

This article details the processes for adding, managing, and organizing sites and their associated locations, slots, placements, and student requirements within Prism. It includes instructions for handling site-related tasks, such as adding new sites, managing slot availability, viewing placements, and uploading required documentation.

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Adding and Managing Sites

Within Prism, a Site is a single entity with a contract to accept students; it may have one or more physical locations. Before adding locations, you will need to add the site.

Jump to a section:

[Adding Site](#)

[Deleting Site](#)

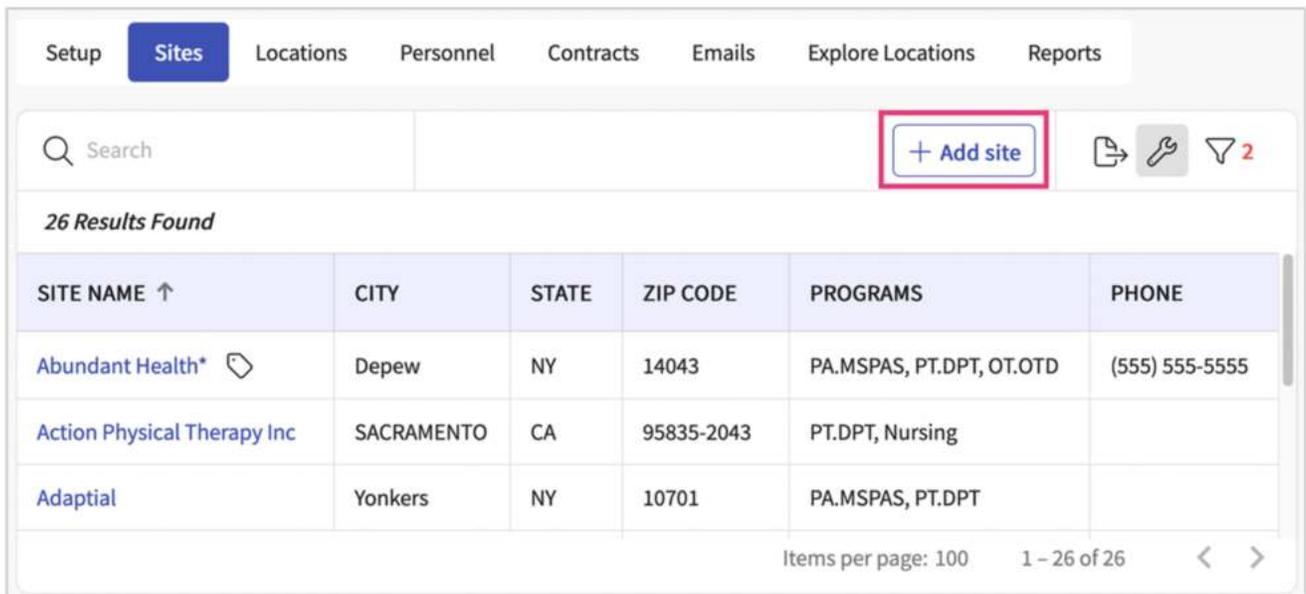
Adding Sites

Below are all the steps you need to follow to add a new site or a clinical site

1. Select Sites from your left menu.



2. Click on +Add Site.



3. A drawer will open where you will provide the Site details. Please note a Site name and address are mandatory.

× Add Site Save

Validating the address keeps your data clean and organized and ensures accurate delivery of hard copy mail. Just use the "Validate Address" button below.

Basic Information

Name *
Exxat PT

Do you want to add this site as a location ?

Active Yes No

Make sure to select this if the address for the site you are entering will take student placements!

4. Add in address details, and any general contact information. Click Save when done.

Address Information

Domestic International

Address line 1 *
87 Cherry Hill Ave

Address line 2

City *
Piedmont

State *
SC

Country
United States

ZIP Code
29673

× Add Site Save

Contact Information

Phone
(555) 555-5555

Phone extension
55555

Fax

Website
https://exxat.com/

5. Your site will now be added in your system!

Exxat PT
87 Cherry Hill Ave., Piedmont, SC 29673

Record Added Successfully.

Delete Site

About Contracts Locations Personnel Slots Interventions Assessments Communications

Basic Information

Alias name	Address	Phone number	Website
-	87 Cherry Hill Ave , Piedmont , SC 29673	(555) 555-5555	https://exxat.com/
EIN	FAX	Total locations	
-	-	0	

Last updated by Rocio Ramirez on May 24, 2022

6. On the About tab, you will be able to provide additional Site Information.

7. The **Basic Information** section will house the information you initially entered when creating the Site.

Basic Information

Alias name	Address	Phone number	Website
Abundant	9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor, Depew, NM 02345	(555) 555-5555 x421223	AbundantHealth.org
EIN	FAX	Total active locations	
-	(555) 867-5308	2	

About us notes

-

Last updated by Ashish Maharaja on May 3, 2023

8. If additional **Programs** utilize Prism and you share Sites, you can add them to the list to share information. This is mainly used by Contract department and might not be applicable to all School/University if they not sharing data across programs. In such cases, this edit option is disabled.

Programs

PA.MSPAS PT.DPT SW Nursing Nursing-CRNA OT.OTD

9. List out any **Requirements** this Site asks of students.

1. Information added here will automatically apply for all locations associated with this Site.
2. This will be shared with Students once they are placed at any location associated with this Site.

Requirements 

Background Check Drug Screen MMR TB CPR Physical Exam CBC

10. If Sites required 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. Details added or updated here will apply to all associated locations of this site.
 2. This will be shared with Students once they are placed at any location associated with this Site.
 3. New requirements added or changes made to the existing requirements will not be visible to students who have begun or already completed a placement at this site.

Student Requirement Upload (Shared Via Profile Link) 

REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
HR Clearance Form				
Onboarding Paperwork			Please complete and upload specific onboarding paperwork	

4. Once the requirements are completed by students, School can choose to share the Location requirement link with Sites to review documents uploaded by students. However, make sure to use new merge field added in the list while creating a new placement notification email template - **@StudentProfileWithComplianceAndLocationRequirementsLink**

Compose Email

Subject*
ABC University Placement Confirmation Request



@Prefix @First Name @Last Name
@Title
Dear @First Name,
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 the following student for a given rotation:

Location: @Location Name
Site: @Site Name
Location Address: @Location Address

Rotation Dates: @Rotation StartDate - @Rotation EndDate
Placement Dates: @Placement StartDate - @Placement EndDate
Setting: @setting
Placement supervisor name: @PlacementSupervisorName

Student Name: @StudentFirstName @StudentLastName (@StudentCohort)
Student profile: @StudentProfileLink
Student profile with Compliance: @StudentProfileWithComplianceLink
Student profile with location requirements:
@StudentProfileWithComplianceAndLocationRequirementsLink

Please respond back to this email directly to let us know if you can take the above mentioned student for the given dates.

Thank you for considering the opportunity to educate a student. Do not hesitate to reach out directly at any time!
Anderson Cooper
Director of Clinical Education
ABC University



Merge Fields

- @First Name
- @Last Name
- @Prefix
- @title
- @Location Name
- @Location Address
- @Site Name
- @StudentProfileLink
- @StudentProfileWithComplianceLink
- @StudentProfileWithComplianceAndLocationRequirementsLink
- @StudentCohort
- @setting
- @StudentFirstName
- @StudentLastName
- @StudentEmailId
- @PlacementStartDate
- @PlacementEndDate
- @RotationStartDate
- @RotationEndDate
- @PlacementSupervisorName
- @PlacementTable

You have 10.00 MB Remaining for Attachments in this

5. Following email distribution from the school, the site/clinical partner will receive a unique delegator link that they must click in order to view the documents.

Profile

Rosie Burton - Exxat Sales (PT)

 Deitra, Kay* (Ky)
She/Her/Her | Kay.Deitra@example.com | (555) 555-5555

Profile Compliance **Location Requirements**

RCP Packet
[View Documents](#)

11. List out common **Settings** this site offers slot availability for.

1. Information added here will automatically apply for all locations associated with this Site.

Settings

Acute Care Home Health Outpatient Rehab School Based Wellness

12. Have program curated **Categories**? Add them to Sites here.

1. Information added here will automatically apply for all locations associated with this Site.



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

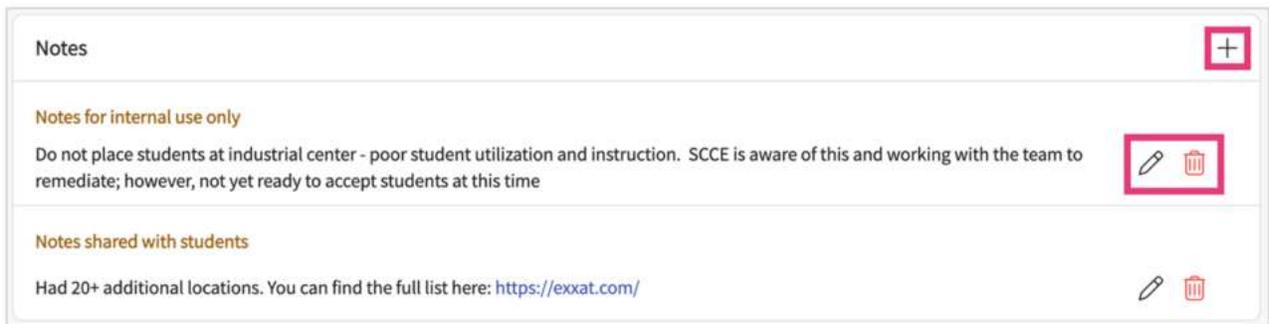
1. Information added here will automatically apply for all locations associated with this Site.

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



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

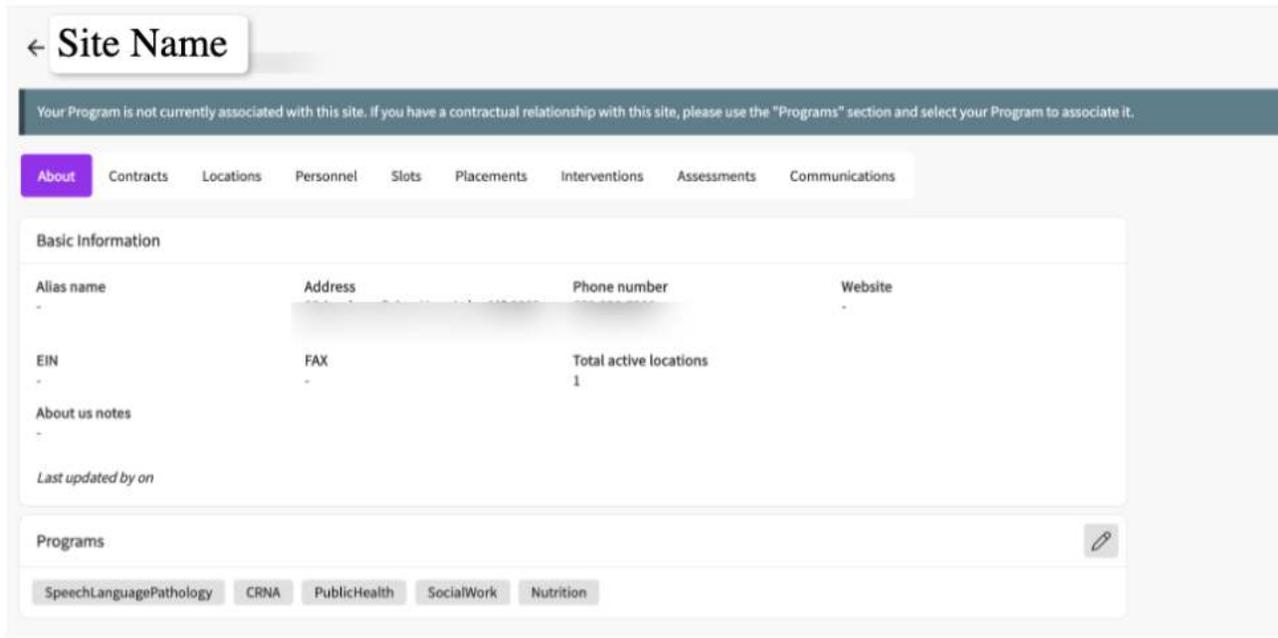
1. Notes shared with students will be displayed on the Explore Clinical Locations section.



Who Can Update Program Information under Site?

- To update the **Programs** section under **Sites and Locations**, a user must have access to the **Sites** module.
- If a user has **Program Admin** access but does **not** have access to the **Sites** module, they cannot update the program information.
- If your setup involves **site sharing**, the site must be shared with the program for the user to edit the site information.
- Without site-sharing permissions, the program information within that site remains read-only for the user.

- Users without the required access or sharing permissions will see a restricted view of the **Programs** section, where editing options are disabled.

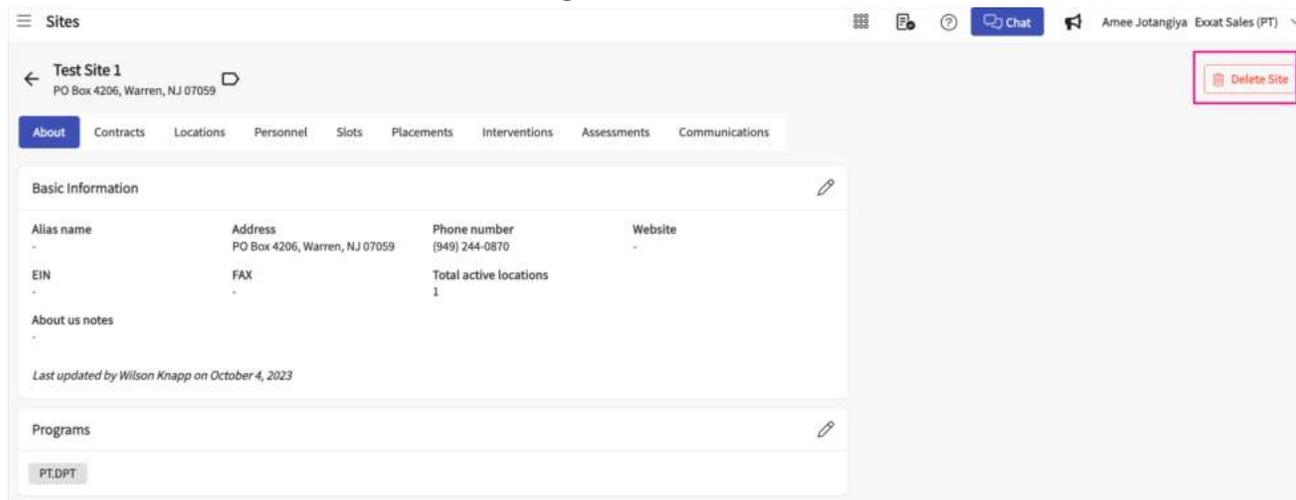


For further assistance, please contact your program administrator or review the **Site Sharing Setup** guidelines.

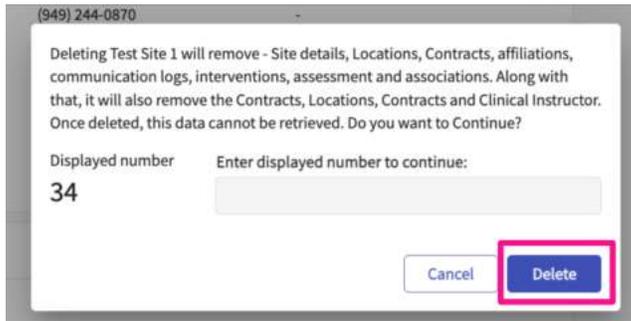
Deleting Site

In case you are no longer working with the site, you always have the option to delete the site. You can only delete the site if it does not have any slots or placements associated with it. You can delete the site by following the below steps:

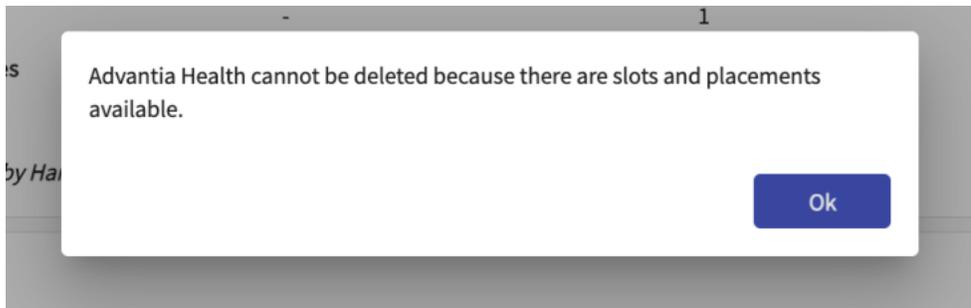
1. Go to Site
2. Locate the **Delete Site** button in the right-hand corner



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



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



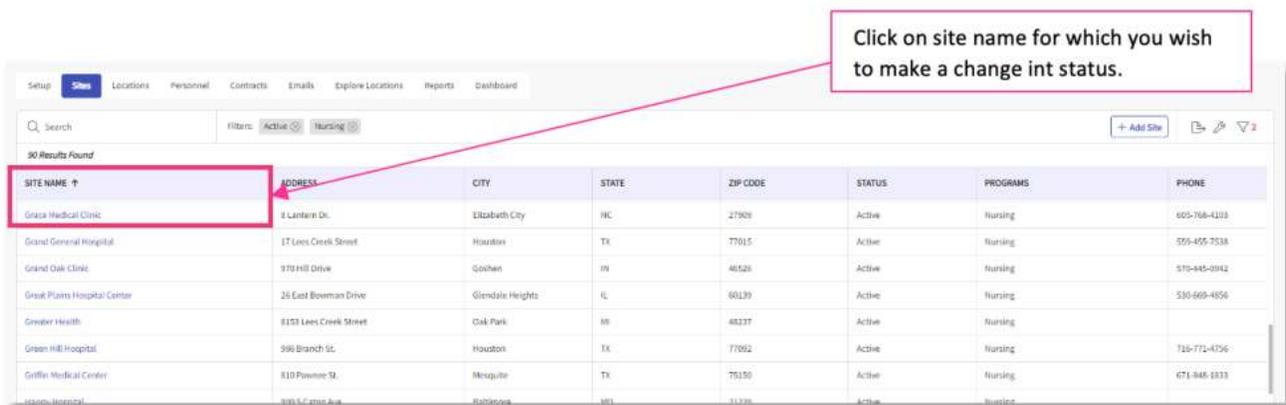
Marking a Site Inactive

In case you are no longer working with the site, and you have past data associated with this site that you wish to preserve, you always have the option to mark the site as inactive instead of deleting it.

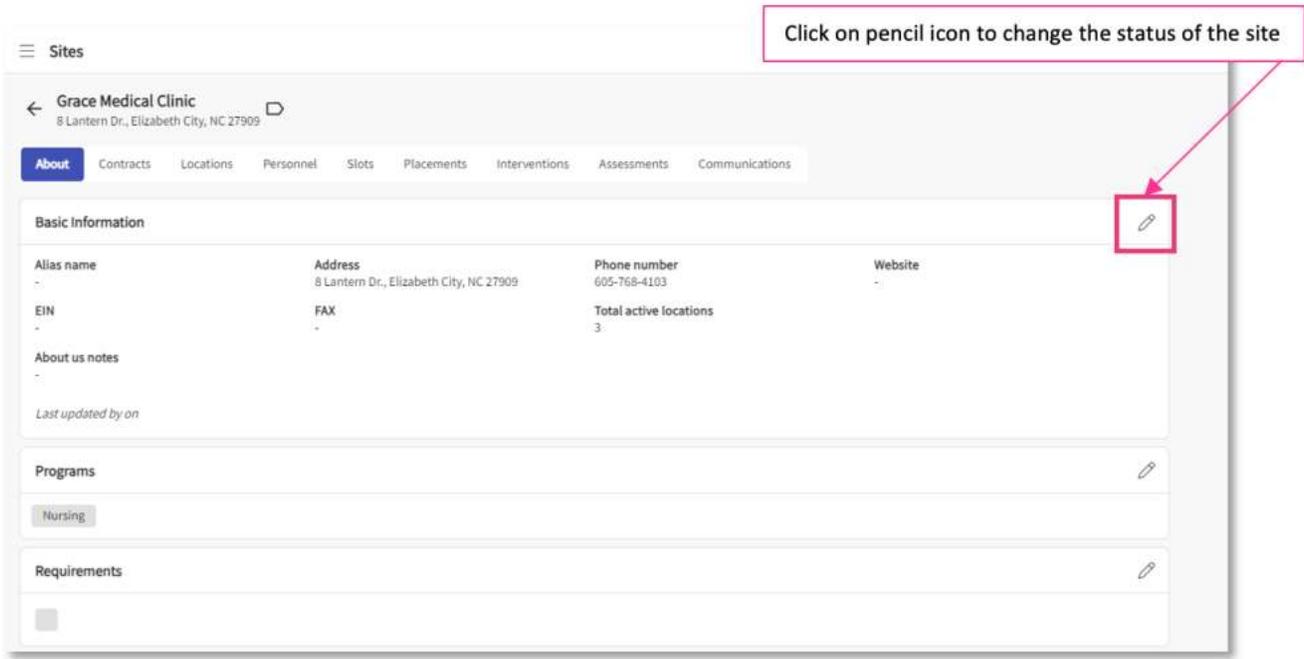
1. Select Sites from your left menu.



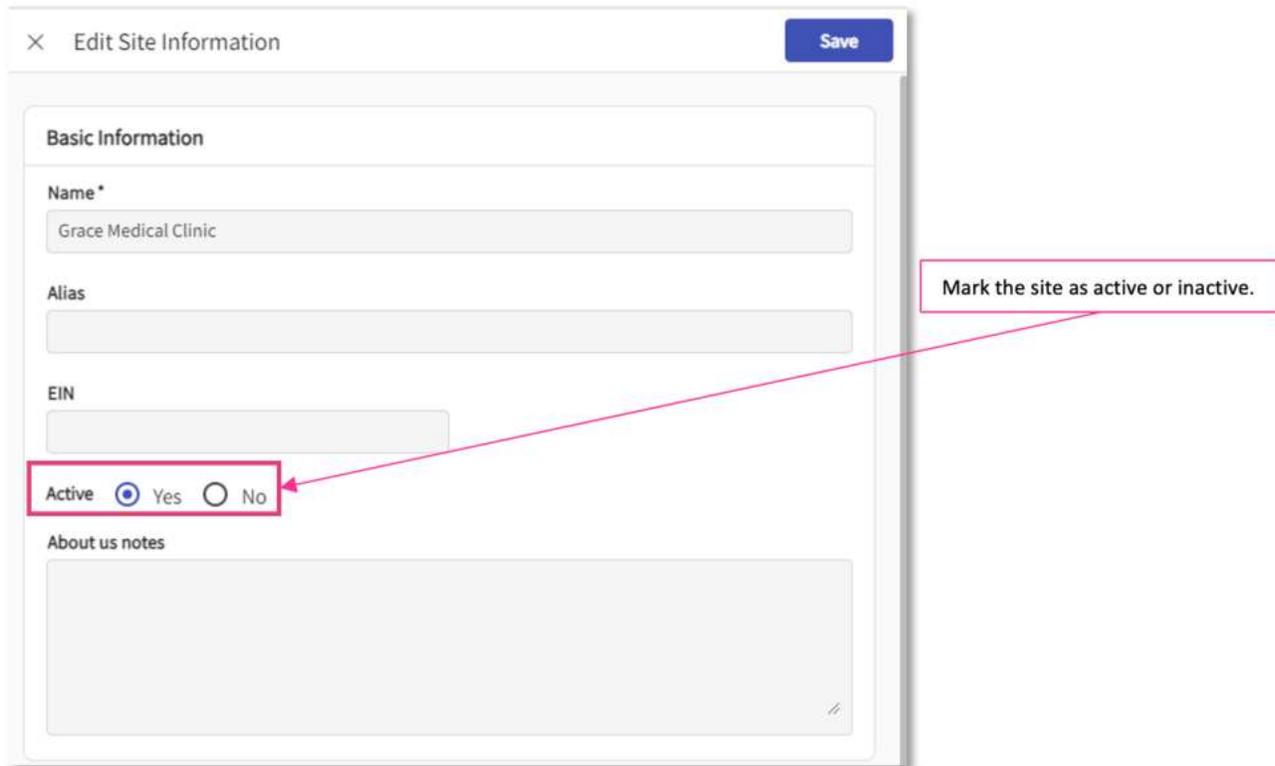
2. Select the site for which you want to modify the status.



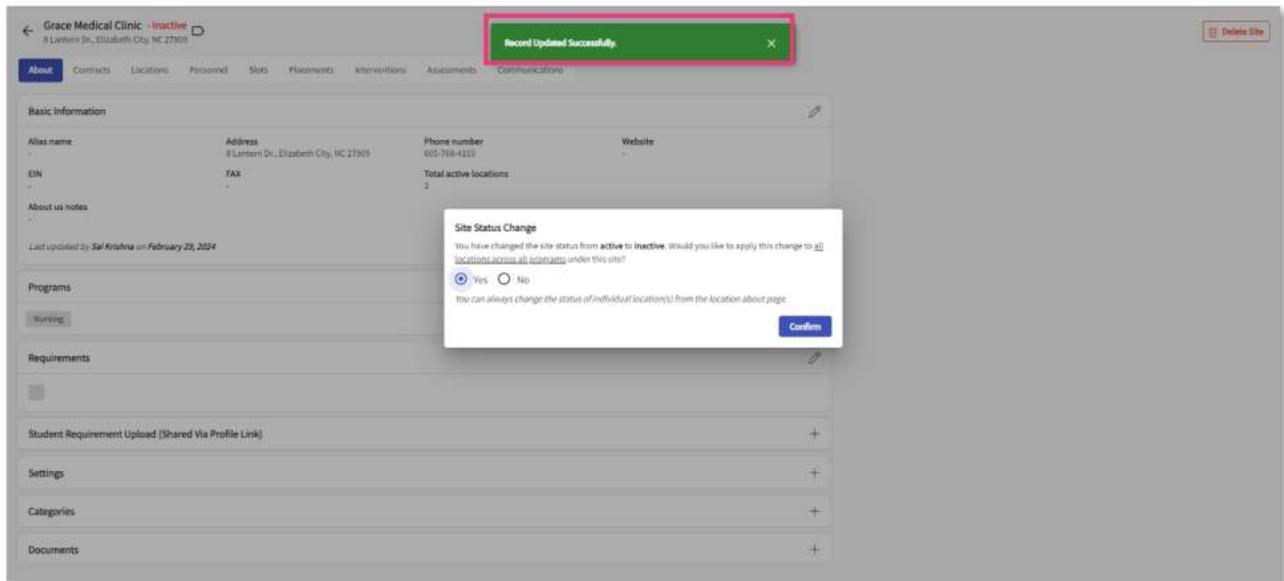
3. After clicking on the site name, you should then select the pencil icon to modify the site's status



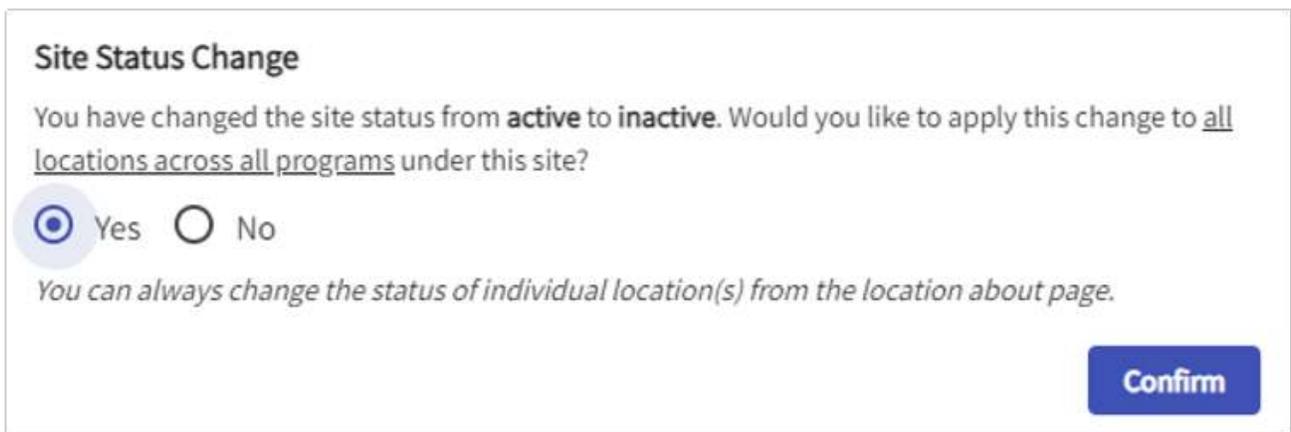
4. When you click on the pencil icon for a site, a drawer will appear where you can find the option to designate the site as active or inactive under "Edit Site Information."



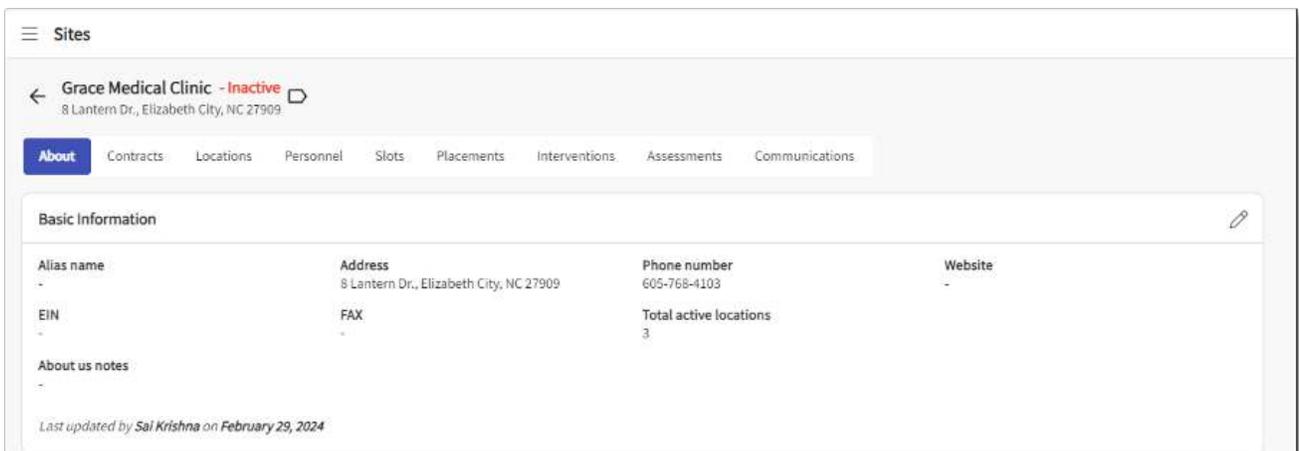
5. When you mark a site as inactive, you need to click on the "Save" button to ensure that the changes are reflected in the system.



6. After saving the changes, a popup will appear allowing you to apply the site status change across all locations for all programs, or you can adjust the status of individual location(s) from the location's page.



7. Once the site status is switched to inactive, the school will notice a caption displayed next to the site name as "-inactive".



Adding Slots by Site and Location

If you receive slot availability outside of Exxat, you can enter the information easily! You can enter slots by Site, Location and Placements. This document will cover adding by Site and Location.

When adding slots by **Site**, you can view all slots offered across all locations, and when adding, you get to choose the Location.

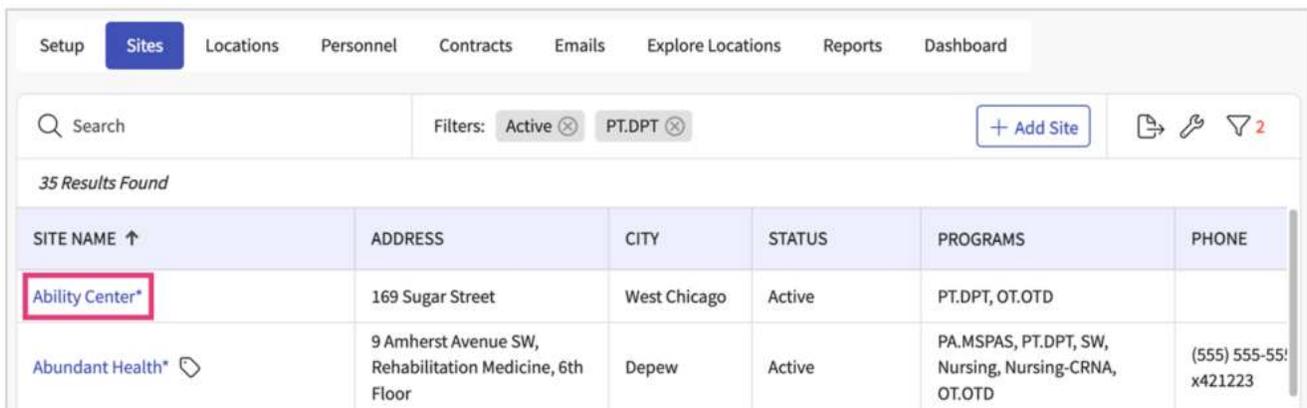
When adding slots by **Location**, your view of slots will be limited to that one location, and the location cannot be changed.

Adding Slots by Site

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



2. Find and select your desired Site.



The screenshot shows the 'Sites' page in a web application. At the top, there is a navigation ribbon with tabs: Setup, Sites (selected), Locations, Personnel, Contracts, Emails, Explore Locations, Reports, and Dashboard. Below the ribbon is a search bar with the text 'Search' and a magnifying glass icon. To the right of the search bar are filter buttons for 'Active' and 'PT.DPT', and an '+ Add Site' button. Below the search bar, it says '35 Results Found'. A table with the following columns is displayed: SITE NAME ↑, ADDRESS, CITY, STATUS, PROGRAMS, and PHONE. The first row is 'Ability Center*' with address '169 Sugar Street', city 'West Chicago', status 'Active', and programs 'PT.DPT, OT.OTD'. The second row is 'Abundant Health*' with address '9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor', city 'Depew', status 'Active', and programs 'PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD'. The phone number for the second row is '(555) 555-55: x421223'.

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health*	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. Click on the Slots tab from the ribbon at the top of the page.



4. On this page you will see all the slots added for Locations associated with this site. To add a new slot, click on +Add Slot.

Abundant Health*
9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor, Depew, NM 02345

Delete Site

About Contracts Locations Personnel **Slots** Placements Interventions Assessments Communications

Search

+ Add Slot

LOCATION	ROTATION ↑	COHORT	SCHEDULE	SETTING	ACTION
Abundant Health - Main Hospital	Clinical Practice I	Class of 2022*	Nov 5, 2018 - Dec 3, 2018	Outpatient	
Location not assigned	Clinical Practice I	Class of 2022*	Nov 5, 2019 - Dec 3, 2019	Home Health	
Abundant - Ambulatory Care - Inactive	Clinical Practice I	Class of 2025	Nov 3, 2025 - Dec 12, 2025	Acute Care	

5. A drawer will open. Enter in your slot information. Click Save once done.

1. For Location, you will have all locations listed, including the Location not known option.
2. The rotation list at the bottom will only include current and future rotations only.
3. The number of offers you have received is required.

Search

Abundant - Ambulatory Care - Inactive

Abundant Health - Main Hospital

Abundant Urgent care

--Location not known--

× Add slots

Save

Location: Abundant Urgent care

Clinical Instructor:

Setting: Outpatient

Slot status: Confirmed

Slot type: Interview Required

Supervision type: 1 Student:1 CI

Notes - Shared with students

Notes - Internal use only

5000 characters left

5000 characters left

The below rotation list shows the current and future rotations only

Search

ROTATION	SLOTS START DATE	SLOTS END DATE	NUMBER OF STUDENTS*
Clinical Practice IV Apr 1, 2023 - Jun 18, 2023 Class of 2023	April 1, 2023	June 18, 2023	1
Clinical Practice II Jun 6, 2023 - Jul 3, 2023 Class of 2024	June 6, 2023	July 3, 2023	Type number

6. Your slot will be added! To edit or delete a slot, click on the pencil icon.

1. Please note, when editing a slot, if a student has already been placed, you will only be able to change the start date, end date, and notes.
2. When editing a slot, you cannot change the number of offers. If you were given additional spots for the same rotation and setting, please add another slot.

Abundant Health*
9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor, Depew, NM 02345

Delete Site

About Contracts Locations Personnel **Slots** Placements Interventions Assessments Communications

Search + Add Slot

LOCATION	ROTATION ↑	COHORT	SCHEDULE	SETTING	ACTION
Abundant Health - Main Hospital	Clinical Practice I	Class of 2022*	Nov 5, 2018 - Dec 3, 2018	Outpatient	
Location not assigned	Clinical Practice I	Class of 2022*	Nov 5, 2019 - Dec 3, 2019	Home Health	
Abundant - Ambulatory Care - Inactive	Clinical Practice I	Class of 2025	Nov 3, 2025 - Dec 12, 2025	Acute Care	

7. A drawer will open.

1. If you are editing a slot, make your desired changes and click Save once done.
2. If you are deleting the slot, click on the trash bin.

Abundant Health* Save

Collapse all

Slot 1

Location: Abundant Urgent care | Calendar year *: 2023 | Rotation *: Clinical Practice II, Jun 6, 2023-Jul 3, 2023

Start date: June 6, 2023 | End date: July 3, 2023

Clinical Instructor: Clinical Instructor not known | Setting: Outpatient | Number of students: 1

Slot status: Confirmed | Slot type: Interview Required | Supervision type: 1 Student:1 CI

Notes - Shared with students: 5000 characters left

Notes - Internal use only: Location may change, update in April. 4962 characters left

Adding Slots by Location

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



2. Find and select your desired Location.

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

Search Filters: Active PT.DPT 2

55 Results Found

LOCATION ↑	ADDRESS	STATUS	PHONE	SITE NAME
Ability Center	169 Sugar Street	Active		Ability Center*
Abundant Health - Main Hospital	9 Amherst Avenue	Active	(555) 555-5555 x5555	Abundant Health*

3. Click on the Slots tab from the left panel.

Sites > Action Physical Therapy Inc > Action Physical Therapy Inc

Action Physical Therapy Inc 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043 [Delete Location](#)

Location Menu

- About
- Personnel
- Communications
- Slots**
- Placements
- Interventions
- Assessments
- Location Evaluations

Action Physical Therapy Inc

Address	Location Area	Phone
380 SUTLEY CIR, SACRAMENTO, CA 95835-2043	-	-
FAX	Location label	Website
-	TEST	-
Rural Location	Underserved Population	Explore clinical locations
No	Yes	Yes

Last updated by Sai Potturi on November 22, 2022

Contracts

Action Physical Therapy Inc Awaiting Signoff
June 6, 2022 - June 7, 2028

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

Search [+ Add Slot](#)

ROTATION	COHORT	SCHEDULE	SETTING	OFFERED	AVAILABLE	STUDENT	ACTION
Clinical Practice III	Class of 2022*	Feb 1, 2021 - Mar 12, 2021	Sub-Acute	1	0	1	
Clinical Practice IV	Class of 2022*	Apr 5, 2022 - Jun 18, 2022	Outpatient	1	0	1	
Clinical Practice III	Class of 2022*	Feb 1, 2021 - Mar 12, 2021	Acute Care	1	0	1	

5. A drawer will open. Enter in your slot information. Click Save once done.

1. The Location field will be prefilled and cannot be changed.
2. The rotation list at the bottom will only include current and future rotations only.

3. The number of offers you have received is required.

ROTATION	SLOTS START DATE	SLOTS END DATE	NUMBER OF STUDENTS*
Clinical Practice IV <i>Apr 1, 2023 - Jun 18, 2023</i> Class of 2023	April 1, 2023	June 18, 2023	Type number
Clinical Practice II <i>Jun 6, 2023 - Jul 3, 2023</i> Class of 2024	June 6, 2023	July 3, 2023	1

6. Your slot will be added! To edit or delete a slot, click on the pencil icon.

1. Please note, when editing a slot, if a student has already been placed, you will only be able to change the start date, end date, and notes.
2. When editing a slot, you cannot change the number of offers. If you were given additional spots for the same rotation and setting, please add another slot.

ROTATION	COHORT	SCHEDULE	SETTING	OFFERED	AVAILABLE	STUDENT	ACTION
Clinical Practice III	Class of 2022*	Feb 1, 2021 - Mar 12, 2021	Sub-Acute	1	0	1	
Clinical Practice IV	Class of 2022*	Apr 5, 2022 - Jun 18, 2022	Outpatient	1	0	1	
Clinical Practice III	Class of 2022*	Feb 1, 2021 - Mar 12, 2021	Acute Care	1	0	1	

7. A drawer will open.

1. If you are editing a slot, make your desired changes and click Save once done.

2. If you are deleting the slot, click on the trash bin.

The screenshot shows the 'Adaptial' interface for editing a slot. The window title is 'Adaptial' with a close button on the left and a 'Save' button on the right. Below the title bar is a 'Collapse all' button. The main content area is titled 'Slot 1' with a trash bin icon and an expand/collapse arrow. The form contains the following fields:

- Location:** Adaptial - Wellington
- Calendar year *:** 2023
- Rotation *:** Clinical Practice IV, Apr 1, 2023-Jun 18, 2023
- Start date:** April 1, 2023
- End date:** June 18, 2023
- Clinical Instructor:** Clinical Instructor not known
- Setting:** Rehab
- Number of students:** 1
- Slot status:** Confirmed
- Slot type:** FCFS
- Supervision type:** 1 Student:1 CI

At the bottom, there are two text areas for notes, each with a rich text editor toolbar and a '5000 characters left' indicator.

Viewing Placements by Site and Location

There may be times when you'd like to review placements in the system by Site or Location.

[Viewing placements by Site](#) will show you all the placements made across all Locations associated with that Site.

[Viewing placements by Location](#) will be limited to that Location only.

Both pathways will show you the same information:

- Student Name
- Student Cohort
- Student Group
- Student Phone
- Student Email
- Site Name
- Location Name
- Placement Dates
- Program Requirements
- Site/Location Contacts
- Clinician Details
- Placement Faculty
- Placement Status
- Placement Notes – Shared with Students
- Placement Notes – Internal Use Only
- Placement Publish Status
- Student Attestations
- Location Address
- Setting
- Rotation
- Course Offering

Viewing Placements by Site

1. Select Sites from the left menu or dashboard.

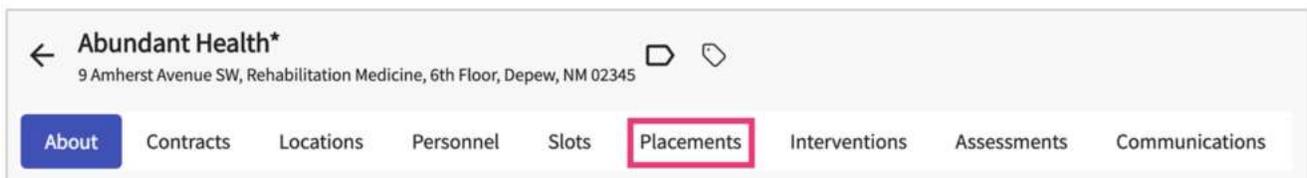


2. Find and select your desired Site.

 A screenshot of a web application interface for viewing sites. At the top, there is a navigation ribbon with tabs: Setup, Sites (highlighted in blue), Locations, Personnel, Contracts, Emails, Explore Locations, Reports, and Dashboard. Below the ribbon is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar are filter buttons for 'Active' and 'PT.DPT', and a '+ Add Site' button. Further right are icons for a document, a key, and a funnel with the number '2'. Below the search bar, it says '35 Results Found'. A table with columns 'SITE NAME', 'ADDRESS', 'CITY', 'STATUS', 'PROGRAMS', and 'PHONE' is displayed. The first row is 'Ability Center*' with address '169 Sugar Street', city 'West Chicago', status 'Active', and programs 'PT.DPT, OT.OTD'. The second row is 'Abundant Health*' with address '9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor', city 'Depew', status 'Active', and programs 'PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD'. The phone number '(555) 555-55! x421223' is listed in the 'PHONE' column.

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health*	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. Click on the Placements tab from the ribbon at the top of the page.



4. The page will load all placements for all locations associated with the Site.
 1. Please note this report is updated every 24 hours.
 2. You can export this information if needed.
 3. Modify the columns you see and the order they appear in using the wrench icon.
 4. Filter the list by rotation, cohort, and other fields available.

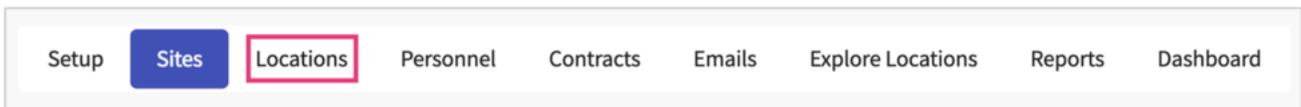
STUDENT NAME	ROTATION	STUDENT EMAIL	SITE NAME	LOCATION NAME	SETTING	LOCATION ADDRESS
Bryant, Rose	Clinical Practicum I - Spring	rose.bryantcrna@exxat.com	Abundant Health*	Abundant Urgent care	Setting not assigned	4110 ABC Av 07059
Holt, Max	Clinical Practice I	Max.Holt@exxat.com	Abundant Health*	Abundant Health - Main Hospital	Outpatient	9 Amherst A 14043

Viewing Placements by Location

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.

LOCATION ↑	ADDRESS	STATUS	PHONE	SITE NAME
Ability Center	169 Sugar Street	Active		Ability Center*
Abundant Health - Main Hospital	9 Amherst Avenue	Active	(555) 555-5555 x5555	Abundant Health*

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

Sites > Action Physical Therapy Inc > Action Physical Therapy Inc

Action Physical Therapy Inc 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043 Delete Location

Location Menu <

- About
- Personnel
- Communications
- Slots
- Placements**
- Interventions
- Assessments
- Location Evaluations

Action Physical Therapy Inc

Address 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043	Location Area -	Phone -
FAX -	Location label TEST	Website -
Rural Location No	Underserved Population Yes	Explore clinical locations Yes

Last updated by Sai Potturi on November 22, 2022

Contracts

[Action Physical Therapy Inc](#) Awaiting Signoff
June 6, 2022 - June 7, 2028

5. The page will load all placements for the Location you selected.

1. Please note this report is updated every 24 hours.
2. You can export this information if needed.
3. Modify the columns you see and the order they appear in using the wrench icon.
4. Filter the list by rotation, cohort, and other fields available.

This report is updated with placement information every 24 hours. Last updated on: May 26, 2023, 10:39:29 PM

Student First Na... Search Export Edit Filter

STUDENT NAME	STUDENT COHORT	STUDENT GROUP	STUDENT PHONE	STUDENT EMAIL	SITE NAME
Stevenson, Samantha	Class of 2024	Residential	(555) 555-5555	Samantha.Stevenson@exxat.com	Abundant Health*
Bryant, Rose	Class Of 2025	Full Time	(555) 555-5555	rose.bryantcma@exxat.com	Abundant Health*

Managing Site/location Requirement Uploads

You may have sites or location that request additional documentation from students before starting a placement.

If so, you'll want to make sure you have the documentation available for students to work on and share with the site.

Here is the general workflow:



Uploading documents for Sites or location that require additional documentation

If a Site or location requires additional documentation, you have two pathways to choose from:

- **Add documents to the Site**
 - If the Site has multiple locations, and they all require the same additional documentation, adding it at the Site will add it to all locations. You simply have to add it once!
- **Add documents to a Location**
 - If the documentation required only applies to one location, it is recommended you add it to that single location.

You also have the ability to update and track the status of each site and the location requirements of each student.

Adding documents for a Site

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



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

Setup Sites Locations Personnel Contracts Emails Explore Locations Reports Dashboard					
Search		Filters: Active <input type="checkbox"/> PT.DPT <input type="checkbox"/>		+ Add Site <input type="button" value="📄"/> <input type="button" value="🔧"/> <input type="button" value="🔍 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* <input type="button" value="📄"/>	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. Once on the Site profile, within the About tab, scroll down to the Student Requirement Upload (Shared Via Profile Link) section and click on the + icon.

Abundant Health*
9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor, Depew, NM 02345

[About](#)
[Contracts](#)
[Locations](#)
[Personnel](#)
[Slots](#)
[Placements](#)
[Interventions](#)
[Assessments](#)
[Communications](#)

Student Requirement Upload (Shared Via Profile Link) +

REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
HR Clearance Form	✓	✓		✎
Onboarding Paperwork	✓	✓	Please complete and upload specific onboarding paperwork	✎

4. A drawer will open. Provide the document's name, a description, and template. Click Save once done.

1. These documents will automatically be enabled for students and included in the student's profile link for sites to view.
2. Please note, if you are making changes or adding new requirements, students who have already started a placement or completed a placement will not view these changes or updates.

Student Requirement Upload (Shared via Prof. ...) Save

New requirements added or changes made to the existing requirements will not be visible to students who have begun or already completed a placement at this site.

Requirement 🗑️

Requirement Name *

Orientation Packet

Enabled for Students

Include in the Profile Link

Paragraph B I U ☰ 🔗 ⋮

Description

Template

📁 Browse to upload

5. The document will then be added to all associated locations.
 1. Please note, that any edits to the document you have added, must be done at the Site level.
6. If changes occur, and the document no longer applies to a location, you can easily remove it for single locations.
7. To remove a site document from a location, click on Locations from the ribbon at the top of the page.

The screenshot shows the 'Locations' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Student Requirement Upload (Shared Via Profile Link)' with a plus sign icon. Below this section is a table with the following data:

REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
HR Clearance Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Onboarding Paperwork	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Please complete and upload specific onboarding paperwork	
Orientation Packet View document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

8. Select the Location you would like to remove the document for.

The screenshot shows the 'Locations' tab selected in the top navigation bar. Below the navigation bar, there is a search bar and a '+ Add location' button. Below these is a table with the following data:

LOCATION ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS
Abundant - Ambulatory Care	3200 WALDEN AVE	DEPEW	NY	14043	Inactive
Abundant Health - Main Hospital 	9 Amherst Avenue	Depew	NY	14043	Active
Abundant Urgent care	4110 ABC Ave	Warren	IA	07059	Active

9. On the About tab, scroll down to the Student Requirement Upload (Shared Via Profile Link) and turn off the option "Enable for this location".
 1. Please note, this will remove all student required upload files added at Site level. Make sure this is what you want!

Sites > Abundant Health* > Abundant Health - Main Hospital

Abundant Health - Main Hospital 9 Amherst Avenue, Depew, NY 14043 | [exxat.com](#) Delete Location

Location Menu <

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

Student Requirement Upload (Shared Via Profile Link) +

Site Specific Requirements ^

Enable for this location ⓘ

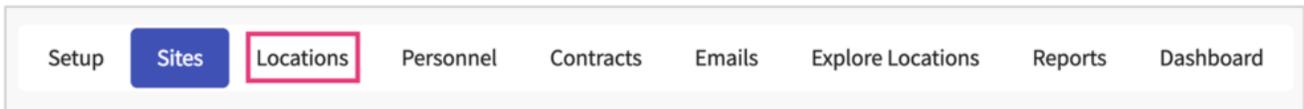
REQUIREMENT NAME	ENABLED FOR STUDENTS	INCLUDE IN THE PROFILE LINK	DESCRIPTION	ACTION
HR Clearance Form	✓	✓		✎
Onboarding Paperwork	✓	✓	Please complete and upload specific onboarding paperwork	✎
Orientation Packet View document	✓	✓		✎

Adding documents for a Location

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



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



3. Find and select the Location you'd like to manage.

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

Search Filters: Active PT.DPT 📄 ⚙️ 🔍 2

55 Results Found

LOCATION ↑	ADDRESS	STATUS	PHONE	SITE NAME
Ability Center	169 Sugar Street	Active		Ability Center*
Abundant Health - Main Hospital	9 Amherst Avenue	Active	(555) 555-5555 x5555	Abundant Health*

4. On the About tab, scroll down to the Student Requirement Upload (Shared Via Profile Link) and click on the + icon.

Sites > Ability Center* > Ability Center

Ability Center 169 Sugar Street, West Chicago, IL 60185 Delete Location

Location Menu <

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

Categories ✎

Inherited from site

Major Medical Center

Location categories

-

Location Requirement +

Student Requirement Upload (Shared Via Profile Link) +

5. A drawer will open. Provide the document's name, a description, and template. Click Save once done.
 1. These documents will automatically be enabled for students and included in the student's profile link for sites to view.
 2. Please note, if you are making changes or adding new requirements, students who have already started a placement or completed a placement will not view these changes or

updates.

× Student Requirement Upload (Shared via Prof... Save

New requirements added or changes made to the existing requirements will not be visible to students who have begun or already completed a placement at this site.

Requirement

Requirement Name*

Orientation Packet

Enabled for Students

Include in the Profile Link

Paragraph **B** *I* U

Description

Template

Browse to upload

Reviewing documents student's upload

1. Once your students begin uploading their necessary documentation, you may want to review it before they share the files with the site.
2. Select Placements from your left-menu or dashboard.



3. Select your desired course or placement group.

The screenshot shows the 'Course Offerings' interface. On the left, there is a sidebar with 'Placement Groups' and a list of classes: 'Class of 2024', 'Class of 2023', 'Class of 2021', and 'Class of 2022*'. The 'Class of 2023' group is selected. The main area shows a search bar with 'Course number' and a search icon. Below the search bar, it says 'Results found : 4'. A table lists the results:

COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM	COHORT ↓
DPT 800	Clinical Practice I*	2020 - 2021	1st Year	Fall	Class of 2023
DPT 850	Clinical Practice II*	2021 - 2022	2nd Year	Summer	Class of 2023
DPT 900	Clinical Practice III*	2022 - 2023	3rd Year	Spring	Class of 2023

4. If you selected a placement group, click Placements for Group.

The screenshot shows the 'Class of 2023' page. The sidebar on the left has 'Class of 2023' selected. The main area shows the 'Class of 2023' header with edit and delete icons. Below the header is a blue button labeled 'Placements for Group'. Underneath is a search bar for 'Search course offering'. A table lists the course offerings:

COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	PROFESSIONAL YEAR	TERM
DPT 950	Clinical Practice IV*	2022 - 2023	3rd Year	Spring
DPT 900	Clinical Practice III*	2022 - 2023	3rd Year	Spring
DPT 800	Clinical Practice I*	2020 - 2021	1st Year	Fall

5. Select Placement Clearance from the ribbon at the top of the page.

The screenshot shows the top ribbon of the application. It contains several buttons: 'Setup', 'Slots', 'Wishlist', 'Placements', 'Email & Publish', 'Placement Clearance', and 'Reports'. The 'Placement Clearance' button is highlighted with a red box.

6. The page will load all of the students for the selected course or placement group. The column Requirement Upload Status will indicate if the student must upload additional documentation. You may see the following statuses:

1. **Get Started:** student has not yet uploaded any required files
2. **Action Required:** student has at least one document left to upload
3. **Uploaded:** student has uploaded all required documents
4. **Not Applicable:** student does not have to upload additional documentation

7. To review student file uploads, click on the status.

← Class of 2022							Setup	Slots	Wishlist	Placements	Email & Publish	Placement Clearance	Reports
Search													
STUDENT DETAILS ↑	COURSE OFFERING		ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	REQUIREMENT UPLOAD STATUS						
Deitra, Kay*		DPT 950 - Clinical Practice IV*, 2021 - 2022, 3rd Year, Spring, Class of 2022*	Clinical Practice IV	Sub-Acute Apr 5, 2022 - May 1, 2022	Mar 11, 2022	Caremark Orthopedics Palm City, FL	Not Applicable						
Deitra, Kay*		DPT 800 - Clinical Practice I*, 2019 - 2020, 1st Year, Fall, Class of 2022*	Clinical Practice I	Outpatient Nov 5, 2018 - Mar 1, 2022	Jan 19, 2023	Crestview Orthopedics Goshen, IN	Action Required						
Deitra, Kay*		DPT 900 - Clinical Practice IV*, 2021 - 2022, 3rd Year, Spring, Class of 2022*	Clinical Practice III	Acute Care Feb 8, 2022 - Mar 19, 2022	Mar 11, 2022	Mercy Central Philadelphia, PA	Get Started						

8. A drawer will open and will list the documentation that is required of them. For uploaded files, you will have an option to view the document.

1. You can also download the files all at once.

✕
Review Student Requirement Upload

Deitra, Kay*

Crestview Orthopedics | Goshen, IN

Clinical Practice I | November 5, 2018 - March 1, 2022

Outpatient

Action Required

Requirements

REQUIREMENT NAME ↑	NOTES	STATUS	DOCUMENT
Crestview Health Clearance Form	-	Get Started	View document
Orientation Packet	-	Uploaded	View document

9. Please note, the feature for programs to share Student Requirement Uploads via the student profile has not been developed yet. Your students must share their profile via their Coursework section to share these documents

Contract Status on Clearance Dashboard

1. A Contract Status column next to Location Column in placement clearance dashboard has been introduced.

Placement Clearance

Class of 2024

Rotation Setup Slots Wishlist Placements Email & Publish Placement Clearance Reports

Search

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Kumar, Aditya	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice IV	Home Health Apr 1, 2024 - Jun 18, 2024	Aug 22, 2023	Adaptial - Easton South Easton, MA	Valid Contract Multiple Contracts	Get Started
Kumar, Aditya	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	DPT 850 - Clinical Practice II	Sports Research Feb 2, 2023 - Feb 21, 2023	-	Allsports - Warren Warren, NH	Valid Contract	Not Applicable
Kumar, Aditya	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	DPT 850 - Clinical Practice II	Home Health Feb 2, 2023 - Feb 21, 2023	-	Abundant Health - Main Hospital Depew, NY	Needs Attention Missing contract	Not Applicable

2. Status shows as 'Valid Contract' if the location has a contract that is
1. Fully executed,
 2. Active, and
 3. Valid through placement dates or is open-ended.

Search

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
	Spring, Class of 2024		12, 2024				
Mills, Marco	DPT 950 - Clinical Practice IV*, 2023 - 2024, 3rd Year, Spring, Class of 2024	Clinical Practice IV	Home Health Apr 1, 2024 - Jun 18, 2024	Feb 28, 2023	Newlife Central New Milford, CT	Valid Contract	Not Applicable

3. Status shows as 'Needs Attention' for sites/locations that do not meet all of the above.

Search

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Stevenson, Samantha	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice I	Home Health Sep 8, 2021 - Dec 30, 2023	Sep 25, 2023	Crestview Central Muscatine, IA	Needs Attention	Get Started

4. The status will show as 'Valid Contract' even for those placements where the placement end date is the same as the contract expiry date.

5. If the Location is associated with a single contract, the status will show :

1. Valid Contract: If the contract is in Fully Executive Status, Active, open-ended or Not expiring within the placement end date and the contract start date is not after the placement start date

Search

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
	Spring, Class of 2024		12, 2024				
Mills, Marco	DPT 950 - Clinical Practice IV*, 2023 - 2024, 3rd Year, Spring, Class of 2024	Clinical Practice IV	Home Health Apr 1, 2024 - Jun 18, 2024	Feb 28, 2023	Newlife Central New Milford, CT	Valid Contract	Not Applicable

2. Needs Attention (expiring during placement): If the contract is in Fully Executive Status, Active, but expiring within the placement end date.

STUDENT DETAILS ↑ COURSE OFFERING ROTATION PLACEMENT DETAILS PUBLISH DATE LOCATION CONTRACT STATUS ⓘ REQUIREMENT UPLOAD STATUS ⓘ

Brewer, Donald	DPT 800 - Clinical Practice I*, 2020 - 2021, 1st Year, Fall, Class of 2023	Clinical Practice I	Acute Care Nov 3, 2020 - Dec 21, 2020	-	Total Therapy Solutions Troy, NY	Needs Attention Expiring during Placement	Not Applicable
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3. Needs Attention: For all other scenarios.

Search

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Stevenson, Samantha	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice I	Home Health Sep 8, 2021 - Dec 30, 2023	Sep 25, 2023	Crestview Central Muscatine, IA	Needs Attention	Get Started

- If the location is associated with multiple contracts, the status will show the following:
- Valid Contract (Multiple Contracts): If there is at least one contract with status as Fully Executed Status, Active and not expired (including open-ended contracts) and the contract is not expiring within the placement end date and the contract start date is not after the placement start date, this will be shown. Also, an additional label with multiple contracts associated will be shown along with shown.

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Kumar, Aditya ⓘ	UP1 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice II	Home Health Jun 10, 2023 - Jul 5, 2023	Aug 22, 2023	Abundant Health - Main Hospital Depew, NY	Needs Attention Missing contract	Get Started
Kumar, Aditya ⓘ	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice IV	Home Health Apr 1, 2024 - Jun 18, 2024	Aug 22, 2023	Adaptial - Easton South Easton, MA	Valid Contract Multiple Contracts	Get Started

- Needs Attention (Expiring During Placement) (Multiple Contract): If there is at least one contract with status as Fully Executed Status, Active and not expired (including open-ended contracts), this will be shown. Also, an additional label with multiple contracts associated will also be shown along with shown. However, all contracts satisfying the above criteria are expiring during placements.

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Barton, Gwendolyn ⓘ	DPT 850 - Clinical Practice II*, 2021 - 2022, 2nd Year, Summer, Class of 2023	Clinical Practice II	Outpatient Jun 15, 2022 - Jul 31, 2022	Jun 6, 2023	Abundant Urgent care - NEW NAME Warren, IA	Needs Attention Expiring during Placement Multiple Contracts	Get Started

- Needs Attention (Multiple Contracts): If there are no contracts with Fully executed and not expired and active, then the Needs Attention status will be shown along with the multiple contracts label.

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Mills, Marco ⓘ	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	Clinical Practice I	Home Health Jan 14, 2021 - Jun 1, 2021	-	Location Test Test, AL	Needs Attention Multiple Contracts	Not Applicable

- If there are no contracts associated with the location, the status will show Needs Attention (Missing Contracts) :

STUDENT DETAILS ↑	COURSE OFFERING	ROTATION	PLACEMENT DETAILS	PUBLISH DATE	LOCATION	CONTRACT STATUS ⓘ	REQUIREMENT UPLOAD STATUS ⓘ
Stevenson, Samantha ⓘ	DPT 800 - Clinical Practice I*, 2021 - 2022, 1st Year, Fall, Class of 2024	DPT 850 - Clinical Practice II	Home Health Feb 2, 2023 - Feb 21, 2023	-	Abundant Health - Main Hospital Depew, NY	Needs Attention Missing contract	Not Applicable

Managing Assessments for Sites and Locations

An important part of clinical education is ensuring you make routine visits to connect with your clinical partners. In Exxat, you're able to track these site assessments right within the system.

You can log site assessments for both Sites and Locations.

- **Creating Custom Site Assessment forms**
- [Adding assessments for Sites](#)

- [Adding assessments for Locations](#)

Creating Custom Site Assessment forms

Form Setup within the **Setup** tab allows you to independently configure site assessment forms. This eliminates the need to rely on Exxat support for assessment form creation. On the **Form Setup** page, you can create a new form, view the existing forms, clone, edit, and delete the form.

Based on the type of form, the following information and options are displayed:

- **Form Name:** The name you entered during form setup.
- **Status: Published** or **Draft**, indicating the form's readiness for use.
 - **Published:** Forms ready to capture assessment responses will be displayed under all the sites and locations profile.
 - **Draft:** Forms in draft state fall into two categories:
 - Newly created forms awaiting publication.
 - Edits to published forms. This can be done only to those published forms that has not been filled yet
- **Last Updated By:** Displays the name and date of the user who last created or updated the form.
- **Action:** This section allows you to perform various actions on the configured form:
 - **Clone:** Create a copy of an existing form for reuse with modification.
 - **Publish :** Publish a form that is ready to be used.

Note: Forms cannot be unpublished once they're live, so please review everything carefully before publishing.
 - **Delete Form:** Delete a form that you do not want to use.

Note : You will not be able delete standard forms and any custom form with responses.
 - **Edit:** Edit a form in any state, as long as it has no responses (future phases will allow editing with responses).

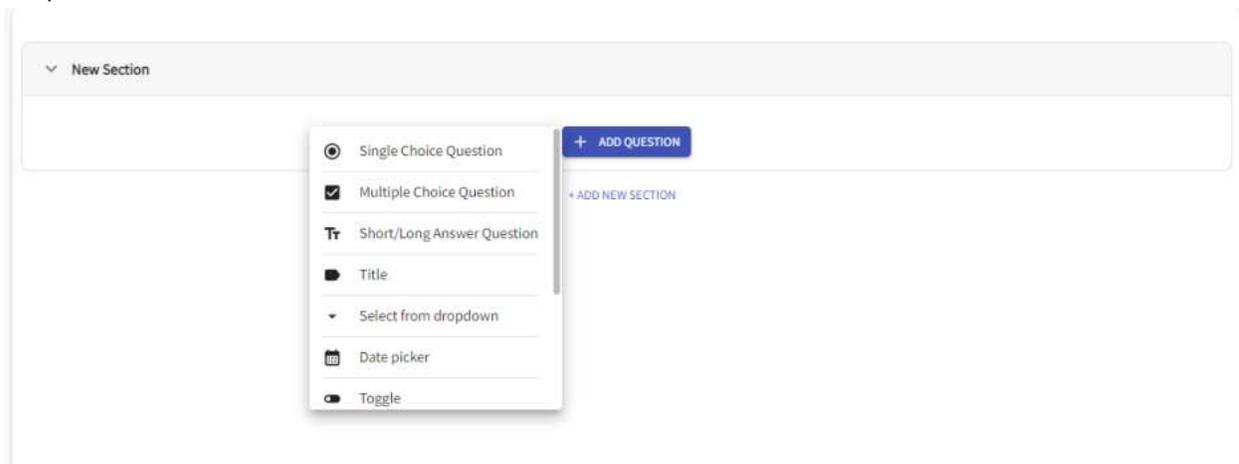
Note: Standard forms cannot be edited.
 - **Create New Form:** Opens the form configuration screen for building a new form.

Creating New Form

To create a new form, perform the following:

1. In the **Setup** screen, click **Form Setup** from the left menu.
2. In the **Assessment Form** screen, click **Create New Form**.
3. In the left pane, you can add your questions and in the right pane, you can configure and set properties.
4. On the left pane, perform the following:
 1. In the **New Section** bar, click **Add Question**. You can select the type of question from the following menu:

- **Single choice question:** A question that offers a single correct or most appropriate answer from a list of options.
- **Multiple choice question:** A question that allows for multiple correct answers from a list of options.
- **Short/long answer question:** A question that requires a text-based response, either brief (short answer) or detailed (long answer).
- **Title:** To provide header within a section
- **Select from dropdown:** A question that has options in a dropdown menu
- **Date Picker:** A calendar-based interface that allows the user to select a specific date.
- **Toggle:** A toggle button that allows the user to switch between two states (e.g., on/off, true/false).
- **Attestation:** An option to agree/acknowledge a statement
- **E-Signature:** A digital signature that verifies the authenticity of a document or claim.
- **Divider:** A visual element that separates content sections within a form or page.
- **Text Editor:** A tool that allows you to create, edit, and format text content when filling response



2. In the **Attributes** section on the right pane, select the required attributes. Based on the type of question you select, following attributes will be displayed for you to select and specify:

- **Question Type:** Select the type of question from the following options:
 - Single Choice Question
 - Multiple Choice Question
 - Short/Long Answer Question
 - Title
 - Select From Dropdown
 - Date Picker
 - Toggle
 - Attestation
 - E-Signature
 - Divider
 - Text Editor

- **Question** : Type your question in the text box.
- **Help Information**: Additional text or instructions that provide more context or guidance for a question. Text added here will show on hovering on a '?'
- **Comments**: A toggle that allows site professionals to add optional comments or notes to their response.
- **Make This Mandatory**: A toggle that indicates whether a response to the question is mandatory. Ensures that critical information is collected from the user.
- **Long Answer**: A question type that requires an extended text-based response.
- **Character Limit**: The maximum number of characters allowed for this field. By default, it is set to 0 which means there is no limit.
- **Enable E-sign**: A toggle that indicates whether electronic signatures are required for this question or section of the form. Ensures the authenticity and integrity of the collected data.
- **Answer Choices**: The options available for the site professionals to select as their response.
 - **Option**: The text displayed for each answer choice.
 - **Reordering**: Allows the answer choices to be arranged in the desired order.
 - **Deletion**: Allows answer choices to be removed if they are no longer necessary.

3. Once you have added the question and sections as required, you can use the following options:

-  **Move Up**: Shifts a question or section to a higher position within the form. Allows you to reorder questions or sections for better flow or organization.
-  **Move Down**: Shifts a question or section to a lower position within the form.
-  **Delete**: Removes a question or section from the form.
-  **Duplicate**: Creates a copy of a question or section.
-  **Reposition**: Rearrange questions or sections within the form.

4. Click **Save As Draft** to save the progress and continue editing without publishing the form.

5. Click **Preview** to review the form's layout, content, and functionality before publishing.

6. Click **Publish** to make the form available for filling under a site/location

7. Click **Settings** if you wish to include instructions or guidance for the form.

- **Form Instruction Title**: The title or heading for the instructions added to the form. Provides a clear and concise label for the instructions.
- **Form Instruction Description**: Provides sites with specific guidance, information, or requirements related to completing the form.

Viewing Forms

To view the assessment forms, perform the following:

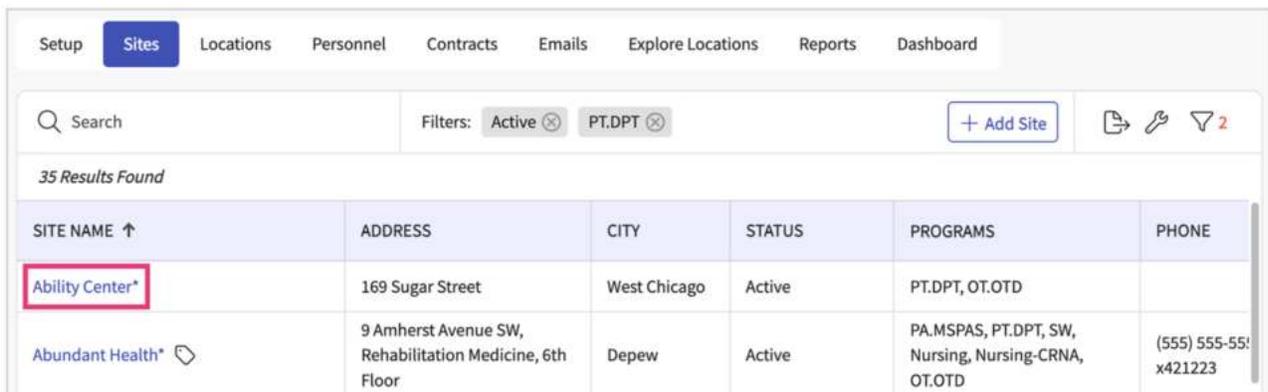
1. Go to **Sites > Setup > Form Setup**
2. In the **Assessment Forms** screen, you can view the assessment forms with the following information:
 1. **Form Name:** The title assigned to the assessment form.
 2. **Status:** The current state of the form, such as **Draft** and **Published**.
 3. **Last Updated By:** The name, date, and time of the last modified the form.
 4. **Actions:** Following actions can be performed for the required forms:
 -  **Publish:** Makes the form available for completion by the intended audience.
 -  **Clone:** Allows you to create a new form based on an existing template while maintaining the original form.
 -  **Edit:** Allows you to make changes to the form's content, structure, or settings.
 -  **Delete:** Allows you to remove unnecessary forms.

Adding assessments for Sites

1. Select Sites from the left-menu.

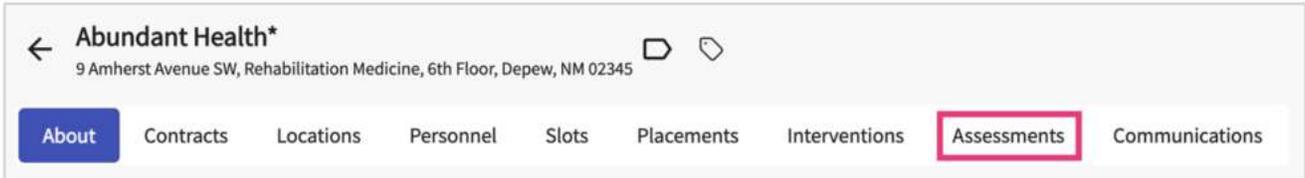


2. Find and select your desired site.
 1. Use the search or filter options to quickly find what you are looking for.

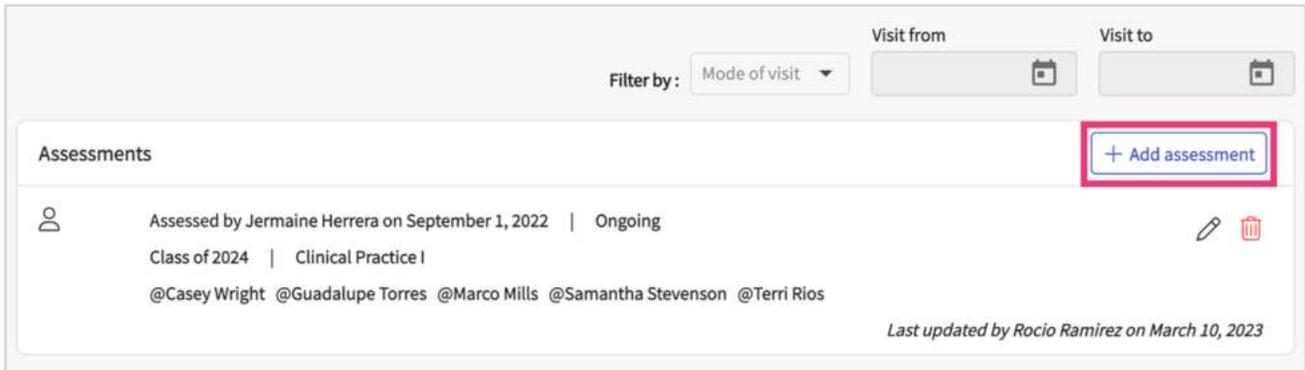
A screenshot of a web application interface for managing sites. At the top, there is a navigation bar with tabs for 'Setup', 'Sites' (selected), 'Locations', 'Personnel', 'Contracts', 'Emails', 'Explore Locations', 'Reports', and 'Dashboard'. Below the navigation bar is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar are filter buttons for 'Active' and 'PT,DPT', and a '+ Add Site' button. Below the search and filter area, it says '35 Results Found'. A table with the following columns is displayed: 'SITE NAME ↑', 'ADDRESS', 'CITY', 'STATUS', 'PROGRAMS', and 'PHONE'. The first row is 'Ability Center*' with address '169 Sugar Street', city 'West Chicago', status 'Active', and programs 'PT,DPT, OT,OTD'. The second row is 'Abundant Health*' with address '9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor', city 'Depew', status 'Active', and programs 'PA,MSPAS, PT,DPT, SW, Nursing, Nursing-CRNA, OT,OTD'. The phone number for the second row is '(555) 555-55: x421223'.

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

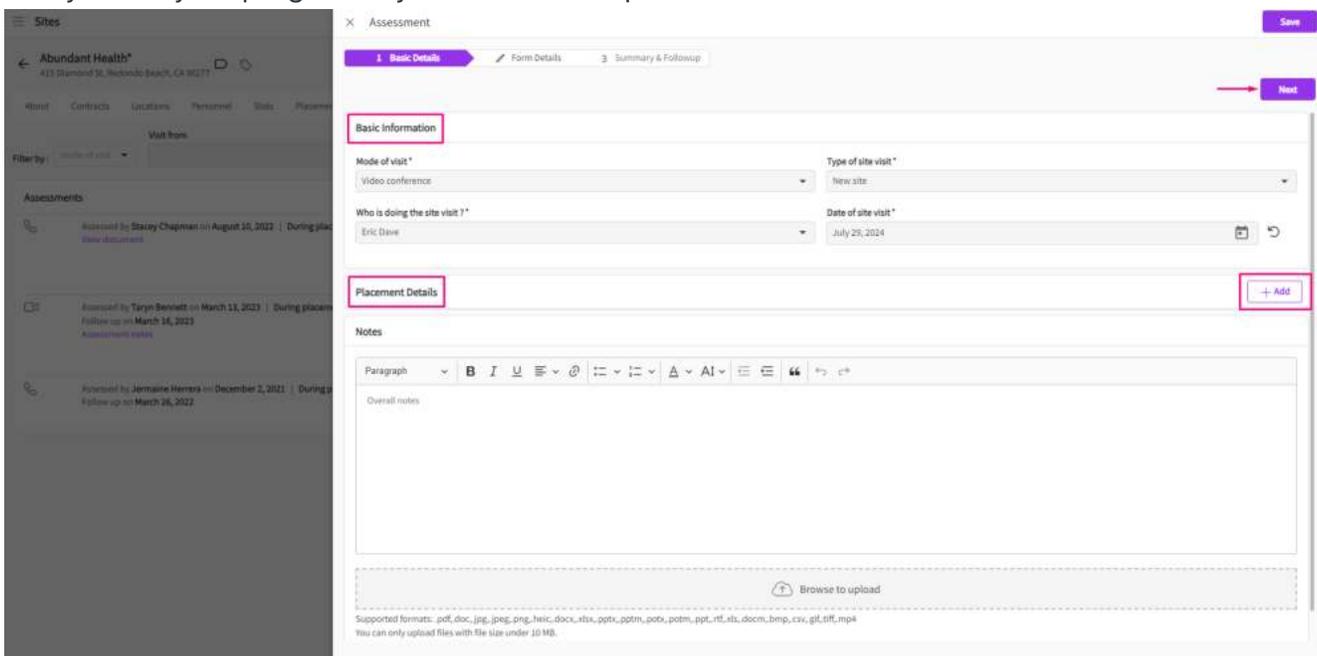
3. On the ribbon at the top of the page, click on Assessments.



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



5. 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.



6. 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 the 'Assessment' form with three steps: 'Basic Details', '2 Form Details', and '3 Summary & Followup'. The 'Form Details' step is active. On the right side, there are three buttons: 'Previous', 'Next', and 'Save form details'. The 'Next' and 'Save form details' buttons are highlighted with red boxes. Below the buttons is a section titled 'Site/Facilities' with a text area for 'Comments on sites facilities and educational environment:'. The text area has a rich text editor toolbar and a character count of '500 characters left'.

7. 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.

8. Once done, click Save Form Details, and Click Next.

The screenshot shows the 'Assessment' form with three steps: 'Basic Details', 'Form Details', and '3 Summary & Followup'. The 'Summary & Followup' step is active. On the right side, there is a 'Previous' button. Below it is a 'Summary' section with a 'Final Assessment' heading and 'Summary Notes' text area. The text area has a rich text editor toolbar. Below the text area is a question: 'Do you require a follow-up visit?' with radio buttons for 'Yes' (selected) and 'No'. Below that is a 'Follow up date' field with a calendar icon and a refresh icon. The date is 'July 29, 2022'. Below the date field is another text area for 'Follow up Note' with a rich text editor toolbar. In the top right corner, there is a 'Save' button highlighted with a red box.

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 **B** *I* U **≡** **🔗** **:=** **!:=** **A** **:**

summary Notes:

Do you require a follow-up visit ? Yes No

Follow up date

July 29, 2022 **📅** **↻**

Paragraph **B** *I* U **≡** **🔗** **:=** **!:=** **A** **:**

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 + 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

Adding assessments for Location

1. Select Sites from the left menu.

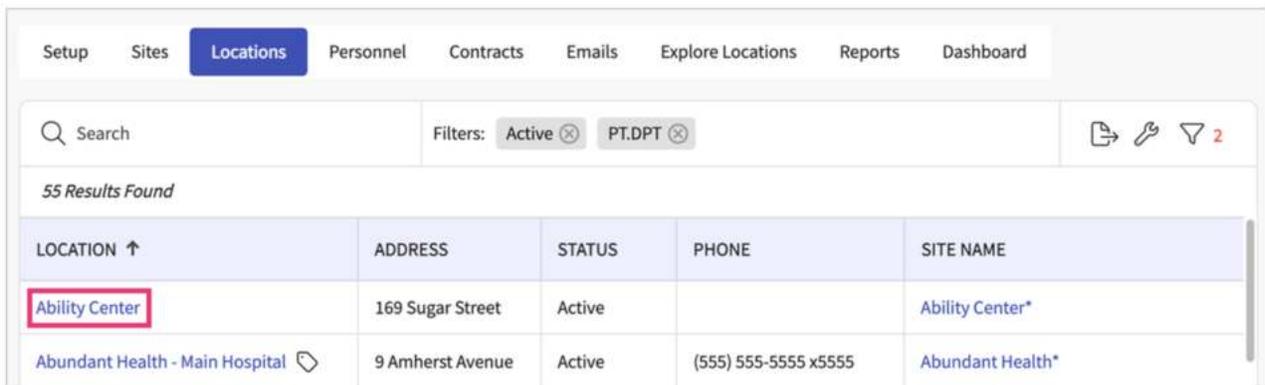


2. Select Locations from the top banner.

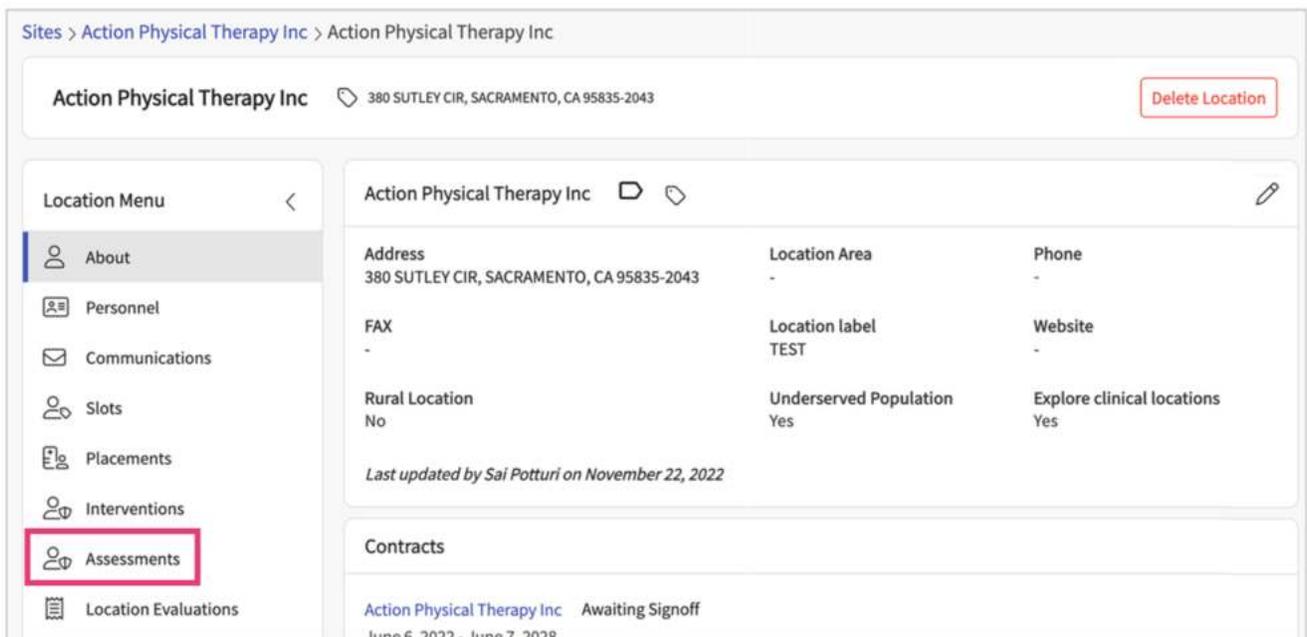


3. Find and select your desired location.

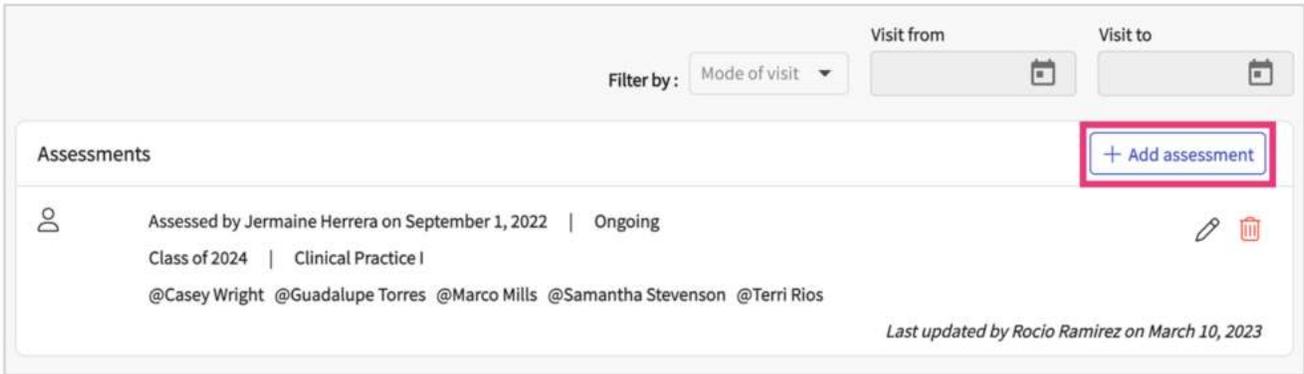
1. Use the search or filter options to quickly find what you are looking for.



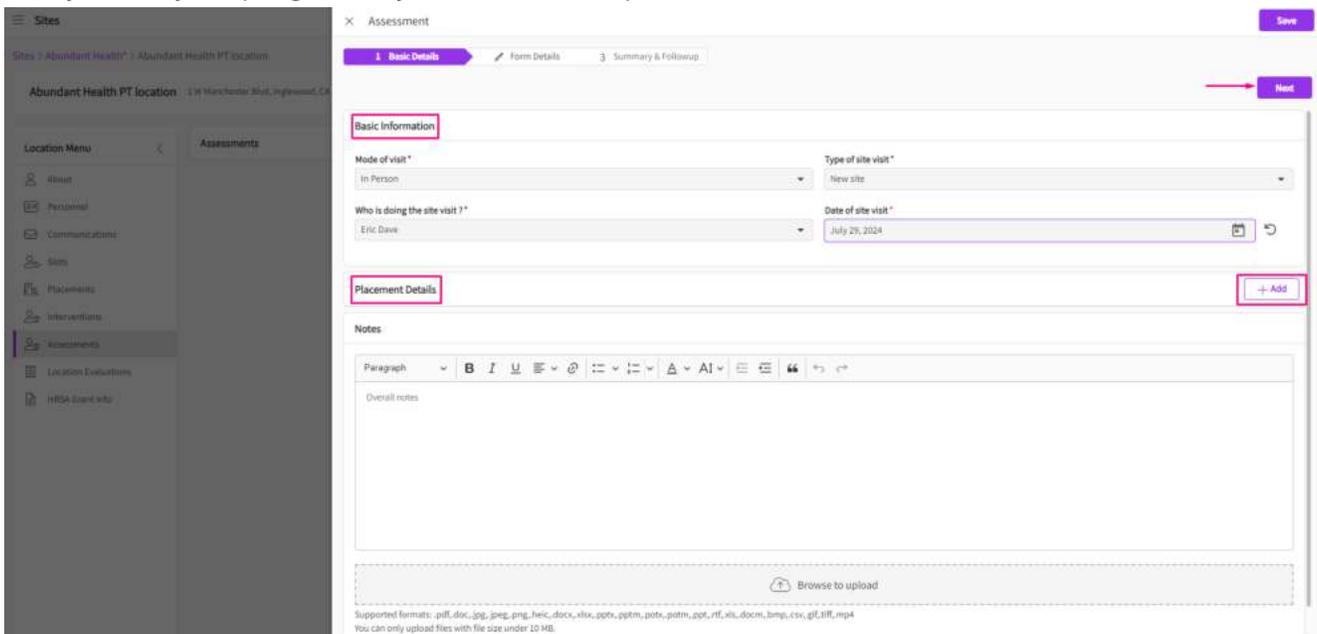
4. Select Assessments from the left panel.



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



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.



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 the 'Assessment' form with three steps: 'Basic Details', '2 Form Details', and '3 Summary & Followup'. The 'Form Details' step is active. In the top right corner, there are three buttons: 'Previous', 'Next', and 'Save form details'. The 'Next' and 'Save form details' buttons are highlighted with red boxes. Below the buttons is a section titled 'Site/Facilities' with a text area for 'Comments on sites facilities and educational environment:'. The text area has a rich text editor toolbar and a character count of '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.

The screenshot shows the 'Assessment' form with three steps: 'Basic Details', 'Form Details', and '3 Summary & Followup'. The 'Summary & Followup' step is active. In the top right corner, there is a 'Save' button highlighted with a red box. Below the buttons is a 'Summary' section with a 'Final Assessment' heading and 'Summary Notes' text area. The 'Summary Notes' text area has a rich text editor toolbar. Below the text area is a question: 'Do you require a follow-up visit?' with radio buttons for 'Yes' (selected) and 'No'. Below the question is a 'Follow up date' field with a calendar icon and a refresh icon. The date is 'July 29, 2022'. Below the date field is another text area for 'Follow up Note' with a rich text editor toolbar.

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

The screenshot shows the 'Assessment' form with the 'Summary & Followup' tab selected. The 'Save' button is highlighted with a red box. The form includes sections for 'Summary', 'Final Assessment', and 'Summary Notes'. The 'Summary Notes' section has a rich text editor with a toolbar containing options for Paragraph, Bold (B), Italic (I), Underline (U), List, Link, Table, Bulleted List, and Text Color (A). Below this is a text input field containing 'summary Notes:'. The 'Final Assessment' section has a question 'Do you require a follow-up visit?' with radio buttons for 'Yes' (selected) and 'No'. Below this is a 'Follow up date' field with a calendar icon and a refresh icon, showing 'July 29, 2022'. The 'Follow up Note' section has another rich text editor with the same toolbar and a text input field containing 'Follow up Note'. A 'Previous' button is located at the top right of the form.

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

The screenshot shows the 'Assessments' list view. At the top, there are filters for 'Filter by: Mode of visit', 'Visit from', and 'Visit to'. Below this is a '+ Add assessment' button. The main list shows one assessment entry with a person icon, the text 'Assessed by Jermaine Herrera on September 1, 2022 | Ongoing', 'Class of 2024 | Clinical Practice I', and a list of names: '@Casey Wright @Guadalupe Torres @Marco Mills @Samantha Stevenson @Terri Rios'. A red box highlights the edit and delete icons. At the bottom right, it says 'Last updated by Rocio Ramirez on March 10, 2023'.

Managing Site and Locations Communications

When managing your clinical education program, you communicate with all stakeholders – sites, individual locations, students and their instructors. Whether you are connecting via phone, facetime, email, system-generated message or in person, keeping track of communication is easy with Communications.

Adding Site Communications

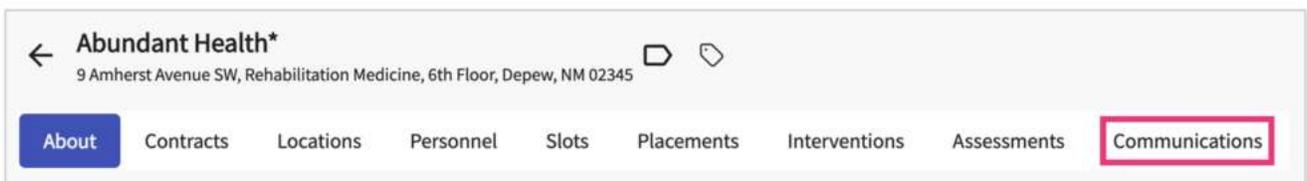
1. Select Sites from the left-menu or dashboard.



2. Find and select your desired Site.

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health*	9 Amherst Avenue SW, Rehabilitation Medicine, 6th Floor	Depew	Active	PA.MSPAS, PT.DPT, SW, Nursing, Nursing-CRNA, OT.OTD	(555) 555-551 x421223

3. Click on the Communications tab from the ribbon at the top of the page.



4. 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.

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

5. To add a new communication, click + Add Communication.

Search text		+ Add communication					
MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

6. Enter the details you want to record and click Save.

× Communication Save

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by *

Rocio Ramirez

Communicated with *

SCCE

Subject *

Emergency Student Placements

Paragraph **B** *I* U

Requesting emergency placement for 2 students who have been displaced due to vaccination requirements - site unable to accommodate unvaccinated students

Communication date *

May 22, 2023

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.

× Communication Save

Follow Up

Follow up date  

Follow up completion date  

Paragraph ▼ **B** *I* U ≡ ▼  := ▼ ;! = ▼ A ▼ AI ▼ ≡ ⋮

Internal Notes

7. This communication now joins all others in the Communications section. To edit or delete a communication, click the pencil icon.

🔍 Search text + Add communication 

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

8. A drawer will open.

1. If you are making edits, once done click save.
2. Click the 3 dotted icons to delete a communication log entry.

× Communication Save

Delete

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by*

Communicated with*

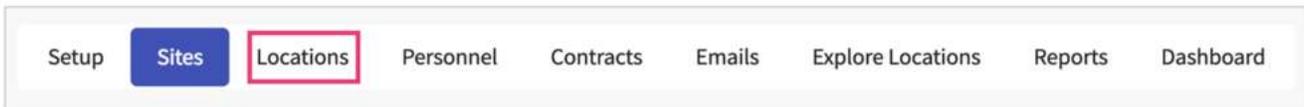
Subject*

Adding Location Communications

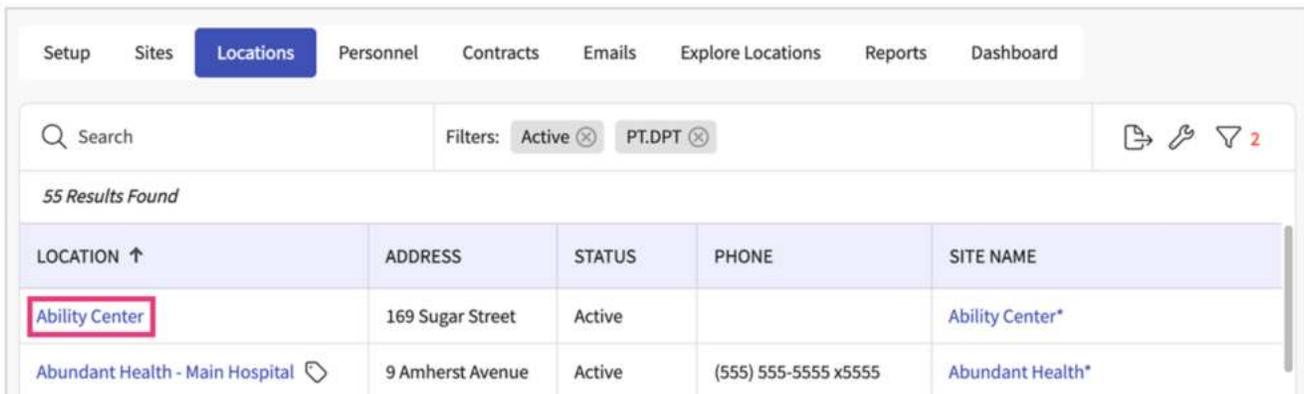
1. Select Sites from the left-menu or dashboard.



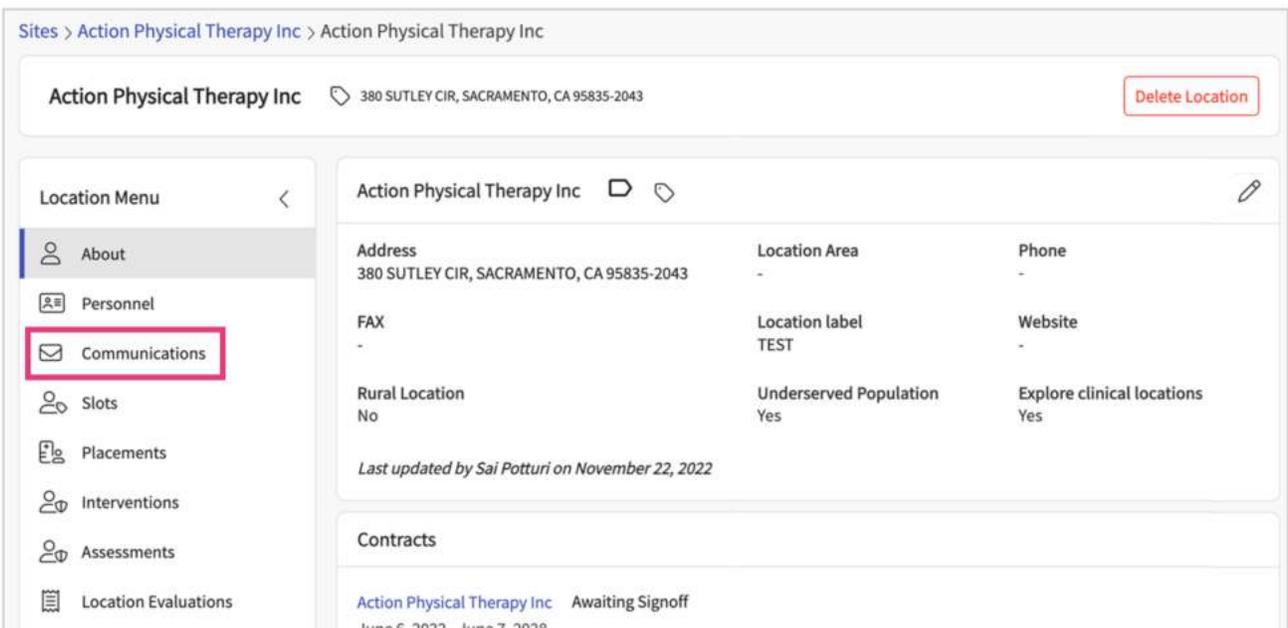
2. Select Locations from the ribbon at the top of the page.



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.

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

6. To add a new communication, click + Add Communication.

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

7. Enter the details you want to record and click Save.

× Communication
Save

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by *

Rocio Ramirez

Communicated with *

SCCE

Subject *

Emergency Student Placements

Paragraph v **B** *I* U ≡ v  := v ;:= v A v AI v ≡ ⋮

Requesting emergency placement for 2 students who have been displaced due to vaccination requirements - site unable to accommodate unvaccinated students

Communication date *

May 22, 2023  

 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.

× Communication Save

Follow Up

Follow up date  

Follow up completion date  

Paragraph ▼ **B** *I* U ≡ ▼  := ▼ !:= ▼ A ▼ AI ▼ ≡ ⋮

Internal Notes

8. This communication now joins all others in the Communications section. To edit or delete a communication, click the pencil icon.

🔍 Search text + Add communication 

MODE OF COMMUNICATION	COMMUNICATED BY	COMMUNICATED WITH	SUBJECT & DESCRIPTION	FOLLOW UP	COMMUNICATION DATE	DATE OF UPDATE	ACTION
Audio Call	Rocio Ramirez	SCCE	Emergency Student Placements : Requesting emergency placem...	June 5, 2023	May 22, 2023	May 27, 2023	

9. A drawer will open.

1. If you are making edits, once done click save.
2. Click the 3 dotted icons to delete a communication log entry.

× Communication Save ⋮

Delete

Mode of communication *

Audio Call Video Call Email In Person Other

Communicated by*

Rocio Ramirez

Communicated with*

SCCE

Subject*

Emergency Student Placements

Managing Interventions for Site and Location

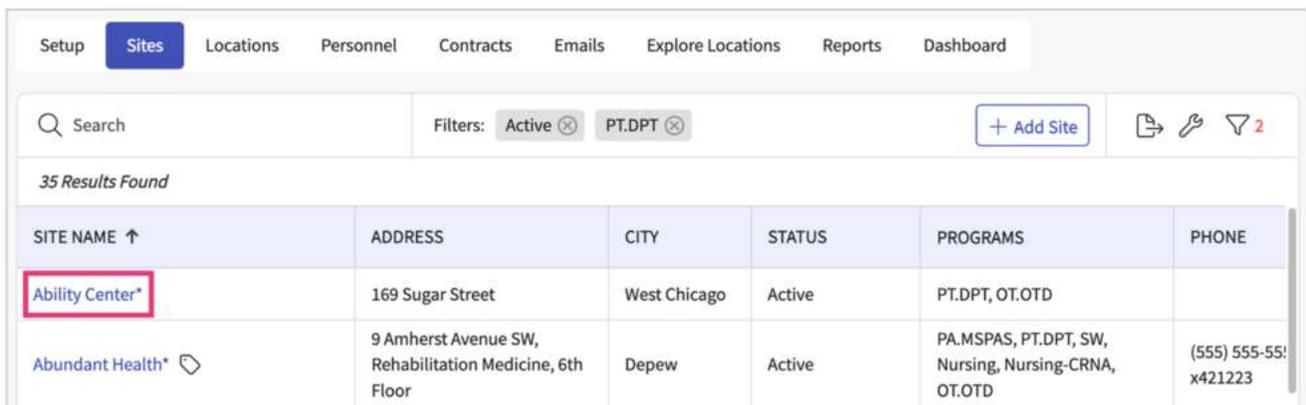
Interventions are meant to track any incidents or ongoing problems during a placement. You can log interventions for Sites, Locations, and personnel. The form is exactly the same no matter the pathway, and you can add as many follow ups within a single intervention as needed.

Adding Interventions for Sites

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



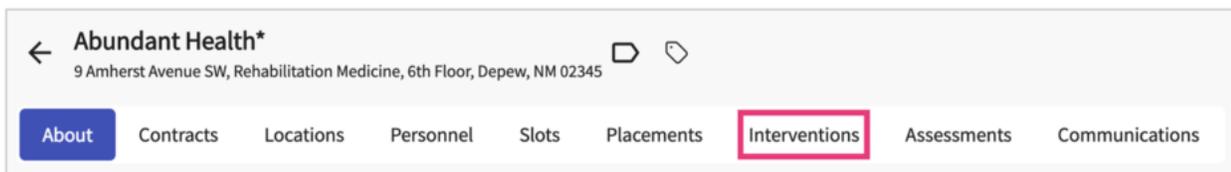
2. Find and select your desired Site.



The screenshot shows the 'Sites' page with a navigation ribbon at the top containing 'Setup', 'Sites', 'Locations', 'Personnel', 'Contracts', 'Emails', 'Explore Locations', 'Reports', and 'Dashboard'. Below the ribbon is a search bar and filter buttons for 'Active' and 'PT.DPT'. A table displays 35 results found. The first row is highlighted with a red box.

SITE NAME ↑	ADDRESS	CITY	STATUS	PROGRAMS	PHONE
Ability Center*	169 Sugar Street	West Chicago	Active	PT.DPT, OT.OTD	
Abundant Health*	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. Click on the Interventions tab from the ribbon at the top of the page.



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



The screenshot shows the 'Interventions' page with a search bar and a '+ Add Intervention' button highlighted in a red box. Below is a table of intervention entries.

MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DA IN
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

5. 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

6. 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

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

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

× Intervention
Save

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.

Follow Up
🗑️

Planned follow up date *

June 12, 2023
📅 ↻

Actual follow up date

📅 ↻

Paragraph ▼
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Description

Add Followup

8. The intervention will be listed on the main grid. To edit an intervention, click on the Subject of Intervention text.

MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DA IN
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

9. A drawer will open.

1. Click on the pencil icon to make edits.

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

Location Intervention

Supervision of Students

Contact with - SCCE
May 15, 2023

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!

In Person

Rotation
Clinical Practice II

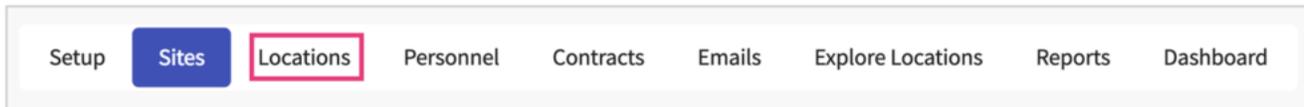
Initiated by
Rocio Ramirez

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.

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

Search Filters: Active PT.DPT

55 Results Found

LOCATION ↑	ADDRESS	STATUS	PHONE	SITE NAME
Ability Center	169 Sugar Street	Active		Ability Center*
Abundant Health - Main Hospital	9 Amherst Avenue	Active	(555) 555-5555 x5555	Abundant Health*

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

Sites > Action Physical Therapy Inc > Action Physical Therapy Inc

Action Physical Therapy Inc 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043 Delete Location

Location Menu

- About
- Personnel
- Communications
- Slots
- Placements
- Interventions**
- Assessments
- Location Evaluations

Action Physical Therapy Inc

Address 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043	Location Area -	Phone -
FAX -	Location label TEST	Website -
Rural Location No	Underserved Population Yes	Explore clinical locations Yes

Last updated by Sai Potturi on November 22, 2022

Contracts

Action Physical Therapy Inc Awaiting Signoff
June 6, 2022 - June 7, 2028

- 5.
- 6.
7. The page will load all previously added interventions. Click on the + icon to add an entry.

Search text + Add Intervention

MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DA IN
In Person	Rocio Ramirez	SCCE	Supervision of Students : Di...	June 9, 2023	Discussed need for gradual release on student supervision... <a>Show More	Clinical Practice II	Me

8. 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

9. 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

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

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

× Intervention
Save

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.

Follow Up
🗑️

Planned follow up date *

June 12, 2023
📅 ↻

Actual follow up date

📅 ↻

Paragraph
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Description

Add Followup

11. The intervention will be listed on the main grid. To edit an intervention, click on the Subject of Intervention text.

MODE	INITIATED BY	CONTACT WITH	SUBJECT OF INTERVENTION	PLANNED FOLLOW UP DATE	FOLLOW UP NOTES	ROTATION	DATE
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

12. A drawer will open.

1. Click on the pencil icon to make edits.

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

✕ Location Intervention

Supervision of Students

Contact with - SCCE
May 15, 2023

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!

In Person

Rotation
Clinical Practice II

Initiated by
Rocio Ramirez

