Exxat Prism enables efficient communication with site locations, whether for general information, location updates, or slot requests. This guide details the steps to send emails, manage recipients, and review responses.

- Sending Emails
- Reviewing Email Dashboard
- Reviewing the Response Report

## Sending Email to Sites

Whether you are sending a general communication, a request for updated location information, or a slot request, the process of selecting the Locations you will contact and drafting your communication is the same!

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



2. Select Emails from the ribbon.

3. Select Send Emails for your desired communication.

Setup	Sites	Locations	Personnel	Contrac	ts Emails	Explore Locations	Reports	Dashboard			
Title		• Q 2023				×				+ Setup	new communication
6 Results	Found										
COMMUN	etup Sites Locations Personnel Con e				ACTIVITY		SELECT	LOCATIONS AN	D SEND EMAILS	EMAIL DASHBOARD	RESPONSE REPORT
Exxat Univ Last upda	<b>versity Upd</b> ted on Feb	ate Location Inf 10, 2023 6:52 A	formation 2023	Ø	Request Update	ed Location Information	Send er Email s Last up	nails aved as draft dated on Feb 10	, 2023 6:52 AM	E	L <u>ui</u>

4. The system will show you all locations that have at least 1 personnel set to receive slot request emails.

5. If you prefer to filter the recipient's list by location, select the "Location" view

Ξ	Sites				800	Ee 🕜 🖵 Chat	Ask Leo 🕅 Am	ee Jotangiya Exxat Sales (PA) 🛛 🗸
$\leftarrow$	1 Slot Red Select by	Select locations 2 Compos juest 2024 Location Personnel	Last	saved on 01/07/2025 1:44 PM EST Email sent: Sites/Lo	2 Save changes Save & Next cations: 11 Recipients: 10			
	Sites	n - I Search	Filters: Include Staff 🛞					C ∇1
	69 Re.	sults Found	Image: Compose mall       Image: Compose mall<					
	Sites  Select by Location  Control by Contro	LOCATION	SITE 🛧	RECIPIENT	LOCATION SETTINGS	LOCATION CATEGORIES	LAST EMAIL SENT/SCHEDULED TIME	REQUEST RESPONSE
		Abundant Health - Secondary Hos KA, AK   Out-Area	Abundant Health - New Site	Alicia Inagram [Manager/Dir		Spanish Speakers Only	04/26/2024 6:34 AM EST	No Response
		Abundant Health - Main Hos 🟷 Los Angeles, CA   In-Area	Abundant Health*	Alicia Inagram [Manager/Dir Alice Li [Administrator,Clinic Show More	Cardiology Emergency Medicine Family Medicine Show More	Indisciplinary Opportunity,	05/01/2024 1:50 PM EST	Slots offered
	Sites	Abundant Health - Main Hos 🟷 Los Angeles, CA   In-Area	Abundant Health*	Alicia Inagram [Manager/Dir Alice Li [Administrator,Clinic Show More	Cardiology Emergency Medicine Family Medicine Show More	Indisciplinary Opportunity,	02/05/2024 9:39 AM EST	No Response
		Abundant Health - Main Hos 🟷 Los Angeles, CA   In-Area	Abundant Health*	Alicia Inagram [Manager/Dir Alice Li [Administrator,Clinic Show More	Cardiology Emergency Medicine Family Medicine Show More	Indisciplinary Opportunity,	N/A	Slots offered
		Abundant - Action Therapy ( 🟷 Long Beach, CA   North Coast	Abundant Health*	은 Alice Li [Administrator,Clinic 은 Peter Mentor [Clinical Prece Show More	Allergy and Immunolo Cardiology Emergency Medicine Show More	Spanish Speakers Only, Indi	N/A	N/A
						Iten	ns per page: 75 1 – 69 of 69	

6. If you prefer to filter the recipient's list by personnel, select the "personnel" view

≡	Sites						## <b>Eø</b> ?	모) Chat 📢 🄇	Amee Jotangiya Exxat Sales (PA) 🗸
$\leftarrow$	Slot Re Select	equest 2024 by: Location Personn	2 Compose email					Last saved on 01,	107/2025 5:03 PM EST Save changes Save & Next
	Q	Search	1						$\bigtriangledown$
									Selected recipients: 65
		PERSONNEL NAME ↑	DESIGNATION	EMAIL ID	CATEGORY	PRACTICE SETTING	MARKED AS PRECEPTOR	COMMUNICATION PREFERENCE	ASSOCIATED SITES
		Albert Ruiz 🟷	Administrator,Clinical Preceptor	rocio.ramirez@exxat.com			Yes	Slot request: Yes Email notification: No	Wellspring Medical Group Primary
		Alice Li	Administrator,Clinical Preceptor,Contract Coordinator	Alicelii@email.com		Allergy and Immunolo Cardiology	Yes	Slot request: Yes Email notification: Yes	Abundant Health* Primary
		Alice Li	Clinical Preceptor,Field Instructor	aliceli@email.com		Cardiology Internal Medicine Intervnetional Radio	Yes	Slot request: No Email notification: No	Alliance Medical Center* Primary
		Alicia Inagram 🛇	Manager/Director	alicia.ingram@exxat.com		Family Medicine	Yes	Slot request: Yes Email notification: Yes	Zeta Medical Group +1 more
		Amee Jotangiya	Preceptor, Preceptor	amee.j@exxat.com		Cardiology	Yes	Slot request: No Email notification: No	Zeta Medical Group Primary
	$\checkmark$	Amy Baker	Manager/Director	amy.baker@exxat.com			Yes	Slot request: Yes Email notification: Yes	Lutheran Regional +3 more
		Ana Lambert	Contract Person	erik.steen@exxat.com			No	Slot request: Yes Email notification: Yes	Lifeshades Medical Primary
		Anamika Singh		anamika.singh@exxat.com			Yes	Slot request: No Email notification: Yes	Abundant Health* Primary
		Angel Sharp 🟷	Manager/Director	angel.sharp@exxat.com			Yes	Slot request: Yes Email notification: Yes	Memorial Hospital West Primary
								Items per page:	75 1-68 of 68  < < 1 > >

- 7. The system will also show the filter options as listed below:-
  - 1. **Location Area** will filter the location, that are in the select location area as assigned by the school and to select the locations with No area assigned.
  - 2. Site status and location status Will filter Sites/Locations that are Active or Inactive as per the filler selected.
  - 3. **Site Tag and location tag** Will filter Sites/ locations based on tags that are assigned by the school or filter the site/locations with No tags, assigned.

- 4. Location setting Will filter locations based on settings that are selected by the school or filter the locations with No settings, assigned.
- 5. **Location category –** Will filter locations based on category that are assigned by the school or filter the locations with No category, assigned.
- Request Response Will filter the locations with the response that they have provided for the slot request like, Filter locations that have no responded, Contact later, No slots to offer and NA.
- 8. The system will also show you all inactive Sites and Locations. If you would like to remove these from your mailing, click the filter icon and set the Site and Location Status to Active.

	imes Filters		Apply
	Reset all	Reset all Select all	
	Location Area	No tags assigned	
	State	Accept PA student only     Available Slots	
	Personnel Email	Challenging for Students	
	Site status	Consortium member	
	Location status	Female student only	
	Site tags	<ul> <li>Offers slots every other year</li> </ul>	
	Location tags	Private practice	
	Location Settings	Provides lunch	
	Location Categories	Umbrella Contract	
_	Email Sent	U West region	
$\int 1$	Request Response		

9. To include locations in your mailing, simply click the open checkbox on the left. You can easily select all records by selecting the checkbox at the top. This will provide you an option to select all the records on all the pages by clicking on the Select all location.

	Select locations 2 Compo	se email						
Exxat l	Iniversity Slot Request 2024					Save changes	Save &	& Next
Email s	ent 59 Sites/Locations 56	6 Recipients (i) It's always re	ecommended to click on "Save changes"	after every 5-10 pages of lo	cations selection.	Selected locatio	ns: 103 (	Clear All
Locat	ion - Q Search		Filters: Slot request 🛞		Vie	ew List of Personnel (i)	C	<b>∀1</b>
All lo	cations in this page are sele ted. Select a	all 163 locations across all pages (any e is	ting saved selections outside of this list w	ill be disregarded)				
	LOCATION	SITE ↑	RECIPIENT	LOCATION SETTINGS	LOCATION CATEGORIES	LAST EMAIL SENT/SCHEDULED TIME	:	REQ
	ABC Central Chesterfield, VA	ABC Community Medical (Demo)	A Mock test Pinaz Test [Clinic John Johnson [SCCE]	Family Medicine Internal Medicine IP Mixed Show More		N/A		N/A
	ABC Orthopedics Cottage Grove, MN   Out-Area	ABC Community Medical (Demo)	은 John Johnson [SCCE]	Family Medicine Internal Medicine IP Mixed Show More		N/A		N/A
_	ABC Ambulatory Care	ABC Community Medical (Demo)	Bradley Cooper	Family Medicine Internal Medicine		N /A		NI /A
				Items per page: 75 1	– 75 of 163 🛛 🖂	< 1 2	>	х

10. If you would like deselect all the Selection use the Clear All option.

1	Select locations 2 Compos	e email						
Exxat U	niversity Slot Request 2024					Save changes	Save	& Next
1       Select locations       2       Compose email         Save changes         Exact University Slot Request 2024         Email sent       59       Sites/Locations       56       Recipients       It's always recommended to click on "Save changes" after every 5-10 pages of locations selection.       Selected location         Location <ul> <li>Q</li> <li>Search</li> <li>Filters:</li> <li>Slot request @</li> <li>View List of Personnel (I)</li> <li>All locations in this page are selected.</li> <li>Select all 163 locations across all pages (any existing saved selections outside of this list will be disregarded)</li> <li>Internal Medicine</li> <li>Sent/SCHEDULED TIME</li> <li>ABC Community Medical (Demo)</li> <li>Mock test Pinaz Test [Clinic</li> <li>John Johnson [SCCE]</li> <li>Mixed Show More</li> <li>N/A</li> </ul>		ns: 103	Clear All					
Locatio	n – Q Search		Filters: Slot request 🛞		Vi	iew List of Personnel (i)	C	$\nabla 1$
All loc	ations in this page are selected. Select al	ll 163 locations across all pages (any exis	ting saved selections outside of this list w	ill be disregarded)				
	LOCATION	SITE ↑	RECIPIENT	LOCATION SETTINGS	LOCATION CATEGORIES	LAST EMAIL SENT/SCHEDULED TIME		REQ
	ABC Central Chesterfield, VA	ABC Community Medical (Demo)	은 Mock test Pinaz Test [Clinic 은 John Johnson [SCCE]	Family Medicine Internal Medicine IP Mixed Show More		N/A		N/A

11. Recipients who are associated with multiple locations that are all under 1 site, will receive 1 email.

Caremark Central 🚫 Winona, MN	Centralmark Medical 🛛 🏷	Stella Nichols [SCCE]
Caremark Orthopedics Palm City, FL	Centralmark Medical	Stella Nichols [SCCE]
Caremark Ambulatory Care Anoka, MN	Centralmark Medical	Stella Nichols [SCCE]

12. Recipients who are associated with locations that belong to different Sites, will receive multiple emails.

Modern Wellness 🖒 Marshfield , WI	Modern Wellness		O Deborah Foster [SCCE]
Newlife Orthopedics Salt Lake City, UT	Newlife Hospital	$\bigcirc$	O Deborah Foster [SCCE]

13. If you notice a recipient is missing from your list, or would like to remove a recipient, click View List of Personnel – this will take you to the Personnel – Location Details report where you can easily update mailing preferences for personnel.

1 Sel	lect locations 2 Compose email		
Exxat Unive	ersity Slot Request 2024		Save changes Save & Next
Email sent	25 Sites/Locations 16 Recipients	(i) It's always recommended to click on "Save changes" after every 5-10 pages of lo	cations selection. Selected locations: 0
Location	✓ Q Search	Filters: Slot request 🛞	View List of Personnel (i) C V1
25 Results	Found		

14. Once you're done selecting items on the first page, click the arrow at the bottom of the page to go to the next page.

Location  - Q Search			Filters: Slot request 🛞	Filters: Slot request 🛞 View List of Personn		
25 Re.	sults Found					
	LOCATION	SITE ↑	RECIPIENT	LOCATION SETTINGS	LOCATION CATEGORIES	LAST EMAIL SENT/SCHED
	Adaptial - Easton 🔊 South Easton, MA   Out Of State	Adaptial	Aaron Hotchner [SCCE]	Acute Care Home Health Outpatient	Outpatient Conglomerate	Mar 1, 2023 3:00 AM
	Adaptial - Wellington 🖒 BALTIMORE, MD	Adaptial	Aaron Hotchner [SCCE]	Home Health		Mar 1, 2023 3:00 AM
	Alliance Medical Center - Cardiology Andover, MA	Alliance Medical Center*	<ul> <li>Kanthi Kalidindi [Manager/Director]</li> <li>John Smith [Clinical Instructor]</li> </ul>			Mar 1, 2023 3:00 AM
				ltems per pa	age: 75 1 – 75 of 95 🛛 🔇	< 1 2 > >I

15. As you select locations to include in your mailing, it is strongly recommended for you to Save Changes every 5-10 pages. While the system automatically saves your selections, this prevents any delays as the system tries to save large amounts of data.

		Save ch	Save change	Save changes	Save changes Sav	Save changes Save &
on.			Se	Select	Selected lo	Selected locat

16. Once you're done selecting your Locations, click Save & Next.

1 Se	elect locations	2	Compose email			
Exxat Univ	ersity Slot Request	2024				
Email sent	25 Sites/Locat	tions	16 Recipien	ts i	t's always recommended to click on "Save changes" after every 5-10 pages of locations selection.	

17. The system will show you a total count of who you are sending your mailing to, along with any Add-On Activities you have selected when creating your communication. Click Compose Email.

🧷 Select I	ocations 2 Compose email	
		Previous
	Exxat University Slot Request 2024	
	Recipients	
	24 Sites/Locations 13 Recipients	
	Add-On Activity	
	Gather availaibility for student placements	
	Compose Email	

- 18. A drawer will open with 3 steps. On step 1, you can:
  - 1. **Override Recipient's Email**: this is great to test the email that will be sent. The email will be sent to the email address entered instead of the original recipient.
  - 2. Reply to: any replies to the communication will be sent to this email address.
  - 3. **CC/BCC**: include any additional recipients as needed.

## 4. **Upload files**: Attach files if necessary

× Compose Email	
1 Recipients 2 Template 3 Prev	riew
13 Total Recipients	
If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.	of
Override Recipient's Email	
Reply to *	
rocio.ramirez@exxat.com	
сс	
всс	
Upload files	
Slot Request Attachment Sample.pdf	
(     Browse to upload	
Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm You can only upload files with file size under 10 MB.	d

19. On Step 2, you will select the email template you would like to send. You can use the standard template available or create your own using the + Add Template option. Click Preview once ready.

× Compose Email	
Recipients 2 Template 3 Pre	view
Pick a template *	
Standard	
+ Add Template	Previous
Subject*	Merge Fields
Request for clinical internships	@FirstName (j)
	@LastName (i)
	@Prefix (i)
	@CommunicationTitle
	@RequestLink (i)
As you know, Clinical Education is integral to preparing students for patient care and helps to shape the future of our profession. We are reaching out to ask for your support of our program by agreeing to accept students during upcoming rotations.	

- 20. On step 3, review your email. If everything looks good, you will now decide when to send your email.
  - 1. Send email now: send your emails instantly
  - 2. **Send email at specific date and time**: schedule your emails to be sent on a specific date and time. You will select your date and time using a calendar.

Compose Email	
Recipients Template 3 Pre	view Previous Send
Request for clinical internships	<ul> <li>Send email now</li> <li>Send email at specific date and time</li> </ul>
Dear @FirstName, As you know, Clinical Education is integral to preparing students for patient care and helps to shape the future of our profession. We are reaching out to ask for your support of our program by agreeing to accept students during upcoming rotations.	

	2023 Tu	e, 1	L4 F	eb	19:	18	
<ul> <li>Send email at specific date and time</li> </ul>	<		F	ebruar	у		>
	Su	Мо	Tu	We	Th	Fr	Sa
Date Time *				1	2	3	4
5	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28				

## **Reviewing the Email Dashboard**

Once you have scheduled or sent your site emails, you'll have a dashboard available to review how many emails were sent, delivered successfully, and more!

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



2. Select Emails from the ribbon.

	Setup	Sites	Locations	Personnel	Contracts	Emails	Explore Locations	Reports	Dashboard
--	-------	-------	-----------	-----------	-----------	--------	-------------------	---------	-----------

3. Select the Email Dashboard icon for your desired communication.

Setup	Sites	Locations	Personnel	Contracts	Emails	Explore L	ocations	Reports	Dashboard		
Title			h							+ Setu	p new communication
51 Results	s Found										
COMMUNICATION TITLE V AC				ACTIVITY	ACTIVITY			OCATIONS AN	ID SEND	EMAIL DASHBOARD	RESPONSE REPORT
Exxat Unive Last update	ersity Slot ed on May	* <b>Request 2023*</b> y 30, 2023 12:23	PM EST 🖉	Request sl Request U Informatic	ots pdated Locati on	on	Send em Last ema PM EST	ails il sent on May	30, 2023 12:23	E	[ <u>.11]</u>

4. The page will display a tally at the top, and a grid showing you any scheduled or sent emails for recipients you have selected.

←	Exxat University Slot Request	2023*							
53	Total Emails 4 Failed	0 In Progress 48 Succe	essful - 26 Delivered (not ope	ened) 10	Opene	ed (link not clicked) 12 Link clicked	1 Scheduled		
í	Please note that once you've sent the emails, some emails may appear to be stuck with "In Progress" or "Scheduled" status even though they are sent. You do not need to resend those emails, the accurate status will be updated within 24 hours.								
Q	Search				From	То	Reset C	$\times  / (2 ) /$	
	RECIPIENT NAME	RECIPIENT EMAIL	SENT/SCHEDULED TIME	STATUS		SUBJECT	REQUEST LINK	RESEND	
	Samantha Stevenson	noreply@exxat.com	May 31, 2023 11:00 AM EST	Scheduled	í	Exxat University Annual Slot Request - CY 2023	-		
	Rosie Burton	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend	
	Kunal Vaishnav	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend	

5. If you would like to cancel a scheduled email, select the recipient using the open checkbox and click the X icon.

← Exxat University Slot Request	2023*				
53 Total Emails 4 Failed	0 In Progress 48 Succe	essful - 26 Delivered (not ope	ened) 10 Op	pened (link not clicked) 12 Link clicked	1 Scheduled
(i) Please note that once you've sent the hours.	emails, some emails may appear to b	e stuck with "In Progress" or "Schedul	ed" status even thoug	th they are sent. You do not need to resend those em	ails, the accurate status will be updated within 24
Q Search			F	from To	■ Reset C × → Ø
RECIPIENT NAME	RECIPIENT EMAIL	SENT/SCHEDULED TIME	STATUS	SUBJECT	REQUEST LINK Cancel : ID
Samantha Stevenson	noreply@exxat.com	May 31, 2023 11:00 AM EST	Scheduled	Exxat University Annual Slot Request - (i)	

6. If you'd like to view the email that was sent, click on the Subject text.

÷	Exxat University Slot Request	2023*						
53	Total Emails 4 Failed	0 In Progress 48 Succe	essful - 26 Delivered (not ope	ened) 10	Opene	ed (link not clicked) 12 Link clicked	1 Scheduled	
í	Please note that once you've sent the emails, some emails may appear to be stuck with "In Progress" or "Scheduled" status even though they are sent. You do not need to resend those emails, the accurate status will be updated within 24 hours.							
Q	Search				From	то	Reset C	$\times  / (2 ) /$
	RECIPIENT NAME	RECIPIENT EMAIL	SENT/SCHEDULED TIME	STATUS		SUBJECT	REQUEST LINK	RESEND
	Samantha Stevenson	noreply@exxat.com	May 31, 2023 11:00 AM EST	Scheduled	í	Exxat University Annual Slot Request - CY 2023	-	
	Rosie Burton	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend
	Kunal Vaishnav	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend

7. A drawer will open showing you the content of the email sent.

× View Email Content
Below is the content of sent email
** Send Exxat University Annual Slot Request - 2023
Dear Rosie Burton,
As you know, Clinical Education is integral to preparing students for patient care and helps to shape the future of our profession. We are reaching out to ask for your support of our program by agreeing to accept students during upcoming rotations.
We realize that scheduling and managing clinical education experiences are an enormous undertaking. To make the process more streamlined for you, please let us know your availability to accept students by clicking the link below.

8. If you requested slot availability or updated location information and would like to access the page a specific contact received, click the View text within the Request Link column.

← Exxat University Slot Request 2023*												
53     Total Emails     4     Failed     0     In Progress     48     Successful     -     26     Delivered (not opened)     10     Opened (link not clicked)     12     Link clicked     1     Scheduled												
Please note that once you've sent the emails, some emails may appear to be stuck with "In Progress" or "Scheduled" status even though they are sent. You do not need to resend those emails, the accurate status will be updated within 24 hours.												
Q Search	Q searchToImage: C $\nearrow$ $\not>$ $\not>$ $\checkmark$											
RECIPIENT NAME	RECIPIENT EMAIL	SENT/SCHEDULED TIME	STATUS	SUBJECT	REQUEST LINK	RESEND						
Samantha Stevenson	noreply@exxat.com	May 31, 2023 11:00 AM EST	Scheduled	Exxat University Annual Slot Request - CY 2023								
Rosie Burton	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	** Send Exxat University Annual Slot Request - 2023	View	Resend						
Kunal Vaishnav	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	** Send Exxat University Annual Slot Request - 2023	View	Resend						

9. This will open a new tab and show you the slot request/updated location information page.

≡	Exxat ⑦	Rosie Burton E	xxatSales (DPT)					
	Request For Availability And Update Information							
	Thank you for considering working with a student from our university's DPT program. We sincerely appreciate the time and effort that it takes to educate a student and cannot express our gratitude enough, after all, you are shaping the future of our profession! Please take a moment to review the clinical experience schedule you'll see after clicking the "Start" button below. In order to provide insight into where each experience falls within the curriculum, you will find the curriculum in the documents below.							
	Shared documents View Documents							
	Start							
	n Exxat							

10. If you'd like to resend an email, click Resend for any specific recipient.

÷	← Exxat University Slot Request 2023*												
53	Total Emails 4 Failed	0 In Progress 48 Succe	essful - 26 Delivered (not ope	ened) 10	Opene	d (link not clicked)	1 Scheduled						
í	Please note that once you've sent the emails, some emails may appear to be stuck with "In Progress" or "Scheduled" status even though they are sent. You do not need to resend those emails, the accurate status will be updated within 24 hours.												
Q													
	RECIPIENT NAME	RECIPIENT EMAIL	SENT/SCHEDULED TIME	STATUS		SUBJECT	REQUEST LINK	RESEND					
	Samantha Stevenson	noreply@exxat.com	May 31, 2023 11:00 AM EST	Scheduled	i	Exxat University Annual Slot Request - CY 2023	-						
	Rosie Burton	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend					
	Kunal Vaishnav	jake.killian@exxat.com	Apr 27, 2023 11:31 AM EST	Delivered	í	** Send Exxat University Annual Slot Request - 2023	View	Resend					

11. A drawer will open where you can set your preferences and resend your email.

× Resend	
1 Recipients 2 Template 3 Preview	
CD Copy selected recipient email addresses	Next
Recipients 1 selected recipients	If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.
✓ Rosie Burton (jake.killian@exxat.com)	Override Recipient's Email
	Reply to *
	rocio.ramirez@exxat.com
	cc
	BCC
	Upload files
	Browse to upload
	Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.docx,.xlsx,.pptx,.pptm,.potx,.potm You can only upload files with file size under 10 MB.

## **Reviewing the Response Report**

Once you have sent out a slot request, or update location information request, as your sites begin to respond with offers and updates, the Response Report will inform you of who has responded.

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



2. Select Emails from the ribbon.

Setup	Sites	Locations	Personnel	Contracts	Emails	Explore Locations	Reports	Dashboard

3. Select the Response Report icon for your desired communication.

Setup	Sites	Locations	Personnel	Contracts	Emails	Explore I	Locations	Reports	Dashboard		
Title		▼ Q Searce	h							+ Setu	p new communication
51 Results	s Found										
COMMUNI	CATION T	ITLE 🕹		ACTIVITY			SELECT L EMAILS	OCATIONS AN	ID SEND	EMAIL DASHBOARD	RESPONSE REPORT
Exxat Univ Last updat	ersity Slot ed on May	t <b>Request 2023*</b> y 30, 2023 12:23	PM EST 🖉	Request sl Request U Informatic	ots pdated Locati on	on	Send em Last ema PM EST	ails il sent on May	30, 2023 12:23	LE_	Lut

- 4. Depending on the Add-On Activities you selected, the report may include two tabs Slot Request and Updated Location Information.
- 5. The Slot Request tab will show you a tally of how many locations you contacted, and who has either not responded, responded with offers, a request to be contacted later, or had nothing to offer.
- 6. The grid will list all the locations included in your communication and will include a slot request response column for you to review. For locations who have offered slots, you can click on View to see the offers they have provided to you.

← Exxat University Slot Re	equest 2023*										
Slot Request Updated Locatio	n Information										
26 Total Locations 22	No Response 4 Response	e - 3 Of	fered slots	0 Contact I	Later 1 No slots to offer						
(i) Please visit the Placement > S	(i) Please visit the Placement > Slots section for a consolidated view of the offered slots. You can create a placement group in a way that it covers all the Rotations that you want to see together.										
Q Search	Q Search 🕒 🥕 🗸										
28 Results Found											
LOCATION	SITE	CITY	STATE	ZIP CODE	SLOT REQUEST RESPONSE	LAST UPDATED BY	LAST UPDATED ON	VIEW DETAILS			
Location not assigned	Abundant Health*	Depew	NM	02345	No slots to offer	John Smith	May 18, 2023 5:43 AN EST	-			
Abundant - Ambulatory Care	Abundant Health*	DEPEW	NY	14043	Slots offered	Rosie Burton	May 4, 2023 5:50 PM	E View			
Adaptial - Wellington	Adaptial	BALTIMORE	MD	21231-2620	No Response	Nellie Hawkins	May 1, 2023 12:41 PN EST	-			

7. A drawer will open showing you the slot offer details.

× Abundant - Ambulatory Care											
Last Updated By:Rosie Burton on May 4, 2023 5:50 PM EST											
Offered Slots											
ROTATION	SCHEDULE	NO.OF STUDENTS	SETTING	CLINICAL INSTRUCTOR	TYPE	SLOT TYPE					
Clinical Practice IV	Apr 1, 2024 - Jun 18, 2024	1	Home Health	Clinical Instructor not assigned	-	Resume Required					
Clinical Practice IV	Apr 1, 2024 - Jun 18, 2024	2	Acute Care	James Spader	1 Student:1 Cl	-					
Clinical Practice	Feb 1, 2023 - Mar 12, 2023	2	Home Health	James Spader	2 Student:1 Cl	-					

- 8. The Updated Location Information tab will show you a tally of how many locations you contacted, and whether they responded.
- 9. The grid will only list locations who have responded with updates. Click on View to see the changes they provided.

Exxat University Slot Request 2023* Slot Request Updated Location Information										
26 Total Locations 25 No Response 1 Response										
Q Search										
1 Results Found										
LOCATION SITE CITY STATE RESPONSE LAST UPDATED BY [SITE] LAST UPDATED ON ↓ VIEW DETAILS [SITE]										
Abundant - Sinactive	Abundant Health*	DEPEW	NY	Response Received	Kunal Vaishnav	May 30, 2023 7:47 PM	View			

10. A drawer will open showing you the changes. You must access that Location's profile and makes those changes manually. Once you have made all necessary updates, click on Mark as Updated.

× Abundant - Ambulatory Care	Save
Last Updated By [Site]: Kuna	al Vaishnav on May 30, 2023 7:47 PM
Updated Location Information	✓ Mark As Updated
We require students to have a COVID-19 vaccine, along with fingerprinting.	
Please remove Rosie Burton from our personnel list, she is no longer with us.	

11. The grid will show you and updated status for you to easily keep track of information you have already processed.

Q Search							₿ ⊽1
1 Results Found							
LOCATION	SITE	CITY	STATE	RESPONSE	LAST UPDATED BY [SITE]	LAST UPDATED ON [SITE]	VIEW DETAILS
Abundant - Ambulatory Care	Abundant Health*	DEPEW	NY	Response Received	Kunal Vaishnav	May 30, 2023 7:47 PM	View