 boxes under **Permit View** and press **Save**

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**The mentor is now added to this school’s record. This mentor will now be listed when following steps 1-5 under** [**Add a mentor to a placement record**](#_Add_a_mentor)**.**

# Remove a mentor from a placement record

If a mentor is replacing another then the mentor/s already attached will need to be removed from the trainees placement record.

**Navigate to** [**InPlace**](https://www.edgehill.ac.uk/service/education-placements/) **and find the trainees placement record that you would like to remove a mentor from.**

1. Once on the placement record, scroll to the bottom of the page to the Supervisors area.
2. Press **Detail** on the mentor you would like to remove

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Name of mentor to remove

1. Press **Delete**

Name of mentor to remove

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Name of mentor to remove

**The mentor will now be removed from the trainee’s placement record.**

# Change/update a mentor’s email address or name

A mentor’s email/name may have changed or be inputted incorrectly on InPlace so will require updating.

**Navigate to** [**InPlace**](https://www.edgehill.ac.uk/service/education-placements/)

1) Navigate to **Manage > Agency Personnel**

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2) Search for the **School** of your mentor under **Agency Name**

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1. Press **Apply Filter** and a list of mentors that match your search will appear.

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1. Press the **Agency name**

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1. Navigate to **Personnel**

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1. A list of mentor names will appear. **Press on the name** of the mentors record you want to amend.

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1. Enter the new/amended **email address** and press **Save**

Here you can also amend the mentors name if this is misspelt or changed.

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**These updates will now be changed automatically on any trainee placements that this mentor is attached as a supervisor to.**