Switching to CordialChart

Moving from FISDAP or Platinum Planner is straightforward. Here is what to expect and how to make it painless for a cohort.

When to switch

The clean moment is the start of a new cohort. Current students can finish their level on your existing tool while new cohorts start on CordialChart, or you can move a whole program at a term boundary. Because one CordialChart account carries a student from EMR to Paramedic, you will not face the kind of mid-program data split that strands cohorts on a legacy tool.

What comes over

- **Your sites and preceptors.** Set up your clinical and field sites, departments or bases, and preceptors. Preceptors do not need accounts.
- **Your minimums and gates.** CordialChart ships with CoAEMSP-aligned defaults. Adjust the required numbers and graduation gates per level to match your program and accreditor.
- **Your roster.** Import students by CSV, or hand out self-registration codes and let students register themselves. Seat balances are tracked by level.
- **Your policies.** Load your handbook and required policies so students e-sign them at first login.

What changes for the better

- Students chart realistic, de-identified PCRs, so they graduate fluent in real documentation.
- Preceptors sign on their own phone with no account and never on a student's login.
- Appendix G counts itself from the charting, with a live readiness verdict per student.
- One account per student across levels, with history that never resets.

A simple rollout

1. Set up sites, preceptors, and your minimums.
2. Import or invite your first cohort.
3. Load your handbook and policies.
4. Run a short walkthrough for instructors and students (ask us, we will tailor it to your program).
5. Start charting. Watch the accreditation numbers fill themselves.

Get help

Ask about a comped pilot for your next cohort, and we will help you set it up. Email Support@CordialChart.com or request a walkthrough at CordialChart.com.