

This document serves as a comprehensive guide for managing **Sites** and their associated **Locations** within the system. It includes detailed instructions on adding and managing locations, maintaining relevant details, and performing various operations such as adding slot availability, assessments, communications, interventions, and HRSA grant information. It also provides guidelines for modifying and deleting locations, adding student requirements, and sharing specific location-related information with students.

- **Introduction to Sites and Locations**
- **Deleting Locations**
- **Adding Slots by Site**
- **Adding Assessments for Locations**
- **Adding Location Communications**
- **Adding Interventions for Locations**
- **HRSA Grant Info**

Within the system, you will have Sites (group or entity with which a contractual relationship is established) and Locations (a physical location where patient care takes place).

You'll want to make sure you have at least 1 location associated with each site to ensure that they receive a Slot Request if needed. Let's work together to add a Location!

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



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

1. Pro-tip: use search box and filters to find what you're looking for!

Setup

Sites

Locations

Personnel

Contracts

Emails

Explore Locations

Reports

Dashboard

Q

Search

Filters:

Active

PT.DPT

+ Add Site

2

35 Results Found

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health* <div></div>	9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor	Depew	Active	PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD	(555) 555-55! x421223

3. On the ribbon at the top of the page, click on Locations.

←

Action Physical Therapy Inc

380 SUTLEY CIR , SACRAMENTO , CA 95835-2043

Delete Site

About

Contracts

Locations

Personnel

Slots

Interventions

Assessments

Communications

4. The page will load all existing locations for the selected site. Click +Add Location.

←

Action Physical Therapy Inc

380 SUTLEY CIR , SACRAMENTO , CA 95835-2043

Delete Site

About

Contracts

Locations

Personnel

Slots

Interventions

Assessments

Communications

Q Search

+ Add location

LOCATION ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS	ACTIONS
Action Physical Therapy Inc <div></div>	380 SUTLEY CIR	SACRAMENTO	CA	95835-2043	Active	<div></div>

Click here to view/edit Location profile

5. A drawer will open for you to add all the Location's details:

1. Please note that location name and full address are required before you can save.

2. Basic Information

× **Location details** Save

Basic Information

Name *

Label

Location Area

Active ☒ Yes ☐ No

6. Address Information

Address Information

☒ Domestic ☐ International

Address line 1 *

50 East Cottage Avenue

Address line 2

City *

Ronkonkoma

State *

NY

Country

United States

ZIP Code

11779

7. Contact Information: optional if you have an office #, fax and website.

Contact Information

Phone

Phone extension

Fax

Website

8. Additional Information: track whether this is a rural location, if it serves underserved populations, and whether it should show to students on the map.

9. Once you add all the information you'd like to enter, click Save.

× **Location details** Save

Additional Information

Rural Location ☐ Yes ☒ No

Underserved Population ☐ Yes ☒ No

Show On Explore Clinical Locations ☒ Yes ☐ No

10. The location will now be added in the system!

Note: Please note that the inactive locations will not be shown to students on the Explore Clinical Location page.

11. On the About tab, you will be able to provide additional Location Information.

12. You can manage the information you initially entered when creating the Location.

Sites

Sites > Abundant Health* > Action Therapy

Action Therapy6 Thomas Jefferson, Warren, NJ 00854

Move LocationDelete Location

Location Menu

About

Personnel

Communications

Slots

Placements

Interventions

Assessments

Location Evaluations

Contracts

AdaptialFully Executed

July 1, 2021 - July 31, 2026

Alliance Medical Center - Nursing PICUFully Executed

March 20, 1991 - Is open ended

Advent ProfessionalsAwaiting Signoff

November 25, 2004 - Is open ended

AH ContractAwaiting Signoff

June 7, 2023 - June 12, 2024

Settings

Inherited from site

Acute CareHome HealthOutpatientPedsRehabSchool BasedWellness

Location settings

Child NutritionOtherSports Research

Categories

Inherited from site

Major Medical CenterOutpatient Conglomerate

Location categories

13. View Contract information

1. You can manage this at the Site level.

Contracts

Action Physical Therapy IncAwaiting Signoff

June 6, 2022 - June 7, 2028

14. List out common **Settings** this location offers slot availability for.

1. If settings were added at the Site level, you will see the inherited items listed in this section.

Settings

Inherited from site

Acute CareRehab

Location settings

Home HealthOther

Location setting notes

Occasionally takes women's health

2. You can modify the inherited settings from the site, if needed

×

Settings

Save

Inherited From Site

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Inherited Settings

Acute Care

Home Health

Outpatient

Peds

Rehab

School Based

Wellness

Inherited Setting Notes

Applicable for this location

Location Settings

Update location specific settings as needed below.

Settings

Child Nutrition

Other

Sports Research

Neuro

Sub-Acute

Setting Notes

Paragraph

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15. If you are a PA program you will also find a section to add "ARC-PA" settings for your site and location

ARC-PA Settings

Inpatient

Operating Room

16. Have program curated **Categories**? Add them to Locations here.

1. If categories were added at the Site level, you will see the inherited items listed in this section.

Categories

Inherited from site

Stand-Alone Clinic

Location categories

Private Practice

2. Edit any location categories

×

Categories

Save

Inherited From Site

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Category

Major Medical Center

Outpatient Conglomerate

Location Categories

Update location specific categories as needed below.

Category

Private Practice

Stand-Alone Clinic

17. List out any **Requirements** this Location asks of students.

1. If requirements were added at the Site level, you will see the inherited items listed in this section in blue.

2. This will be shared with Students once they are placed at any location associated with this Site.

Location Requirement

COVID-19 Vaccination

Fingerprinting

Site requirement notes

Make sure to upload this documentation within Compliance

3. Edit any Requirements

×

Requirements

Save

Information inherited from the site will be listed below. Any details that are not applicable to this specific location can be easily removed.

Inherited Requirements

Background Check

Drug Screen

MMR

TB

CPR

Physical Exam

CBC

PBI test

Inherited Requirement Notes

Applicable for this location

Background Check

Compliance Che...

Show More

Location Requirements

Update location specific requirements as needed below.

Requirements

Should be compliant

Enter requirements...

Requirement Notes

Paragraph

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Note

18. If Locations require any documentation to be provided by your students prior to starting a placement, add them to the **Student Requirement Upload (Shared via Profile Link)**

1. If documents were added at the Site level, you will see the inherited items listed in this section. You can turn this off using the Enable for this location option.

2. This will be shared with Students once they are placed at this location.

Student Requirement Upload (Shared Via Profile Link)

+

Site Specific Requirements

Enable for this location

Requirement Name	Enabled for Students	Include in the Profile Link	Description	Action
Orientation Packet View document				

Location Specific Requirements

Requirement Name	Enabled for Students	Include in the Profile Link	Description	Action
HR Clearance Form View document				

Please note Student requirement uploads added/updated after the placement starts will not be shown to the students.

19. Add any general **Documents** with the option to share details with students.

1. If documents were added at the Site level, you will see the inherited items listed in this section.

Student Requirement Upload (Shared Via Profile Link)

+

Site Specific Requirements

Enable for this location

Requirement Name	Enabled for Students	Include in the Profile Link	Description	Action
Requirements checklist View document				
Onboarding paperwork View document			Please fill in the on boarding paperwork and submit to hospital	
Covid Exemption Form View document			Unique Form for Abundant Health	

Documents

Inherited from site

Type	Date Uploaded	Document	Shared with Student	Notes	Action
General	08/11/2023	Onboarding Handbook		Update by PA	<div><div>Applicable for this location</div></div>

20. Add in general **Notes** on important information you'd like to keep on file, with the option to share details with students.

1. Notes shared with students will be displayed on the Explore Clinical Locations section.

2. You can click on + icon and add notes to be shared with Students

3. You can also turn on the bit on to inherit notes from sites

Notes

Notes for internal use only Inherit notes from site

Inherited from site

☐ This Site is on Probation, there have been some HR issues

Location specific notes +

☐ Please carry your school ID

Notes shared with students Inherit notes from site

Inherited from site

☐ Let us know if you have any issues with this site.

Location specific notes +

21. Add Housing and Parking Information.

1. This will be shared with students on the Explore Clinical Locations page.

Housing And Parking Information

Housing available at this location? - Yes

Parking available at this location? - Yes

Parking note -
Parking only available for 2 Wheeler.

Deleting Location

In case you are no longer working with the location, you always have the option to delete the location. You can only delete the location if it does have any slots or placements associated with it.

1. Go to Location

2. Locate the **Delete Location** button in the right-hand corner.

Sites > Abundant Health - New Site > Abundant Health - Secondary Hospital

Abundant Health - Secondary Hospital Secondary Location, KA, AK Move Location **Delete Location**

Location Menu <

- About
- Personnel
- Communications
- Slots
- Placements
- Interventions
- Assessments

Abundant Health - Secondary Hospital

Address Secondary Location, KA, AK	Location Area Out-Area	Phone -
FAX -	Location label -	Website -
Rural Location N/A	Underserved Population N/A	Explore clinical locations Yes

Last updated by *Sayantan Basu* on July 9, 2024

Contracts

3. You will see the confirmation message as below, enter the number displayed and click on "Delete".

Deleting Wellspring Central will permanently remove - location details, communications, interventions and associations. Once deleted, this data cannot be retrieved. Do you want to Continue?

Displayed number44

Enter displayed number to continue:

Cancel

Delete

4. If there are any slots and placements added for this location, you will not be able to delete the site. You may contact our support team at prism-support@exxat.com

Abundant Health - Secondary Hospital cannot be deleted because there are slots and placements available.

Ok

Adding Slots by Site

1. Click on the desired location name.

Abundant Health - New Site

ABC, CA, AR

Delete Site

AboutContractsLocationsPersonnelSlotsPlacementsInterventionsAssessmentsCommunications

Search

+ Add location

Location Movement History

LOCATION ↑	LABEL NAME	ADDRESS	CITY	STATE	ZIP CODE	STATUS	ACTIONS
Abundant Health - Secondary Hospital		Secondary Location	KA	AK		Active	
Abundant Health - Tertiary Hospital		Tertiary Location	KA	AK		Active	

2. Click on Slots option from the left side menu.

Sites > Abundant Health - New Site > Abundant Health - Secondary Hospital

Abundant Health - Secondary HospitalSecondary Location, KA, AK

Move LocationDelete Location

Location Menu

AboutPersonnelCommunicationsSlotsPlacementsInterventions

Abundant Health - Secondary Hospital

Address

Secondary Location, KA, AK

Location Area

Out-Area

Phone

-

FAX

-

Location label

-

Rural Location

N/A

Underserved Population

N/A

Explore clinical locations

Yes

Last updated by Sayantan Basu on July 9, 2024

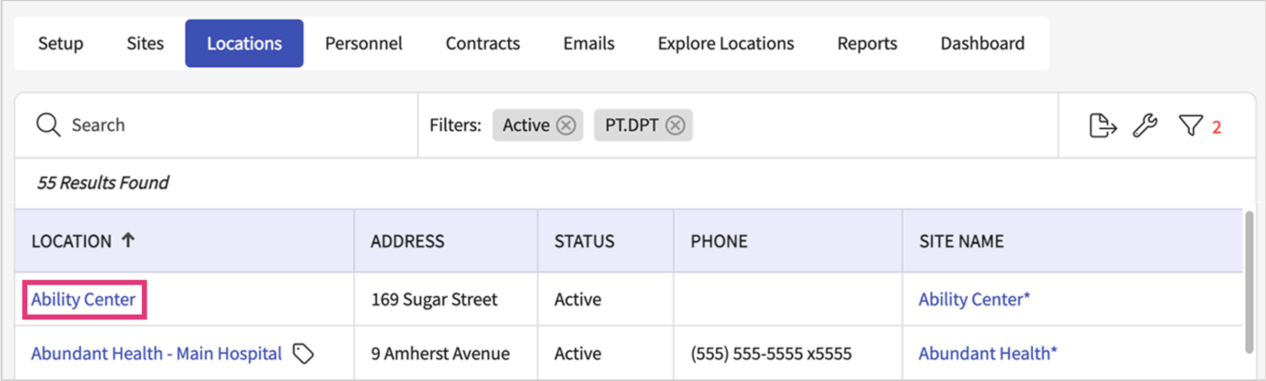
3. The page will load all the slots added for this Location. To add a new slot, click on +Add Slot.

2. Select Locations from the top banner.

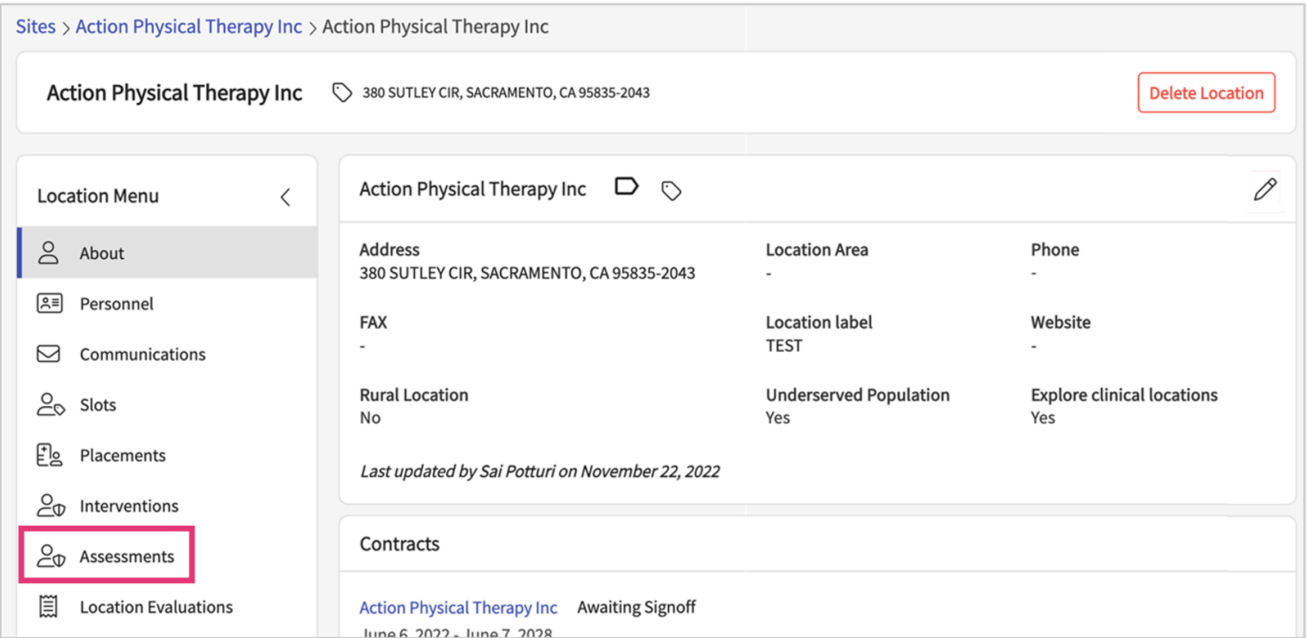


3. Find and select your desired location.

1. Use the search or filter options to quickly find what you are looking for.



4. Select Assessments from the left panel.



5. The Page will load all logged Assessments. Click on + Add Assessment

Filter by:

Mode of visit

Visit from

Visit to

Assessments

+ Add assessment

Assessed by Jermaine Herrera on September 1, 2022 | Ongoing

Class of 2024 | Clinical Practice I

@Casey Wright @Guadalupe Torres @Marco Mills @Samantha Stevenson @Terri Rios

Last updated by Rocio Ramirez on March 10, 2023

6. A drawer will open with three steps: Basic Details, Form Details, Summary & Follow Up. You can always save your progress if you'd like to complete the form at a later time.

Sites

Sites > Abundant Health* > Abundant Health PT location

Abundant Health PT location 1 W Manchester Blvd, Inglewood, CA

Location Menu

About

Personnel

Communications

Slots

Placements

Interventions

Assessments

Location Evaluations

HRSA Grant Info

Assessments

Assessment

Save

1 Basic Details 2 Form Details 3 Summary & Followup

Next

Basic Information

Mode of visit *

In Person

Type of site visit *

New site

Who is doing the site visit ? *

Eric Dave

Date of site visit *

July 29, 2024

Placement Details

+ Add

Notes

Paragraph

B I U

Overall notes

Browse to upload

Supported formats: .pdf,.doc,.jpg,.jpeg,.png,.heic,.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.

7. In the Basic Details section, you will provide:

1. Basic information on the visit
2. Placement Details (if applicable)
3. Upload files if needed.

4. Click Next once done.

The screenshot shows a web interface for an 'Assessment' form. At the top, there's a header with a close button (X) and the title 'Assessment'. On the right of the header is a blue 'Save' button. Below the header is a progress bar with three steps: '1 Basic Details', '2 Form Details' (which is highlighted in blue), and '3 Summary & Followup'. To the right of the progress bar are three buttons: 'Previous', 'Next' (highlighted with a red box), and 'Save form details' (also highlighted with a red box). Below these buttons is a section titled 'Site/Facilities' with an upward arrow icon. Under this title is a text area with the placeholder text 'Comments on sites facilities and educational environment:'. Above the text area is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, link), alignment, and other functions. At the bottom right of the text area, it says '500 characters left'.

8. The Form Details section you will have a default template built in. If you have your own form, you can get it created by contacting prism-support@exxat.com. Once done, click Save Form Details,

and Click Next.

×

Assessment

Save

Basic Details

Form Details

3

Summary & Followup

Previous

Summary

Final Assessment

Summary Notes

Paragraph

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summary Notes:

Do you require a follow-up visit ?

☒ Yes

☐ No

Follow up date

July 29, 2022

Paragraph

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Follow up Note

9. In the Summary & Follow Up section you'll provide a final assessment and indicate if this requires a follow up. Click

×
Assessment

Save

Basic Details

Form Details

3 Summary & Followup

Previous

Summary

Final Assessment

Summary Notes

Paragraph

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summary Notes:

Do you require a follow-up visit ?
☒ Yes
☐ No

Follow up date

July 29, 2022

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Follow up Note

10. Your assessment will be saved. You can edit or delete them if needed.

Filter by:
Mode of visit

Visit from
Visit to

Assessments

👤

Assessed by Jermaine Herrera on September 1, 2022 | Ongoing
Class of 2024 | Clinical Practice I
@Casey Wright @Guadalupe Torres @Marco Mills @Samantha Stevenson @Terri Rios

✎

🗑

+ Add assessment

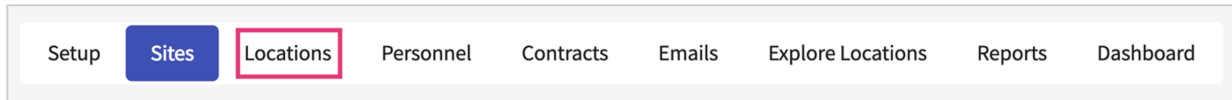
Last updated by Rocio Ramirez on March 10, 2023

Adding Location Communications

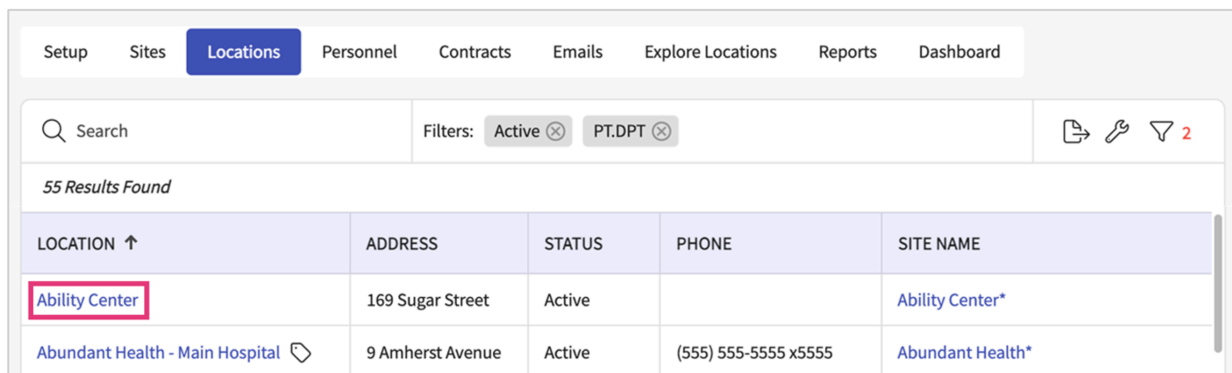
1. Select Sites from the left-menu or dashboard.



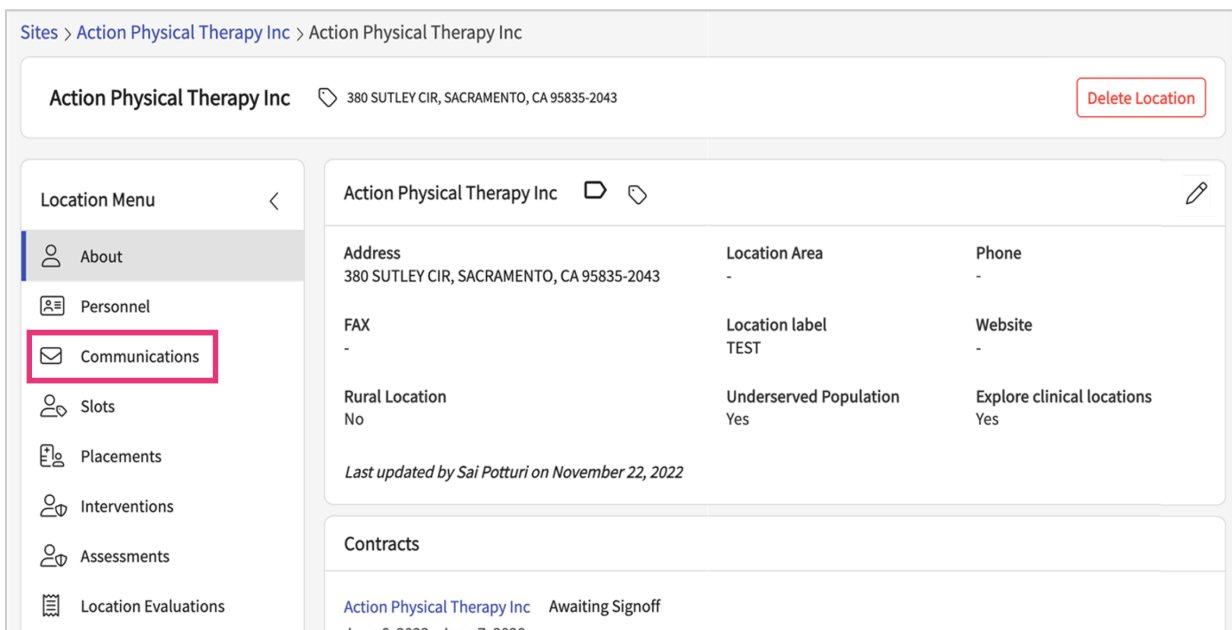
2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.



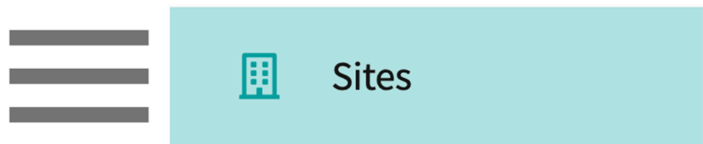
4. Click on the Communications tab from the left panel.



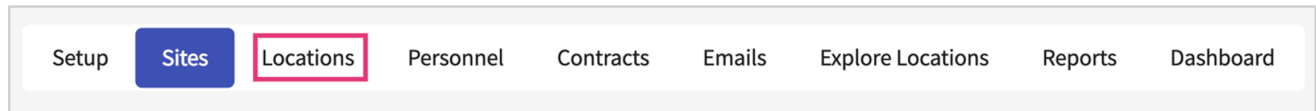
5. Explore the communications that have already been logged by filtering for the mode of communication, the need for follow-up, the person who initiated the communication or by searching the subject.

Adding Interventions for Locations

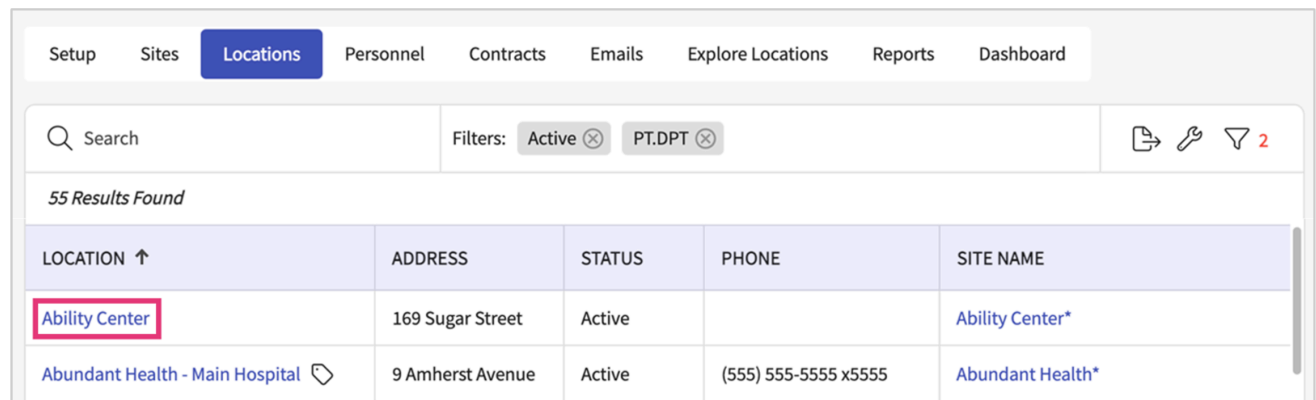
1. Select Sites from the left-menu or dashboard.



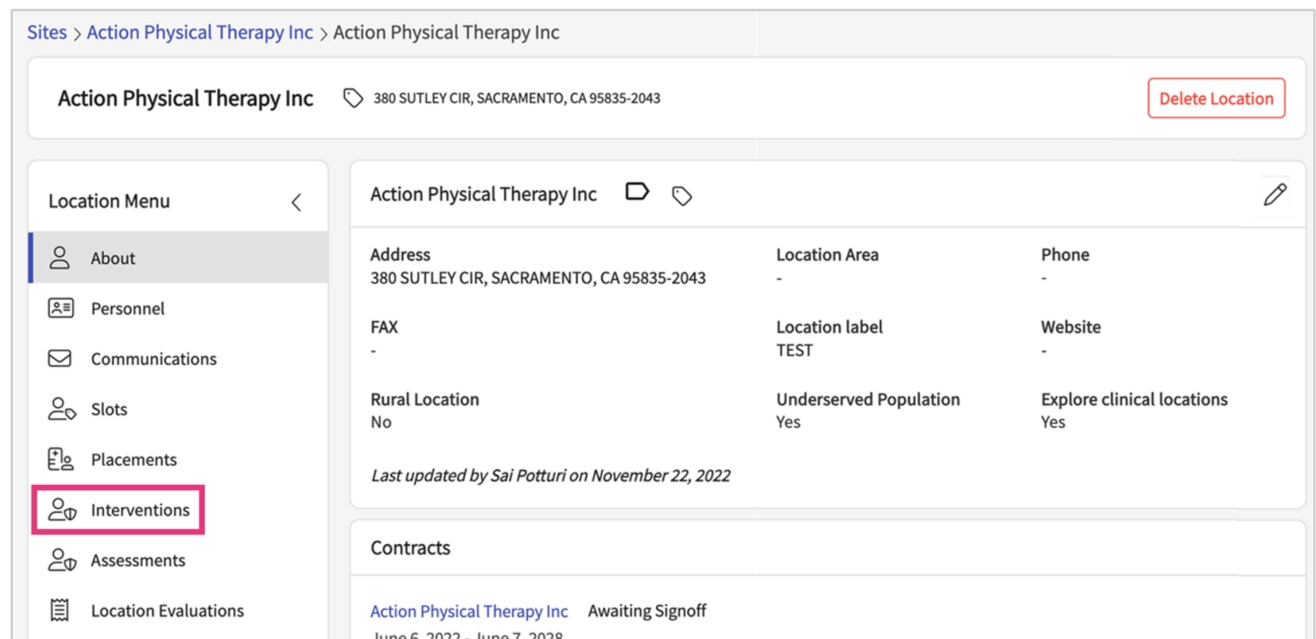
2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.



4. Click on the Interventions tab from the left panel.



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

<div><div><div></div></div><div>Search text</div></div>			<div><div>+ Add intervention</div><div></div></div>				
MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DATE INITIATED
In Person	Rocio Ramirez	SCCE	Supervision of Students : DI...	June 9, 2023	Discussed need for gradual release on student supervision... Show More	Clinical Practice II	Me...

6. 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

7. If this is an ongoing intervention, click on Add Follow Up.

× Intervention
Save

Mode*

☐ Audio Call
 ☐ Video Call
 ☐ Email
 ☒ In Person
 ☐ Other

Initiated by*

Rocio Ramirez

Contact with*

SCCE

Rotation

Clinical Practice II ▼

Subject*

Supervision of Students

Paragraph ▼ **B** *I* U ≡ ▼ 🔗 :≡ ▼ ⁒≡ ▼ A ▼ AI ▼ ⇐ ⋮

Discussed need for gradual release on student supervision as several students have reported that instructing clinicians provide close supervision even during final clinical experience. Site has requested education for instructors on implementing gradual release - will provide this summer!

Date of intervention*

May 15, 2023

Status

Open ▼

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.

Add Followup



8. If you added a follow up, you'll provide details of your planned follow up date. Click Save once done.

2. Click on the trash bin to delete the intervention.

× Location Intervention

Supervision of Students

Contact with - SCCE
May 15, 2023



In Person

Description

Discussed need for gradual release on student supervision as several students have reported that instructing clinicians provide close supervision even during final clinical experience. Site has requested education for instructors on implementing gradual release - will provide this summer!

Rotation

Clinical Practice II

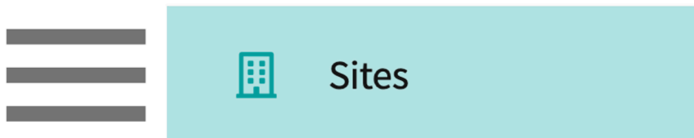
Initiated by

Rocio Ramirez

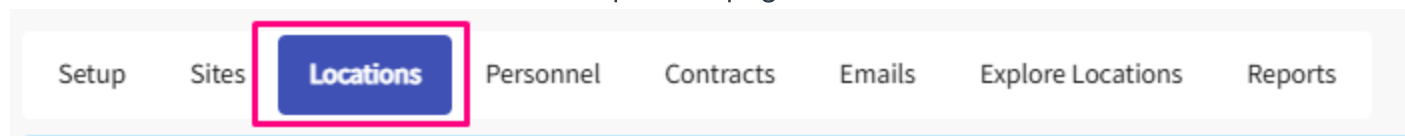
Adding HRSA Grant Info

Store all HRSA grant details, including funding amounts, program goals, timelines, and reporting requirements, etc. This helps reduce manual effort and streamline grant management tasks.

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



2. Select Locations from the ribbon at the top of the page.



3. Find and select your desired Location.

SetupSitesLocationsPersonnelContractsEmailsExplore LocationsReports

The data in downloaded excel is updated with latest information every 24 hours. Please contact y4support@exxat.com for questions or concerns.

Search

Filters: ActivePT.DPT

2

80 Results Found

LOCATION ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS	PHONE	SITE NAME
Abundant - Action Therapy (Geocoding Enabled)*	411 W Ocean Blvd	Long Beach	CA	90802	Active	(213) 239-3570	Abundant Health*
Abundant - Action Therapy Easton	411 W Ocean Blvd	Long Beach	CA	90802	Active	(732) 501-1730	Abundant Health*

4. Click on the HRSA Grant Info tab from the left panel & click on +Add option.

Sites > Abundant Health - New Site > Abundant Health - Secondary Hospital

Abundant Health - Secondary HospitalSecondary Location, KA, AK

Move LocationDelete Location

Location Menu<

AboutPersonnelCommunicationsSlotsPlacementsInterventionsAssessmentsLocation EvaluationsHRSA Grant Info

HRSA Grant Information

+ Add

No HRSA Grant information has been added at this location. Click on 'Add' to add new grant information.

5. Provide HRSA Grant information in the pre-defined fields and click on Save.



Add HRSA Grant information

Save

HPSA PC

HPSA Dental

HPSA MH

MUA

VAMC

FQHC

Loan Repayment

Hospital-affiliated Primary Care Out Patient Clinic

HPSA PC Score

HPSA Dental Score

HPSA MH Score

MUP

Military

Rural Health Clinic

FQHC Look-Alike

Indian Health Service, Tribal Clinic, and Urban Indian Health Clinic (ITU)