

Once a placement is over, you can send a notification to your clinicians to thank them or continue email notifications for taking a student! In this article, we will talk about:

- Sending Thank You emails
- Setting up Thank You Certificates in an email
- Sending Continuing Education Units Based on Supervision Percentage %
- Sending Continuing Education Units Credit Email
- Sending Thank You email without Continuing Education Units
- [Sending Thank you emails with CEU Credits & Clinical Hours Based on Supervision Percentage](#)

Steps:

1. Select Placements from the left menu or dashboard.



2. Select the course you'd like to manage.

1. You can also select a placement group to manage multiple courses at a time.

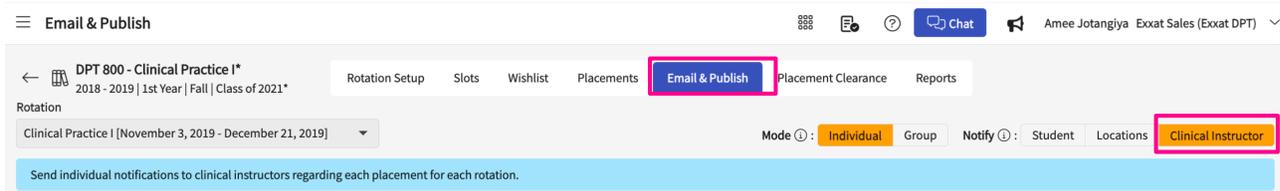
Course Offerings		Course number	Search			
Placement Groups + Add Group		Results found : 4				
Class of 2024		COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM
Class of 2023		DPT 800	Clinical Practice I*	2020 - 2021	1st Year	Fall
Class of 2021		DPT 850	Clinical Practice II*	2021 - 2022	2nd Year	Summer
Class of 2022*		DPT 900	Clinical Practice III*	2022 - 2023	3rd Year	Spring
						COHORT ↓
						Class of 2023
						Class of 2023
						Class of 2023

3. If you selected a placement group, click Placements for Group.

Course Offerings		Class of 2023		
Placement Groups + Add Group		Class of 2023		Placements for Group
Class of 2024		Search course offering		
Class of 2023		COURSE NUMBER	COURSE NAME	ACADEMIC YEAR
Class of 2021		DPT 950	Clinical Practice IV*	2022 - 2023
Class of 2022*		DPT 900	Clinical Practice III*	2022 - 2023
		DPT 800	Clinical Practice I*	2020 - 2021
				PROFESSIONAL YEAR
				3rd Year
				3rd Year
				1st Year
				TERM
				Spring
				Spring
				Fall

4. Select the Email & Publish tab, the rotation you would like to send notifications for and ensure to select Clinician from the Notify header.

1. You will see a different label depending on your program (Clinical Instructor, Preceptor, Fieldwork Educator, Supervisor).



5. Manage Student Added Preceptor / CI / Fieldwork Educator/Supervisor

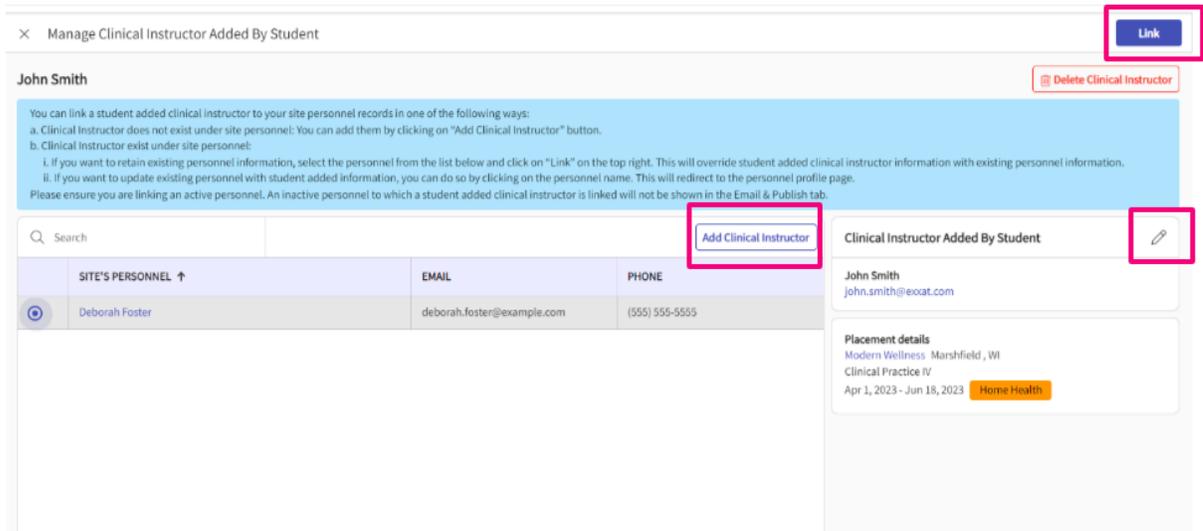
1. If your program allows students to add clinician details, you may want to ensure the information you have on file is correct.

2. Click Manage to review their contact information.

LOCATION ↑	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS ⓘ
Abundant - Ambulatory Care DEPEW, NY Clinical Practice I	Dawson, Spencer ⓘ	Apr 3, 2023 - May 26, 2023 Acute Care	Judith Erickson Manage	280 (N/A)	Placement published on May 25, 2023
Community Ambulatory Care Mount Airy, MD Clinical Practice I	Torres, Allison	Apr 17, 2023 - May 30, 2023 Outpatient	Jill Durham Manage	280 (N/A)	Placement published on May 25, 2023

3. You can link a student-added Preceptor / CI / Fieldwork Educator/Supervisor to your site personnel records in one of the following ways:

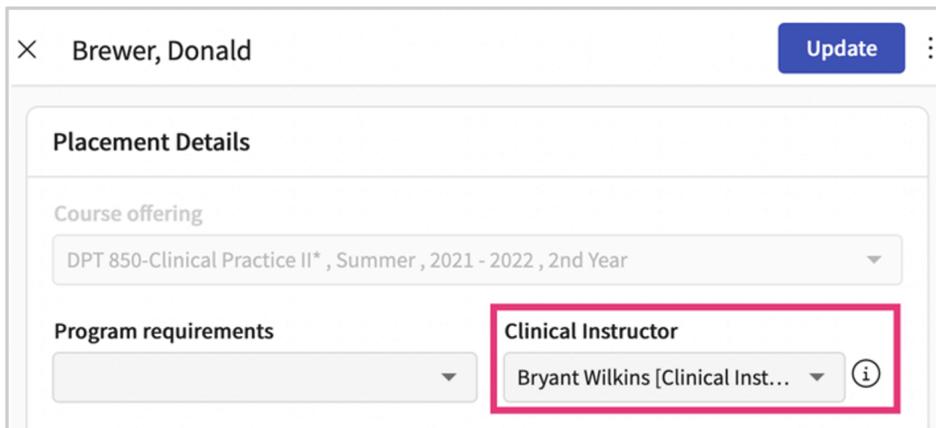
1. Clinical Instructor does not exist under site personnel: You can add them by clicking on the "Add Clinical Instructor" button.
2. Preceptor / CI / Fieldwork Educator/Supervisor exists under site personnel:
 1. If you want to retain existing personnel information, select the personnel from the list below and click on "Link" on the top right. This will override student-added clinical instructor information with existing personnel information.
 2. If you want to update existing personnel with student-added information, you can do so by clicking on the personnel name. This will redirect to the personnel profile page. Please ensure you are linking active personnel. Inactive personnel to which a student-added clinical instructor is linked will not be shown in the Email & Publish tab



6. If the clinician column has NA for any placements, you must associate a clinician with the placement or request your student add them to their placement (if applicable) before you can send them notifications.

SEARCH	LOCATION	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS
3 Results Found	Abundant - Ambulatory Care DEPEW, NY Clinical Practice I	Dawson, Spencer	Apr 3, 2023 - May 26, 2023 Acute Care	Judith Erickson Manage	280 (N/A)	Placement published on May 25, 2023
	Community Ambulatory Care Mount Airy, MD Clinical Practice I	Torres, Allison	Apr 17, 2023 - May 30, 2023 Outpatient	Jill Durham Manage	280 (N/A)	Placement published on May 25, 2023
	Community Ambulatory Care Mount Airy, MD Clinical Practice I	Jaylee, Valerie	Apr 3, 2023 - May 26, 2023 Rehab	NA	NA	Placement published on May 25, 2023

7. You can update this by going to Placements and updating the student's placement details.



8. If your program has set up the rotation to **thank clinicians with credit for hours using percentage Supervision or Actual Clinical Hours**, you will have an additional column, Actual Clinical Hours

9. This column will show you the total number of hours which will be sent to the clinician, along with the percentage shown in parentheses. If you need to make changes to the %, click on the pencil icon.

LOCATION ↑	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS
Abundant - Ambulatory Care DEPEW, NY Clinical Practice I	Dawson, Spencer	Apr 3, 2023 - May 26, 2023 Acute Care	Judith Erickson Manage	280 (100%)	Placement published on May 25, 2023
Community Ambulatory Care Mount Airy, MD Clinical Practice I	Torres, Allison	Apr 17, 2023 - May 30, 2023 Outpatient	Jill Durham Manage	280 (N/A)	Placement published on May 25, 2023

10. A drawer will open. Update the Supervision % and click Update. The Actual Clinical Hours will automatically update.

× Jill Durham Update

Placement Details

Student name: Torres, Allison

Community Ambulatory Care Apr 17, 2023 - May 30, 2023
Mount Airy, MD Outpatient
Clinical Practice I

Clinical Hours For Jill Durham

Clinical hours (set at rotation): 280

Supervision % 50

Calculated clinical hours: 140 ⓘ

Actual clinical hours 140

11. If your program has set up the rotation to **thank clinicians with credit for hours by either a set number of hours or sing approved timesheet hours**, you will have an additional column, Actual Clinical Hours.

12. This column will show you the total number of hours which will be sent to the clinician. If you need to make changes, click on the pencil icon

LOCATION ↑	STUDENT	PLACEMENT DETAILS	PRECEPTOR	ACTUAL CLINICAL HOURS	LATEST STATUS
Biomed Ambulatory Care Seymour, IN Block 1*	Student, Mock	Jul 1, 2021 - Jul 31, 2021 Emergency Medicine	John Smith Manage	160	Placement published on Dec 14, 2022
Biomed Central Redondo Beach, CA Block 1*	Abbott, Grace*	Jun 1, 2021 - Nov 30, 2021 OB/GYN	Gwen Little John Smith Manage	160	Last email delivered on Nov 11, 2022 Placement published on Dec 14, 2022

13. A drawer will open. Update the actual hours as needed and click Update.

1. Set number of hours view:

✕ John Smith Update

Placement Details

Student name: Student, Mock

Biomed Ambulatory Care Jul 1, 2021 - Jul 31, 2021
Seymour, IN Emergency Medicine
Block 1*

Clinical Hours For John Smith

Clinical hours (set at rotation): 160

Actual clinical hours 160

2. Approved timesheet hours view:

✕ John Smith Update

Placement Details

Student name: Abbott, Grace*

Biomed Central Jul 1, 2021 - Jul 31, 2023
Redondo Beach, CA OB/GYN
Block 1*

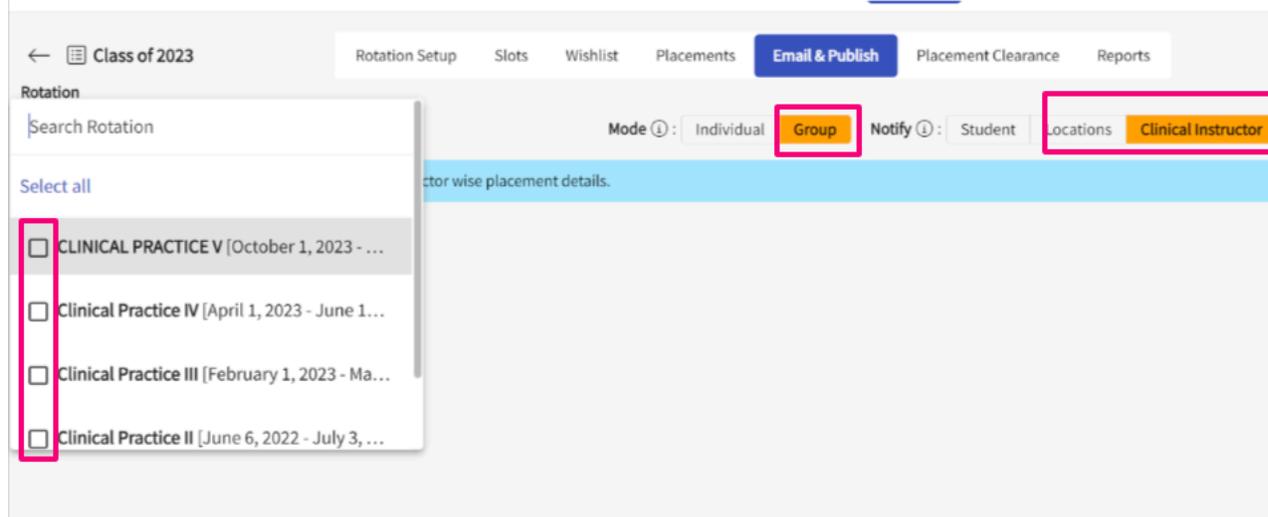
Timesheet Hours For John Smith

Approved timesheet hours: 7.75

Actual hours 7.75

3. You can even select multiple rotations while sending out email notifications. Change the “Mode” to “Group” and then click on the dropdown menu below the rotation tab which will

allow you to select multiple rotations within that placement group.



14. Select the placements to send a notification for. Click Compose Email.

LOCATION ↑	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS
Abundant - Ambulatory Care DEPEW, NY Clinical Practice I	Dawson, Spencer	Apr 3, 2023 - May 26, 2023 Acute Care	Judith Erickson Manage	280 (100%)	Placement published on May 25, 2023
Community Ambulatory Care Mount Airy, MD Clinical Practice I	Torres, Allison	Apr 17, 2023 - May 30, 2023 Outpatient	Jill Durham Manage	140 (50%)	Placement published on May 25, 2023
Community Ambulatory Care Mount Airy, MD Clinical Practice I	Jaylee, Valerie	Apr 3, 2023 - May 26, 2023 Rehab	Dr. Arnold Guerrero	280 (100%)	Placement published on May 25, 2023

15. You'll complete a three-step process to send out notifications. On the first step, review your recipient's list. Click Next when ready.

1. Override recipient's list: test this email by sending it to yourself
2. Reply to: if anyone responds to the email, the email listed will receive the responses
3. CC or blind copy any users

4. Attach any files as needed.

Compose Email

1 Recipients Template Preview

Copy selected recipient email addresses

Next

Recipients 3 selected recipients

- Judith Erickson (rocio.ramirez@exxat.com)
- Jill Durham (rocio.ramirez@exxat.com)
- Arnold Guerrero (noreply@exxat.com)

If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.

Override Recipient's Email
rocio.ramirez@exxat.com

Reply to *
rocio.ramirez@exxat.com

CC

BCC

Upload files
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.

2. On the second step, you can choose from three different email templates available to that you can send out to your clinical.

1. Continuing Education Units Credit emails

Compose Email

Recipients 2 Template Preview

Pick a template *
CEU Credit Notification Set as Default Template

+ Add Template Previous Edit **Preview**

Subject *
CEU Credits Awarded

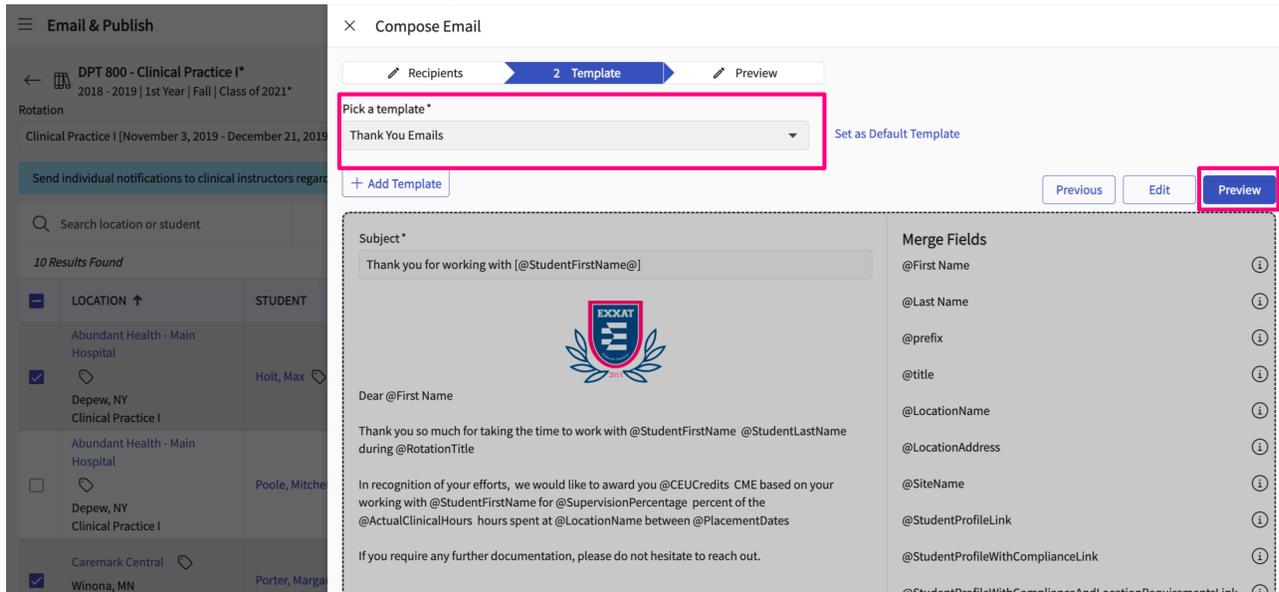
Merge Fields
@First Name
@Last Name
@prefix
@title
@LocationName
@LocationAddress
@SiteName
@StudentProfileLink

Hello @First Name @Last Name,

Thank you for spending the time working with @StudentFirstName @StudentLastName for the clinical experience from @PlacementDates. Below are the hours awarded for this placement.

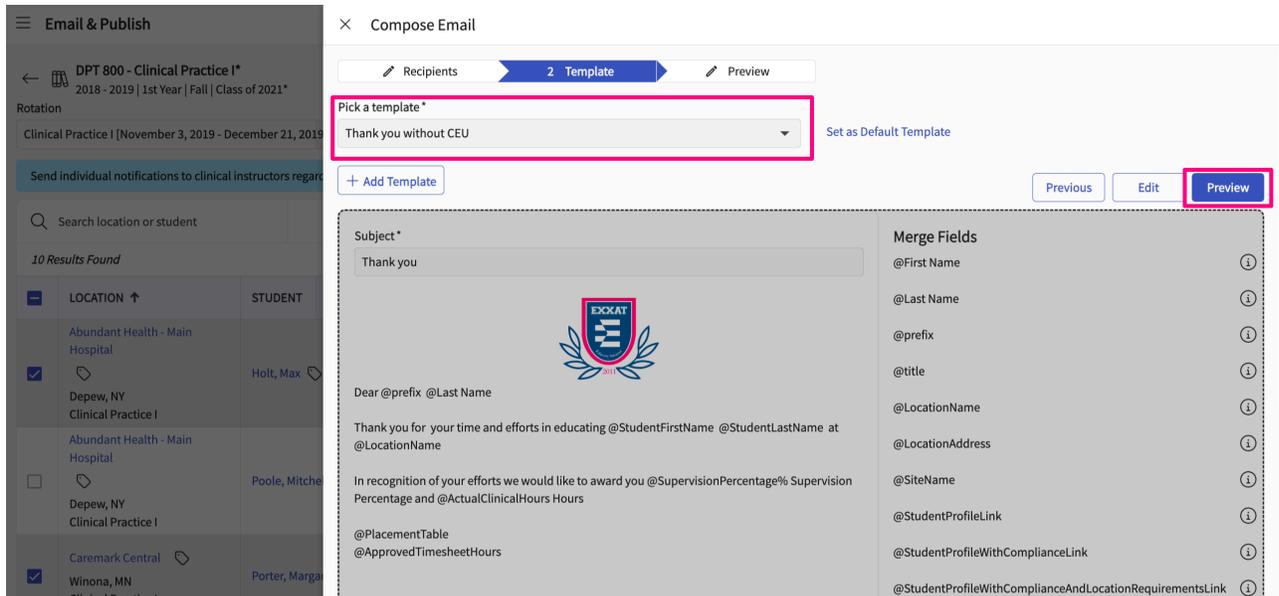
CEU Credits: @CEUCredits
Clinical Hours: @ActualClinicalHours
Supervision Percentage: @SupervisionPercentage

2. Thank You Emails with Continuing Education Units



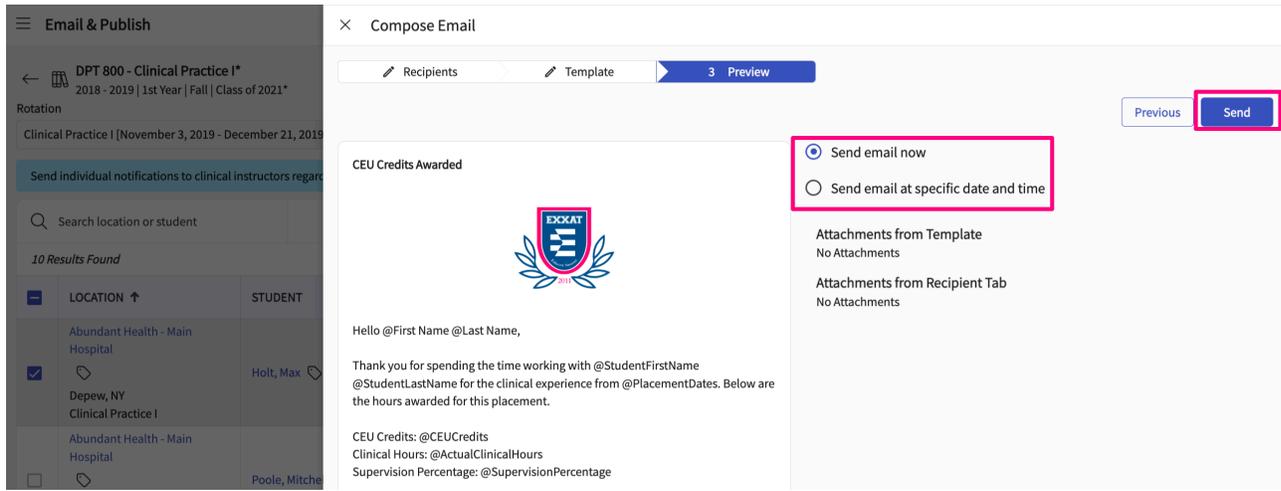
3. Thank You Email without Continuing Education Units.

Note: To set up **Thank You Emails and Certificates** for PT programs, contact the Exxat support team. Once they've created the email template, you can choose it from the template options.



3. Click Preview to move on to the next step. You will see a preview of your email. You can now decide when to send your emails! You can send your email immediately or schedule it for a specific date and time. Click Send or Schedule based on your selection.

1. You can always go back by using the Previous button.



4. Your emails will be sent, and the report will show updated details in the latest status column. You can also keep track of the status of the emails sent using the Email Dashboard.

LOCATION	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS
Abundant - Ambulatory Care DEPEW, NY Clinical Practice I	Dawson, Spencer	Apr 3, 2023 - May 26, 2023 Acute Care	Judith Erickson Manage	280 (100%)	Last email delivered on May 26, 2023 Placement published on May 25, 2023
Community Ambulatory Care Mount Airy, MD Clinical Practice I	Torres, Allison	Apr 17, 2023 - May 30, 2023 Outpatient	Jill Durham Manage	140 (50%)	Last email delivered on May 26, 2023 Placement published on May 25, 2023

5. Clicking on the Email Dashboard will open a new drawer where all the email statuses will show.

1. You can view the status of emails both sent and scheduled.

Email Dashboard

Rotation: Clinical Practice I [April 3, 2023 - May 26, 2023]

Recipient: Student Locations **Clinical Instructor** Email Type: **Sent** Scheduled

Search by Recipient Name, Recipient Email, Subject or Email Content

RECIPIENT NAME	RECIPIENT EMAIL	SUBJECT	STATUS	FROM	EMAIL SENT TIME
Admin Email	rocio.ramirez@exxat.com	Placement	Delivered	rocio.ramirez@exxat.com	May 25, 2023 9:18 PM
Admin Email	rocio.ramirez@exxat.com	Placement	Delivered	rocio.ramirez@exxat.com	May 25, 2023 9:18 PM
Admin Email	rocio.ramirez@exxat.com	Placement	Delivered	rocio.ramirez@exxat.com	May 25, 2023 9:18 PM

2. Select the recipient as Clinical Instructor and Email Type as Sent, you will see a column called Status which will allow you to track the email status.

3. Please note the status will change based on actions afterward. For any emails scheduled in the future sent to the preceptor/CI/supervisor, the status will state In Progress until the date it is scheduled.

4. Below is a list of some of the statuses this could change to:

1. In progress = email is on its way to be delivered
2. Delivered = email has reached recipients inbox
3. Opened = recipient has opened and viewed the email
4. Link Clicked = The preceptor clicked the link to open the evaluation form
5. Bounced = email was not delivered to the recipient due to technical issues i.e. email address is invalid, firewalls, etc.

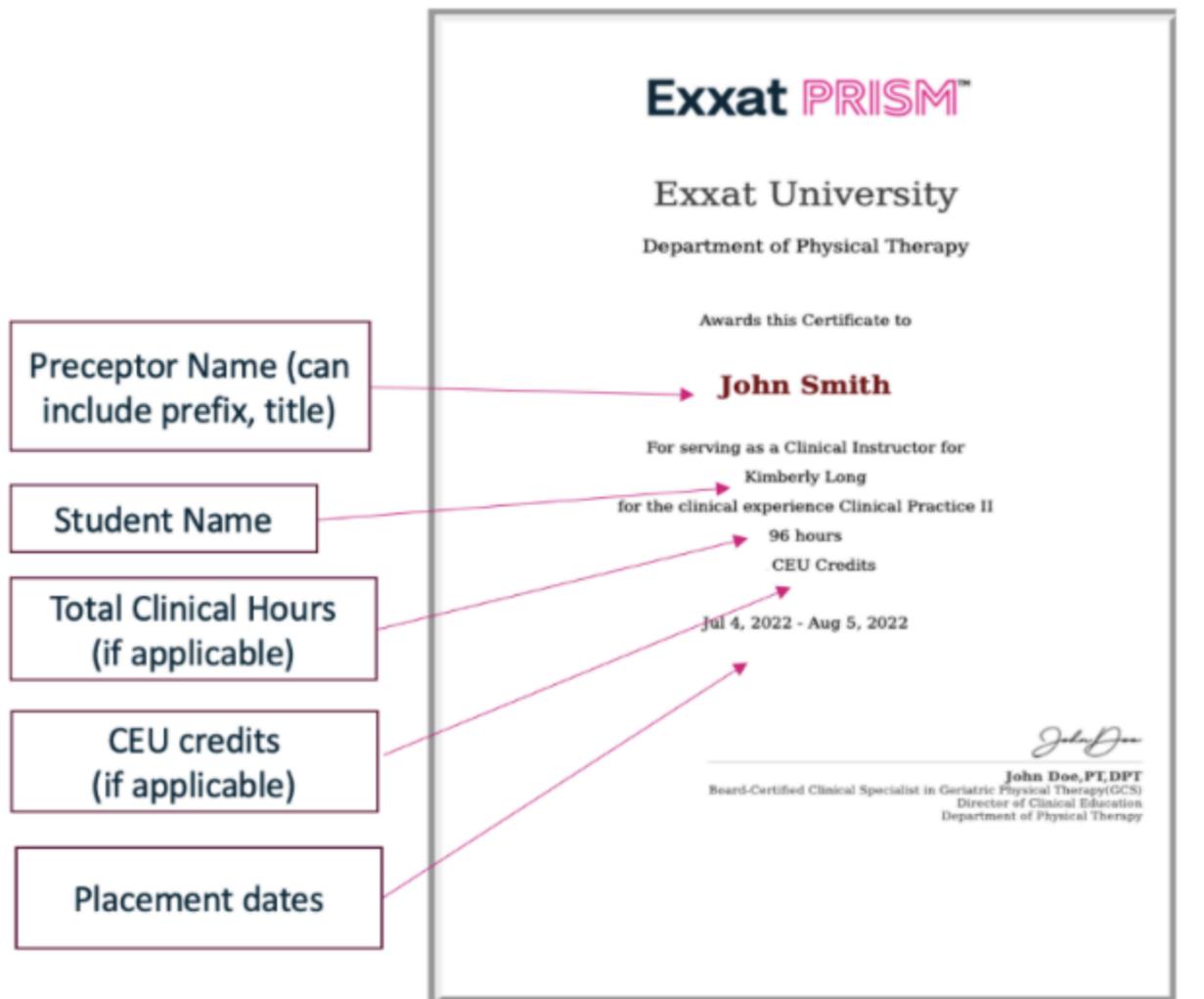
Setting up Thank You Certificates in Exxat Prism

You can now generate Thank You Certificates to express your gratitude to your experiential supervisors (clinical instructors, preceptors, and educators) for their dedication and support of your students.

To set up your certificates:

1. Send a sample certificate to v4support@exxat.com.
2. Exxat Support will integrate the certificate into your email templates.

Below is a sample certificate illustrating the format and type of information you can include:-



Once your certificate is set up, follow these steps to send emails with certificates:-

1. Ensure that key attributes, such as Clinical Hours, Timesheet Hours, or CEU Credits, are properly configured when setting up a rotation.

✕ Edit rotation

Save

Course *

DPT 123 - Adult Medicine 1, Spring, 2024 - 2025, Year I Students are pla... ▾

Setup advanced schedule



Show other students placed



Show on Site Resources Page



Thank clinical instructor with credit for hours



- Set number of hours
- Use approved timesheet hours

Collect % Supervision per Clinical Instructor



Set this field as Mandatory ⓘ

Clinical hours *

420 ⓘ

CEU credits

4

Rotation Notes

Text area for Rotation Notes with a double slash icon at the bottom right.

2. Select Placements from the left menu or dashboard and click on the **Email & Publish** tab.

The screenshot shows the 'Email & Publish' interface for 'DPT 123 - Adult Medicine 1'. The 'Mode' is set to 'Individual' and 'Notify' is set to 'Clinical Instructor'. A table lists 3 results found:

LOCATION	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	ACTUAL CEU	LATEST STATUS
Adena Regional Medical Indianapolis, IA DPT 123 - Adult Medicine 1 Class of 2025	Sideways, Eileen	PM00000894 03/04/2024 - 04/26/2024 Cardiology	Sylvester Samuel	420 (Not Added)	4	
Ensure Healthy Mountain View, NJ DPT 123 - Adult Medicine 1 Class of 2025	Kubde, Tanmay	PM00000878 03/04/2024 - 04/26/2024 Dermatology	Captain America Dr John Smith	288 (60%) 192 (40%)	2.4 1.6	Placement published on 03/27/2024
New Location for Placement New York, NY DPT 123 - Adult Medicine 1 Class of 2025	Glover, Kevin	PM00000879 03/04/2024 - 04/26/2024 Cardiology	NA	NA	NA	

3. Choose whether to send emails in **Individual** or **Group** mode.

4. Select the clinical instructors, preceptors, or educators you wish to thank (**Note:** They must be assigned to a placement to receive the email).

5. Use the standard Exxat template or create a custom email template.

The screenshot shows the 'Compose Email' interface. The 'Pick a template' dropdown is set to 'Thank You! CEU Credits Awarded (Default)'. The preview shows the following email content:

Subject: Thank You! CEU Credits Awarded

Hello @prefix @First Name,
 Thank you so much for investing in the future of our great profession by having @StudentFirstName for @RotationTitle. Your efforts don't go unnoticed and we appreciate all you did to guide the student in their learning.
 Please accept the below credits as a thank you and proof of your efforts.
 @PlacementTable
 Actual Clinical Hours: @ActualClinicalHours
 Actual CEU Credit :- @Actual CEU
 We thank you for your contribution to student learning. Without your participation, we would not have such a successful program.
 Thanks,
 Exxat

Merge Fields: @First Name, @Last Name, @prefix, @title, @LocationName, @LocationAddress, @SiteName, @StudentProfileLink, @StudentProfileWithComplianceLink

6. Choose the certificate option when sending the emails and Send or schedule the thank-you emails accordingly.

× Compose Email

Recipients Template 3 Preview

Previous Send

Thank you for working with [StudentFirstName]



@First Name @Last Name
@title

Dear @prefix @First Name @Last Name,
Thank you so much for working with @StudentFirstName @StudentLastName
from @StudentCohort for the clinical experience @RotationTitle at
@LocationName (@LocationAddress) from @PlacementDates for setting
@Setting. Below are the hours awarded for this placement.
Clinical hours: @ActualClinicalHours
@Actual CEU
Please tell us if you need more information for your records and thank you for
helping shape our profession's future!
Best,
The ABC University Placement Team

Send email now
 Send email at specific date and time

Personalized Attachments
1. Individual_CI_Certificate.pdf

Attachments from Template
No Attachments

Attachments from Recipient Tab
No Attachments

Calculate CEU Credits & Clinical Hours Based on Supervision Percentage

At times, you might need to share CEU credits & hours with the clinical instructor or supervisor. The Exxat Prism platform allows you to add CEU credits at rotation level, and the system calculates the CEU credit for each clinical instructor based on the supervision percentage added by the student.

1. Select Placements from the left menu or dashboard.
2. Select the course you'd like to manage. Use the search or filter options to quickly find what you're looking for.

Course Offerings

Placement Groups [+ Add Group](#)

- Class of 2024
- Class of 2023
- Class of 2021
- Class of 2022*

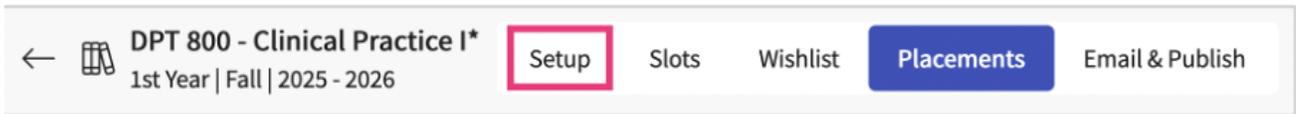
To make placements, select an individual course offering below or select a group on the left to place for multiple course offerings at once.

Course number Search 1

Results found : 4

COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT
DPT 950	Clinical Practice IV*	2022 - 2023	3rd Year	Spring	Class of 2023
DPT 900	Clinical Practice III*	2022 - 2023	3rd Year	Spring	Class of 2023
DPT 850	Clinical Practice II*	2021 - 2022	2nd Year	Summer	Class of 2023
DPT 800	Clinical Practice I*	2020 - 2021	1st Year	Fall	Class of 2023

3. Select the Setup tab from the horizontal menu bar.



4. Click +Add Rotation or click on the existing rotation name to add CEU credits.

× Add rotation Save

Title *

Start date *  **End date *** 

Minimum recommended duration **Time segment** 

Course *
 

Setup advanced schedule

Show other students placed 

Show on Site Resources Page

Thank clinical instructor with credit for hours

CEU credits

- 5. Students can add their clinical instructor and supervision percentage for each of them using Coursework section.

Clinical Instructor +

Captain America Added by School

capt.america@example.com
(321) 456-9875
Supervision: 60%

Dr John Smith

john.smith@example.com
-
Supervision: 40%

- 6. At the administrator end, click on Placement Module >> Email & Publish Tab >> Notify: Clinical Instructor option

DPT 123 - Adult Medicine 1
2024 - 2025 | Year 1 | Spring

Rotation Setup Slots Wishlist Placements **Email & Publish** Placement Clearance Reports

Rotation: DPT 123 - Adult Medicine 1 Class of 2025 [March 4, 2024 - ...]

Mode: Individual Group Notify: Student Locations **Clinical Instructor**

Send individual notifications to clinical instructors regarding each placement for each rotation.

Search location or student Compose Email Email Dashboard

3 Results Found Selected Placements: 0

<input type="checkbox"/>	LOCATION ↑	STUDENT	PLACEMENT DETAILS	CLINICAL INSTRUCTOR	ACTUAL CLINICAL HOURS (% SUPERVISION)	LATEST STATUS
<input type="checkbox"/>	Adena Regional Medical Indianapolis, IA DPT 123 - Adult Medicine 1 Class of 2025	Sideways, Eileen	Mar 4, 2024 - Apr 26, 2024 Cardiology	Sylvester Samuel	480 (Not Added)	
<input type="checkbox"/>	Ensure Healthy Mountain View, NJ DPT 123 - Adult Medicine 1 Class of 2025	Kubde, Tanmay	Mar 4, 2024 - Apr 26, 2024 Dermatology	Captain America Dr John Smith Manage	288 (60%) 192 (40%)	Placement published on Mar 27, 2024

The system calculates CEU credits and clinical hours based on the supervision percentage added by the student.

Admin can also click on pencil sign and update the % supervision per CI

× Dr John Smith

Update

Placement Details

Student name: Kubde, Tanmay

Ensure Healthy

Mar 4, 2024 - Apr 26, 2024

Mountain View , NJ

Dermatology

DPT 123 - Adult Medicine 1 Class of 2025

Clinical Hours For Dr John Smith

Clinical hours (set at rotation): 480

Supervision %

40

Calculated clinical hours: 192 ⓘ

Actual clinical hours

192