

Within the system, you will have Sites (group or entity with which a contractual relationship is established) and Locations (a physical location where patient care takes place).

You'll want to make sure you have at least 1 location associated with each site to ensure that they receive a Slot Request if needed. Let's work together to add a Location!

- 1. Select Sites from your left-menu or dashboard.



- 2. Find and select the Site you'd like to manage.

- 1. Pro-tip: use search box and filters to find what you're looking for!

A screenshot of a web application interface showing a search results table. The top navigation bar includes "Setup", "Sites" (highlighted), "Locations", "Personnel", "Contracts", "Emails", "Explore Locations", "Reports", and "Dashboard". Below the navigation is a search bar with a magnifying glass icon and the text "Search". To the right of the search bar are filters: "Active" and "PT.DPT", each with a close icon. There is also a "+ Add Site" button and icons for a document, a key, and a funnel with the number "2". Below the search bar, it says "35 Results Found". The table has columns: "SITE NAME", "ADDRESS", "CITY", "STATUS", "PROGRAMS", and "PHONE". The first row is "Ability Center*" with address "169 Sugar Street", city "West Chicago", status "Active", and programs "PT.DPT, OT.OTD". The second row is "Abundant Health*" with address "9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor", city "Depew", status "Active", and programs "PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD". The phone number is "(555) 555-55! x421223".

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health*	9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor	Depew	Active	PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD	(555) 555-55! x421223

- 3. On the ribbon at the top of the page, click on Locations.



4. The page will load all existing locations for the selected site. Click +Add Location.

The screenshot shows the 'Action Physical Therapy Inc' site page. At the top, there is a header with the site name and address: 'Action Physical Therapy Inc' and '380 SUTLEY CIR, SACRAMENTO, CA 95835-2043'. A 'Delete Site' button is in the top right. Below the header is a navigation menu with tabs: 'About', 'Contracts', 'Locations' (highlighted), 'Personnel', 'Slots', 'Interventions', 'Assessments', and 'Communications'. A search bar is present with a '+ Add location' button highlighted in a red box. Below the search bar is a table with the following data:

LOCATION ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS	ACTIONS
Action Physical Therapy Inc	380 SUTLEY CIR	SACRAMENTO	CA	95835-2043	Active	

Click here to view/edit Location profile

5. A drawer will open for you to add all the Location's details:

1. Please note that location name and full address are required before you can save.
2. Basic Information

The screenshot shows a 'Location details' drawer with a 'Save' button. The form is titled 'Basic Information' and contains the following fields:

- Name ***: Text input field containing 'Action Physical Therapy - NY'.
- Label**: Empty text input field.
- Location Area**: Dropdown menu with 'Out Of State' selected.
- Active**: Radio buttons for 'Yes' (selected) and 'No'.

6. Address Information

Address Information

Domestic International

Address line 1 *

50 East Cottage Avenue

Address line 2

City *

Ronkonkoma

State *

NY

Country

United States

ZIP Code

11779

7. Contact Information: optional if you have an office #, fax and website.

Contact Information

Phone
(555) 555-5555

Phone extension
5555

Fax
(555) 555-5555

Website
www.exxat.com

8. Additional Information: track whether this is a rural location, if it serves underserved populations, and whether it should show to students on the map.

9. Once you add all the information you'd like to enter, click Save.

× Location details Save

Additional Information

Rural Location Yes No

Underserved Population Yes No

Show On Explore Clinical Locations Yes No

10. The location will now be added in the system!

Note: Please note that the inactive locations will not be shown to students on the Explore Clinical Location page.

11. On the About tab, you will be able to provide additional Location Information.

12. You can manage the information you initially entered when creating the Location.

Sites > Abundant Health* > Action Therapy

Action Therapy 6 Thomas Jefferson, Warren, NJ 00854 Move Location Delete Location

Location Menu <

- About
- Personnel
- Communications
- Slots
- Placements
- Interventions
- Assessments
- Location Evaluations

Contracts

Adaptial Fully Executed
July 1, 2021 - July 31, 2026

Alliance Medical Center - Nursing PICU Fully Executed
March 20, 1991 - Is open ended

Advent Professionals Awaiting Signoff
November 25, 2004 - Is open ended

AH Contract Awaiting Signoff
June 7, 2023 - June 12, 2024

Settings

Inherited from site

Acute Care Home Health Outpatient Peds Rehab School Based Wellness

Location settings

Child Nutrition Other Sports Research

Categories

Inherited from site

Major Medical Center Outpatient Conglomerate

Location categories

13. View Contract information

1. You can manage this at the Site level.

Contracts

Action Physical Therapy Inc Awaiting Signoff
June 6, 2022 - June 7, 2028

14. List out common **Settings** this location offers slot availability for.

1. If settings were added at the Site level, you will see the inherited items listed in this section.

Settings

Inherited from site

Acute Care Rehab

Location settings

Home Health Other

Location setting notes
Occasionally takes women's health

2. You can modify the inherited settings from the site, if needed

× **Settings** Save

Inherited From Site

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Inherited Settings

Acute Care × Home Health × Outpatient ×
Peds × Rehab × School Based ×
Wellness ×

Inherited Setting Notes

Applicable for this location

Location Settings

Update location specific settings as needed below.

Settings

Child Nutrition × Other × Sports Research ×
Neuro Sub-Acute

Setting Notes

Paragraph ▼ **B** *I* U ☰ ▼ 🔗 ⋮

15. Have program curated **Categories**? Add them to Locations here.

1. If categories were added at the Site level, you will see the inherited items listed in this section.

Categories ✎

Inherited from site

Stand-Alone Clinic

Location categories

Private Practice

2. Edit any location categories

× Categories Save ⋮

Inherited From Site

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Category

Major Medical Center × Outpatient Conglomerate ×

Location Categories

Update location specific categories as needed below.

Category

Private Practice ×

Stand-Alone Clinic

16. List out any **Requirements** this Location asks of students.

1. If requirements were added at the Site level, you will see the inherited items listed in this section in blue.
2. This will be shared with Students once they are placed at any location associated with this Site.

Location Requirement

✎

COVID-19 Vaccination Fingerprinting

Site requirement notes
Make sure to upload this documentation within Compliance

3. Edit any Requirements

× **Requirements** Save

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Inherited Requirements

Background Check × Drug Screen × MMR ×
TB × CPR × Physical Exam × CBC ×
PBI test ×

Inherited Requirement Notes

Applicable for this location

Background Check
Compliance Che...
[Show More](#)

Location Requirements

Update location specific requirements as needed below.

Requirements

Should be compliant × Enter requirements...

Requirement Notes

Paragraph ▼ **B** *I* U ≡ ▼ @ ⋮

Note

17. If Locations require any documentation to be provided by your students prior to starting a placement, add them to the **Student Requirement Upload (Shared via Profile Link)**

1. If documents were added at the Site level, you will see the inherited items listed in this section. You can turn this off using the Enable for this location option.

2. This will be shared with Students once they are placed at this location.

Student Requirement Upload (Shared Via Profile Link) +

Site Specific Requirements ^

Enable for this location i

REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
Orientation Packet View document	✓	✓		✎

Location Specific Requirements ^

REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
HR Clearance Form View document	✓	✓		✎

Please note Student requirement uploads added/updated after the placement starts will not be shown to the students.

18. Add any general **Documents** with the option to share details with students.

1. If documents were added at the Site level, you will see the inherited items listed in this section.

Documents +

Inherited from site ^

TYPE	DATE UPLOADED	DOCUMENT	SHARED WITH STUDENT	NOTES	ACTION
General		2022 Paper Slot Request Form View document	✗		<input checked="" type="checkbox"/> Applicable for this location i

Location documents ^

TYPE	DATE UPLOADED	DOCUMENT	SHARED WITH STUDENT	NOTES	ACTION
General		Additional Locations View document	✓		✎ 🗑

19. Add in general **Notes** on important information you'd like to keep on file, with the option to share details with students.

1. Notes shared with students will be displayed on the Explore Clinical Locations section.

Notes

Notes for internal use only

Location specific notes +

Notes shared with students

Location specific notes +

Please carry you school ID card during placement. ✎ 🗑

20. Add Housing and Parking Information.

1. This will be shared with students on the Explore Clinical Locations page.

Housing And Parking Information ✎

Housing available at this location? - Yes

Parking available at this location? - Yes
Parking note -
 Parking only available for 2 Wheeler.

Deleting Location

In case you are no longer working with the location, you always have the option to delete the location. You can only delete the location if it does not have any slots or placements associated with it.

1. Go to Location
2. Locate the **Delete Location** button in the right-hand corner.

Sites > Abundant Health - New Site > Abundant Health - Secondary Hospital

Abundant Health - Secondary Hospital Secondary Location, KA, AK

Location Menu <

- About
- Personnel
- Communications
- Slots
- Placements
- Interventions
- Assessments

Abundant Health - Secondary Hospital ✎

Address Secondary Location, KA, AK	Location Area Out-Area	Phone -
FAX -	Location label -	Website -
Rural Location N/A	Underserved Population N/A	Explore clinical locations Yes

Last updated by *Sayantana Basu* on July 9, 2024

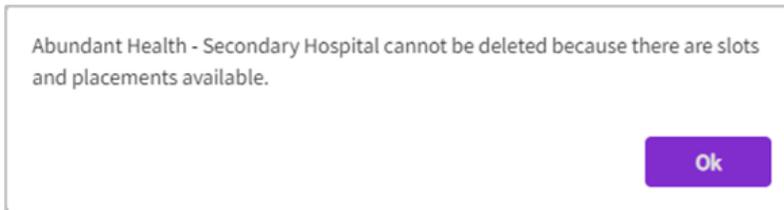
Contracts

3. You will see the confirmation message as below, enter the number displayed and click on "Delete".

Deleting Wellspring Central will permanently remove - location details, communications, interventions and associations. Once deleted, this data cannot be retrieved. Do you want to Continue?

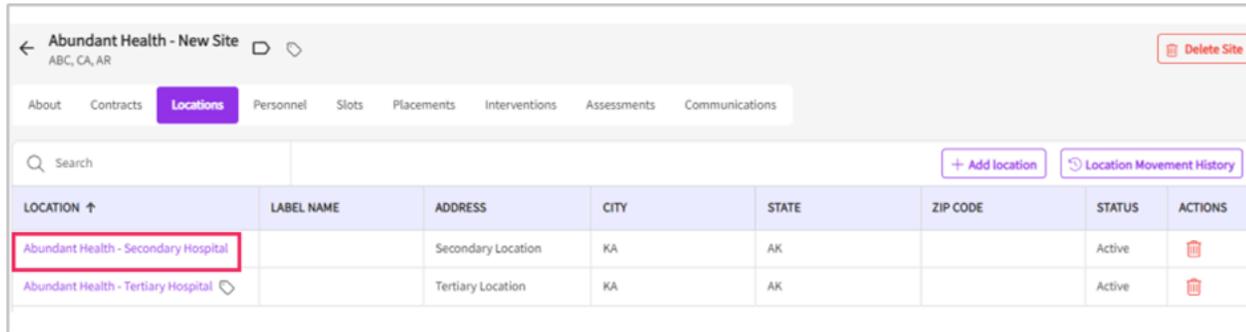
Displayed number **44** Enter displayed number to continue:

4. If there are any slots and placements added for this location, you will not be able to delete the site. You may contact our support team at v4support@exxat.com

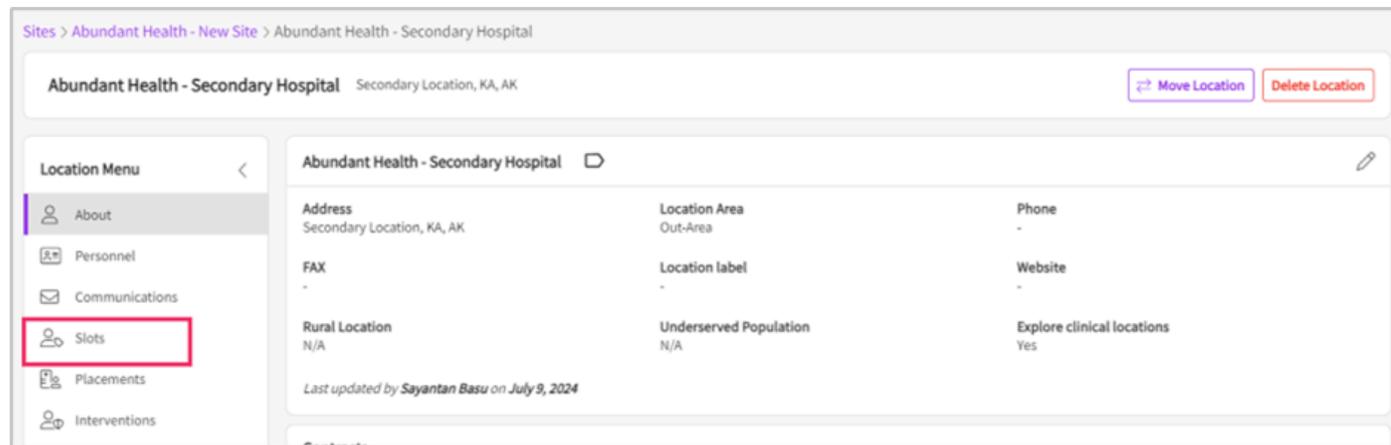


Adding Slots by Site

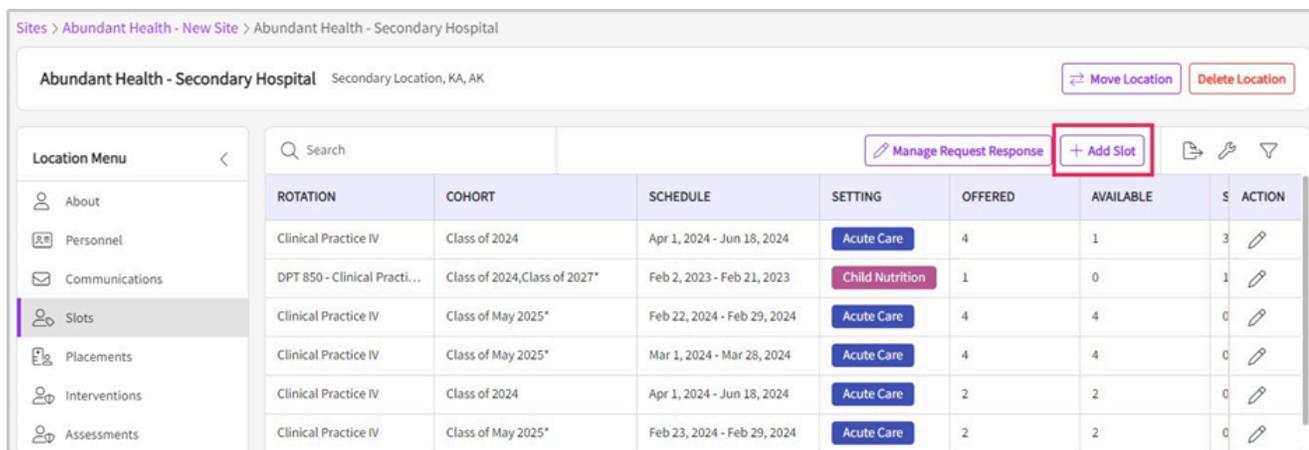
1. Click on the desired location name.



2. Click on Slots option from the left side menu.



3. The page will load all the slots added for this Location. To add a new slot, click on +Add Slot.



4. A drawer will open. Enter in your slot information. Click Save once done.

1. The Location field will be prefilled and cannot be changed.
2. The rotation list at the bottom will only include current and future rotations only.
3. The number of offers you have received is required.

× Add slots
Save

Location
Adaptial - Wellington

Clinical Instructor

Setting
Outpatient

Slot status
Confirmed

Slot type

Supervision type

Notes - Shared with students

5000 characters left

Notes - Internal use only

5000 characters left

The below rotation list shows the current and future rotations only

ROTATION	SLOTS START DATE	SLOTS END DATE	NUMBER OF STUDENTS*
Clinical Practice IV <i>Apr 1, 2023 - Jun 18, 2023</i> Class of 2023	April 1, 2023	June 18, 2023	<input style="width: 80%; border: 1px solid #ccc;" type="text" value="Type number"/>
Clinical Practice II <i>Jun 6, 2023 - Jul 3, 2023</i> Class of 2024	June 6, 2023	July 3, 2023	<input style="width: 80%; border: 1px solid #ccc;" type="text" value="1"/>

Adding assessments for Location

1. Select Sites from the left menu.

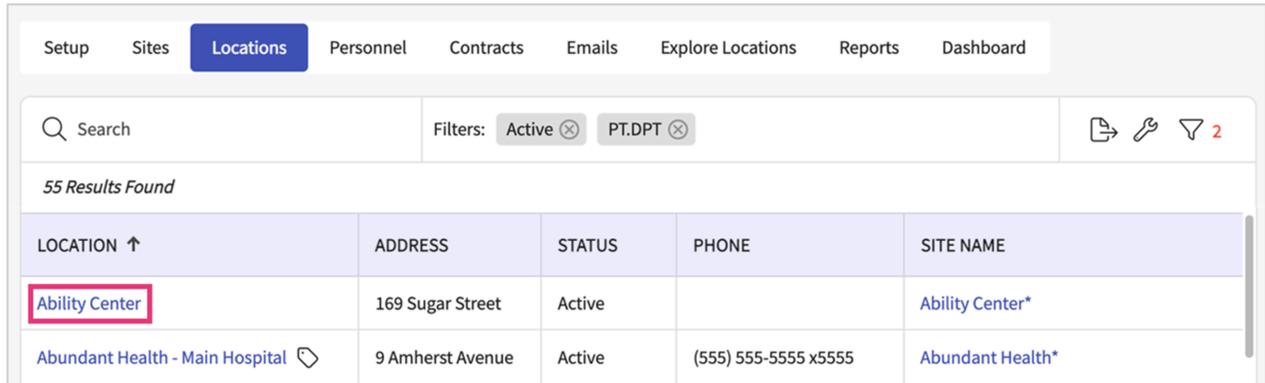
2. Select Locations from the top banner.

3. Find and select your desired location.

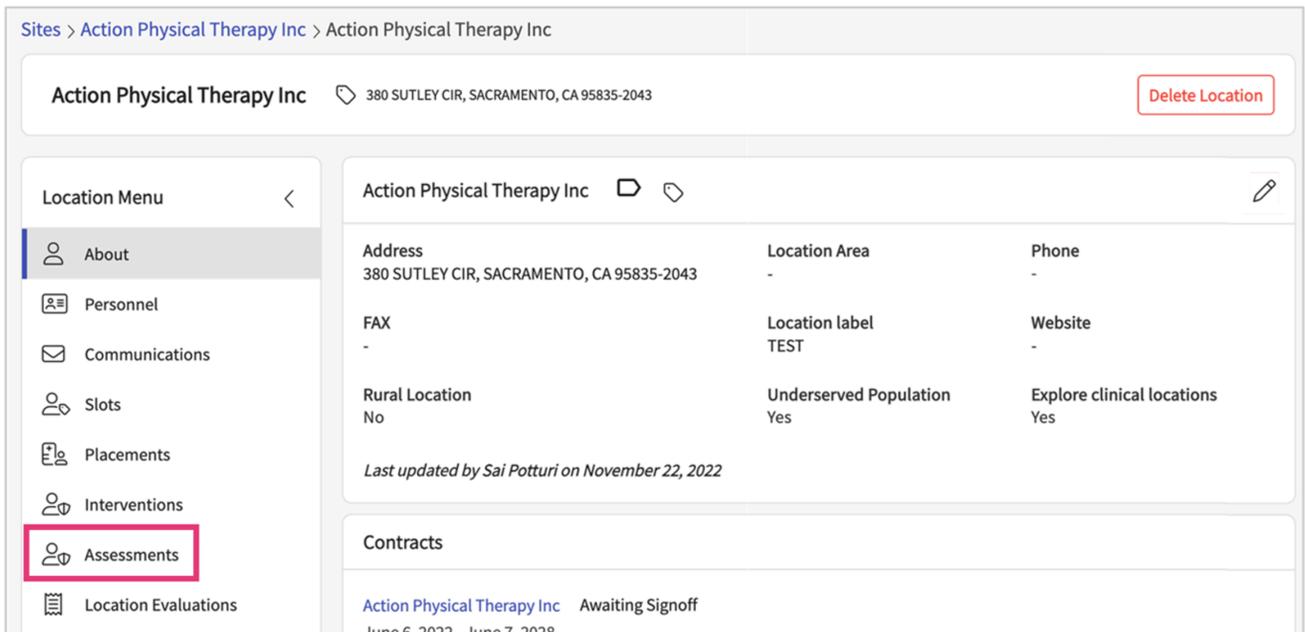
https://exxat.zendesk.com/knowledge/editor/01HK8Y25SARJNQSGN23WVSZZ53/en-us?brand_id=360002990097&return_to=%2Fhc%2Fen-us%2Farticles%2F...

12/25

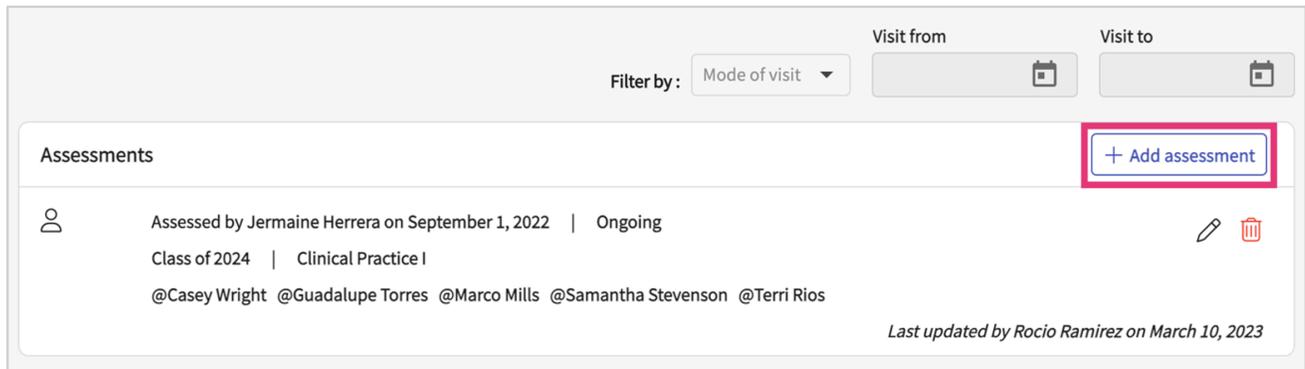
1. Use the search or filter options to quickly find what you are looking for.



4. Select Assessments from the left panel.



5. The Page will load all logged Assessments. Click on + Add Assessment



6. A drawer will open with three steps: Basic Details, Form Details, Summary & Follow Up. You can always save your progress if you'd like to complete the form at a later time.

The screenshot shows the 'Assessment' form in the 'Basic Details' section. The form is titled 'Assessment' and has a 'Save' button in the top right corner. The 'Basic Details' section is highlighted with a red box. The form includes the following fields:

- Basic Information:**
 - Mode of visit*: In Person
 - Type of site visit*: New site
 - Who is doing the site visit?: Eric Dave
 - Date of site visit*: July 29, 2024
- Placement Details:** A '+ Add' button is highlighted with a red box.
- Notes:** A rich text editor with a toolbar and a file upload area. The text area contains 'Overall notes'. Below the text area is a 'Browse to upload' button and a list of supported file formats: pdf, doc, jpg, jpeg, png, heic, docx, xlsx, pptx, pptm, potx, potm, ppt, rtf, xls, docm, bmp, csv, gif, tiff, mp4. A note states: 'You can only upload files with file size under 10 MB.'

A red arrow points to the 'Next' button in the top right corner.

7. In the Basic Details section, you will provide:

1. Basic information on the visit
2. Placement Details (if applicable)
3. Upload files if needed.
4. Click Next once done.

The screenshot shows the 'Assessment' form in the 'Form Details' section. The form is titled 'Assessment' and has a 'Save' button in the top right corner. The 'Form Details' section is highlighted with a red box. The form includes the following elements:

- Navigation:** A progress bar with three steps: '1 Basic Details', '2 Form Details' (highlighted), and '3 Summary & Followup'. There are 'Previous' and 'Next' buttons, with the 'Next' button highlighted in red. A 'Save form details' button is also highlighted in red.
- Site/Facilities:** A section titled 'Site/Facilities' with a rich text editor for 'Comments on sites facilities and educational environment:'. The text area is empty. Below the text area is a '500 characters left' indicator.

8. The Form Details section you will have a default template built in. If you have your own form, you can get it created by contacting V4support@exxat.com. Once done, click Save Form Details, and

Click Next.

× Assessment Save ⋮

✎ Basic Details ✎ Form Details **3** Summary & Followup

Previous

Summary

Final Assessment

Summary Notes

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summary Notes:

Do you require a follow-up visit? Yes No

Follow up date

July 29, 2022 📅 ↺

Paragraph ▼ **B** *I* U ≡ ▼ 🔗 := ▼ ½= ▼ A ▼ ⋮

Follow up Note

9. In the Summary & Follow Up section you'll provide a final assessment and indicate if this requires a follow up. Click

Assessment Save

Basic Details | Form Details | **3 Summary & Followup**

[Previous](#)

Summary

Final Assessment

Summary Notes

Paragraph | **B** | *I* | U | ≡ | @ | := | ½ := | A | :

summary Notes:

Do you require a follow-up visit? Yes No

Follow up date

July 29, 2022 📅 ↻

Paragraph | **B** | *I* | U | ≡ | @ | := | ½ := | A | :

Follow up Note

10. Your assessment will be saved. You can edit or delete them if needed.

Filter by: Mode of visit | Visit from: 📅 | Visit to: 📅

Assessments [+ Add assessment](#)

 Assessed by Jermaine Herrera on September 1, 2022 | Ongoing

Class of 2024 | Clinical Practice I  

@Casey Wright @Guadalupe Torres @Marco Mills @Samantha Stevenson @Terri Rios

Last updated by Rocio Ramirez on March 10, 2023

Adding Location Communications

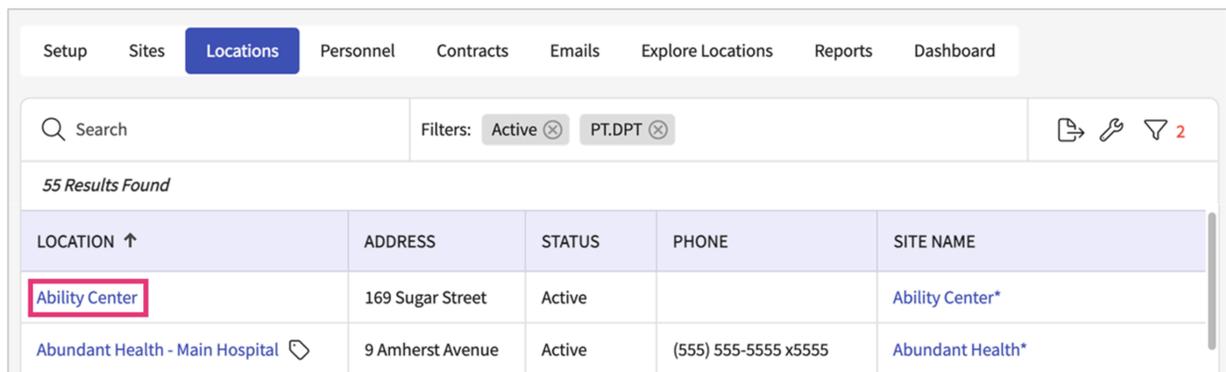
1. Select Sites from the left-menu or dashboard.



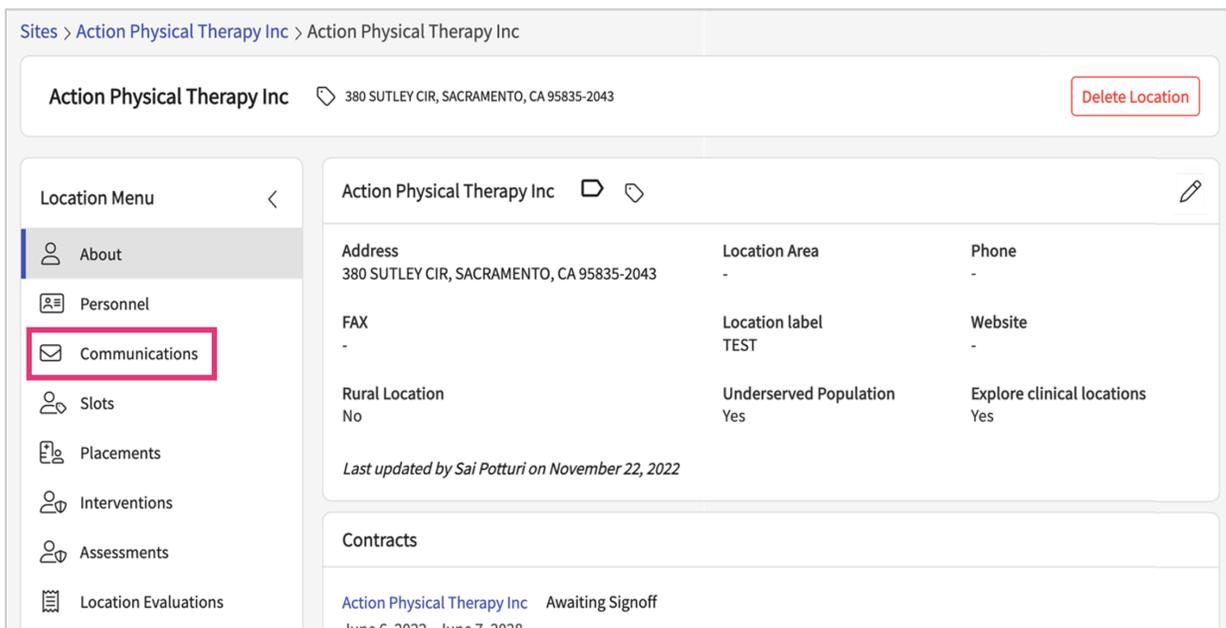
2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.



4. Click on the Communications tab from the left panel.



5. Explore the communications that have already been logged by filtering for the mode of communication, the need for follow-up, the person who initiated the communication or by searching the subject.

Search text		+ Add communication					
MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

6. To add a new communication, click + Add Communication.

Search text		+ Add communication					
MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

7. Enter the details you want to record and click Save.

× Communication Save

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by *

Rocio Ramirez

Communicated with *

SCCE

Subject *

Emergency Student Placements

Paragraph **B** *I* U

Requesting emergency placement for 2 students who have been displaced due to vaccination requirements - site unable to accommodate unvaccinated students

Communication date *

May 22, 2023

Browse to upload

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm
You can only upload files with file size under 10 MB.

× Communication
Save

Follow Up

Follow up date

Follow up completion date

Paragraph v **B** *I* U ≡ v ::= v := v A v AI v ⇐ ⋮

Internal Notes

8. This communication now joins all others in the Communications section. To edit or delete a communication, click the pencil icon.

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

9. A drawer will open.

1. If you are making edits, once done click save.
2. Click the 3 dotted icons to delete a communication log entry.

× Communication

Save
⋮

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by *

Communicated with *

Subject *

Delete

Adding Interventions for Locations

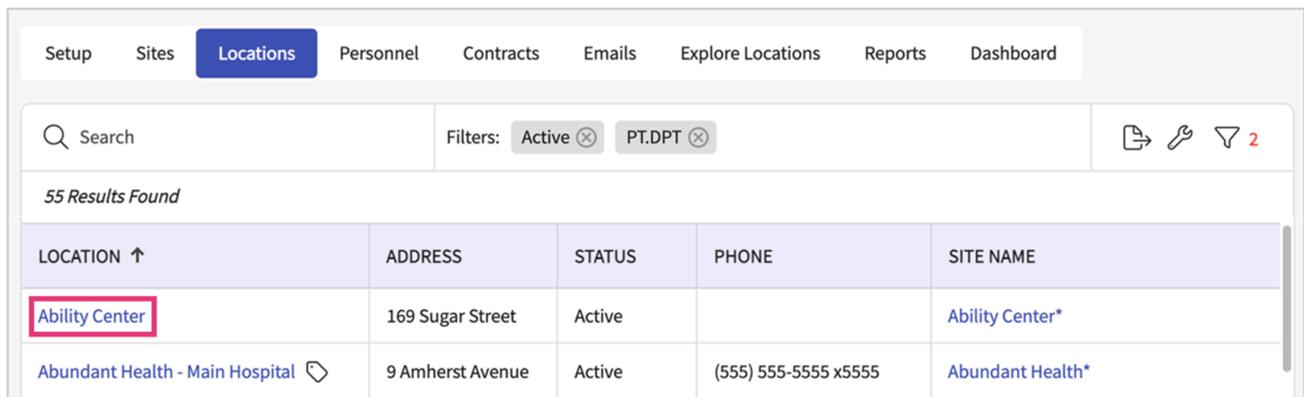
1. Select Sites from the left-menu or dashboard.



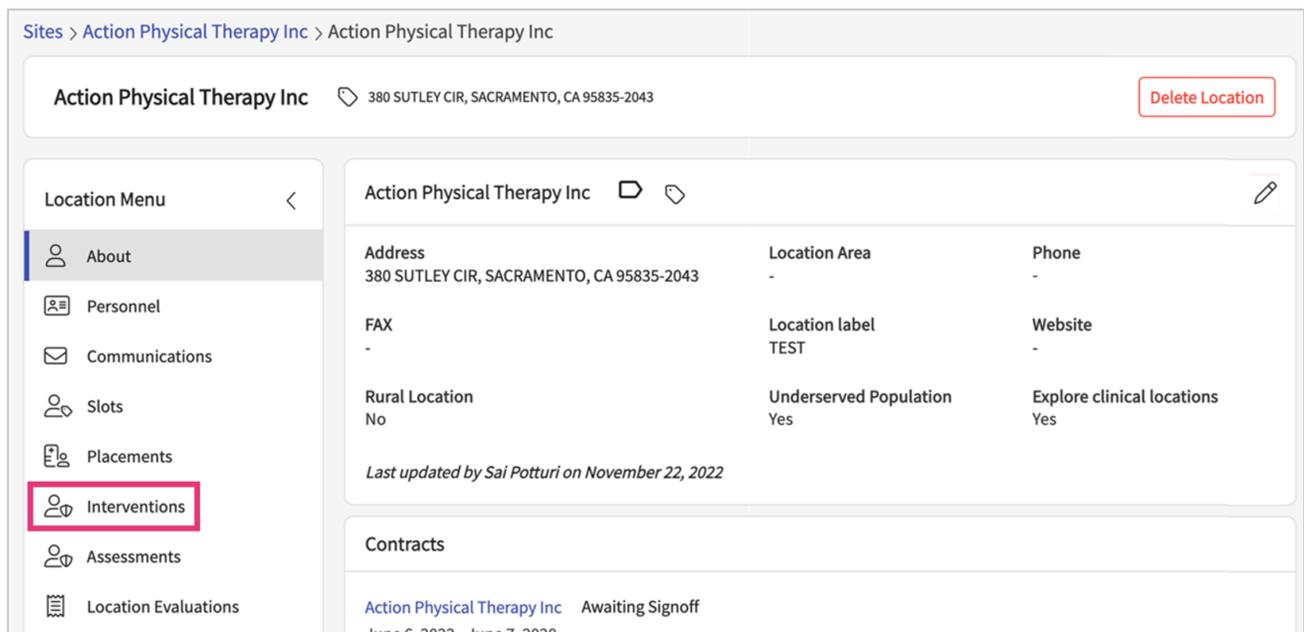
2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.



4. Click on the Interventions tab from the left panel.



5. The page will load all previously added interventions. Click on the + icon to add an entry.

MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DA IN
In Person	Rocio Ramirez	SCCE	Supervision of Students : Di...	June 9, 2023	Discussed need for gradual release on student supervision... Show More	Clinical Practice II	Me

6. A drawer will open. You'll be able to enter the following information. Click Save when done.

- 1. Mode of intervention
- 2. Details of intervention

7. If this is an ongoing intervention, click on Add Follow Up.

× Intervention Save

Mode *
 Audio Call Video Call Email In Person Other

Initiated by *
Rocio Ramirez

Contact with *
SCCE

Rotation
Clinical Practice II

Subject *
Supervision of Students

Paragraph **B** *I* U

Discussed need for gradual release on student supervision as several students have reported that instructing clinicians provide close supervision even during final clinical experience. Site has requested education for instructors on implementing gradual release - will provide this summer!

Date of intervention *
May 15, 2023

Status
Open

Browse to upload

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm
You can only upload files with file size under 10 MB.

Add Followup

8. If you added a follow up, you'll provide details of your planned follow up date. Click Save once done.

× Intervention Save

Browse to upload

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm
You can only upload files with file size under 10 MB.

Follow Up 🗑️

Planned follow up date *

June 12, 2023 📅 ↻

Actual follow up date

📅 ↻

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Description

Add Followup

9. The intervention will be listed on the main grid. To edit an intervention, click on the Subject of Intervention text.

Search text							+ Add intervention	🔽
MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DA IN	
In Person	Rocio Ramirez	SCCE	Supervision of Students : Di...	June 9, 2023	Discussed need for gradual release on student supervision... Show More	Clinical Practice II	Me	

10. A drawer will open.

1. Click on the pencil icon to make edits.

2. Click on the trash bin to delete the intervention.

× Location Intervention

Supervision of Students

Contact with - SCCE
May 15, 2023

Description
Discussed need for gradual release on student supervision as several students have reported that instructing clinicians provide close supervision even during final clinical experience. Site has requested education for instructors on implementing gradual release - will provide this summer!

In Person

Rotation
Clinical Practice II

Initiated by
Rocio Ramirez



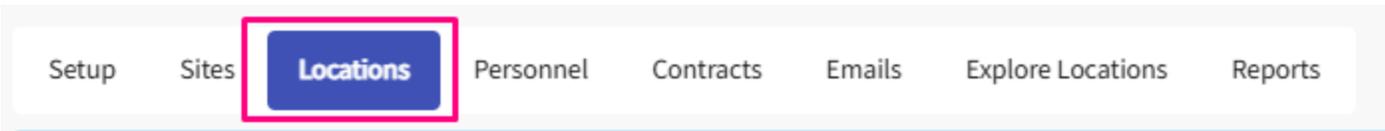
Adding HRSA Grant Info

Store all HRSA grant details, including funding amounts, program goals, timelines, and reporting requirements, etc. This helps reduce manual effort and streamline grant management tasks.

1. Select Sites from the left-menu or dashboard.



2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.

The screenshot shows a web interface for managing locations. At the top, there are navigation tabs: Setup, Sites, **Locations**, Personnel, Contracts, Emails, Explore Locations, and Reports. Below the tabs is a blue banner with the text: "The data in downloaded excel is updated with latest information every 24 hours. Please contact v4support@exxat.com for questions or concerns." Below the banner is a search bar with the text "Search" and a magnifying glass icon. To the right of the search bar are filter buttons: "Active" and "PT.DPT". Further right are icons for a list, a pencil, and a funnel with the number "2". Below the search and filters is the text "80 Results Found". Below that is a table with the following columns: LOCATION ↑, ADDRESS, CITY, STATE, ZIP CODE, STATUS, PHONE, and SITE NAME. The table contains two rows of data. The first row is "Abundant - Action Therapy (Geocoding Enabled)*" with address "411 W Ocean Blvd", city "Long Beach", state "CA", zip code "90802", status "Active", phone "(213) 239-3570", and site name "Abundant Health*". The second row is "Abundant - Action Therapy Easton" with address "411 W Ocean Blvd", city "Long Beach", state "CA", zip code "90802", status "Active", phone "(732) 501-1730", and site name "Abundant Health*". The second row is highlighted with a red box.

LOCATION ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS	PHONE	SITE NAME
Abundant - Action Therapy (Geocoding Enabled)*	411 W Ocean Blvd	Long Beach	CA	90802	Active	(213) 239-3570	Abundant Health*
Abundant - Action Therapy Easton	411 W Ocean Blvd	Long Beach	CA	90802	Active	(732) 501-1730	Abundant Health*

4. Click on the HRSA Grant Info tab from the left panel & click on +Add option.

The screenshot shows a web interface for managing HRSA Grant information for a specific location. The breadcrumb trail is "Sites > Abundant Health - New Site > Abundant Health - Secondary Hospital". The main header is "Abundant Health - Secondary Hospital" with a sub-header "Secondary Location, KA, AK". To the right of the header are two buttons: "Move Location" and "Delete Location". Below the header is a "Location Menu" sidebar with the following items: About, Personnel, Communications, Slots, Placements, Interventions, Assessments, Location Evaluations, and HRSA Grant Info. The "HRSA Grant Info" item is highlighted with a red box. The main content area is titled "HRSA Grant Information" and contains a blue message box that says "No HRSA Grant information has been added at this location. Click on 'Add' to add new grant information." To the right of the message box is a "+ Add" button, which is also highlighted with a red box.

5. Provide HRSA Grant information in the pre-defined fields and click on Save.

✕ Add HRSA Grant information

Save

HPSA PC

HPSA PC Score

HPSA Dental

HPSA Dental Score

HPSA MH

HPSA MH Score

MUA

MUP

VAMC

Military

FQHC

Rural Health Clinic

Loan Repayment

FQHC Look-Alike

Hospital-affiliated Primary Care Out Patient Clinic

Indian Health Service, Tribal Clinic, and Urban Indian Health Clinic (ITU)