This comprehensive document provides a detailed guide on how to efficiently review compliance information for students within the system. As an administrator or user, understanding the process of managing compliance documents, tracking statuses, and communicating with students regarding their requirements is essential for maintaining organizational standards and student success. This guide outlines step-by-step procedures and functionalities available within the system to facilitate streamlined compliance management.

- **Reviewing Student Compliance by Cohort**
  - **Dashboard Tab**
  - **Summary Tab**
  - **Notification Tab**
  - **Reports Tab**
- **Reviewing Student Compliance by Student**
- **Reviewing Student Compliance by Documents**
- **Reviewing Student Compliance from Course Section**

Ask Leo   Amee Jotangiya Exxat Sales (Nursing) ⌄

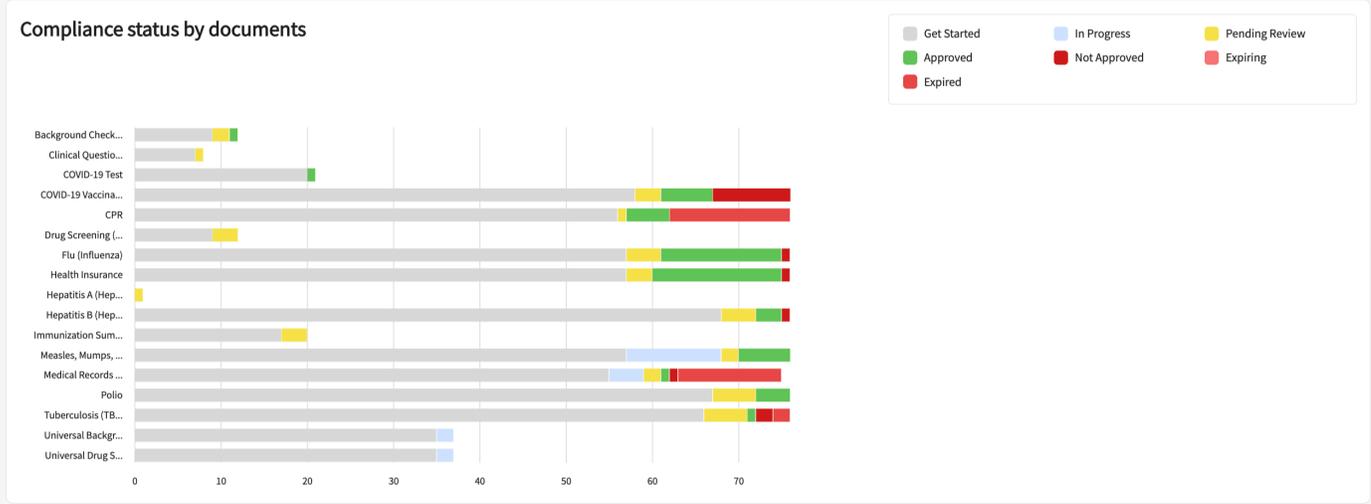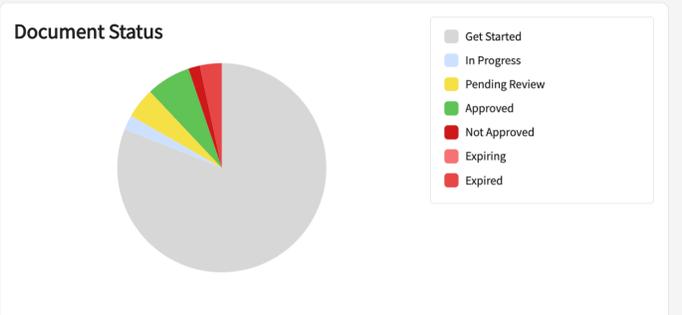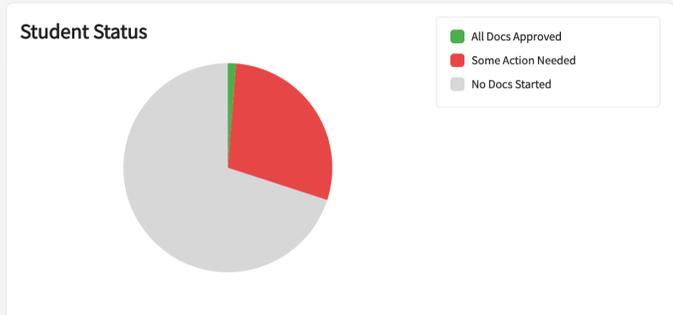Setup | **Compliance** | Review Clarifications

View By: By Cohort | By Student | By Document

🔘 Hide cohorts that do not have any active documents or students.

Select any cohort listed below to view compliance details.

🔍 Search

COHORTS ↑	COMPLIANT STUDENTS	NON COMPLIANT STUDENTS	PENDING REVIEW DOCUMENTS	EXPIRING DOCUMENTS	EXPIRED DOCUMENTS	POWERED BY ⓔApprove
Advanced Practice/DNP*	0 / 30	30 / 30	4	0	12	No
BSN Students*	1 / 21	20 / 21	0	0	2	No
Class of 2023	0 / 8	8 / 8	7	0	8	No
Class of 2024	0 / 8	8 / 8	0	0	0	No
FNP	0 / 1	1 / 1	0	0	0	No
FNP-Summer 2023	0 / 4	4 / 4	20	0	5	No
PNP-Fall 2023	0 / 3	3 / 3	7	0	1	No
Summer 2025	0 / 1	1 / 1	1	0	0	No

Items per page: 50   1 – 8 of 8 |< < **1** > >|

Student Status

- 🟩 All Docs Approved
- 🟥 Some Action Needed
- ⬜ No Docs Started

Document Status

- ⬜ Get Started
- 🟦 In Progress
- 🟨 Pending Review
- 🟩 Approved
- 🟥 Not Approved
- 🟥 Expiring
- 🟥 Expired

Compliance status by documents

- ⬜ Get Started 🟦 In Progress 🟨 Pending Review
- 🟩 Approved 🟥 Not Approved 🟥 Expiring
- 🟥 Expired

Reviewing Compliance by Cohort

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

1. Select Student Compliance from your dashboard or left menu.

Student Compliance

Configure, collect, review and communicate with students about clearance documents for clinical education.

2. The system will load all cohorts, along with the current status for all compliant & non-compliant students. It will also show the count of documents that are in 'Pending Review', 'Expiring' and 'Expired'. Click on the cohort name to check more details.
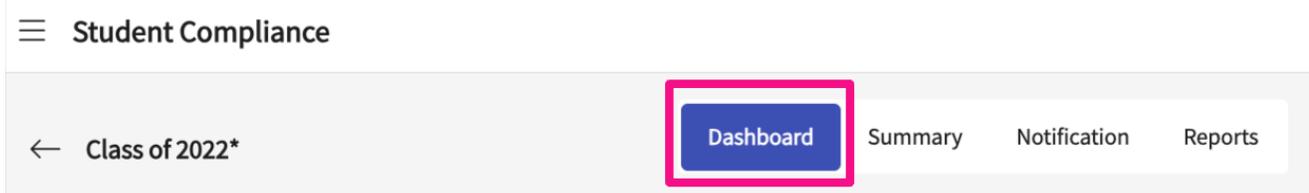

3. By default, you will land on the Dashboard for that cohort.

Dashboard

You can view an interactive dashboard created to track the compliance documents for a cohort.

1. Click on Student Compliance
2. Select the 'By Cohort' option under View By
3. Select the Dashboard tab
4. It will load four graphs: By Student, By Document, All Documents, and Documents uploaded by the school. Each graph will give you a visual representation of any documents in a particular

status.

By Student

6
Students

- 🟩 All Docs Approved ⓘ
- 🟥 Some Action Needed ⓘ
- ⬜ No Docs Started ⓘ

By Document

12
Documents

- ⬜ Get Started
- 🟦 In Progress
- 🟨 Pending Review
- 🟩 Approved
- 🟥 Not Approved
- 🟧 Expiring
- 🟥 Expired

C19TEST
COVID
FLU
HEP B
MMR
POLIO
TB
CPR
BGCHECK
INSUR
ADIPL
CQ

All Documents

72

6 students x 12 documents

	Get Started		In Progress		Pending Review
	Approved		Not Approved		Expiring
	Expired				

Documents Uploaded By School

1

Documents

	Status
Professional liability insurance	Expired

5. Each graph is clickable which will redirect you to the documents

Summary

1. Click **Student Compliance**.
2. Select **By Cohort** under **View By**.
3. Click **Summary**.
4. Once you click on any status, you'll be taken to the **Summary** to view additional information. In the below screenshot, it has been clicked on the status **Some Action Needed** under the **By Student** graph. The system will automatically apply that filter under the Summary tab.

5. Click **Pending Review** to review the individual documents for each student. You can also apply an additional filter by clicking on the funnel icon on the top right of the screen.

6. On the 'Status' filter, select 'Pending Review' and click on 'Apply'.

7. The system will show only those documents that are in 'Pending Review' status. Click on the same to review the document for that student.

8. Review the detailed information for that student. You can update the document status, select the reason from the drop-down, and provide comments (if needed). You can select from below reasons for approval:
    1. Approved with Declination: Approve (D)
    2. Approved with Exception: Approve (E)
    3. Approved with Medical Exemption: Approve (M)
    4. Approved with Religious Exemption: Approve (R)

9. On the **Student Compliance** window, in the **Required Action** section, specify the following and click **Update Status**:

1. **Document Status**: Select the status of the reviewed document from the drop-down menu.
2. **Reason**: Select a reason for the status of the document from the drop-down menu.
3. **Comment**: Add any notes or comments for the students to view and action, if required.

10. The status will change, and the requirements will be updated. Close the drawer to review other compliance items.

11. If you prefer to view data in Excel format, click Document Details Report.

12. The report will include the overall status of each compliance item, along with any dates entered for easy reviewing.

Updating Due Date

To update the due date, perform the following:

1. On the **Summary** tab, click the required document status for the student you want to edit the due date for.

2. In the **Student Compliance** drawer, click ✎ **Edit**.
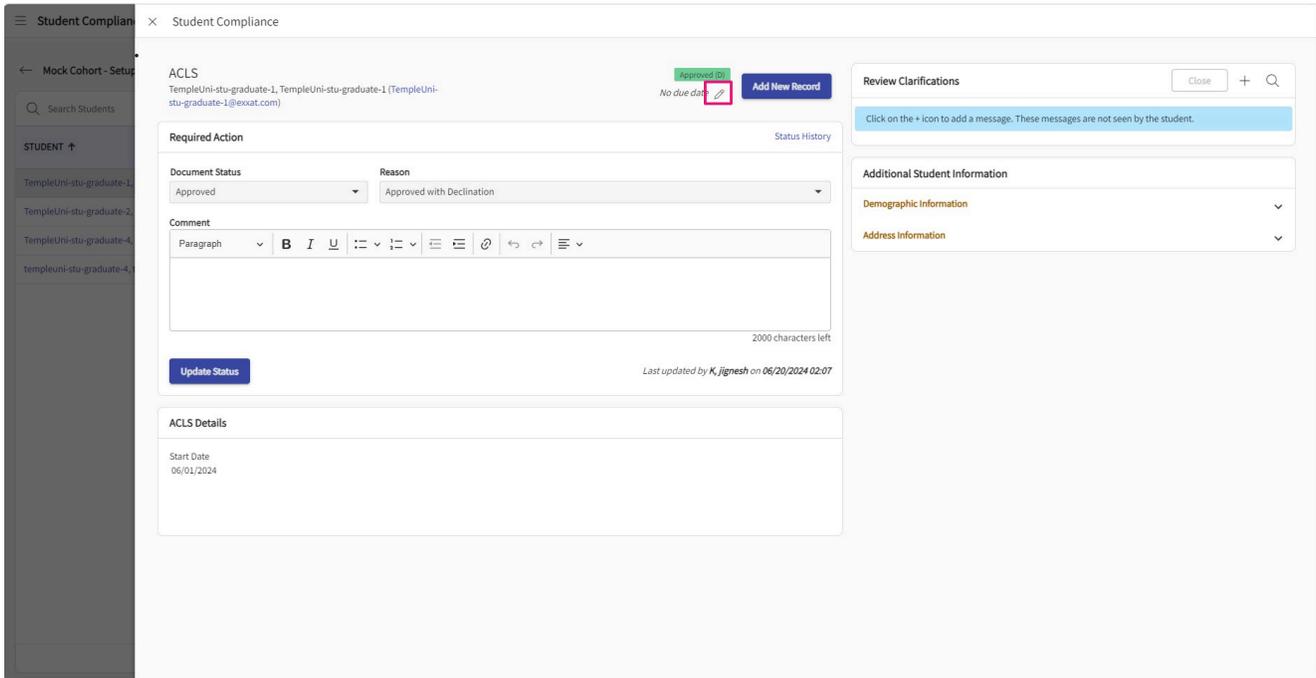
3. In the **Due date to be applied for the student:** message box, select one of the following and click **Confirm**:
   - **Due date configured for the requirement**: Select if the due date applies to all the students involved in the requirement.
   - **Due date specific to the student**: Select if the due date is for a specific individual and select a date in the calendar.
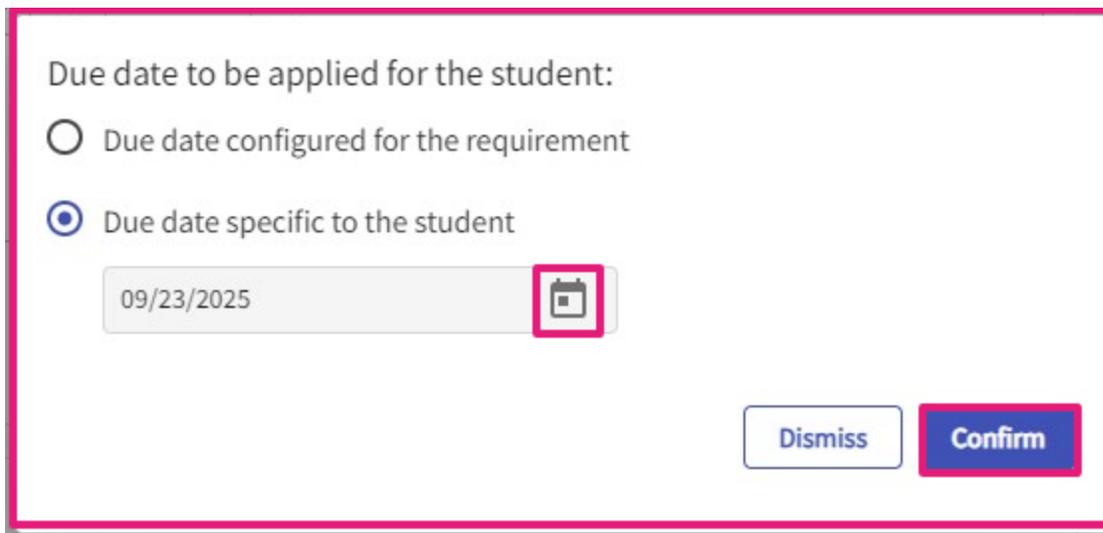
   - A confirmation message is displayed once the due date is updated. Refresh your screen to view the updated date.

Note: You can update the due for by clicking the status available on **Summary Reports**, **By Student**, and **By Document** screens.

Notification

Communicating with students regarding compliance requirements is important. Whether you'd like to send students an overall status notification of their items or follow up with individual students regarding specific requirements, you can achieve this easily with our Compliance Notifications!

1. Click on Student Compliance
2. Select the 'By Cohort' option under View By
3. Select the Notification Tab
4. Select Compliance from your dashboard or left menu.

5. Select Notification from the ribbon at the top of the page and select the desired cohort.

6. The system will display all of the students within that cohort and will give you a tally of how many documents they are to upload.
7. If you'd like to send a general notification with status updates on all their items, select the students using the open checkbox on the left of the grid.

8. If you would like to quickly view the status of each compliance item or pick and choose which requirement is included in your notification, click on the > icon.

9. The system will then display each requirement with the corresponding status. Unselect any items you would like to exclude from your notification.

10. If you would like to only contact specific students, click on the filter icon.

11. A drawer will open. Make your desired selections and click Apply.

12. The page will then filter based on your preferences. You can then select your students using the open checkboxes on the left of the grid.

13. Once you've selected the desired students, click + Compose Email.

14. A drawer will open with three steps. Review your recipients and preferences on step 1. Click Next.

15. On step 2, select your desired template. You can use our standard email or create/select templates. Click Preview.
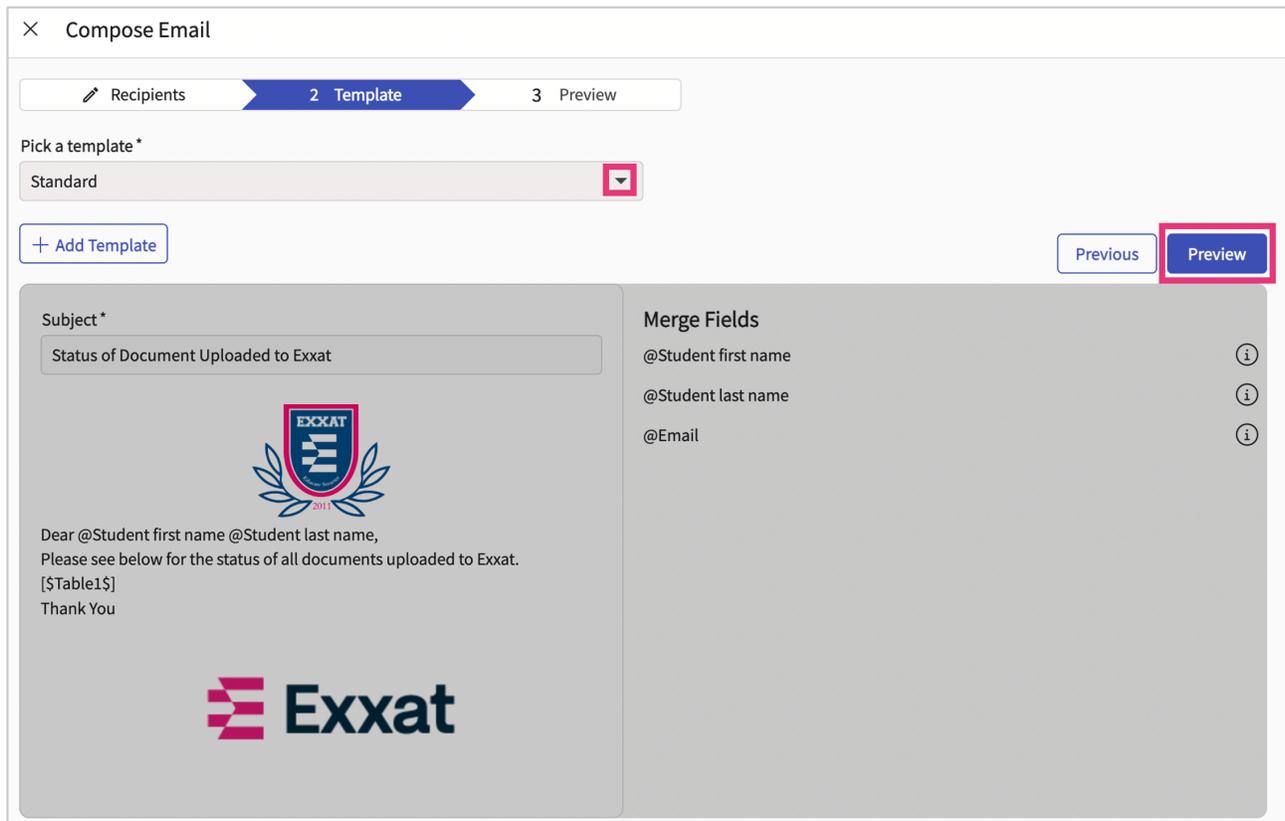
16. Preview your template.
    1. If everything looks good, select Send email now to send your message instantly, or schedule it for a specific date and time.
    2. You can also click Previous to go back and make changes as necessary.
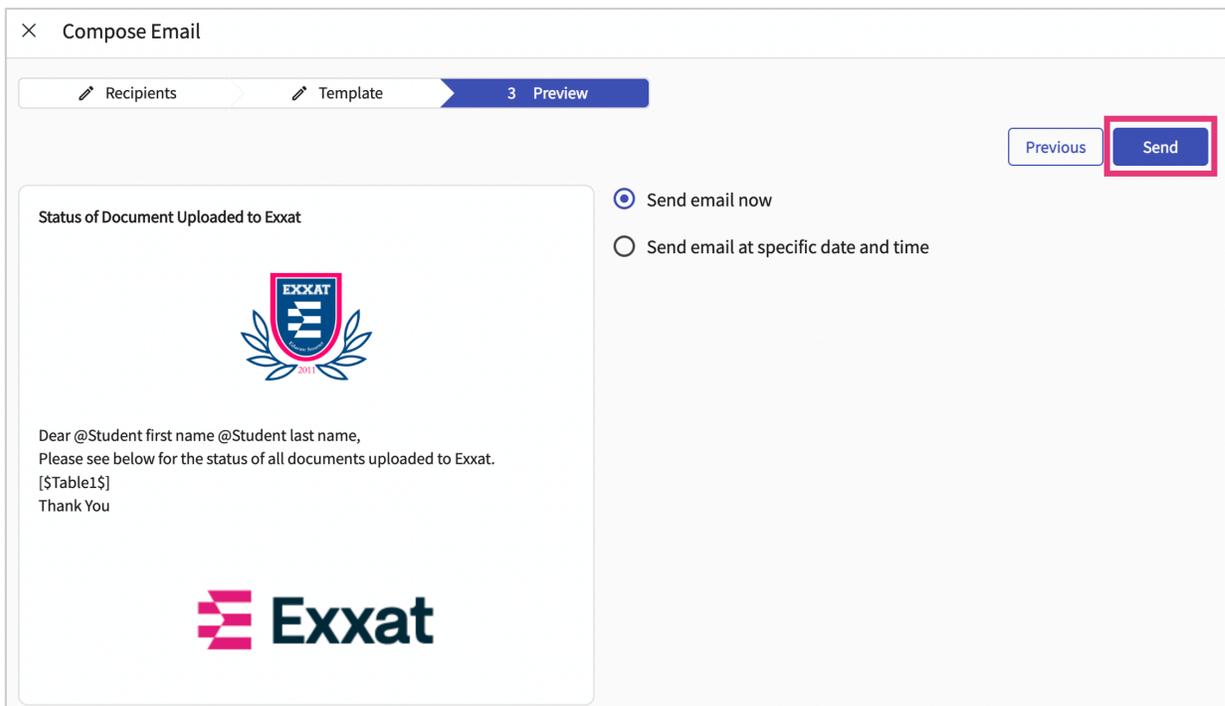
14. Your emails will be sent!
15. If you'd like to review your sent emails, or review whether your students have read your email, click History.

Reports

As your students upload Compliance items, you may want to easily review any items that are:

- Pending Review
- Expiring soon, or has already expired

You can easily review this information with our Compliance Reports!

1. Click on Student Compliance
2. Select the 'By Cohort' option under View By
3. Select the Reports Tab
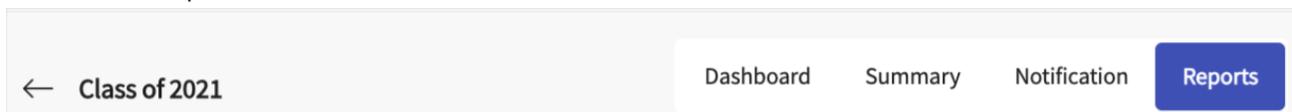
4. The Pending Review report will show you any items that are pending your review. This report can be utilized as a to-do list for you to easily review anything that needs your attention.

5. The Expiring, Expired report will show you any items that are near their expiration date or have already expired. Use this report to easily identify any students you need to get in touch with.
   1. Please note, compliance items are marked as Expiring 30 days from the expiration date.

6. Both reports will have similar features that you can utilize:
   1. Ability to export to excel

2. Option to view the report in full-screen
3. Ability to filter by fields such as groups, enrollment, requirement, status, and student tags.

Reviewing Student Compliance by Student

The "By Student" tab offers a complete view of student compliance status, providing essential details like compliance expiration dates and pending documents. This view allows you to monitor and manage individual student compliance efficiently

1. Select the Student Compliance section
2. Select "By Student" option under View By Section
3. You will view the details compliance information for each student.

4. You will be able to view the Grid will show you a quick overview of the student's compliance status, the date until which the student is compliance, documents that the student needs to update, and the list of documents that are pending review, etc.

5. You can click on the Compliance Status to view all the documents

6. You will be able to see an overview of all the individual documents. You will be able to download all Compliance reports for a student when you click on "Download Report" button.

Reviewing Student Compliance by Documents

The "By Document" tab offers a complete view of student compliance status. This view allows you to monitor and manage individual student compliance for each document catergory efficiently

1. Select Compliance from your dashboard or left menu.

2. Click on Compliance Tab

3. Select the "By Document" tab on View by option

4. Select Document Status to view the status of the document for each student

5. You will see detailed of all compliance details

6. Under Archived Records seaction will allow you to see the old document records

7. You can also see "View All Clarifications" to see all the past clarifications
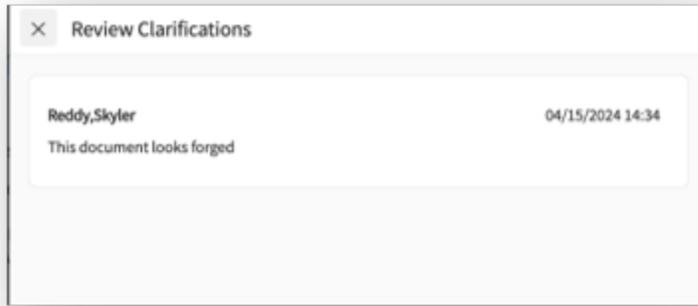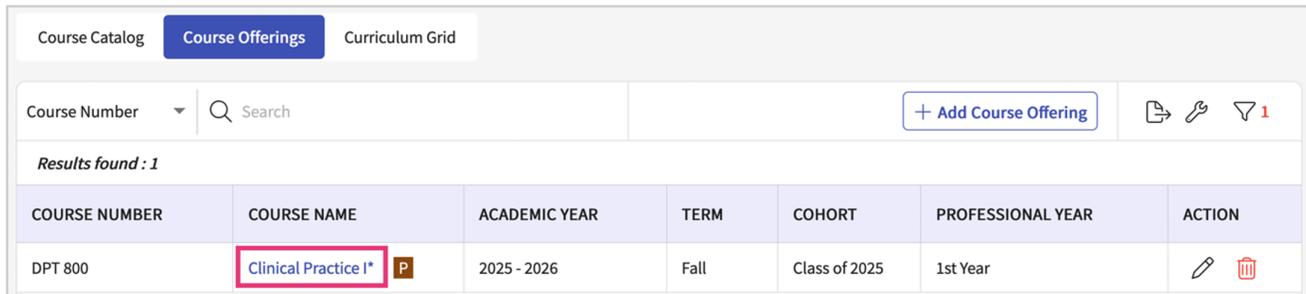

Reviewing Student Compliance From Course Section

As a placement start day gets near, you'll want to make sure your students are compliant! Read on to learn how you can review compliance for each course.

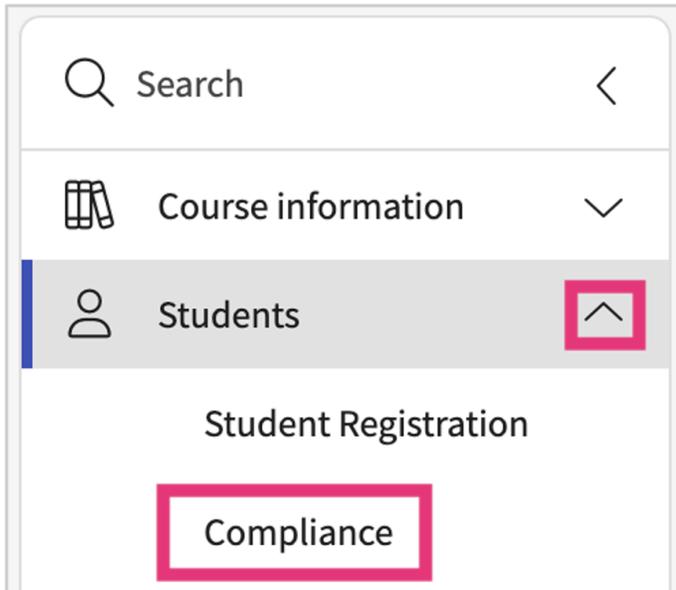1. Select Courses from your dashboard or left menu.

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

3. Open up the Students option from the left panel and select Compliance.

4. The page will display all students who are enrolled in the course and will show an overall status. If a student has more than 1 item that is not approved, the status will show as Some Action Needed. Click on the status to view additional information.

5. A drawer will open, showing you all of the compliance items along with the current status. Click on the requirement to view information provided by the student.

Stevenson, Samantha

Stevenson, Samantha
Class of 2024 | ✉ Samantha.Stevenson@exxat.com | ☎ (555) 555-5555
DPT 800 - Clinical Practice I*
Placement Duration : Nov 03, 2021 - Jul 29, 2023

Some Action Needed

Please select any specific document to see its details

MANDATORY REQUIREMENTS (9)	STATUS	REASON	EXPIRATION DATE
COVID-19 Vaccination	Approved		-
Hepatitis B (HepB)	Pending Review		-
Flu (Influenza)	Pending Review		-
Measles, Mumps, Rubella (MMR)	Pending Review		-

6. A drawer will open. Review information provided by the student. You can update the document status and provide comments (if needed). Once done, click Update Status.

View any uploaded documents

Edit compliance item details

7. The requirements will be updated. Close the drawer to review other compliance items.

× Measles, Mumps, Rubella (MMR)

Measles, Mumps, Rubella (MMR)
Long, Kimberly (Kimberly.Long@exxat.com)

Approved

Guidelines For Students
You must provide individual titer values for Measles, Mumps and Rubella in addition to your childhood vaccination dates. Declination forms are not accepted for MMR

Required Action

Document Status

Approve   ▼

Comment

Paragraph   ∨   **B** *I* U̲ ⁝☰ ∨ ⁝☰ ∨ ⇤☰ ☰⇥ 𝒪 � ↶ ↷ ☰ ∨

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Last up

Status H   Document has been approved successfully.