

You can do more than just review student information, read on to learn more about all the things you can manage via the Student Page

1. **Grid View and Student Selection:** The system provides a grid view to display student information. By selecting a student's name, you can access their detailed profile.
2. **View As Feature:** Allows you to see what students see on their end in a read-only mode for assistance.
3. **Share Profile:** Enables sharing of student profiles via email, allowing selection of specific information to share.
 1. **Share Profile**
 2. **Download Profile:** Facilitates downloading student profiles for sharing with external parties.
 3. **Generate Profile URL:** Creates a direct link to a student's profile for easy sharing.
 4. **Profile Share History:** Provides a history of shared profiles, showing status updates like link clicks and email delivery.
4. **Student Deletion:** Allows administrators to delete student profiles, subject to certain conditions.
5. **Student Profile Tabs Overview:**
 1. **Academics Tab**
 1. Update student status (Active, Inactive, Graduate).
 2. Add and manage SSO keys.
 3. Update student cohort.
 4. Associate Faculty and Staff
 2. **Compliance Tab:** Review and update student compliance information and Download compliance documents.
 3. **Communications Tab:** Log and track communications with students.
 4. **Student Interventions Tab:** Log and track interventions related to student progress.
 5. **Coursework Tab:** Manages clinical placement-related coursework.
 6. **Learning Activities Tab:** Review and manage specific learning activities, including forms, patient logs, timesheets, and time off requests.

Learn all the things you can do

Grid View and Student Selection

1. Select Students from your dashboard or left menu.



2. The Grid View student information, the system

1. To view additional information for a single student, select the student's name.

Students

Setup **Students** Reports

Search Filters: Active

+ Add Student Bulk Update

25 Results Found

<input type="checkbox"/>	STUDENT NAME ↑	STUDENT ID	EMAIL	PHONE	STATUS	COHORT	GROUP
<input type="checkbox"/>	Abbott, Grace	7031-41	grace.abbottpa@example.com	(212) 867-5309	Active	Class of 2022*	Suburban Campus
<input type="checkbox"/>	Adkins, Brian	1231221	brian.adkinspa@example.com		Active	Class of 2025*	
<input type="checkbox"/>	Bailey, Teri		teri.baileypapa@example.com		Active	Class of 2025*	
<input type="checkbox"/>	Brown, Janet*	48928329	janet.brownmpa@example.com	(233) 313-1222	Active	Class of 2025*	NY campus
<input type="checkbox"/>	Deriksson, Ronald		ronald.deriksson@example.com		Active	Class of 2021	Downtown Campus
<input type="checkbox"/>	Doe, John		john.doeapa@example.com		Active	Class of 2027	
<input type="checkbox"/>	Evans, Kevin		kevin.evansmpa@example.com	(333) 333-3333	Active	Class of 2025*	
<input type="checkbox"/>	Foster, Lorena		lorena.fosterpa@example.com		Active	Class of 2027	
<input type="checkbox"/>	Geller, Mitchel		mitchel.gellerpa@example.com		Active	Class of 2027	
<input type="checkbox"/>	George, Traci		traci.georgepa@example.com		Active	Class of 2023	Suburban Campus
<input type="checkbox"/>	Gonzalez, Patricia		patricia.gonzalezpa@example.com		Active	Class of 2022*	Suburban Campus
<input type="checkbox"/>	Hurley, Dianna		dianna.hurleypa@example.com		Active	Class of 2027	
<input type="checkbox"/>	Lambert, Ana		ana.lambertpa@example.com		Active	Class of 2023	Downtown Campus

Items per page: 100 1 - 25 of 25

4. On the Grid View, find and select the student you'd like to manage. Use the search box or filter to quickly find what you are looking for. Select the desired student name.

Students

Setup **Students** Reports

Search Filters: Active

+ Add Student Bulk Update

4 Results Found

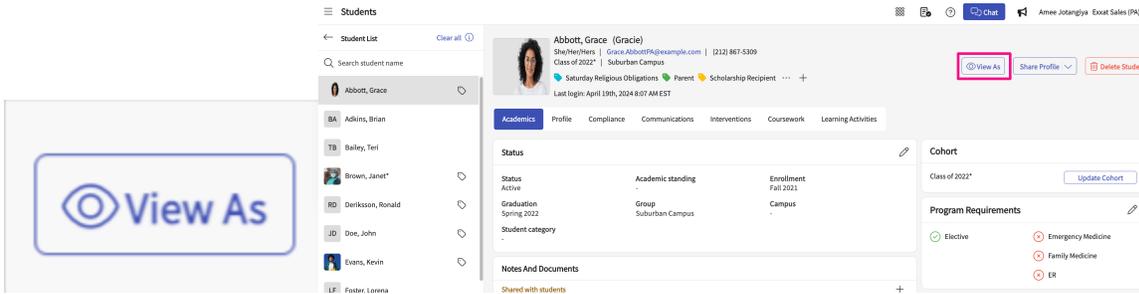
<input type="checkbox"/>	STUDENT NAME ↑	STUDENT ID	EMAIL	PHONE	STATUS	COHORT	GROUP
<input type="checkbox"/>	Geller, Mitchel		mitchel.gellerpa@example.com		Active	Class of 2027	
<input type="checkbox"/>	Mathis, Micheal		michael.mathispa@example.com		Active	Class of 2023	Downtown Campus
<input type="checkbox"/>	Ray, Camille		camille.ray@example.com		Active	Class of 2024	
<input type="checkbox"/>	Smith, Carolyn		carolyn.smithpa@example.com		Active	Class of 2027	

5. The student's profile will load. A few handy features available to you:

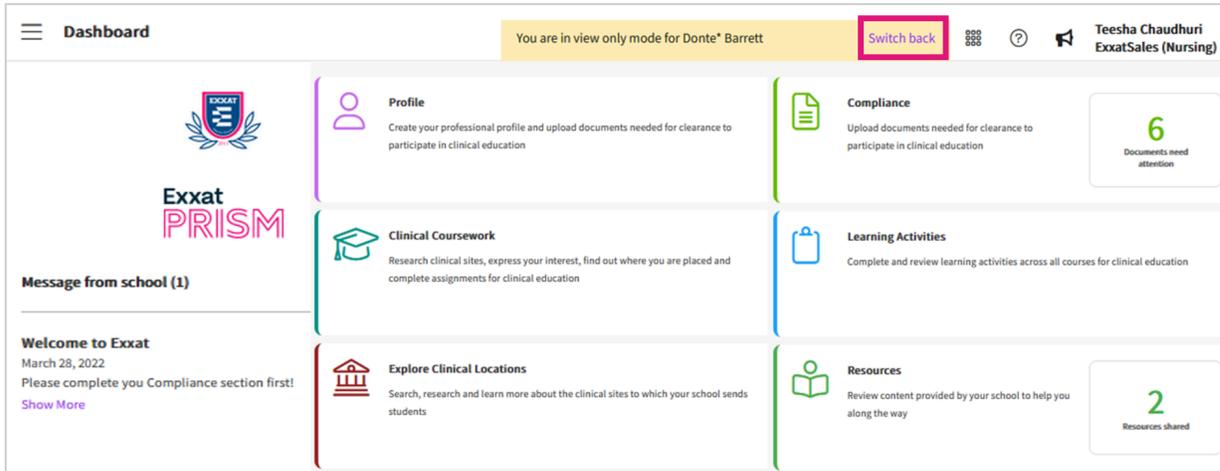
1. View As

1. View as allows you to look at all the information that student see on their end.
2. At times you may need to view what your students are seeing to assist them. In Exxat Prism you have the ability to do so by using the "View As" feature. This feature will allow you to see what your students see.
3. *Please note, the View As feature will not allow you to make any edits and will be in view-only mode.*
4. Select the View As Button, Clicking on this option will take you the student view (view/read-only). Feel free to navigate to any necessary pages using the dashboard or left

menu



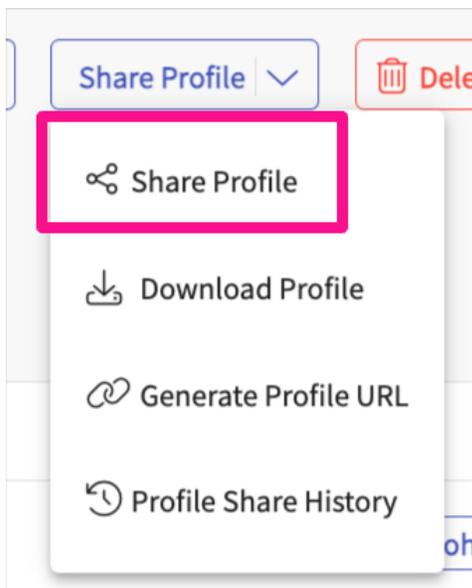
5. Once done, click **Switch Back** to revert to your account.



2. Share Profile:

1. Share Profile:

1. Click on the **Share Profile** button, you will see a couple of different options.



2. Click on Share Profile, and a drop-down will appear, click on Share Profile, this will allow you to share individual student profiles via Email

3. You will be able to pick and choose specific information from the student profile like their contact information, Completed program requirements, Compliance documents,

and students completed placement information.

× Share Profile

Share Profile

Include contact information in the profile link

- Include personal contacts ⓘ
- Include address information ⓘ
- Include emergency contacts

Include completed program requirements

Include compliance documents in the profile link ⓘ

- Additional Documents (Included in Profile Link) Approved
- COVID-19 Vaccination Approved
- CPR Approved
- Flu (Influenza) Approved
- Hepatitis B (HepB) Approved
- Measles, Mumps, Rubella (MMR) Approved
- Physical Examination Form Approved
- Polio Approved
- Tuberculosis (TB) Approved

Include completed placements in the profile link ⓘ

	COURSE NAME	LOCATION DETAILS	PLACEMENT DETAILS
<input type="checkbox"/>	Elective IV (Forms, Patient Logs, Timesheets)*	Adaptial - Wellington 219 S WASHINGTON ST, BALTIMORE, MD 21231-2620	Aug 30, 2023 - Sep 21, 2023 Neurology
<input type="checkbox"/>	Elective Rotation II	All Care Clinic 4021 Shady Pointe Row, Nowhere, CA 46143	Apr 1, 2022 - Jan 30, 2024 Family Medicine
<input type="checkbox"/>	Pediatrics Rotation	Biomed Central 667 West Colonial Street, Redondo Beach, CA 90278	Jun 1, 2021 - Nov 30, 2021 OB/GYN

Recipients entered in the "To" field will be able to see all other recipients' email addresses.

To *

CC

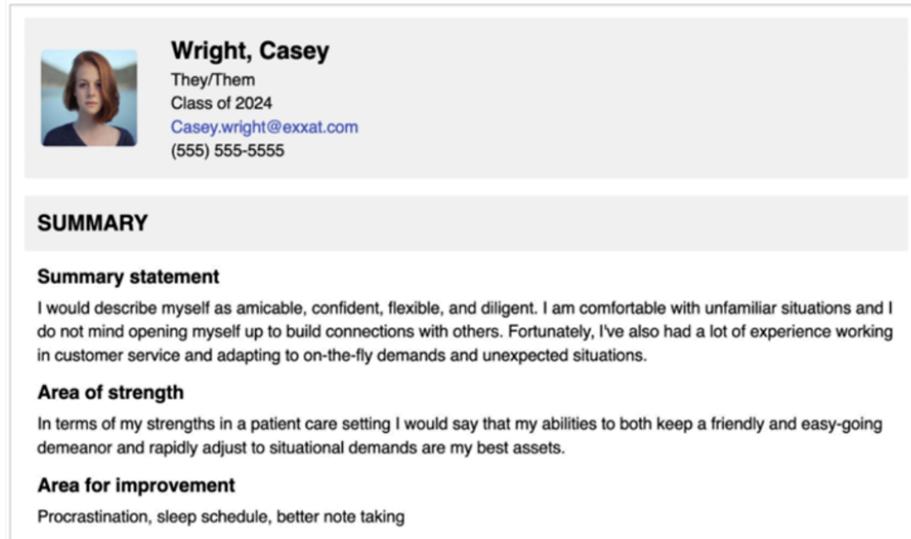
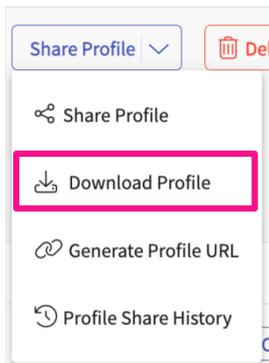
Notes

📎 Browse to upload

Supported formats: .pdf, .doc, .jpg, .jpeg, .png, .docx, .xlsx, .pptx, .pptm, .potx, .potm, .ppt, .rtf, .xls, .docm, .bmp, .csv, .gif, .tiff, .mp4
 You can only upload files with file size under 10 MB.
 We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.

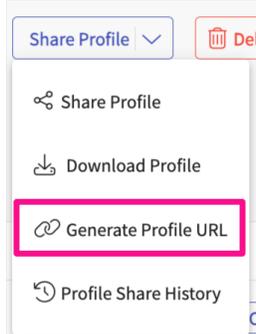
2. Download Profile:

1. Easily download your student's profile to share with clinical sites when needed. Click on Share Profile and a drop-down will appear choose the "Download Profile" option.



3. Generate Profile URL

1. This will allow you to share a direct link for your student's profile. Think of this as your student's portfolio link



1. Click on Share profile, a drop-down will appear to select "Generate Profile URL". You will be able to pick and choose specific information from the student profile like their contact information, Completed program requirements, Compliance documents, and students completed placement

information.

× Generate Profile URL

Generate Profile URL
Please select the sections below if you would like to include those as part of the shareable profile link. Click on 'Generate URL' to create the link once you have finalized your selection.

- Include contact information in the profile link
 - Include personal contacts ⓘ
 - Include address information ⓘ
 - Include emergency contacts
- Include completed program requirements
- Include compliance documents in the profile link ⓘ
 - Additional Documents (Included in Profile Link) Approved
 - COVID-19 Vaccination Approved
 - CPR Approved
 - Flu (Influenza) Approved
 - Hepatitis B (HepB) Approved
 - Measles, Mumps, Rubella (MMR) Approved
 - Physical Examination Form Approved
 - Delta Approved

Preview Generate URL

Profile link
<https://steps.exxat.com/gateway/delegator?key=f9aaa3ae-016b-4447-a8b8-2f766e5f95b1> 📄

2. Click on the Generate URL button, you will find the URL under the profile link
3. Click on the copy button to copy the URL link generated.

4. Profile Share History:

1. Allows you to view the history of profile shared

Share Profile Del

- Share Profile
- Download Profile
- Generate Profile URL
- Profile Share History

× Profile Share History

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

RECIPIENT NAME	RECIPIENT EMAIL	SUBJECT	STATUS	FROM	EMAIL SENT TIME	SCHEDULE EMAIL
sayantan	to : sayantan.basu@exxat.com	Profile for Exxat Sales ...	Link Clicked ⓘ	sayantan.basu@exxat.com	Apr 02, 2024 7:40 AM	no
sayantan	to : sayantan.basu@exxat.com	Profile for Exxat Sales ...	Link Clicked ⓘ	sayantan.basu@exxat.com	Dec 22, 2023 12:49 PM	no
tanya	to : tanya.gupta@exxat.com	Profile for ExxatSales ...	Link Clicked ⓘ	tanya.gupta@exxat.com	Aug 03, 2023 5:36 AM	no
sayantan	to : sayantan.basu@exxat.com	Profile for ExxatSales ...	Link Clicked ⓘ	sayantan.basu@exxat.com	Jun 15, 2023 12:48 PM	no
jake	to : jake.killian@exxat.com	Profile for ExxatSales ...	Link Clicked ⓘ	jake.killian@exxat.com	Mar 23, 2023 2:24 PM	no
erik	to : erik.steen@exxat.com	Profile for ExxatSales ...	Link Clicked ⓘ	Erik.Steen@exxat.com	Feb 28, 2023 4:50 PM	no
erik	to : erik.steen@exxat.com	Profile for ExxatSales ...	Link Clicked ⓘ	Erik.Steen@exxat.com	Feb 20, 2023 6:49 PM	no
steen	to : steen.erik@gmail.com	Profile for ExxatSales ...	Opened ⓘ	Erik.Steen@exxat.com	Feb 20, 2023 6:49 PM	no

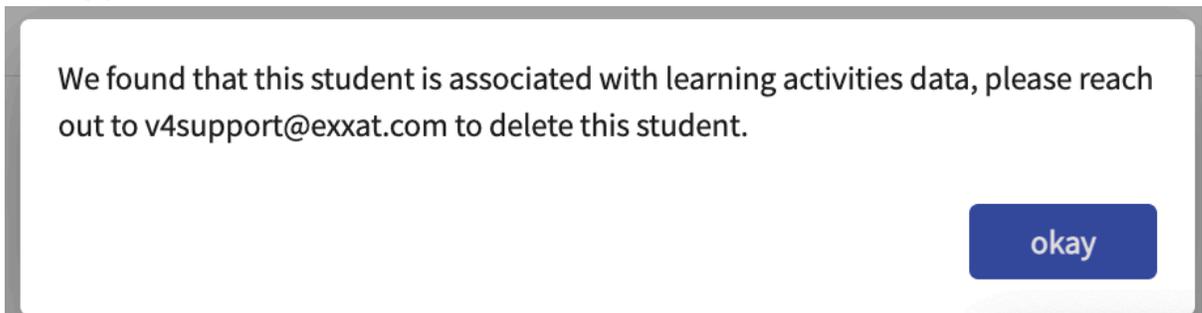
2. Click on the Share Profile button, and select the **Profile Share History** option. On the grid, you will be able to track the history of all the profiles shared and you will be track the status of the link.
3. Under the Status column, learn about all the different status
 1. Link Clicked means the recipient has clicked the profile link
 2. Opened means the email was delivered and opened by the recipients
 3. Delivered means the email was delivered to the recipients' inbox
 4. Bounced means the email was not delivered to the recipients' inbox

3. Student Delete:

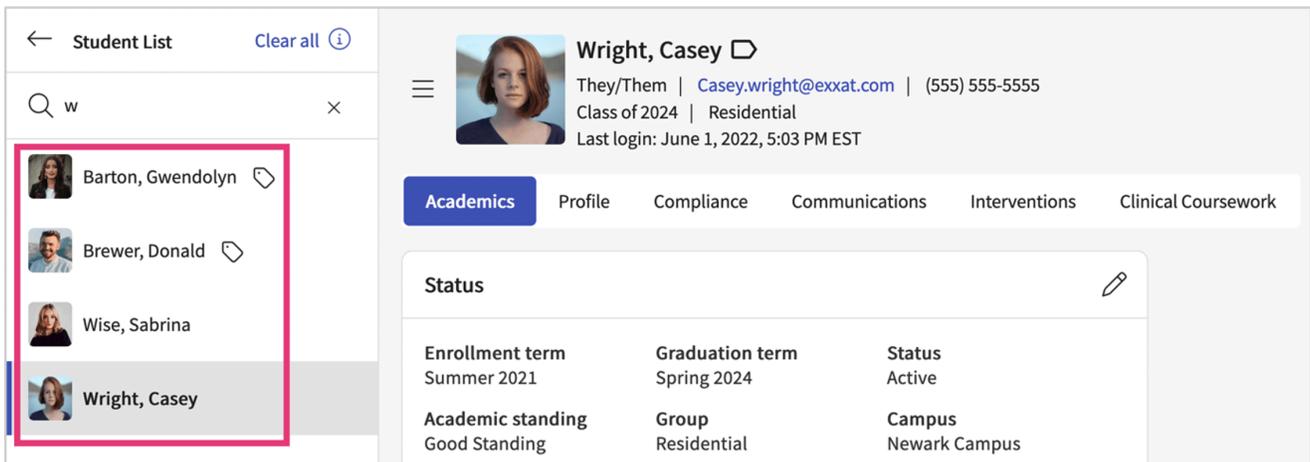
1. Allows admins to delete students who did not fill out any learning activities. Admins are advised to contact support for the deletion of students who have saved or submitted any learning activity data.
2. Click on the Delete Student button to delete student



3. In case the student has any learning activities data, you will receive a warning message stating you will not be able to delete it.



6. Switch to view other student profiles using the left panel.



Student Profile Tabs Overview

The profile will contain the following tabs. Click on each of them to view and manage information!

- **Academics:** you can update program information, requirements, and associated faculty, view attestations, and add any specific notes and documents here. This section will be viewed only for your students.
- **Profile:** view and edit information student provided on their profile.
- **Compliance:** review and approve (if applicable) compliance information.
- **Communications:** log any communications you've had with your student.
- **Interventions:** log any interventions for your student.
- **Coursework:** review all placements for your student. This will include completed assignments!
- **Learning Activities:** View all the learning activities that are added for a student

The screenshot shows a student profile for Kay Deitra. The 'Academics' tab is highlighted with a pink border. The page is divided into several sections:

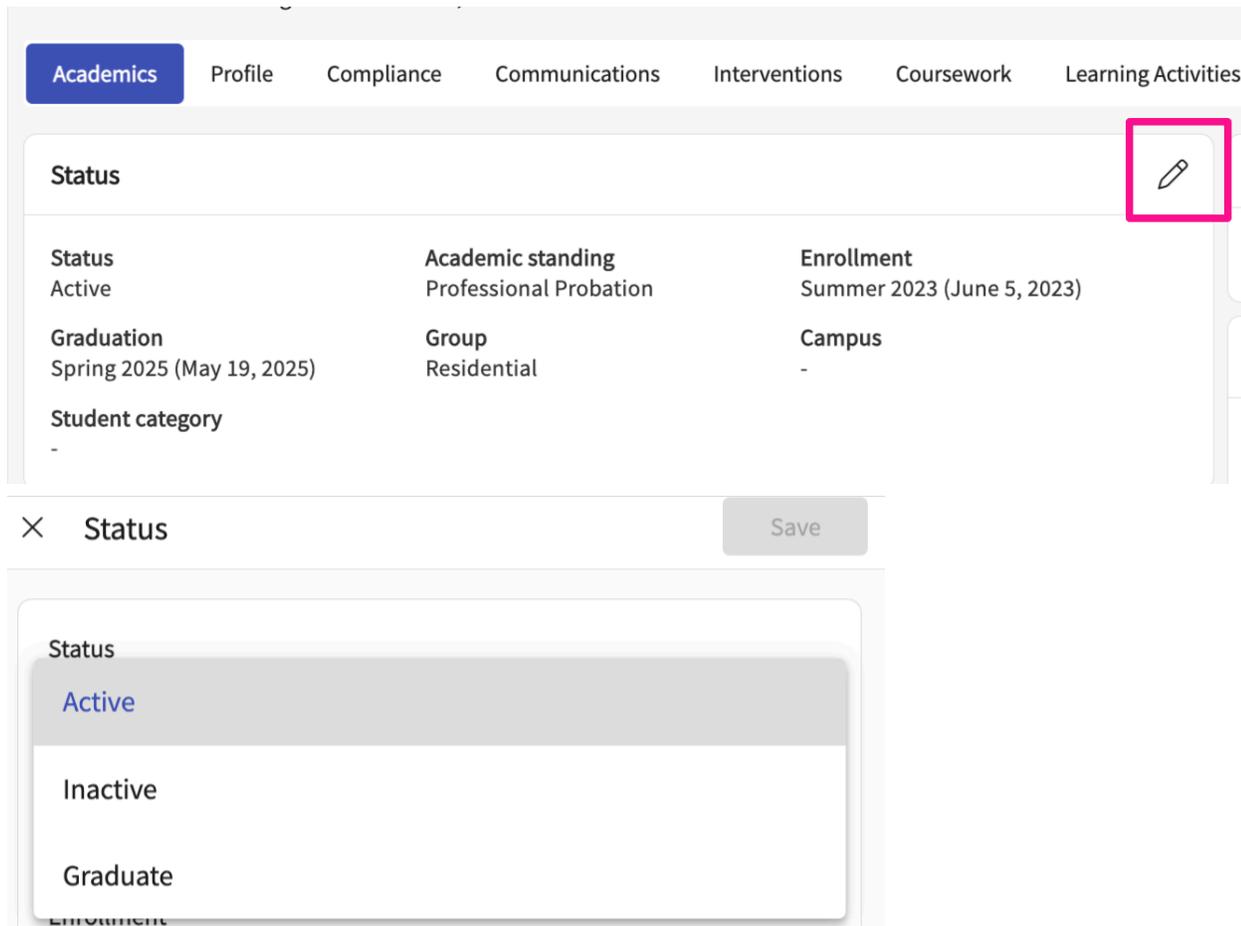
- Header:** Student name, email, phone, class year, and student type. Includes buttons for 'View As', 'Share Profile', and 'Delete Student'.
- Navigation:** A row of tabs: Academics (highlighted), Profile, Compliance, Communications, Interventions, Coursework, and Learning Activities.
- Status Section:** A table with columns for Status, Academic standing, and Enrollment.

Status	Academic standing	Enrollment
Active	Good Standing	Summer 2019
Graduation Spring 2022	Group Hybrid	Campus Newark Campus
Student category Full-time		
- Notes And Documents:** A section for shared notes and documents, including a note from Rocio Ramirez dated July 6, 2023, and internal notes from Skyler Reddy dated May 1, 2024.
- Cohort:** A section for cohort information, including 'Class of 2022*' and an 'Update Cohort' button.
- Program Requirements:** A list of requirements with status indicators (green for met, red for not met):
 - Rehab (met)
 - Out of State Placement (met)
 - Acute Care (met)
 - Outpatient (met)
 - Elective (not met)
 - Test (not met)
 - Inpatient (not met)
 - 400 Hours of Clinical Practice (not met)
- Associated Staff And Faculty:** A list of staff members: Stacey Chapman (Clinical Advisor) and Erik Huff (Academic Advisor).
- Single Sign-On (SSO) Key:** A section for SSO key management.
- Attestation(s):** A section for various attestations:
 - Graduation Requirements Attestation:** Met on April 26, 2022, 3:57:56 PM.
 - Profile Update Request:** Met on December 26, 2023, 10:34:59 AM.
 - Placement Sign Off:** Not yet met.

Academics Tab:

Administrators will be able to change the student status to Active, Inactive or Graduate via the Status section.

- **Status:** Click on the Academic section, Under the Status section, click on the pencil icon, and change any status attributes



SSO: Administrators will be able to add SSO keys within the student academic section and send SSO invitations. Admins can now view already added SSO keys within the student profile as well.

1. Adding SSO Key: Select the Student, then under the Academic section click on the Single Sign-On SSO Key section and click on + icon to add the key

Single Sign-On (SSO) Key



× Add Single Sign-On (SSO) Key Save

To provide Single Sign-On access for this student, please enter a valid Single Sign-On key. If the student is already activated in PRISM, sending a new invitation is unnecessary. However, if the student has not been activated on PRISM yet, you can send an invitation through the "Single Sign-On Invitations" section found within the student management section of the setup.

Single Sign-On (SSO) Key *



Re-enter Single Sign-On (SSO) Key *



Entered values are matched

Student Cohort Movement or Update

Update Cohort: At times you may need to change the cohort of your existing student due to various reasons.

1. Like if the student changes their plan of study or must take a leave of absence. You can now move the student from one cohort to the next to accommodate this change.
2. In order to change or update the cohort you can follow the below-mentioned steps:

3. Select the student you would like to move from one cohort to another cohort.

The screenshot shows a web interface with a navigation bar (Setup, Students, Reports, Dashboard) and a view selector (Grid View, Advanced View). Below is a search bar and a filter set to 'Active'. A table displays 37 results. The first six rows are highlighted with a pink box:

STUDENT NAME ↑	STUDENT ID	EMAIL	PHONE	STATUS	COHORT	GROUP
Adkins, Brian	496983	brian.adkins@exxat.com	(555) 555-5555	Active	Class of 2021*	
Adword, Eric	4422	eric.adword@exxat.com	(888) 888-8888	Active	Mock Class of 2028	Placements
Bailey, Teri	375296	teri.bailey@exxat.com	(555) 555-5555	Active	Class of 2022*	
Blair, Marty	563812	marty.blair@exxat.com	(555) 555-5555	Active	Class of 2025	Residential
Brewer, Donald	195632	donald.brewer@exxat.com	(555) 555-5555	Active	Class of 2023	Residential
Chen, Lucy	36129594	lucy.chen@exxat.com		Active	Class of 2021*	

4. Click on the Update Cohort button from the right to change the cohort.

The screenshot shows a student profile for Deitra, Kay* (Ky). The profile includes a photo, name, contact information, and various tags like Scholarship, Rural, and International Student. Below the profile are tabs for Academics, Profile, Compliance, Communications, Interventions, Coursework, and Learning Activities. The Academics tab is active, showing a table with columns for Status, Academic standing, and Enrollment. The Cohort section on the right shows 'Class of 2022*' and a highlighted 'Update Cohort' button.

Status	Academic standing	Enrollment
Active	Good Standing	Summer 2019

5. A drawer will open where you can find the instructions about the data which will move along with students and the data you lose. Click on Next option for the Cohort Selection.

× Update Cohort

BA

Adkins, Brian

brian.adkins@example.com | (555) 555-5555 | Class of May 2025* | Hybrid

1 Instructions

2 Cohort Selection

Next

When a student is moved to a new cohort by making a selection in step 2, following are the impacts on various aspects of the student data.

Student Setup

- Student will gain access to announcements, resources, attestations, program requirements, and additional profile details that apply only to the new cohort.
- If an attestation, program requirement, or any question within the additional profile details applies to both the old and new cohort, the information collected will be carried forward so while processing the cohort movement please ensure that no one makes any changes within these sections to avoid data loss.

Course Registrations

- Student will retain their registration status for any ongoing courses they are enrolled in. Any additional course registrations will need to be done manually.

Compliance

- The system will analyze the student's compliance documents and determine which items can be carried forward. If any compliance document(s) cannot be transferred to the new cohort, you can choose to download those documents. Also please note that any new changes that are done within this student compliance while processing the cohort movement might not be carried forward.

Placements and Learning Activities

- Placements and learning activities associated with the old cohort will be carried forward. The student will not lose any progress or achievements.

Payment

- Students' subscription will proceed without interruption. In the event of any alterations to the subscription fee or payment plan due to the cohort transition, our support team will contact your program's account manager to establish new payment arrangements.

When a student is moved to a new cohort, the following impacts occur:

- **Student Setup:** The student gains access to announcements, resources, and program requirements for the new cohort. Shared data between cohorts is carried forward; ensure no changes are made during the transition to avoid data loss.
 - **Course Registrations:** Current/ongoing course enrollments remain intact; new registrations must be done manually.
 - **Compliance:** The system carries forward applicable compliance documents, and non-transferable ones can be downloaded. Avoid changes during the transition to ensure data integrity.
 - **Placements & Learning Activities:** All placements and activities transfer with no loss of progress.
 - **Payment:** Subscriptions remain uninterrupted; any fee changes will be handled by the support team with the program's account manager.
6. Select the new cohort from the New Cohort option where you would like to move the student. Program administrators can also download the compliance documents uploaded by students.

× Update Cohort

LC **Chen, Lucy**
lucy.chen@exxat.com | Class of 2021*

Instructions **2 Cohort Selection**

Previous **Update Cohort**

Current Cohort
Class of 2021*

New Cohort
Class of 2022*

Analysis is complete. 7 out of 13 students' compliance documents will be transferred to the new cohort. The remaining documents will be deleted from Prism, if you wish to have a copy of the remaining documents, please click on the download button.

List Of Documents 

7 out of 13 documents uploaded by the student will be carried over. The remaining documents will be deleted

DOCUMENT NAME	CAN BE CARRIED OVER?	REASON
COVID-19 Vaccination	No	Tasks and fields do not match
Hepatitis B (HepB)	Yes	
Flu (Influenza)	Yes	
Measles, Mumps, Rubella (MMR)	No	Tasks and fields do not match
Annual Physical	Yes	
Polio	Yes	

7. Once done click on Update Cohort option.

The screenshot shows a modal window titled "Update Cohort" for a student named Lucy Chen (Class of 2021*). The interface includes a progress bar with "2 Cohort Selection" selected, and a "Previous" button. A yellow notification box indicates that the analysis is complete and documents will be transferred to the new cohort (Class of 2022*). The "Update Cohort" button is highlighted with a red box.

Program Requirement:

Program requirements are essential criteria students must meet to graduate from their program. Schools can define these requirements based on your discipline-specific needs. Allows you to track the program requirements that the student has completed and metExamples include:

- Completing placements across specific settings.
- Achieving a minimum grade in all registered courses.
- Logging a certain number of hours for specific procedures.

You will find 3 categories in which program requirements are categorized.

1. Pending:

- Initial status before placement.

2. Placed for:

- Automatically updated when a placement is published.
- Remains until the placement is successfully completed.

3. Completed:

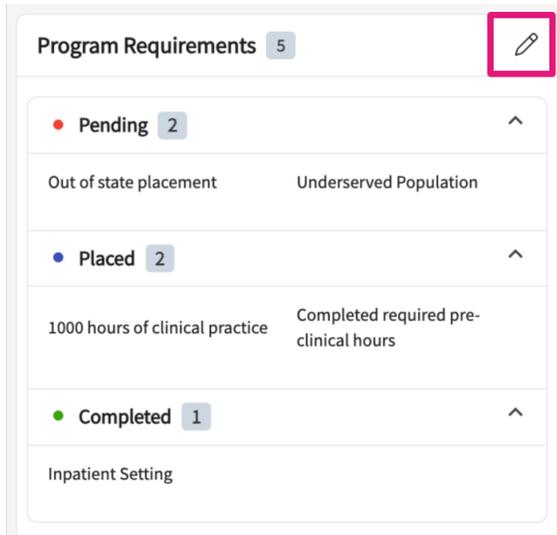
- Automatically updated when placement is completed successfully.

Special Cases:

- If a placement is marked "Unsuccessful," the program requirement reverts to **Pending**.
- The highest status across multiple placements is reflected for each requirement (Pending < Placed for < Completed).

To manually update the program requirements

1. To update the Program Requirements,
 1. Select the student,
 2. Click on the Academic section
 3. Select the pencil icon



4. You will be allowed to update program requirements that are not associated with placement you can mark them Pending or Completed

Program Requirements

Save

Program requirements associated with placements will automatically update based on the placement completion status. Requirements that are not linked to placements can be manually edited.

1000 hours of clinical practice	PM00001531 PM00001536	See More	Placed
Completed required pre-clinical hours	PM00001531 PM00001532	See More	Placed
Inpatient Setting			Completed
Out of state placement			Pending
Underserved Population			Pending

5. Click on Save

Notes and Documents:

Allow you to Add any notes and documents that you want to track for internal use or to share it with students.

Notes And Documents

Shared with students +

1.5x time on exams - accommodations letter attached. 

[View Documents](#)

Last updated by *Kanthy Supriya* on 03/04/2024

Excellent candidate for mentorship of incoming BSN students 

Last updated by *Kanthy Supriya* on 03/04/2024

Internal use only +

Esperanza is an extremely bright student and, at times, becomes disengaged during class as she has already grasped the material being presented. Excellent mentor and peer model for others in the BSN program. 

Last updated by *Kanthy Supriya* on 03/04/2024

- Shared with students

- Click on Notes and Documents section, click on + icon to upload any new documents or notes to be shared with students

× Shared with students

Save

Paragraph ▾ **B** *I* U ≡ ▾ @ := ▾ ½ = ▾ ⋮

Note

Browse to upload

Supported formats:
 .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm,.ppt,.rtf,.xls,.docm,.bmp,.csv,.gif,.tiff,.mp4
 You can only upload files with file size under 10 MB.
 We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.

- Click on Notes and Documents section, click on + icon to upload any new documents or notes to be shared for **Internal use only**

To associate a single student with Faculty & Staff:

2. Select Students from your left-menu.



3. The page will load all students in the system. Click on the student's name.
 - a. To find a particular student, use the search bar.
 - b. To find a specific cohort, use the filter option.

Setup **Students** Reports

Search Students + Add Student Invite Student 1

22 Results Found

<input type="checkbox"/>	STUDENT NAME ↑	EMAIL	STATUS	COHORT	ENROLLMENT
<input type="checkbox"/>	Barton, Gwendolyn	gwendolyn.barton@exxat.com	Active	Class of 2023	Summer 2020
<input type="checkbox"/>	Blair, Marty	marty.blair@exxat.com	Active	Class of 2025	Summer 2022
<input type="checkbox"/>	Brewer, Donald	donald.brewer@exxat.com	Active	Class of 2023	Summer 2020

4. You'll be taken to the student's information page.

Blair, Marty View As Download Profile Share Profile
 B marty.blair@exxat.com
 Class of 2025 | Residential
 Last login: June 20, 2022, 5:06 PM EST Profile Share History

Academics Profile Compliance Communications Interventions Clinical Coursework

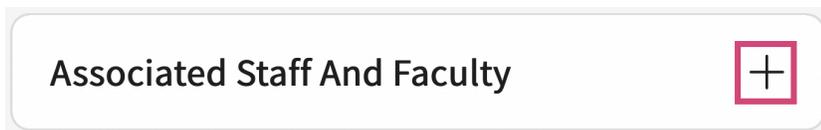
Status			Program Requirements
Enrollment term Summer 2022	Graduation term Spring 2025	Status Active	<input checked="" type="checkbox"/> Rehab <input checked="" type="checkbox"/> Outpatient <input checked="" type="checkbox"/> Out of State Placement <input checked="" type="checkbox"/> Acute Care <input checked="" type="checkbox"/> Elective
Academic standing Good Standing	Group Residential	Campus -	
Student category -			

Notes And Documents

- Shared with students +
- Internal use only +

Associated Staff And Faculty +

5. Click on the + icon within the Associated Staff and Faculty card.



6. A drawer will open. Fill out the form and click Save when done.

1. Contacts added within the Staff & Faculty section will appear in the dropdown.
2. When you associate the staff and faculty, it would allow them to access all the profile and coursework data for this student

× Associated Staff and Faculty
Save

This is the role that the individual plays with respect to this student as an Advisor. Associating them here provides them access to all the profile and coursework data for this student from the faculty module's "Advisees" section.

Associated staff and faculty *

Bhavya Bansal
▼

Role

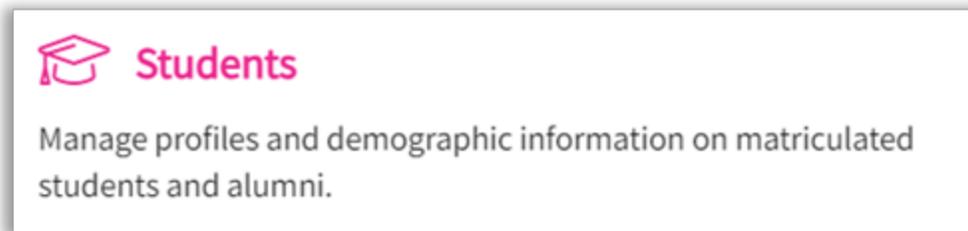
Academic Advisor
▼

Notes

Student "Compliance" Tab:

Once your students start to provide compliance information, you'll be able to review and update that within the system!

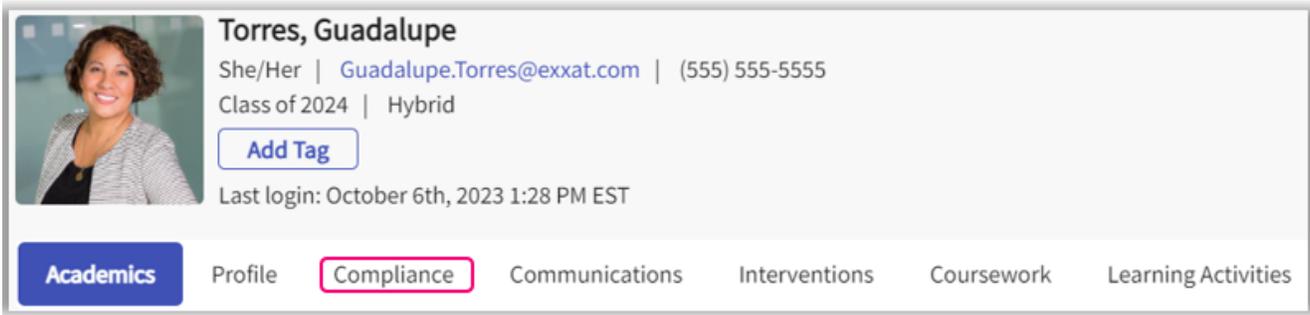
1. Select Students from your dashboard or left menu.



2. Find and select your desired student.

STUDENT NAME ↑	STUDENT ID	EMAIL	PHONE	STATUS
TestCIET, John		johntestingexat@gmail.com		Active
Thomas, Libina	123	libina@exxat.com		Active
Todd, Jeannie	853967	jeannie.todd@exxat.com	(555) 555-5555	Active
Torres, Allison **	682240	allison.torres@exxat.com	(555) 555-5555	Active
Torres, Guadalupe	74913	guadalupe.torres@exxat.com	(555) 555-5555	Active
Vaishnav, Kunal	123456	kunal.vaishnav@gmail.com		Active
Wise, Sabrina	453162	sabrina.wise@exxat.com	(555) 555-5555	Active
Wright, Casey	95483	casey.wright@exxat.com	(555) 555-5555	Active

3. Select Compliance.

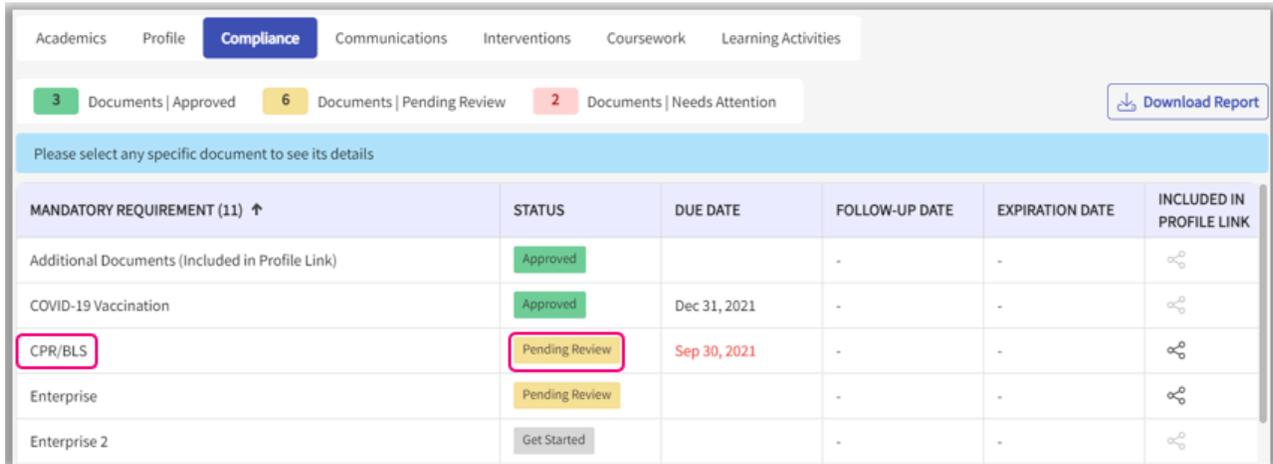


Torres, Guadalupe
She/Her | Guadalupe.Torres@exxat.com | (555) 555-5555
Class of 2024 | Hybrid
[Add Tag](#)
Last login: October 6th, 2023 1:28 PM EST

Academics Profile **Compliance** Communications Interventions Coursework Learning Activities

4. The page will load all requirements enabled along with the current status. Click on the requirement or on the status to view information provided by the student.

1. The tally at the top will quickly show you how many items are approved, pending review, and needs attention.



Academics Profile **Compliance** Communications Interventions Coursework Learning Activities

3 Documents | Approved 6 Documents | Pending Review 2 Documents | Needs Attention [Download Report](#)

Please select any specific document to see its details

MANDATORY REQUIREMENT (11) ↑	STATUS	DUE DATE	FOLLOW-UP DATE	EXPIRATION DATE	INCLUDED IN PROFILE LINK
Additional Documents (Included in Profile Link)	Approved		-	-	
COVID-19 Vaccination	Approved	Dec 31, 2021	-	-	
CPR/BLS	Pending Review	Sep 30, 2021	-	-	
Enterprise	Pending Review		-	-	
Enterprise 2	Get Started		-	-	

5. A drawer will open. Review information provided by the student. You can update the document status, select the reason from the drop down and provide comments (if needed). Once done,

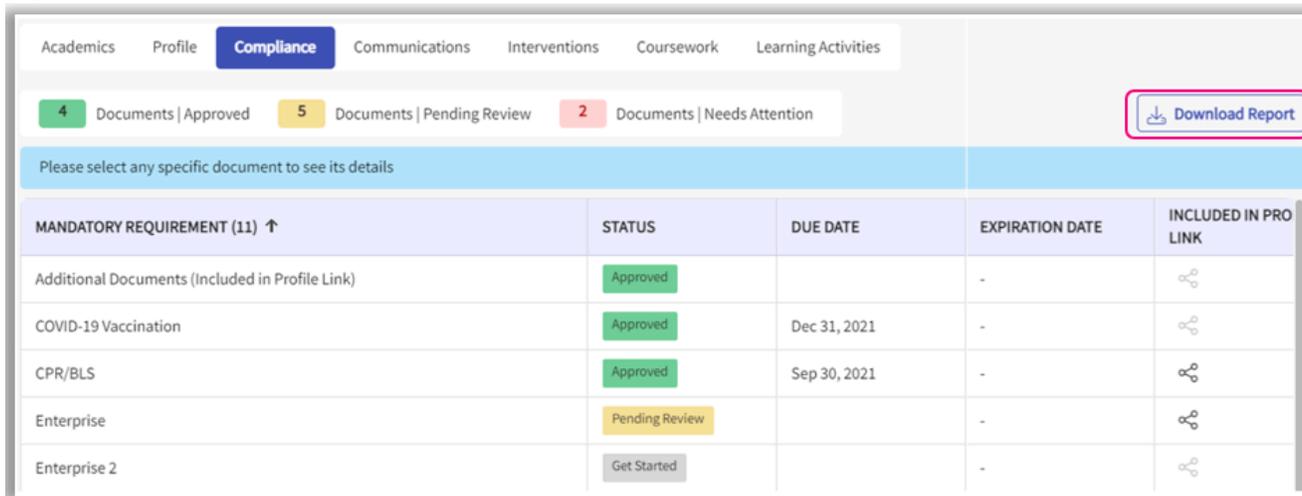
click Update Status.

The screenshot shows a web interface for a compliance item titled "CPR/BLS" by user "Torres (Guadalupe.Torres@exxat.com)". The status is "Pending Review" with a due date of "Sep 30, 2021". The "Required Action" section has a "Document Status" dropdown set to "Approved" and an empty "Reason" dropdown. Below is a rich text editor for a "Comment" with a 2000-character limit. A blue "Update Status" button is visible. On the right, "Guidelines For Students" are listed. At the bottom, a "View Document" button is highlighted with a callout box stating "View any uploaded documents." and an edit icon is highlighted with a callout box stating "Edit compliance item details".

6. The requirement will update. Close the drawer to review other compliance items.

The screenshot shows the same "CPR/BLS" compliance item page, but the status is now "Approved" and the due date is "Sep 30, 2021". A blue "Add New Record" button is present. A black banner at the bottom of the page displays the message "Document has been approved successfully." The "View Document" button and the edit icon from the previous screenshot are still present but no longer highlighted.

7. If you'd like to download documents uploaded by the student, click Download Report.



Academics Profile **Compliance** Communications Interventions Coursework Learning Activities

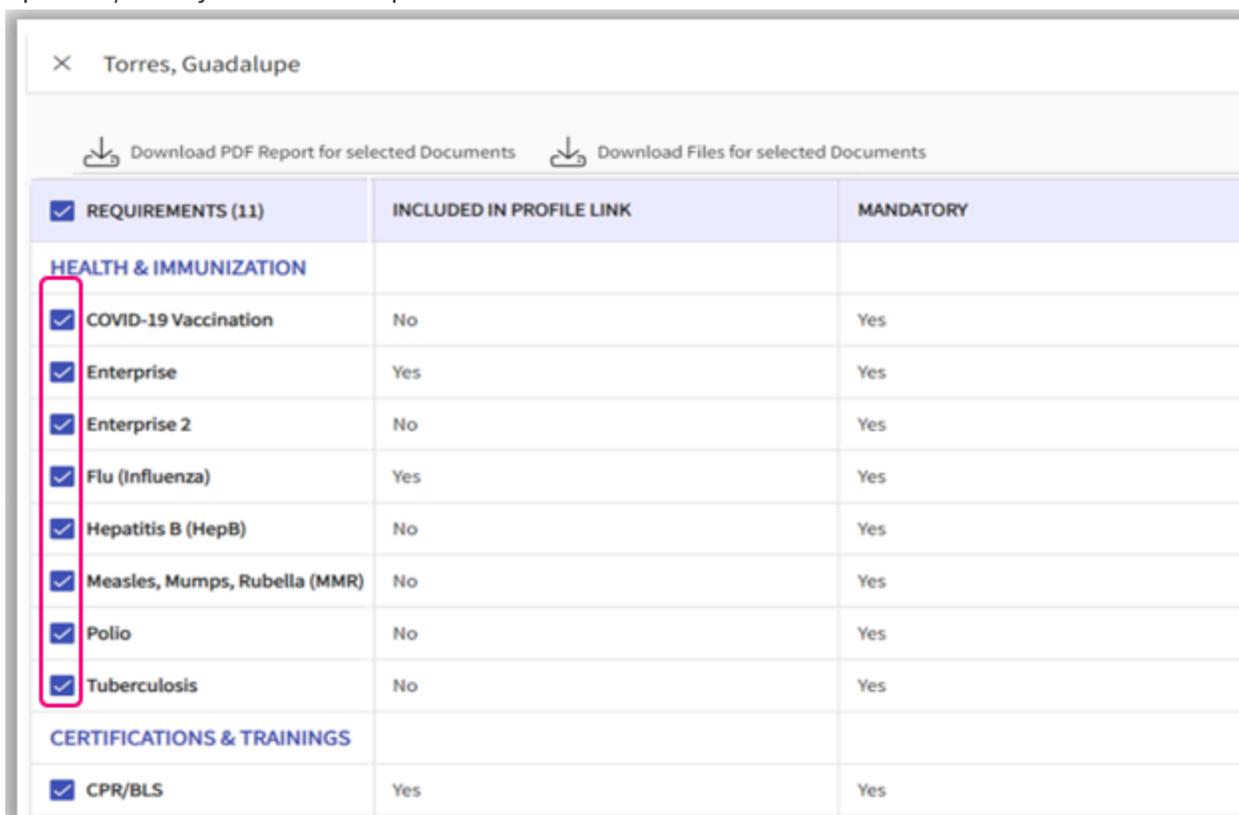
4 Documents | Approved 5 Documents | Pending Review 2 Documents | Needs Attention

[Download Report](#)

Please select any specific document to see its details

MANDATORY REQUIREMENT (11) ↑	STATUS	DUE DATE	EXPIRATION DATE	INCLUDED IN PRO LINK
Additional Documents (Included in Profile Link)	Approved		-	
COVID-19 Vaccination	Approved	Dec 31, 2021	-	
CPR/BLS	Approved	Sep 30, 2021	-	
Enterprise	Pending Review		-	
Enterprise 2	Get Started		-	

8. A drawer will open, and all items will be selected by default. Unselect any documents you would like to exclude from your download. Please note, if you only select items which do not have file uploads, the system will not provide a download file.



× Torres, Guadalupe

Download PDF Report for selected Documents Download Files for selected Documents

<input checked="" type="checkbox"/> REQUIREMENTS (11)	INCLUDED IN PROFILE LINK	MANDATORY
HEALTH & IMMUNIZATION		
<input checked="" type="checkbox"/> COVID-19 Vaccination	No	Yes
<input checked="" type="checkbox"/> Enterprise	Yes	Yes
<input checked="" type="checkbox"/> Enterprise 2	No	Yes
<input checked="" type="checkbox"/> Flu (Influenza)	Yes	Yes
<input checked="" type="checkbox"/> Hepatitis B (HepB)	No	Yes
<input checked="" type="checkbox"/> Measles, Mumps, Rubella (MMR)	No	Yes
<input checked="" type="checkbox"/> Polio	No	Yes
<input checked="" type="checkbox"/> Tuberculosis	No	Yes
CERTIFICATIONS & TRAININGS		
<input checked="" type="checkbox"/> CPR/BLS	Yes	Yes

Student "Communications" Tab:

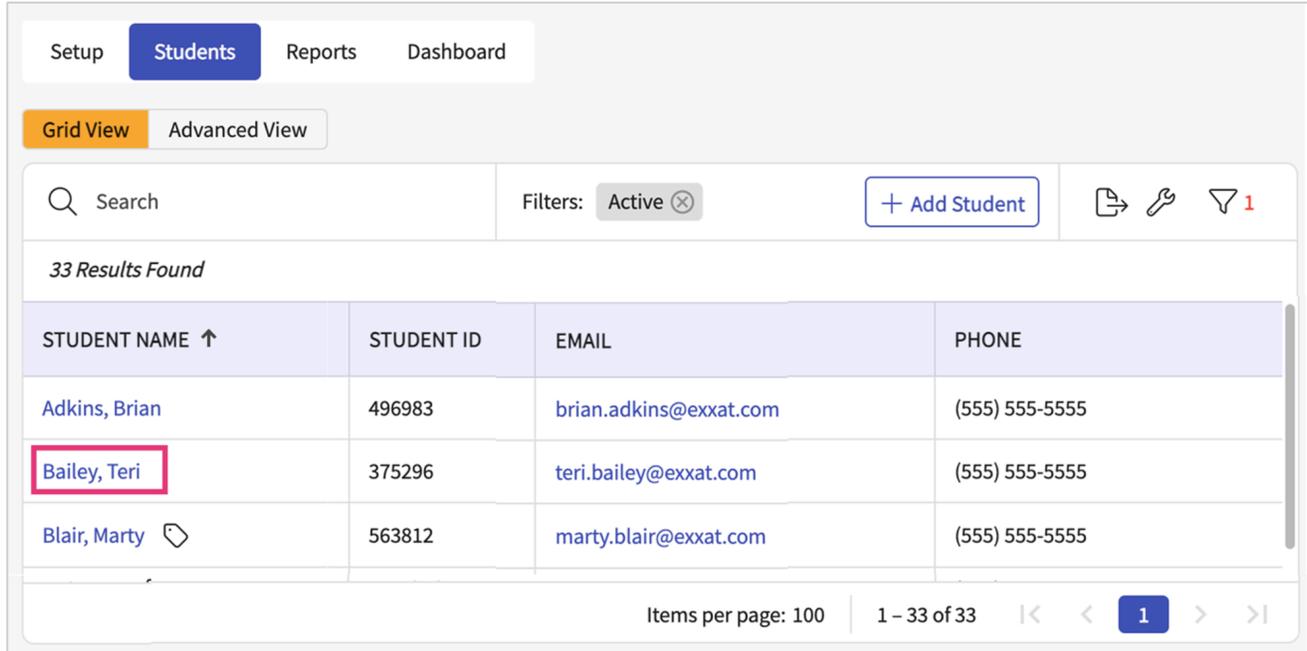
When working with students, there may be items you'd like to keep a note of, and you may not be sure of the best place to store this information.

You may have ongoing discussions with your student about a possible placement, or regular check-ins. For this type of information, we recommend you utilize **Communications**. For incidents, and ongoing problems during a placement, we recommend you use **Interventions**.

1. Select Students from the left menu or dashboard.

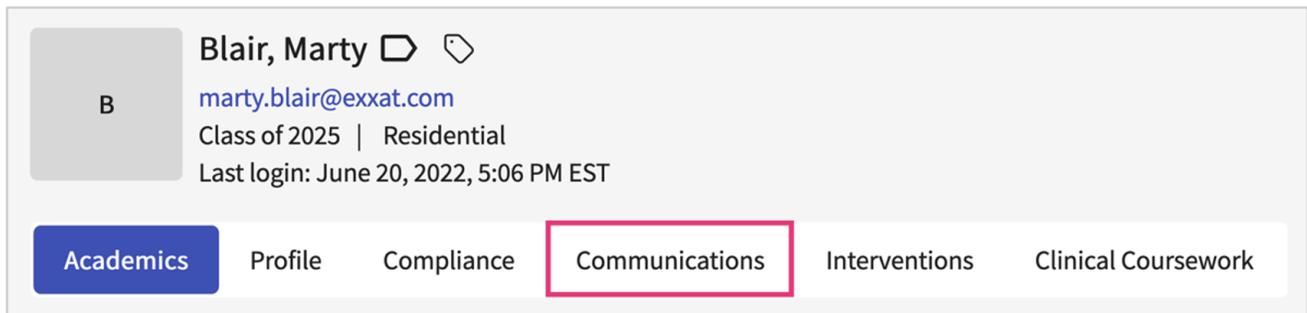


2. Find and select the student you'd like to manage.



To log a communication:

1. Select Communications.



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

1. Click on the pencil icon to make edits to existing communications.

Blair, Marty

[View As](#) [Download Profile](#) [Share Profile](#) [Profile Share History](#)

[Academics](#) [Profile](#) [Compliance](#) **Communications** [Interventions](#) [Clinical Coursework](#)

Communications

Compliance Documents Delay

Marty calls to report that he and his family are having a difficult time finding his childhood vaccination records. Have contact ed pediatrician but may take several weeks to obtain. Extension for compliance due dates granted

Communicated by : *Rocio Ramirez - June 13, 2022* | Follow up date : *August 5, 2022* Log date : *July 14, 2022*

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

- 1. Mode of communication
- 2. Details of communication

Communication [Save](#)

Communication

Mode of communication *
 Audio Call Video Call Email In Person Other

Communicated by *
Rocio Ramirez

Subject *
Interest in NICU

Description
Met with Marty to discuss his interest in working in the NICU after graduation. Placement in acute care pediatrics with potential for PICU experience is a great first step. Registration information provided for CHOP course on NICU interventions.

Communication date
July 14, 2022

Date of update
July 14, 2022

[Browse to upload](#)

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx
You can only upload files with file size under 5 MB.

3. Details of follow up if needed.

✕ Communication

Save

Follow Up

Planned follow up date

Actual follow up date

Notes

Student "Interventions" Tab:

1. Select Interventions

Deitra, Kay* (Ky)
 She/Her/Hers | Kay.Deitra@example.com | (555) 555-5555
 Class of 2022* | Hybrid

◆ Scholarship ◆ Rural ◆ International Student ... +

Last login: May 6th, 2024 11:09 AM EST

Academics

Profile

Compliance

Communications

Interventions

Coursework

Learning Activities

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

1. Click on the pencil icon to make edits to existing interventions.
2. For any existing interventions, you will be able to see the date by which followup is due.
3. You will also be able to track how many follow ups are completed

<p>Phone Use During Clinical Rotation </p> <p>Esperanza was caught on numerous occasions using her cell phone during her clinical rotation. She was advised that she needs to give her full attention during her clinical hours and that she can use her phone during her break time.</p> <p>View Documents</p> <p>Intervention added by : <i>Ananya Sakhuja</i> - 01/09/2024 Intervention Date : 01/01/2024</p>	<p>Total Follow-ups: 1 Completed Follow-ups: 0 Next Follow-up Date: 01/15/2024</p> <p>Last updated date - 12/06/2024</p>
<p>Outstanding Assignments </p> <p>Esperanza has numerous outstanding assignments. She was sent an email requesting an explanation, and seeking to reach an agreement on a plan to complete said assignments.</p> <p>Intervention added by : <i>Ananya Sakhuja</i> - 01/09/2024 Intervention Date : 01/02/2024</p>	<p>Total Follow-ups: 1 Completed Follow-ups: 0 Next Follow-up Date: 03/13/2024</p> <p>Last updated date - 12/06/2024</p>
<p>Excessive Tardiness</p> <p>Bishop has been tardy numerous times in the past few months. We set up a plan to remedy this.</p> <p>View Documents</p> <p>Intervention added by : <i>Ananya Sakhuja</i> - 03/15/2024 Intervention Date : 03/04/2024</p>	<p>Total Follow-ups: 1 Completed Follow-ups: 0 Next Follow-up Date: 03/13/2024</p> <p>Last updated date - 10/17/2024</p>

3. 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

× Intervention Save

Intervention

Mode
 Audio Call Video Call Email In Person Other

Initiated by*
Rocio Ramirez

Course
DPT 850 - Clinical Practice II*

Rotation
Clinical Practice II

Site

Subject of intervention*
Behavior Concerns

Description
At midpoint check in CI mentioned that Marty was defensive when accepting feedback. Discussed with Marty and will be following up before the end of the placement to check in.

Date of Intervention*
May 2, 2022

Status
Open

3. Attach any files, and add details of follow-up if needed

✕ Intervention
Save

Browse to upload

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx
You can only upload files with file size under 5 MB.

Follow Up
+

Follow up 🗑️

Planned follow up date*

July 22, 2022
📅

Actual follow up date

📅
↺

Description

Student's "Coursework" Tab:

View all the past and future courses that a student has undergone. You will find the list of all the courses that a student has been enrolled in. It shows you the information like if the course was associated with a placement or not, the course dates, and any additional details.

Blair, Marty
marty.blair@example.com | (555) 555-5555
 Class of 2025* | Residential

👁️ Observant 🟢 Parent 🏡 Rural ... +

Last login: November 6th, 2023 6:59 PM EST

👁️ View As
Share Profile ▾
🗑️ Delete Student

Academics
Profile
Compliance
Communications
Interventions
Coursework
Learning Activities

COURSE DETAILS	PLACEMENT DETAILS	LOCATION AND SETTING DETAILS	ADDITIONAL DETAILS
DPT 900 - Clinical Practice III* Fall, 2023 - 2024, 3rd Year	Clinical Practice III Aug 1, 2023 - Dec 31, 2025 <small>Published on Sep 20, 2023</small>	Alliance Medical Center* (location not known) ⓘ Acute Care	View Additional Details
DPT 800 - Clinical Practice I* Fall, 2019 - 2020, 1st Year	Rotation 2 Jun 5, 2023 - Oct 20, 2023 📅 <small>Not published</small>	Abundant - Action Therapy (Geocoding Enabled)* ⓘ Other	View Additional Details
DPT 850 - Clinical Practice II* Summer, 2023 - 2024, 2nd Year	Clinical Practice II Jan 1, 2023 - Dec 31, 2025 <small>Published on Sep 20, 2023</small>	Abundant Health - Main Hospital (Geocoding En... ⓘ Acute Care	View Additional Details
DPT 800 - Clinical Practice I* Fall, 2019 - 2020, 1st Year	Rotation 1 May 6, 2019 - May 10, 2022 <small>Not published</small>	Abundant - Urgent Care (Geocoding Enabled)* ⓘ Child Nutrition	View Additional Details
DPT 822 - Cardiac Pathology, Diagnosis and Managem... Spring, 2023 - 2024, 2nd Year	This course does not require placements	This course does not require placements	View Additional Details
DPT 832 - Pediatric Pathology, Diagnosis and Manage... Fall, 2023 - 2024, 2nd Year	This course does not require placements	This course does not require placements	View Additional Details
10 - Wishlist Course Fall, 2023 - 2024, 2nd Year	--	--	View Additional Details

1. Click on Coursework, you can also download all the student's placement details, Click on the export icon in top right corner of the grid to download the data.
2. On the grid you will be able to find the following information like:
 1. Course details: View course name
 2. Placement Details: View rotation name, and placement dates and track if it was published or not
 3. Location and setting details: View the location name and settings for the placement that the student has been assigned to
 4. Additional details: View additional details related to the course

To export click here

COURSE DETAILS	PLACEMENT DETAILS	LOCATION AND SETTING DETAILS	ADDITIONAL DETAILS
DPT 950 - Clinical Practice IV* Spring, 2022 - 2023, 3rd Year	Clinical Practice IV Apr 1, 2023 - Jun 18, 2023 Published on Jan 19, 2023	Modern Wellness Home Health	View Additional Details
DPT 900 - Clinical Practice III* Spring, 2022 - 2023, 3rd Year	Clinical Practice III Feb 1, 2023 - Mar 12, 2023 Not published	Preferred Care Sub-Acute	View Additional Details
DPT 900 - Clinical Practice III* Spring, 2022 - 2023, 3rd Year	Clinical Practice III Feb 1, 2023 - Mar 12, 2023 Not published	Alliance Medical Center* (location not known) School Based	View Additional Details

To edit the columns on this page, click here

Student's "Learning Activities" Tab:

When reviewing learning activities, it may come in handy to focus on one individual learning activity for a student at a time. Here's how to access that information.

1. Select the Learning Activities tab

Deitra, Kay* (Ky)
 She/Her/Hers | Kay.Deitra@example.com | (555) 555-5555
 Class of 2022* | Hybrid

Scholarship Rural International Student ... +

Last login: May 6th, 2024 11:09 AM EST

Academics Profile Compliance Communications Interventions Coursework **Learning Activities**

Forms/Evaluations Patient Log Timesheet Time Off

2. The page will load, and you will select the learning activity you'd like to review – Forms/Evaluations, Patient Log, Timesheet, and Time Off.

3. For each learning activity, a status will indicate where they are in the process. Click on the status to view their assignment and review the item if needed.

FORM	PLACEMENT DETAILS	STATUS	SCORE	DUE DATE	SUBMISSION DATE	AUDIT LOG
CI Details	Clinical Practice II*, Tendercare Home Health Home Health	In Progress by Student	-	06/15/2021	Invalid date	View Log
CIET	Clinical Practice II*, Tendercare Home Health Home Health	Final - Pending School Review	-	06/30/2021	Invalid date	View Log

4. With **forms/evaluations**, you will see the form, will be able to update the status, provide feedback, and click Update once done.

5. With **patient logs**, **timesheets**, and **time off** requests, click on the number highlighted in yellow to begin reviewing. You can also view entries in other statuses.

Forms/Evaluations **Patient Log** Timesheet Time Off

Search Course name Filters:

COURSE ↑	PLACEMENT DETAILS	TOTAL LOGS	LOGS BY STATUS	STATISTICS
DPT 900 - Clinical Practice III* Spring, 2021 - 2022, 3rd Year	Clinical Practice III, Feb 8, 2022 - Mar 19, 2022 Mercy Central Acute Care	1	0 0 1	

Forms/Evaluations Patient Log **Timesheet** Time Off

08:00 In Progress 51:30 Pending Review 09:30 Not Approved 00:00 Approved

Search course details

COURSE ↑	PLACEMENT DETAILS	REQUESTS BY STATUS
DPT 850 - Clinical Practice II* Summer, 2020 - 2021, 2nd Year	Clinical Practice II*, Jun 8, 2021 - Jul 3, 2021 Tendercare Home Health Home Health	00:00 42:30 09:30 00:00

Forms/Evaluations Patient Log Timesheet **Time Off**

1 day In Progress 1 day Pending Review 0 days Not Approved 1 day Approved

Search course details

COURSE ↑	PLACEMENT DETAILS	REQUESTS BY STATUS
DPT 800 - Clinical Practice I* Fall, 2019 - 2020, 1st Year	Clinical Practice I, Nov 5, 2019 - Dec 3, 2019 Crestview Orthopedics Outpatient	0 days 1 day 0 days 1 day

6. With **patient logs**, once the drawer opens, you can:
 1. Select multiple logs at a time to approve
 2. Approve all logs without having to select each entry
 3. Click on the Log ID to view the full log

Review Logs

AT Torres, Allison
Community Ambulatory Care | Clinical Practice I
Outpatient

Logs Statistics

2 Total 2 Pending Review 0 Needs Attention 0 Approved

Status: Needs Attention, Pendi...

Selected logs: 1/2

Approve Approve all logs

	LOG ID (2)	LOG STATUS	DATE OF SUBMISSION	DATE OF ENCOUNTER	AGE	CLINICAL NOTES
<input checked="" type="checkbox"/>	230505131329	Pending Review	May 5, 2023	May 5, 2023	Adult (19-64 years)	-
<input type="checkbox"/>	230505131302	Pending Review	May 5, 2023	May 5, 2023	Older Adult (65+ years)	-

7. If you clicked on the Log ID, another drawer will open, allowing you to:

1. View the full log
 2. Provide feedback to the student
 3. Approve or indicate the log needs attention
 4. Please note, if you are marking a log as "Needs Attention", feedback is required.
8. With timesheets, you can select single or multiple entries to approve or not approve.
1. If you are marking any entries as "Not Approved", comments are required.

Review

TA **Torres, Allison** | allison.torres@exxat.com
 DPT 800 - Clinical Practice I* | 2025 - 2026 | 1st Year | Fall | Class of 2025
 Clinical Practice I (Apr 17, 2023 - May 30, 2023) | Community Ambulatory Care | **Outpatient**

From Date: [Calendar Icon] To Date: [Calendar Icon] Status: Pending Review [Dropdown Arrow]

Not Approve **Approve**

Total 24 Hrs In Progress 8 Hrs Pending Review 16 Hrs Not Approved 0 Mins Approved 0 Mins

REVIEWER'S COMMENTS	STATUS	START DATE ↓	START TIME	END TIME	BREAK TIME	DURATION
<input checked="" type="checkbox"/> Add comment -	Pending Review	Fri Apr 21, 2023	8:00 AM	5:00 PM	60 Mins	8 Hrs
<input type="checkbox"/> Add comment -	Pending Review	Thu Apr 20, 2023	9:00 AM	6:00 PM	60 Mins	8 Hrs

9. With time off requests, you can select single or multiple entries to approve or not approve.
1. If you are marking any entries as "Not Approved", comments are required which are located on the far right of the grid.

Review

TA **Torres, Allison** | allison.torres@exxat.com
 DPT 800 - Clinical Practice I* | 2025 - 2026 | 1st Year | Fall | Class of 2025
 Clinical Practice I (Apr 17, 2023 - May 30, 2023) | Community Ambulatory Care | **Outpatient**

From Date: [Calendar Icon] To Date: [Calendar Icon] Status: Pending Review [Dropdown Arrow]

Not Approve **Approve**

Total 1 Days In Progress 0 Mins Pending Review 1 Days Not Approved 0 Mins Approved 0 Mins

Records Selected: 1

STATUS	FROM DATE ↓	TO DATE	DURATION	CLINICAL INSTRUCTOR	REASON	PLANS FOR MAKING UP THE TIME MISSED	REVIEWER
<input checked="" type="checkbox"/> Pending Review	May 17, 2023	May 17, 2023	1 Day(s)		I have concert tickets for August D on this day, I bought them months ago and they are not Show More	Will work over the weekend.	Add Comment