Within Prism, you can send general emails to Sites and request slot availability along with updates to location information!

If you are sending a slot request, we recommend you create any courses & rotations you'd like to include in your request.
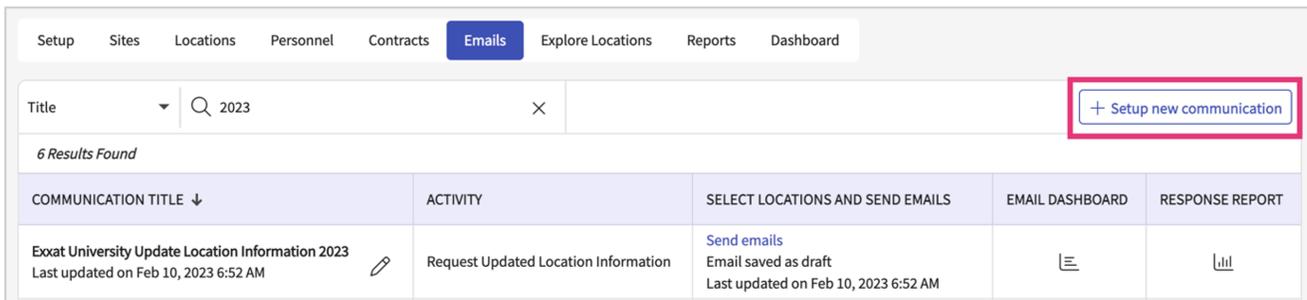
1. Select Sites from your left-hand menu or dashboard.

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


3. Click +Setup New Communication.

4. You will then provide a title for your new communication.
    1. If you would like to send a general email, do not select any of the Add-On Activities and click Next.
    2. If you'd like to request slot availability, turn on the option Request Slots and click Next.
    3. If you would like to request updated location information, turn on the option Request Updated Location Information.
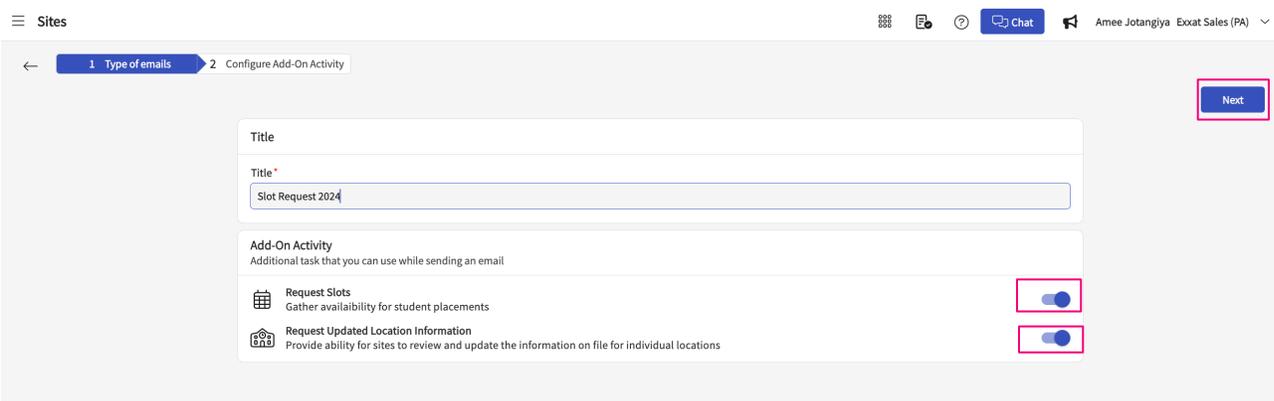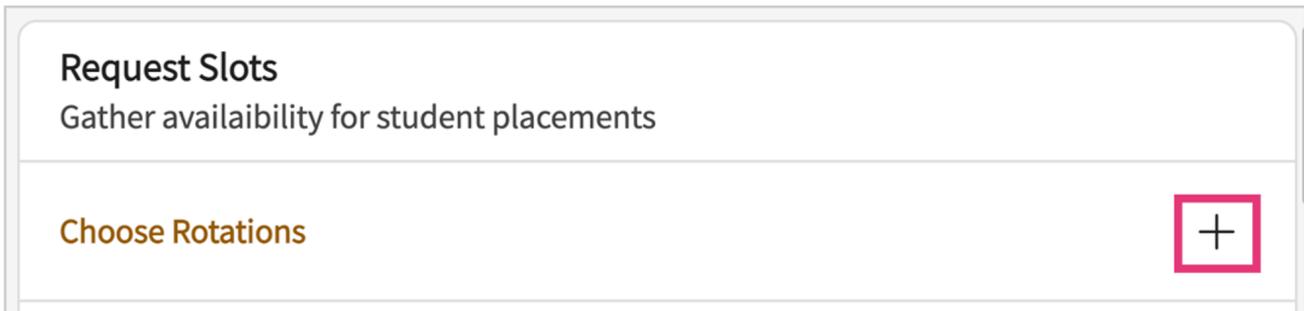

5. If you are requesting slot availability or/and updated location information you will configure your communication with 3-4 steps.

1. If you are sending a general email, skip these steps and click Save.
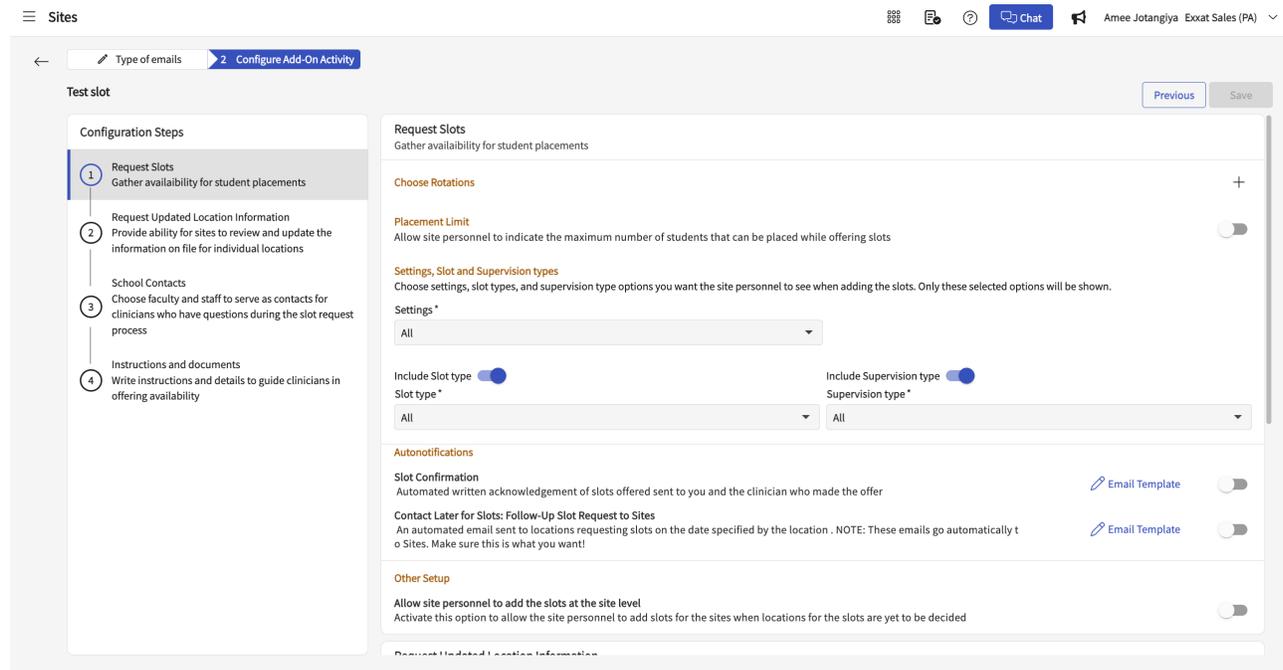
6. On step 1, you will first select the rotations you would like to include in your communication. Click the + icon.

7. A drawer will open showing you all the Rotations you have created in the system. You can now selectively include the advanced schedules when setting up the slot request. Only the selected advanced schedules will be shown to the site users when adding the slots.
8. Make your selections using the open checkbox. Click Save once done.
   1. Filter using the calendar year option if needed.
   2. Not seeing the Rotation you need? Make sure you've added them within Courses!

3. Selectively include advanced schedules of rotations for slot request.

9. The drawer will close, and the Rotations section will list any selected rotations.
   1. Remove unwanted rotations using the trash bin icon.
10. You can add any instruction notes for each rotation by clicking on the + icon.
11. Customize the settings and slot types that sites will select from if needed. Or turn the switch to exclude the section on the slot request for your sites completely.

ROTATION	COURSE CODE	INSTRUCTION NOTE ⓘ	ACTION
Level II Fieldwork A *[Advanced Schedule]* *May 13, 2024 - Jun 7, 2024* Class of 2024	ODT6160,OTD6107,OTD6108,OT 700	+	🗑
Level I Fieldwork A *[Advanced Schedule]* *Jun 10, 2024 - Jul 5, 2024* Class of 2024	ODT6160,OTD6107,OTD6108,OT 600	+	🗑
Level I Fieldwork A *[Advanced Schedule]* *Jul 8, 2024 - Aug 2, 2024* Class of 2024	ODT6160,OTD6107,OTD6108,OT 600	+	🗑

Settings, Slot and Supervision types
Choose settings, slot types, and supervision type options you want the site personnel to see when adding the slots. Only these selected options will be shown.

Settings *
All ▼

Include Slot type 🔵   Include Supervision type ⚪
Slot type *   Supervision type
All ▼   All ▼

12. Next up, you will see Auto notifications. These are automated emails sent to specific entities (Sites, School). To enable an auto notification, make sure you slide the button to the right and it shows a blue color. You have the following options available:
    1. **Slot Confirmation**: once sites offer slots, you can send both the site and your program a summary of what they have offered.

2. **Contact Later for Slots**: if a site requests to be contacted on a specific date, they will be sent a reminder.
   1. Click Email Template if you would like to customize the email that will be sent.

2. A drawer will open, and you will see a tab for each entity that will receive an email (Site, School). Make your desired changes and click Save. The subject of the emails displays name and program name.

3. In **Other Setup,** you can decide if contacts should have the ability to offer slots without selecting a Location. This is helpful for Sites that have several locations and define a location at a later time.

4. If you chose to include a request for Updated Location Information, step 2 will show you the details that will be shared with your contacts for review.

1. At this time, this cannot be customized.

Request Updated Location Information
Provide ability for sites to review and update the information on file for individual locations

☑ Basic information ⓘ   ☑ Notes   ☑ Requirements   ☑ Housing and Parking information with notes field   ☑ Personnel ⓘ

5. **School Contacts**: you will see any Staff and Faculty who are sharing their contact information with Sites. For each contact, you can set whether they should receive the Slot Confirmation emails, and if their information should be displayed on your slot request.
   1. Not seeing your contact information? Check your profile within the Faculty & Staff section.

School Contacts
Choose faculty and staff to serve as contacts for clinicians who have questions during the slot request process

NAME	RECEIVE SLOT CONFIRMATION EMAILS	SHARE CONTACT INFORMATION WITH SITE
Stacey* Chapman ▦ Associate Professor	🔵	🔵
Jermaine Herrera ▦ Associate Professor	⚪	⚪
SK Kanthi Supriya ▦ Full Professor	⚪	⚪

6. **Instructions and Documents**: you will then customize the welcome page of your slot request, and attach any resources as needed. Click the + icon.

Instructions And Documents
Write instructions and details to guide clinicians in offering availability
[+]

7. A drawer will open. Customize your personalized message and add attachments if needed. Click Save once done.

8. Once done, click Save.

To learn how to send the communication you set up right now to your sites and how to monitor the status of all your sent emails, refer to the article Click the link (Sending Site Emails & Tracking Responses)