

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**

Setup Compliance Review Clarifications

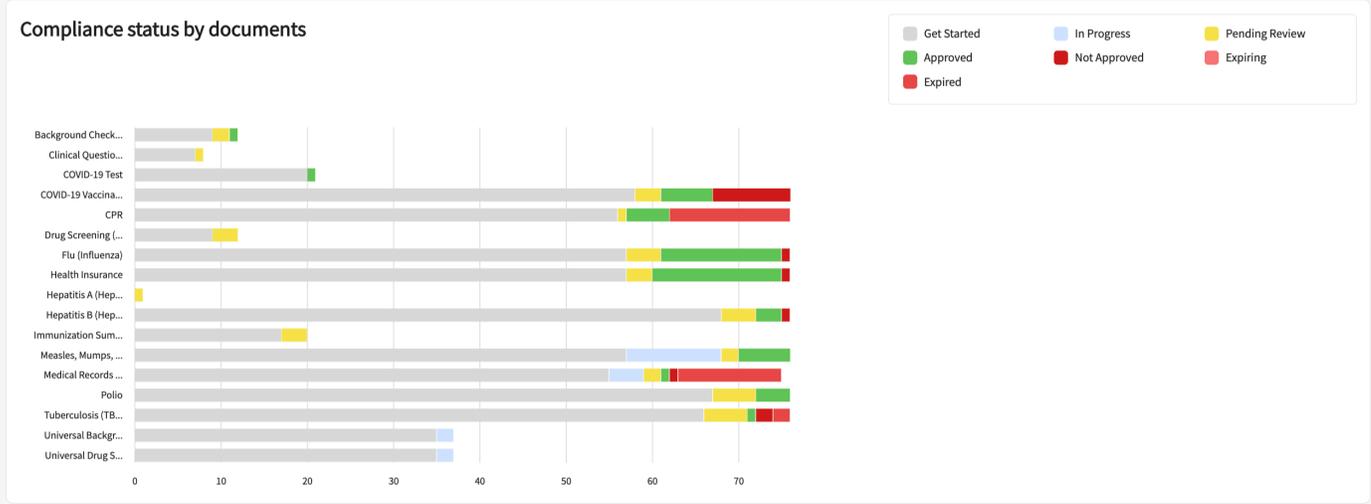
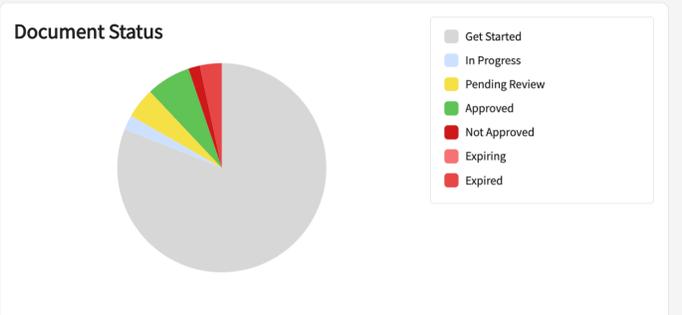
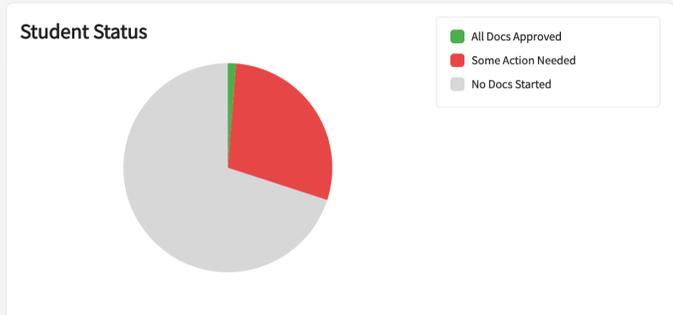
View By: By Cohort By Student By Document

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

Select any cohort listed below to view compliance details.

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



Reviewing Compliance by Cohort

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

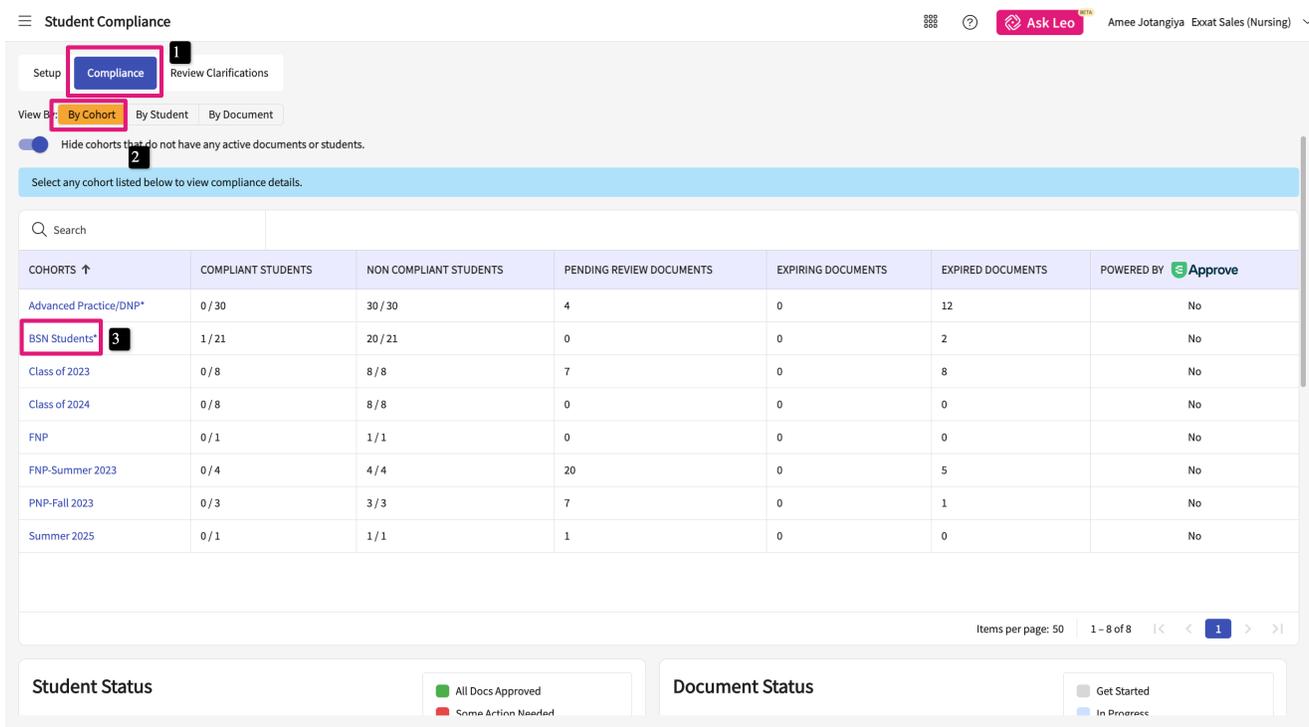
1. Select Student Compliance from your dashboard or left menu.



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.

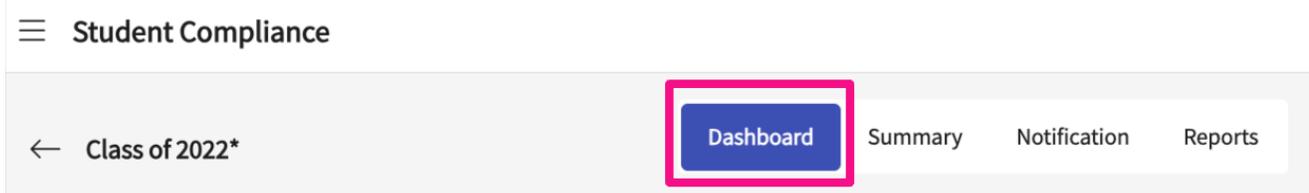


The screenshot shows the 'Student Compliance' dashboard. At the top, there are tabs for 'Setup', 'Compliance' (highlighted with a red box and labeled '1'), and 'Review Clarifications'. Below the tabs, there are 'View By' options: 'By Cohort' (highlighted with a red box and labeled '2'), 'By Student', and 'By Document'. A toggle switch is set to 'Hide cohorts that do not have any active documents or students.' Below this is a search bar and a table of cohorts.

COHORTS ↑	COMPLIANT STUDENTS	NON COMPLIANT STUDENTS	PENDING REVIEW DOCUMENTS	EXPIRING DOCUMENTS	EXPIRED DOCUMENTS	POWERED BY 
Advanced Practice/DNP*	0 / 30	30 / 30	4	0	12	No
BSN Students* (highlighted with red box and labeled '3')	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

At the bottom of the table, there are 'Student Status' and 'Document Status' sections. 'Student Status' has a legend: 'All Docs Approved' (green square) and 'Some Action Needed' (red square). 'Document Status' has a legend: 'Get Started' (grey square) and 'In Progress' (blue square). The page footer shows 'Items per page: 50' and '1 - 8 of 8'.

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



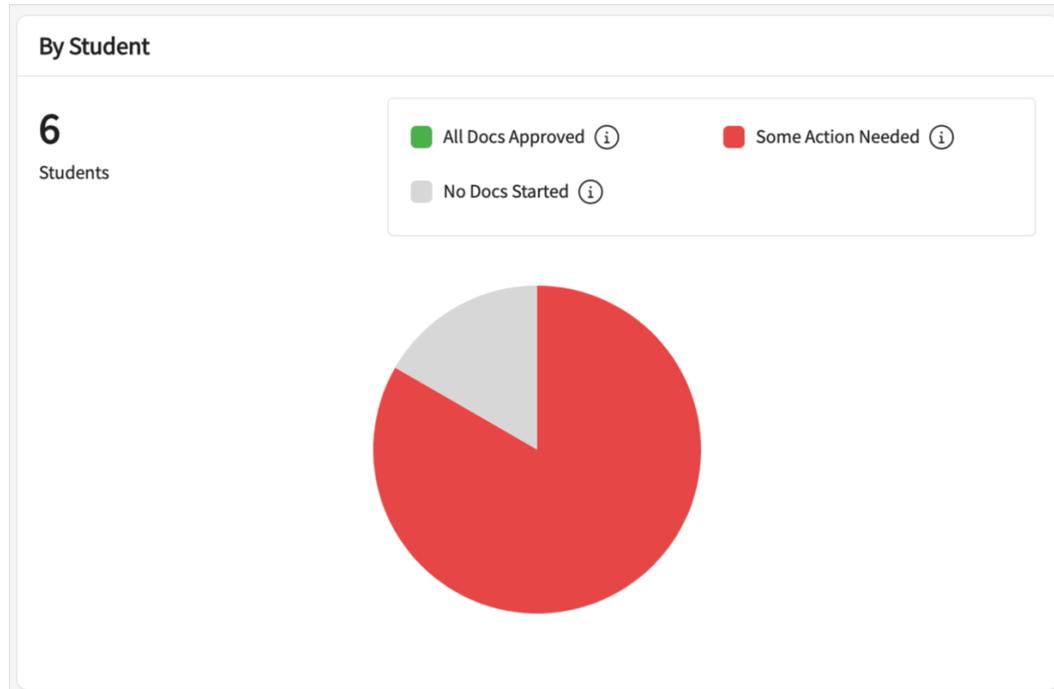
The screenshot shows the 'Student Compliance' dashboard for the 'Class of 2022*' cohort. The 'Dashboard' tab is highlighted with a red box. Other tabs include 'Summary', 'Notification', and 'Reports'. The page title is 'Student Compliance' and the cohort name is 'Class of 2022*'.

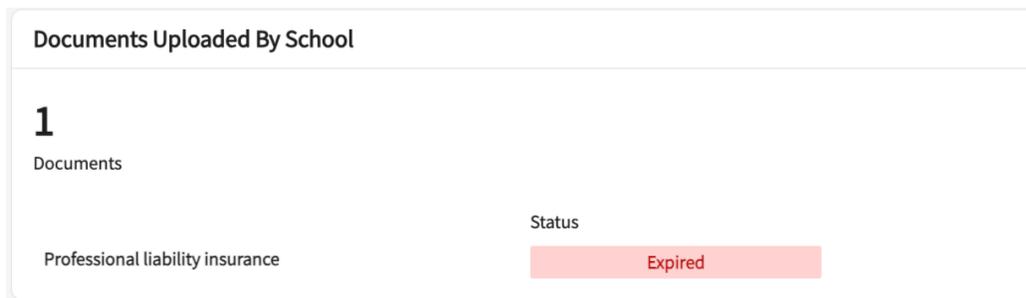
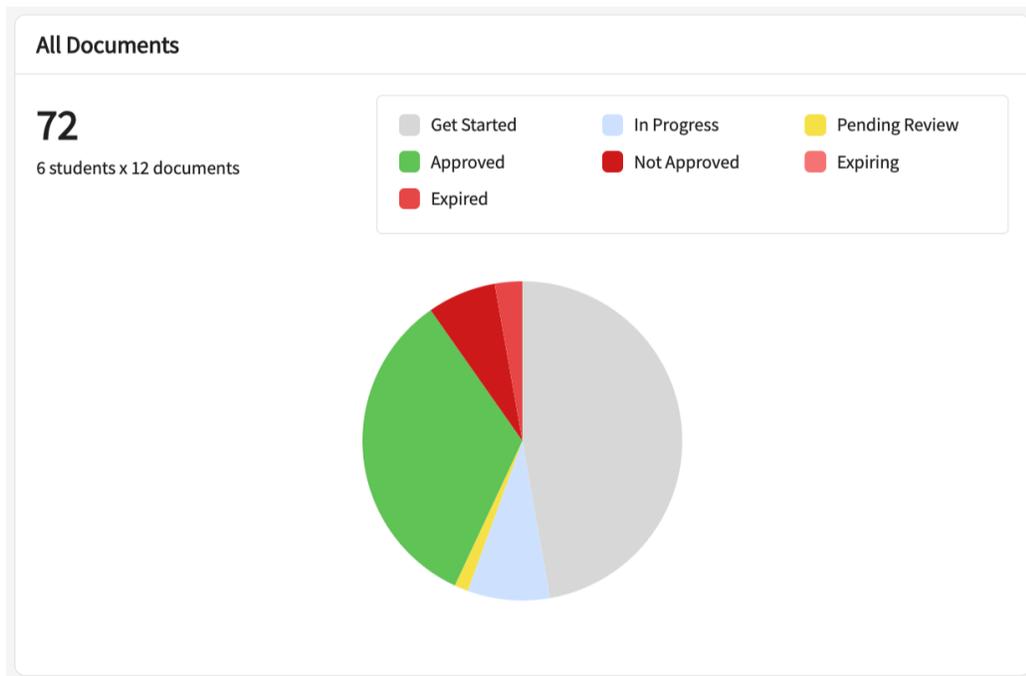
Dashboard

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.





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.

← Class of 2024 Dashboard **Summary** Notification Reports

Search Students Filters: **Some Action N...** Document Details Report 1

STUDENT ↑	ADIPL	COVID	CPR	ENTER	E2	FLU	INSUR	HEP B	MMR
Long, Kimberly (11)	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved	Approved
Mills, Marco (11)	Approved	Approved	Approved	Get Started	Expired	Expired	Approved	Approved	Approved
Rios, Terri (11)	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved	Approved
Stevenson, Samantha (11)	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Approved	Pending Review
Torres, Guadalupe (11)	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Pending Review	Pending Review
Wright, Casey (11)	Get Started	Not Approved	Pending Review	Get Started	Get Started	In Progress	Pending Review	Approved	Approved

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.

STUDENT ↑	ADIPL	COVID	CPR	ENTER	E2	FLU	INSUR	HEP B	MMR
Long,Kimberly (11)	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved	Approved
Mills,Marco (11)	Approved	Approved	Approved	Get Started	Expired	Expired	Approved	Approved	Approved
Rios,Terri (11)	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved	Approved
Stevenson,Samantha (11)	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Approved	Pending Review
Torres,Guadalupe (11)	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Pending Review	Pending Review
Wright,Casey (11)	Get Started	Not Approved	Pending Review	Get Started	Get Started	In Progress	Pending Review	Approved	Approved

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

Filters

Reset all

Groups

Enrollment

Requirement

Status (1)

Reason

Student Status (1)

Student Tags

Follow-up Date

Clear all

Get Started

In Progress

Pending Review

Approved

Not Approved

Expiring

Expired

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.

STUDENT ↑	CPR	INSUR	HEP B	MMR	POLIO	TB
Rios,Terri (0)						
Stevenson,Samantha (5)	Pending Review	Pending Review		Pending Review	Pending Review	Pending Review
Torres,Guadalupe (6)	Pending Review					
Wright,Casey (4)	Pending Review	Pending Review			Pending Review	Pending Review

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.

Hepatitis B (HepB)
Torres,Guadalupe (Guadalupe.Torres@exxat.com)

Pending Review
Due on Sep 30, 2021

Required Action Status History

Document Status: Pending Review
Reason: [Empty]

Comment
Paragraph [Rich Text Editor]
2000 characters left

Update Status
Last updated by Torres, Guadalupe on Dec 13, 2021 04:23 PM

Vaccination

Dose 1 Date Jun 23, 1999	Dose 2 Date Aug 26, 1999
Dose 3 Date Nov 30, 1999	

View Document

Edit compliance item details

View any uploaded documents

Approved

Guidelines For Students
Individual dates for all 3 vaccinations and numerical titer value required If you have partially completed your 3 dose series and/or have a negative or equivocal titer and are awaiting a booster shot, please complete a declination form.

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

Compliance

Hepatitis B (HepB)
Torres,Guadalupe (Guadalupe.Torres@exxat.com)

Approved
Due on Sep 30, 2021

Add New Record

Required Action Status History

Document Status: Approve
Reason: [Empty]

Comment
Paragraph [Rich Text Editor]
Approved.

Document has been approved successfully.

Guidelines For Students
Individual dates for all 3 vaccinations and numerical titer value required If you have partially completed your 3 dose series and/or have a negative or equivocal titer and are awaiting a booster shot, please complete a declination form.

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

STUDENT ↑	AD IPL	COVID	CPR	ENTER	E2	FLU	INSUR	HEP B	MMR
Kumar,Aditya	(11) [down arrow]	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started
Kumar,Aditya	(11) [down arrow]	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started
Long,Kimberly	(11) [down arrow]	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved
Mills,Marco	(11) [down arrow]	Approved	Approved	Approved	Get Started	Expired	Expired	Approved	Approved
Rios,Terri	(11) [down arrow]	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved
Singh,Shubham	(11) [down arrow]	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started	Get Started
Stevenson,Samantha	(11) [down arrow]	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Approved
Torres,Guadalupe	(11) [down arrow]	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Approved

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

Cohort	Student	Email Id	COVID-19 Vaccination Status	COVID-19 Vaccination > COVID Dose - 1 > Dose 1 Date	COVID-19 Vaccination > COVID Dose - 1 > Manufacturer
Class of 2024	Long,Kimberly	Kimberly.Long@exxat.com	Approved	09-06-2021	Pfizer
Class of 2024	Mills,Marco	Marco.Mills@exxat.com	Approved		
Class of 2024	Rios,Terri	Terri.Rios@exxat.com	Approved	02-01-2021	Moderna
Class of 2024	Stevenson,Samantha	Samantha.Stevenson@exxat.com	Approved	03-01-2021	Pfizer
Class of 2024	Torres,Guadalupe	Guadalupe.Torres@exxat.com	Approved	10-15-2021	Pfizer
Class of 2024	Wright,Casey	Casey.wright@exxat.com	Not Approved	10-04-2021	Moderna

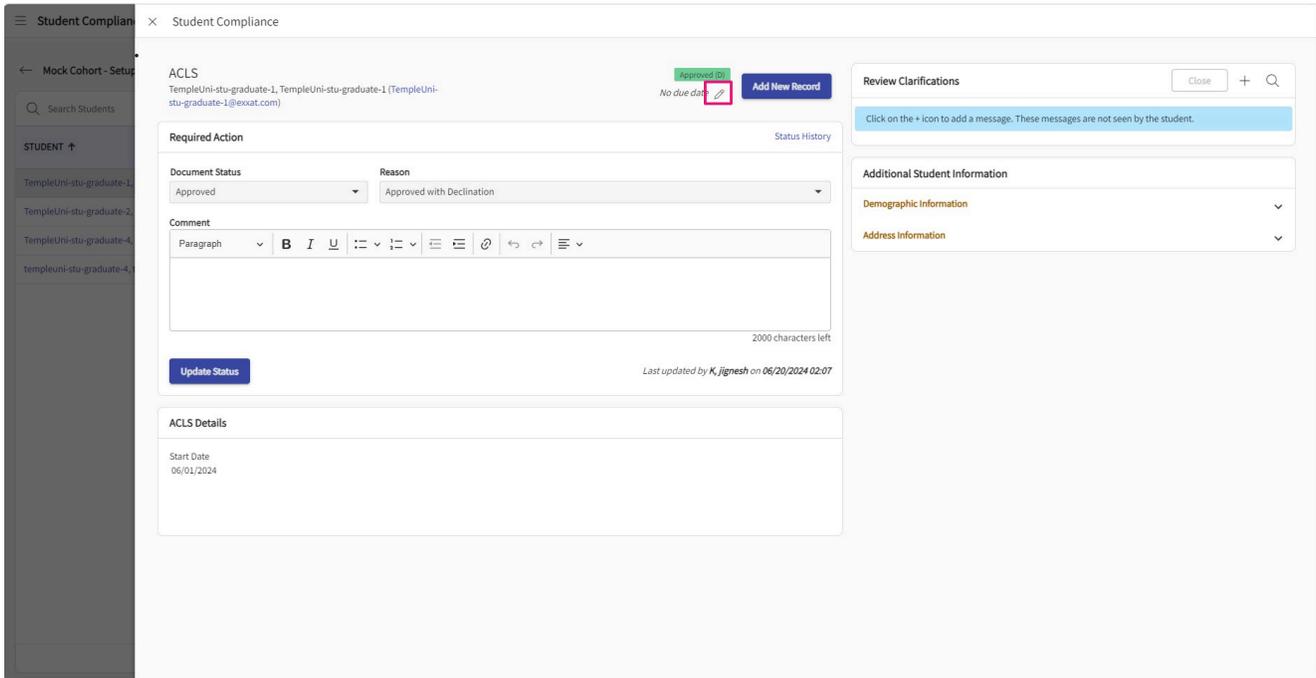
Updating Due Date

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.

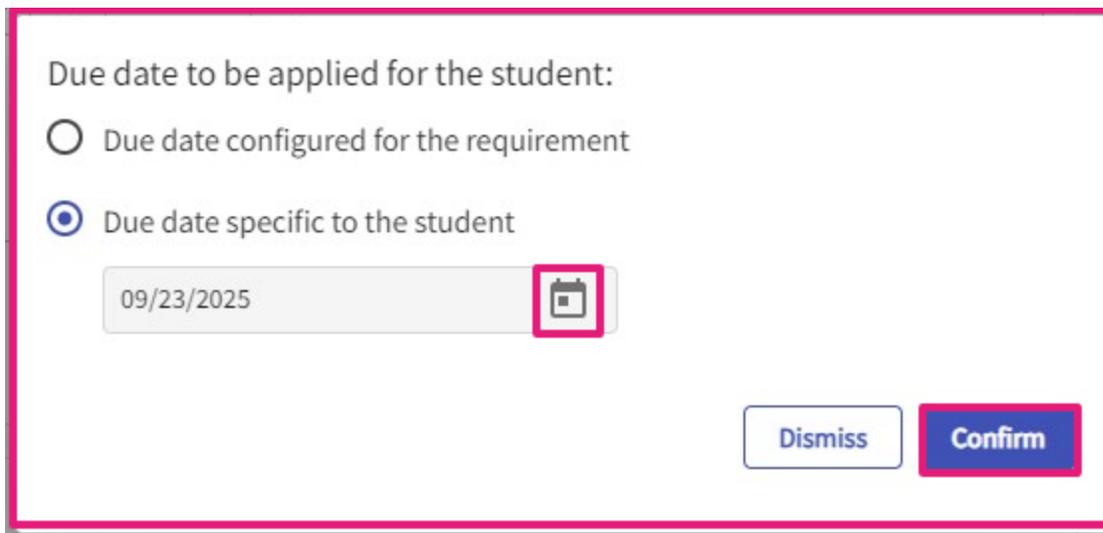
STUDENT ↑	AD IPL	COVID	CPR	ENTER	E2	FLU	INSUR	HEP B	MMR
Long,Kimberly	(11) [down arrow]	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved
Mills,Marco	(11) [down arrow]	Approved	Approved	Approved	Get Started	Expired	Expired	Approved	Approved
Rios,Terri	(11) [down arrow]	Get Started	Approved	Approved	Get Started	Get Started	Expired	Approved	Approved
Stevenson,Samantha	(11) [down arrow]	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Approved
Torres,Guadalupe	(11) [down arrow]	Get Started	Approved	Pending Review	Get Started	Get Started	Not Approved	Pending Review	Pending Review
Wright,Casey	(11) [down arrow]	Get Started	Not Approved	Pending Review	Get Started	Get Started	In Progress	Pending Review	Approved

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.

<input type="checkbox"/>	NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
<input type="checkbox"/>	> Brewer,Donald	Donald.Brewer@exxat.com	12 Document	
<input type="checkbox"/>	> Long,Kimberly	Kimberly.Long@exxat.com	12 Document	
<input type="checkbox"/>	> Phelps,Lester	Lester.Phelps@exxat.com	12 Document	
<input type="checkbox"/>	> Todd,Jeannie	Jeannie.Todd@exxat.com	12 Document	

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.

<input type="checkbox"/>	NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
<input type="checkbox"/>	> Brewer,Donald	Donald.Brewer@exxat.com	12 Document	
<input type="checkbox"/>	> Long,Kimberly	Kimberly.Long@exxat.com	12 Document	
<input type="checkbox"/>	> Phelps,Lester	Lester.Phelps@exxat.com	12 Document	
<input type="checkbox"/>	> Todd,Jeannie	Jeannie.Todd@exxat.com	12 Document	

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

<input checked="" type="checkbox"/>	NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
<input checked="" type="checkbox"/>	▼ Brewer,Donald	Donald.Brewer@exxat.com	12 Document Selected	
<input checked="" type="checkbox"/>			Annual Physical	Get Started
<input checked="" type="checkbox"/>			Background check	Get Started
<input checked="" type="checkbox"/>			COVID-19 Vaccination	Not Approved
<input checked="" type="checkbox"/>			CPR/BLS	Approved

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.

× Filters Apply

Reset all

Groups

Enrollment Calendar

Requirement

Status (3)

Reason

Student Status

Student Tags

Follow-up Date

Clear all

Get Started

In Progress

Pending Review

Approved

Not Approved

Expiring

Expired

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.

<input type="checkbox"/>	NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
<input type="checkbox"/>	> Brewer,Donald	Donald.Brewer@exxat.com	4 Document	
<input type="checkbox"/>	> Long,Kimberly	Kimberly.Long@exxat.com	1 Document	
<input type="checkbox"/>	> Phelps,Lester	Lester.Phelps@exxat.com	3 Document	
<input type="checkbox"/>	> Todd,Jeannie	Jeannie.Todd@exxat.com	1 Document	

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

<input checked="" type="checkbox"/>	NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
<input checked="" type="checkbox"/>	> Brewer,Donald	Donald.Brewer@exxat.com	12 Document Selected	
<input checked="" type="checkbox"/>	> Long,Kimberly	Kimberly.Long@exxat.com	12 Document Selected	
<input checked="" type="checkbox"/>	> Phelps,Lester	Lester.Phelps@exxat.com	12 Document Selected	
<input checked="" type="checkbox"/>	> Todd,Jeannie	Jeannie.Todd@exxat.com	12 Document Selected	

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

Compose Email

1 Recipients 2 Template 3 Preview

Recipients 5 selected recipients

- Brewer,Donald (Donald.Brewer@exxat.com)
- Long,Kimberly (Kimberly.Long@exxat.com)
- Phelps,Lester (Lester.Phelps@exxat.com)
- Todd,Jeannie (Jeannie.Todd@exxat.com)
- Vaishnav,Kunal (kunal.vaishnav@gmail.com)

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

Override Recipient's Email

Reply to*

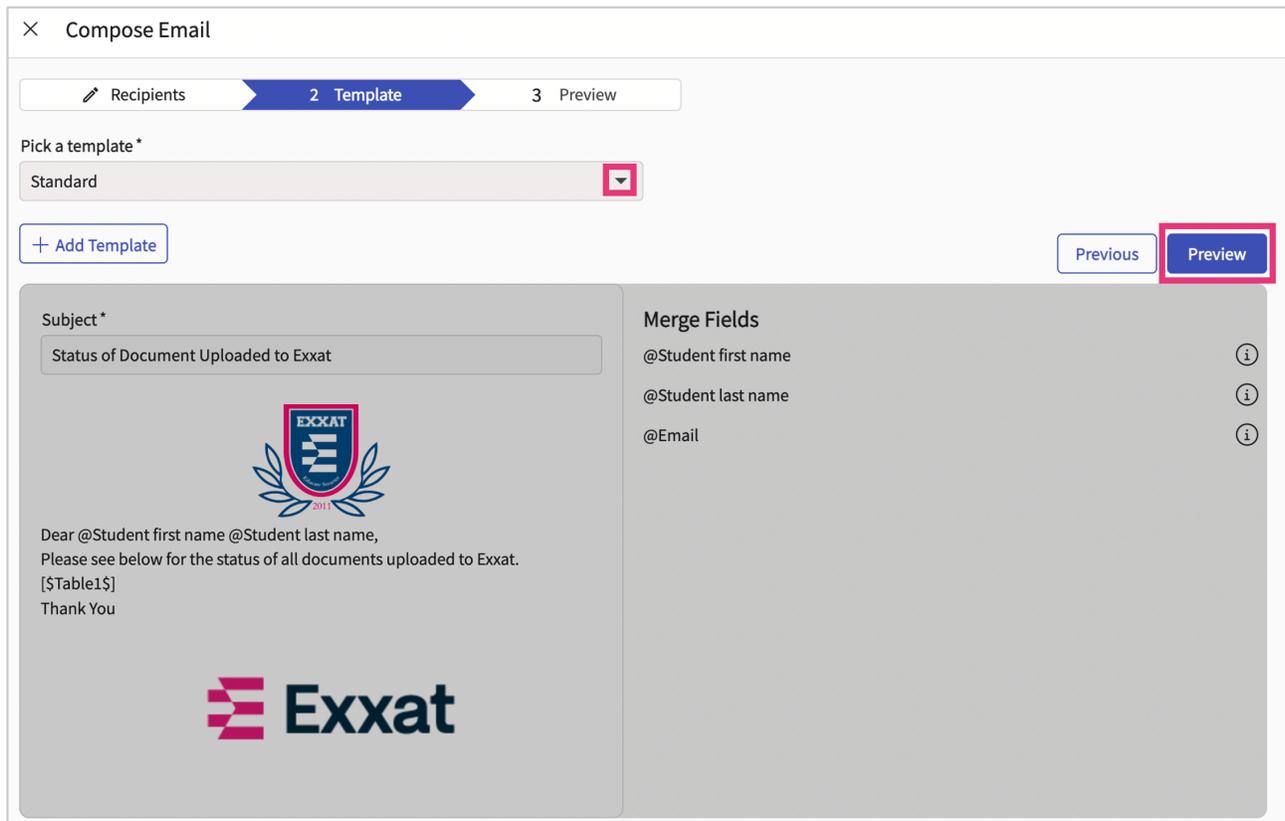
CC

BCC

Upload files

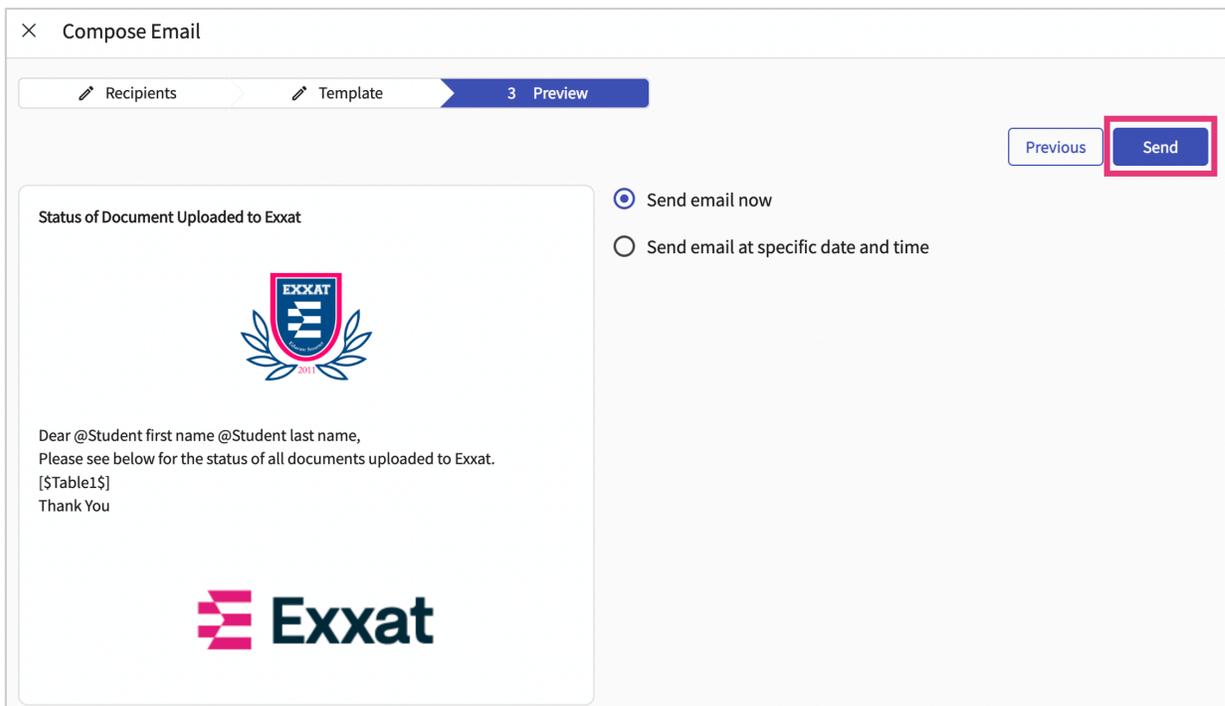
Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm
You can only upload files with file size under 10 MB.

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.

NAME	EMAIL	DOCUMENT	DOCUMENT STATUS
Brewer, Donald	Donald.Brewer@exxat.com	12 Document	
Long, Kimberly	Kimberly.Long@exxat.com	12 Document	
Phelps, Lester	Lester.Phelps@exxat.com	12 Document	
Todd, Jeannie	Jeannie.Todd@exxat.com	12 Document	

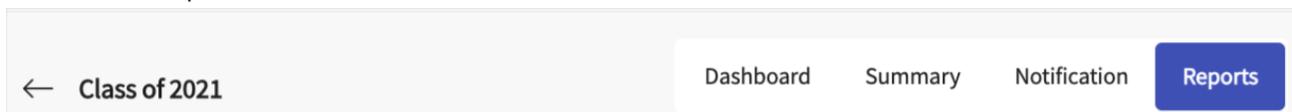
Reports

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.

STUDENT NAME ↑	STUDENT EMAIL	GROUP	TAGS	REQUIREMENT NAME	REQUIREMENT STATUS
Brewer, Donald	Donald.Brewer@exxat.com	Residential		Hepatitis B (HepB)	Pending Review
Brewer, Donald	Donald.Brewer@exxat.com	Residential		Flu (Influenza)	Pending Review
Brewer, Donald	Donald.Brewer@exxat.com	Residential		Measles, Mumps, Rubella (MMR)	Pending Review

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.

STUDENT NAME ↑	STUDENT EMAIL	GROUP	TAGS	REQUIREMENT NAME	REQUIREMENT STATUS	EXPIRATION DATE
Long, Kimberly	Kimberly.Long@exxat.com	Residential	-	Flu (Influenza)	Expired	Aug 31, 2022

6. Both reports will have similar features that you can utilize:

1. Ability to export to excel

- Option to view the report in full-screen
- 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

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

Student Compliance

Setup **Compliance** Review Clarifications

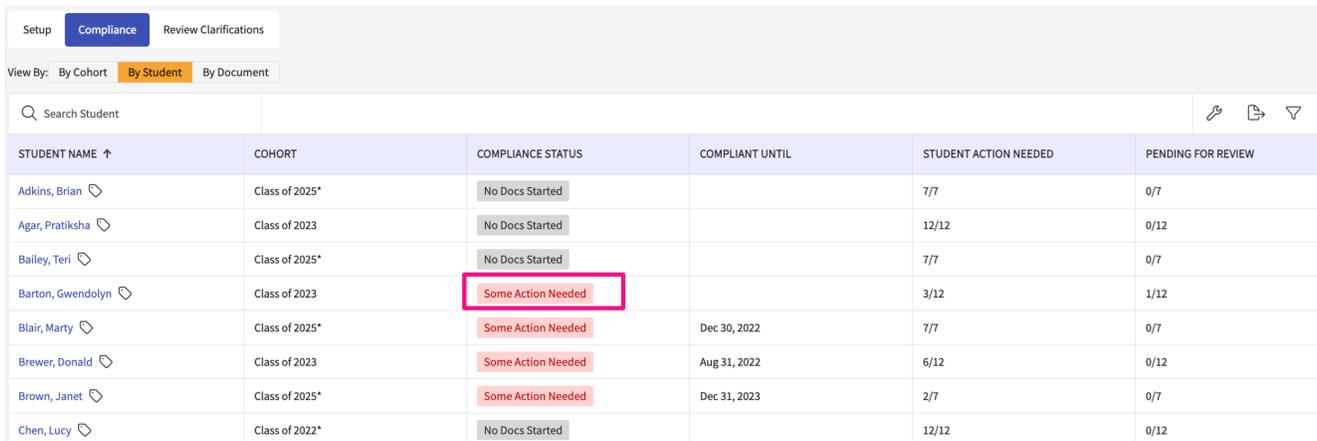
View By: By Cohort **By Student** By Document

Search Student

STUDENT NAME ↑	COHORT	COMPLIANCE STATUS	COMPLIANT UNTIL	STUDENT ACTION NEEDED	PENDING FOR REVIEW
Adkins, Brian	Class of 2025*	No Docs Started		7/7	0/7
Agar, Pratiksha	Class of 2023	No Docs Started		12/12	0/12
Bailey, Teri	Class of 2025*	No Docs Started		7/7	0/7
Barton, Gwendolyn	Class of 2023	Some Action Needed		3/12	1/12
Blair, Marty	Class of 2025*	Some Action Needed	Dec 30, 2022	7/7	0/7
Brewer, Donald	Class of 2023	Some Action Needed	Aug 31, 2022	6/12	0/12
Brown, Janet	Class of 2025*	Some Action Needed	Dec 31, 2023	2/7	0/7
Chen, Lucy	Class of 2022*	No Docs Started		12/12	0/12
Dawson, Spencer	Class of 2025*	Some Action Needed		7/7	0/7
Deitra, Kay	Class of 2022*	Some Action Needed	Aug 31, 2022	4/12	1/12
Evans, Kevin	Class of 2025*	Some Action Needed	Dec 31, 2023	4/7	1/7

- 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.

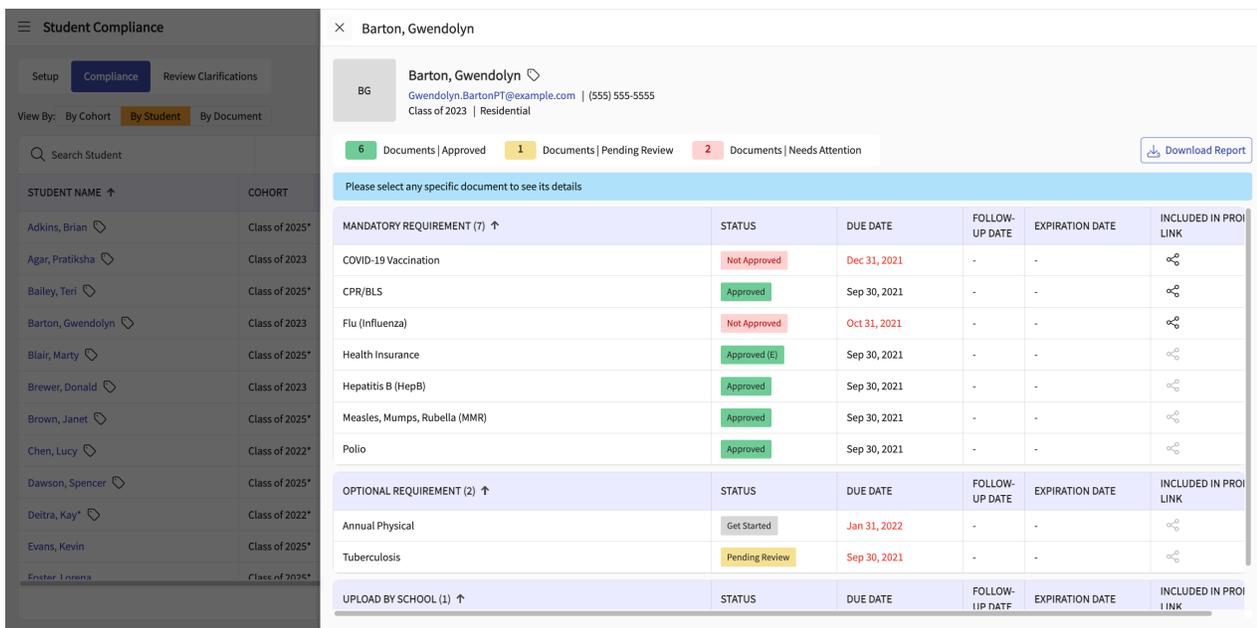
5. You can click on the Compliance Status to view all the documents



The screenshot shows a dashboard with tabs for Setup, Compliance, and Review Clarifications. The 'Compliance' tab is active. Below the tabs, there are filters for 'View By: By Cohort', 'By Student', and 'By Document'. A search bar labeled 'Search Student' is present. The main content is a table with the following columns: STUDENT NAME, COHORT, COMPLIANCE STATUS, COMPLIANT UNTIL, STUDENT ACTION NEEDED, and PENDING FOR REVIEW. The table lists several students, with 'Barton, Gwendolyn' highlighted in a pink box because her 'COMPLIANCE STATUS' is 'Some Action Needed'.

STUDENT NAME ↑	COHORT	COMPLIANCE STATUS	COMPLIANT UNTIL	STUDENT ACTION NEEDED	PENDING FOR REVIEW
Adkins, Brian	Class of 2025*	No Docs Started		7/7	0/7
Agar, Pratiksha	Class of 2023	No Docs Started		12/12	0/12
Bailey, Teri	Class of 2025*	No Docs Started		7/7	0/7
Barton, Gwendolyn	Class of 2023	Some Action Needed		3/12	1/12
Blair, Marty	Class of 2025*	Some Action Needed	Dec 30, 2022	7/7	0/7
Brewer, Donald	Class of 2023	Some Action Needed	Aug 31, 2022	6/12	0/12
Brown, Janet	Class of 2025*	Some Action Needed	Dec 31, 2023	2/7	0/7
Chen, Lucy	Class of 2022*	No Docs Started		12/12	0/12

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.



The screenshot shows the 'Student Compliance' page for 'Barton, Gwendolyn'. The page has a sidebar with navigation options and a main content area. The main content area shows a summary of compliance status: 6 Documents | Approved, 1 Documents | Pending Review, and 2 Documents | Needs Attention. There is a 'Download Report' button. Below this is a table of documents with columns: MANDATORY REQUIREMENT (7) ↑, STATUS, DUE DATE, FOLLOW-UP DATE, EXPIRATION DATE, and INCLUDED IN PROFILE LINK. The table lists various requirements like COVID-19 Vaccination, CPR/BLS, Flu (Influenza), Health Insurance, Hepatitis B (HepB), Measles, Mumps, Rubella (MMR), and Polio. The status for each requirement is indicated by a colored box (e.g., Not Approved, Approved, Pending Review). Below this is a table for OPTIONAL REQUIREMENT (2) ↑, and a table for UPLOAD BY SCHOOL (1) ↑.

MANDATORY REQUIREMENT (7) ↑	STATUS	DUE DATE	FOLLOW-UP DATE	EXPIRATION DATE	INCLUDED IN PROFILE LINK
COVID-19 Vaccination	Not Approved	Dec 31, 2021	-	-	
CPR/BLS	Approved	Sep 30, 2021	-	-	
Flu (Influenza)	Not Approved	Oct 31, 2021	-	-	
Health Insurance	Approved (E)	Sep 30, 2021	-	-	
Hepatitis B (HepB)	Approved	Sep 30, 2021	-	-	
Measles, Mumps, Rubella (MMR)	Approved	Sep 30, 2021	-	-	
Polio	Approved	Sep 30, 2021	-	-	

OPTIONAL REQUIREMENT (2) ↑	STATUS	DUE DATE	FOLLOW-UP DATE	EXPIRATION DATE	INCLUDED IN PROFILE LINK
Annual Physical	Get Started	Jan 31, 2022	-	-	
Tuberculosis	Pending Review	Sep 30, 2021	-	-	

UPLOAD BY SCHOOL (1) ↑	STATUS	DUE DATE	FOLLOW-UP DATE	EXPIRATION DATE	INCLUDED IN PROFILE LINK
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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 category 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

Student Compliance

Setup **Compliance** Review Clarifications

View By: By Cohort By Student **By Document**

Use the "Requirement" filter to view all records for a specific document.

Search Student

DOCUMENT NAME	DOCUMENT STATUS	STUDENT NAME	COHORT	DUE DATE	EXPIRATION DATE	FOLLOW UP DATE	STUDENT EMAIL
COVID-19 Vaccination	In Progress	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Hepatitis B (HepB)	Approved	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Flu (Influenza)	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Measles, Mumps, Rubella (MMR)	Approved	Deriksson, Ronald	Class of 2021	Oct 31, 2021			Ronald.Deriksson@example.com
Physical Examination Form	Not Approved	Deriksson, Ronald	Class of 2021	Sep 30, 2021			Ronald.Deriksson@example.com
Polio	Not Approved	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Tuberculosis (TB)	Approved	Deriksson, Ronald	Class of 2021	Oct 31, 2021			Ronald.Deriksson@example.com
Health Insurance	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
CPR	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
COVID-19 Vaccination	Approved	Rodriguez, Bulah	Class of 2022*				Beulah.RodriguezPA@example.com
Hepatitis B (HepB)	Get Started	Rodriguez, Bulah	Class of 2022*				Beulah.RodriguezPA@example.com

Items per page: 100 1 - 100 of 249

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

Student Compliance

Setup **Compliance** Review Clarifications

View By: By Cohort By Student **By Document**

Use the "Requirement" filter to view all records for a specific document.

Search Student

DOCUMENT NAME	DOCUMENT STATUS	STUDENT NAME	COHORT	DUE DATE	EXPIRATION DATE	FOLLOW UP DATE	STUDENT EMAIL
COVID-19 Vaccination	In Progress	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Hepatitis B (HepB)	Approved	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Flu (Influenza)	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Measles, Mumps, Rubella (MMR)	Approved	Deriksson, Ronald	Class of 2021	Oct 31, 2021			Ronald.Deriksson@example.com
Physical Examination Form	Not Approved	Deriksson, Ronald	Class of 2021	Sep 30, 2021			Ronald.Deriksson@example.com
Polio	Not Approved	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
Tuberculosis (TB)	Approved	Deriksson, Ronald	Class of 2021	Oct 31, 2021			Ronald.Deriksson@example.com
Health Insurance	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
CPR	Get Started	Deriksson, Ronald	Class of 2021				Ronald.Deriksson@example.com
COVID-19 Vaccination	Approved	Rodriguez, Bulah	Class of 2022*				Beulah.RodriguezPA@example.com
Hepatitis B (HepB)	Get Started	Rodriguez, Bulah	Class of 2022*				Beulah.RodriguezPA@example.com

Items per page: 100 1 - 100 of 249

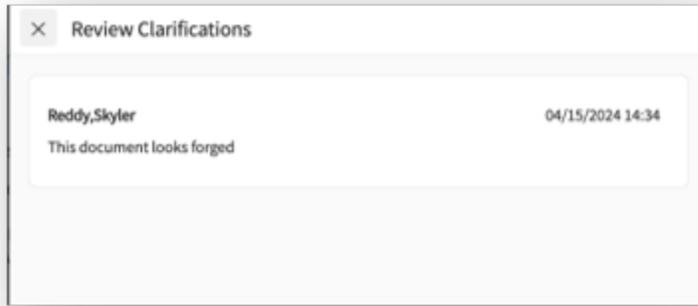
5. You will see detailed of all compliance details

The screenshot shows a 'Compliance' window for 'Hepatitis B (HepB)' for student 'Deriksson, Ronald (Ronald.Deriksson@example.com)'. The document status is 'Approved'. The 'Required Action' section shows 'Document Status' as 'Approve' and 'Reason' as an empty dropdown. A 'Comment' field is present with a rich text editor and a '2000 characters left' indicator. An 'Update Status' button is visible. Below this, there are sections for 'Vaccination', 'Titer', and 'Declination Form'. The 'Declination Form' section shows a 'Date' of 'Sep 21, 2021' and a 'View Document' link. On the right, there is a 'Review Clarifications' section with a 'Close' button and a message: 'Click on the + icon to add a message. These messages are not seen by the student.' Below that are 'Guidelines For Students' and 'Templates'.

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

This screenshot shows the 'Compliance' page for the same student, but with the 'Archived Records' section expanded. The 'Required Action' section now shows 'Document Status' as 'Approved' and 'Reason' as 'Approved with Religious Exemption'. The 'Physical Examination Form Details' section shows 'Exam Date' as '08/01/2024' and 'Expiration Date' as '08/01/2025'. The 'Archived Records' section has a 'View Archived Records' button and a list of records. The first record shows 'Last updated by Reddy, Skyler on 08/16/2024 13:34' and 'Approved' status. Below it, another 'Physical Examination Form Details' section shows 'Exam Date' as '03/22/2022' and 'Expiration Date' as '03/22/2023'. A 'View All Clarifications' link is also present.

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



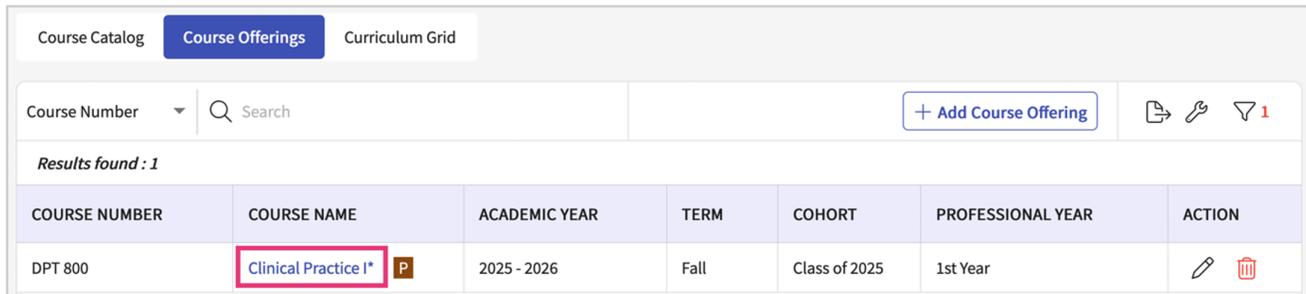
Reviewing Student Compliance From Course Section

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.



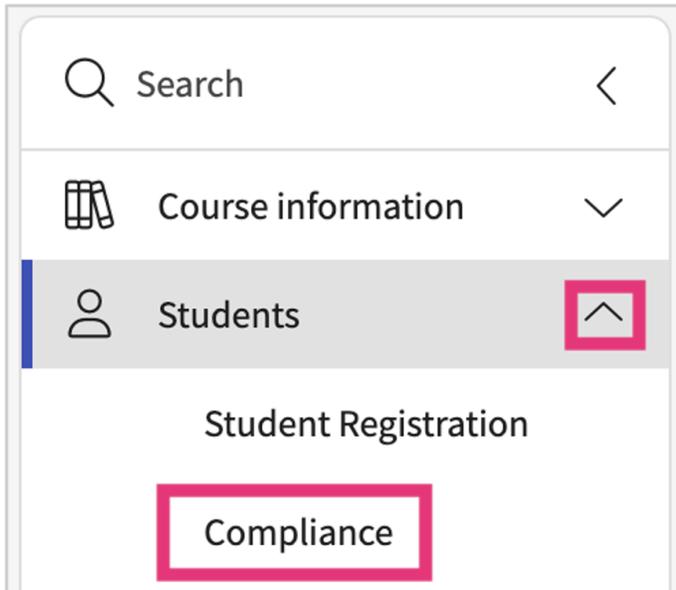
2. Select the Course you'd like to manage.



A screenshot of a 'Course Offerings' table. The table has tabs for 'Course Catalog', 'Course Offerings', and 'Curriculum Grid'. The 'Course Offerings' tab is active. The table has a search bar and a '+ Add Course Offering' button. Below the search bar, it says 'Results found : 1'. The table has the following columns: COURSE NUMBER, COURSE NAME, ACADEMIC YEAR, TERM, COHORT, PROFESSIONAL YEAR, and ACTION. The row for 'DPT 800' is highlighted, and the 'Clinical Practice I*' course name is circled in red.

COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	TERM	COHORT	PROFESSIONAL YEAR	ACTION
DPT 800	Clinical Practice I* P	2025 - 2026	Fall	Class of 2025	1st Year	 

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.

A screenshot of a student compliance interface. At the top, there are three filter buttons: '0 Students | No Docs Started', '5 Students | Some Action Needed' (highlighted), and '0 Students | All Docs Approved'. Below the filters is a search bar for students and a table with 5 records. The table has columns for Student, Cohort & Group, Placement Duration, and Status. The status for all students is 'Some Action Needed', with the one for 'Stevenson, Samantha' highlighted in red.

STUDENT ↑	COHORT & GROUP	PLACEMENT DURATION	STATUS ⓘ
Mills, Marco	Class of 2024 Residential	Nov 04, 2021 - Jun 18, 2024	Some Action Needed
Rios, Terri	Class of 2024 Residential	Nov 03, 2021 - Dec 21, 2021	Some Action Needed
Stevenson, Samantha	Class of 2024 Residential	Nov 03, 2021 - Jul 29, 2023	Some Action Needed
Torres, Guadalupe	Class of 2024 Hybrid	Nov 03, 2021 - Dec 21, 2021	Some Action Needed
Wright, Casey	Class of 2024 Residential	Nov 03, 2021 - Jul 03, 2023	Some Action Needed

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.

CPR/BLS

CPR/BLS Pending Review
 Long, Kimberly (Kimberly.Long@exxat.com)

Required Action

Document Status
 Approved

Comment
 Paragraph **B** *I* U **:=** **:=** **≡** **≡** **🔗** **↶** **↷** **☰**

2000 characters left

Last updated by Long, Kimberly on Dec 13, 2021 02:20 PM

Status History

Update Status

CPR/BLS Details 

Start Date
 Oct 04, 2021

View Document

Guidelines For Students
 Must be a in person course sponsored by the American Red Cross or American Heart Association. Online and hybrid courses will not be accepted.

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* | U | | | | | | | |

2000 characters left

Last updated: [redacted]
Status: [redacted] Document has been approved successfully.