

Prism allows you to capture and manage important contract information and documents for each site. This guide provides detailed steps on how to add, link, manage, unlink, and delete contracts within the system. Learn about how to create auto notification for expiring contracts as well.

Navigating to Contracts

- [Accessing Sites](#)
- [Viewing Contracts](#)

Creating and managing Site Contract

Managing Contracts

- [Linking Contracts](#)
- [Adding Contracts](#)
- [Unlinking Contracts](#)
- [Deleting Contracts](#)

Creating and Managing Auto Notifications

Viewing Reports

Navigating to Contracts

For each site in Prism, you can capture important contract information and documents. Keep on reading to learn how to add and manage contact information!

1. You can navigate to contracts using either of the methods mentioned below:
 - a. Select Sites from your left menu or dashboard.



- b. Select Sites from your left menu or

dashboard and click on contracts from ribbon at the top of the page.

SITE NAME	SITE...	CONTRACT NAME ↑	NUMBER	TAX ID	STATUS	TEMPLATE	START DATE
ABC Speech Therapy	Inactive	ABC Speech Contract	23827394	-	Fully Executed	Modified	February 8, 2024
ABC Speech Therapy	Inactive	ABC Speeh Contract @	23827395	-	Fully Executed	Modified	February 8, 2024
Ability Center	Inactive	Ability Center	1237	-	Fully Executed	Modified	June 5, 2023
Abundant Health*	Active	ABC Speech Contract	23827394	-	Fully Executed	Modified	February 8, 2024

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

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. Pro-tip: use search box and filters to find what you're looking for whether you are on sites page or the contracts page. The filter option allows you search by state, tags and categories to make it easier to look for the contract for specific sites.

4. Funnel icon Filter will allow you to filter on data like Site Status, Status, Expiration, Programs, Contract Tags, and Categories.

SITE NAME ↑	ADDRESS	CITY	STATE	ZIP CODE	STATUS	PROGRAMS	PHONE
Abundant Health - New Site	ABC	CA	AR		Active	PA.MSPAS, PT.DPT, Nursing, OT	
Abundant Health*	415 Diamond St	Redondo Beach	CA	90277	Active	PA.MSPAS, PT.DPT, Pharmacy, SocialWork, Nursing, CRNA, Counseling, Nutrition, Teacher Education, AT, SpeechLanguagePathology, PublicHealth, OT	(555) 555-5555 x421223
Accelerated Learning Solutions	3057 Cleveland Ave	Fort Myers	FL	33309	Active	SpeechLanguagePathology, PT.DPT	

5. On the ribbon at the top of the page, click on Contracts.

The screenshot shows the 'Contracts' tab selected in the top navigation ribbon. The left sidebar contains a 'List Of Contracts' section with a search bar and a list of contracts. The 'AH Contract (with expired contract)' is highlighted. The main content area displays detailed information for this contract, including its status ('Fully Executed'), dates, and various fields like 'Contract number', 'Tax ID', and 'Contract notes'. A 'Delete Contract' button is visible in the top right corner of the main content area.

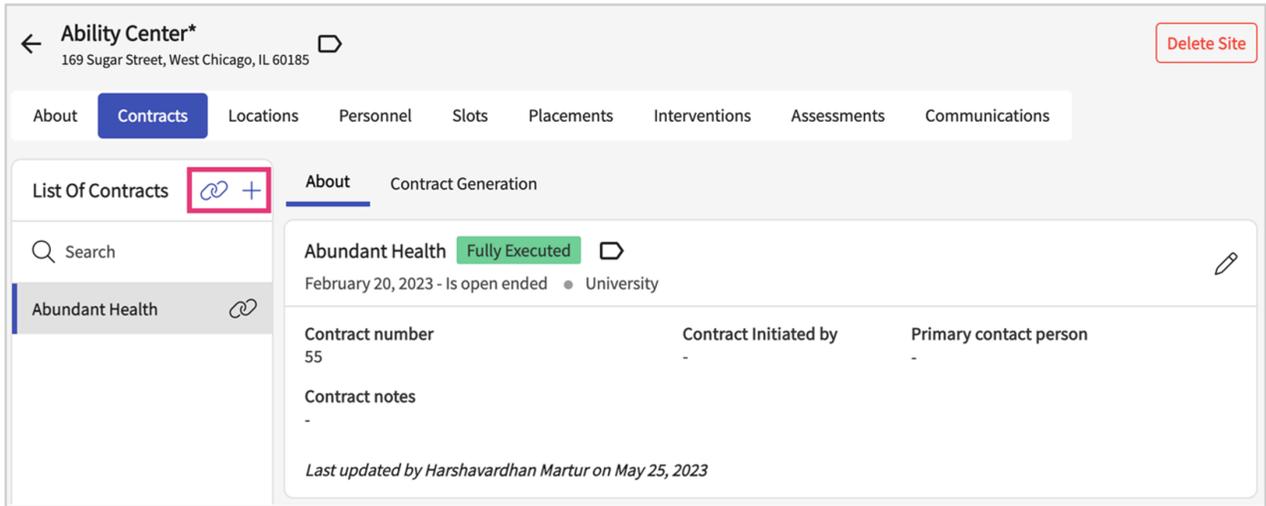
6. On the contracts tab, you will have a left panel that shows you all the contracts available for that Site. Select the contract to view detailed information on the right hand side of the page.

This screenshot is similar to the previous one but shows the 'About' sub-tab selected in the left sidebar. The 'AH Contract (with expired contract)' is still highlighted. The main content area shows the same contract details, but the 'About' sub-tab is active. A 'Delete Contract' button is also present in the top right corner of the main content area.

7. Next to List of Contracts, you will have two icons: and chain and a + icon.

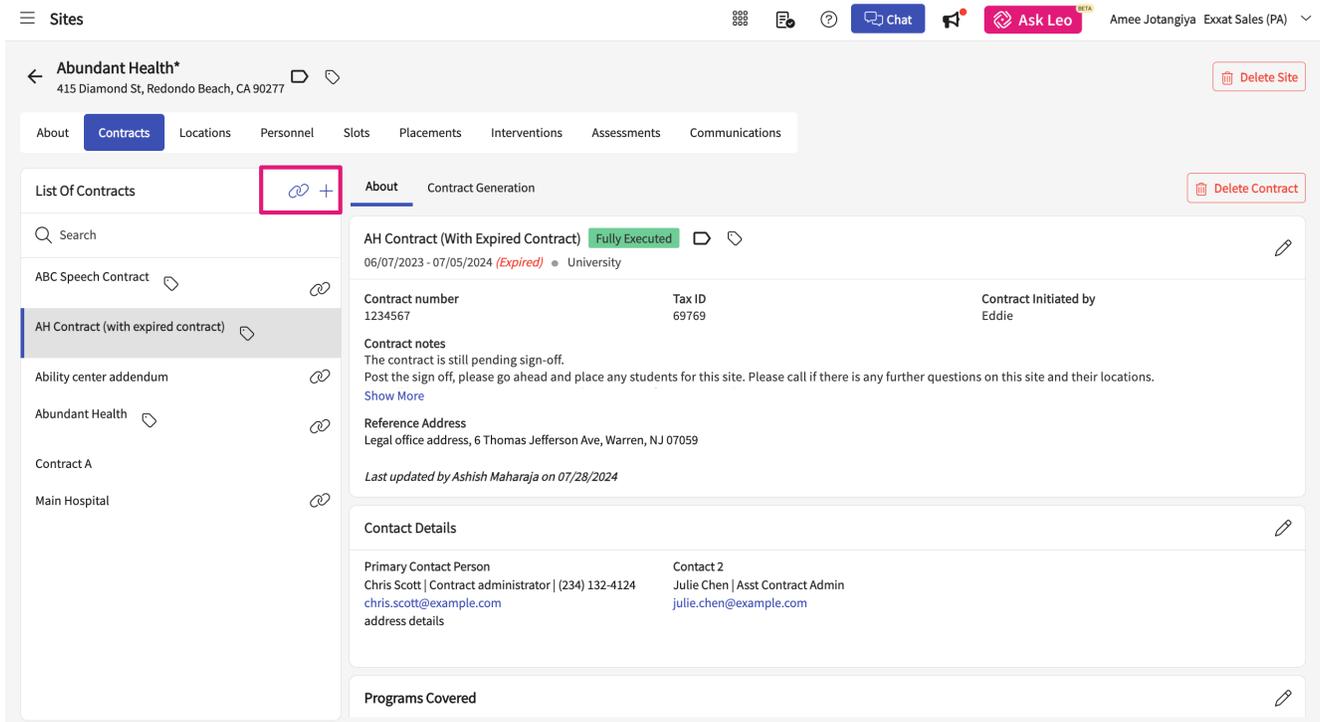
a. The chain icon allows you to link contracts you have already created to different sites. If for example, you have multiple sites who are covered by the same contract, rather than consolidating them, you can easily link the contract and keep your data as is.

b. The + icon allows you to add new contracts.



Linking Contracts

1. Click on the chain icon  to link an existing contract.



2. A drawer will open, showing you the full list of available contracts. Find and select the desired contract with the open checkbox and click Save. You can also use the funnel icon here to filter out for the list of contracts to link with.

a. Any contracts already associated with the site will be greyed out.

<input type="checkbox"/>	CONTRACT NAME ↑	CONTRACT NUMBER	SITE NAME	PROGRAM
<input checked="" type="checkbox"/>	Ability Center	1237	Ability Center*	PT.DPT
<input checked="" type="checkbox"/>	Abundant Health	55	Abundant Health* +2 More	Nursing, OT.OTD, SW, PT.DPT
<input type="checkbox"/>	Abundant Health Addendum	49	Abundant Health*	SW
<input checked="" type="checkbox"/>	Abundant Health Renewal		Abundant Health*	PT.DPT

Adding Contracts

1. Click on the + icon to add a new contract.

Abundant Health*
415 Diamond St, Redondo Beach, CA 90277

Contracts

List Of Contracts

- ABC Speech Contract
- AH Contract (with expired contract)**
- Ability center addendum
- Abundant Health
- Contract A
- Main Hospital

AH Contract (With Expired Contract) Fully Executed
06/07/2023 - 07/05/2024 (Expired) • University

Contract number: 1234567 | Tax ID: 69769 | Contract Initiated by: Eddie

Contract notes: The contract is still pending sign-off. Post the sign off, please go ahead and place any students for this site. Please call if there is any further questions on this site and their locations. [Show More](#)

Reference Address: Legal office address, 6 Thomas Jefferson Ave, Warren, NJ 07059

Last updated by Ashish Maharaja on 07/28/2024

Contact Details

Primary Contact Person: Chris Scott | Contract administrator | (234) 132-4124 | chris.scott@example.com | address details

Contact 2: Julie Chen | Asst Contract Admin | julie.chen@example.com

Programs Covered

2. A drawer will open where you will add contact information. Please note that contract name, start date, expiration date, contract template, and status are mandatory fields. Click Save once done.

a. Enter the Contract name of the agreement.

b. The system will add a contract number automatically, but this can be changed.

c. Enter the Tax ID of the contract. This is completely optional.

d. Add the name of the faculty or staff who initiated the contract along with the primary contact person.

- e. You can also add the contract start date and expiration dates.
- f. You can also pick the contract template.
- g. You can also add the contract status.

The screenshot shows a web form titled "Add Contract" with a "Save" button in the top right corner. A blue notification banner at the top states: "'Primary contact person' field has been removed from here. You can now add contact information in more detail in the 'Contact Details' card on the contract's About tab." The form contains the following fields:

- Contract name ***: A text input field.
- Contract number**: A text input field containing the value "23827402".
- Tax ID**: A text input field.
- Contract Initiated by**: A text input field.
- Contract Start date ***: A date picker field with a calendar icon and a refresh icon.
- Select if this is an open ended contract
- Contract expiration date ***: A date picker field with a calendar icon and a refresh icon.
- Contract Template ***: A dropdown menu.
- Active status**: Radio buttons for "Yes" (selected) and "No".

- h. The system will set contracts as active by default, but you can mark it as inactive if needed.
 - i. Add any notes if needed.
 - j. Click Save once done.
3. Your contract will now be added to the system! If you need to make changes, click on the pencil icon. Each contract you add will have two tabs, About and Contract Generation.

Sites

Abundant Health*
415 Diamond St, Redondo Beach, CA 90277

Delete Site

About Contracts Locations Personnel Slots Placements Interventions Assessments Communications

List Of Contracts About Contract Generation Delete Contract

AH Contract (With Expired Contract) Fully Executed
06/07/2023 - 07/05/2024 (Expired) • University

Contract number: 1234567 Tax ID: 69769 Contract Initiated by: Eddie

Contract notes
The contract is still pending sign-off.
Post the sign off, please go ahead and place any students for this site. Please call if there is any further questions on this site and their locations.
[Show More](#)

Reference Address
Legal office address, 6 Thomas Jefferson Ave, Warren, NJ 07059
Last updated by Ashish Maharaja on 07/28/2024

Contact Details

Primary Contact Person Chris Scott Contract administrator (234) 132-4124 chris.scott@example.com address details	Contact 2 Julie Chen Asst Contract Admin julie.chen@example.com
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Programs Covered

4. Within the About tab, you will have the following sections:

- Basic details of the contract that you added.

About Contract Generation Delete Contract

AH Contract (With Expired Contract) Fully Executed
06/07/2023 - 07/05/2024 (Expired) • University

Contract number: 1234567 Tax ID: 69769 Contract Initiated by: Eddie

Contract notes
The contract is still pending sign-off.
Post the sign off, please go ahead and place any students for this site. Please call if there is any further questions on this site and their locations.
[Show More](#)

Reference Address
Legal office address, 6 Thomas Jefferson Ave, Warren, NJ 07059
Last updated by Ashish Maharaja on 07/28/2024

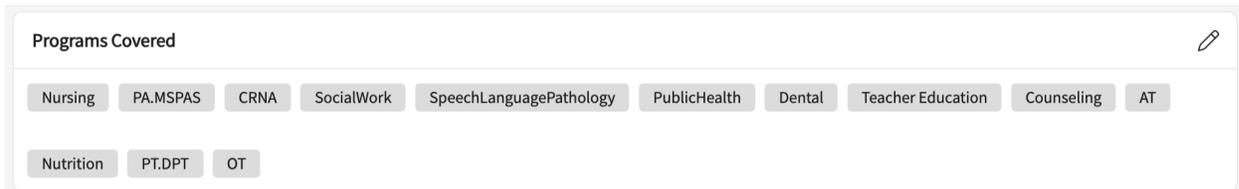
- Contact details of the contract that is added.

Contact Details

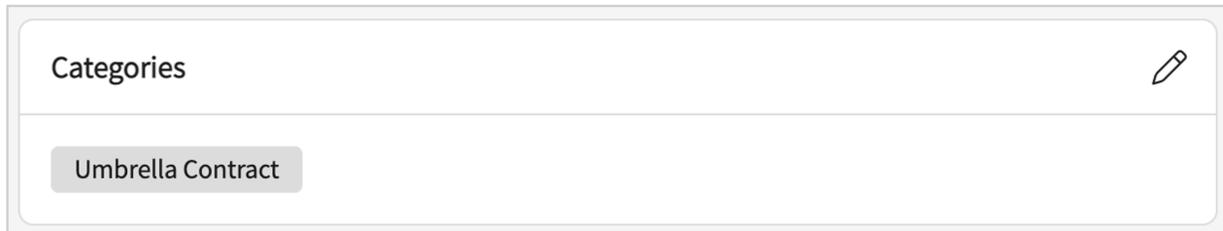
Primary Contact Person Chris Scott Contract administrator (234) 132-4124 chris.scott@example.com address details	Contact 2 Julie Chen Asst Contract Admin julie.chen@example.com
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- Programs covered under the contract. This is applicable for schools who have "common contract sharing" enabled, which means if multiple programs from your university has signed up with exxat and you allow the sites to be shared then you will be able to pick

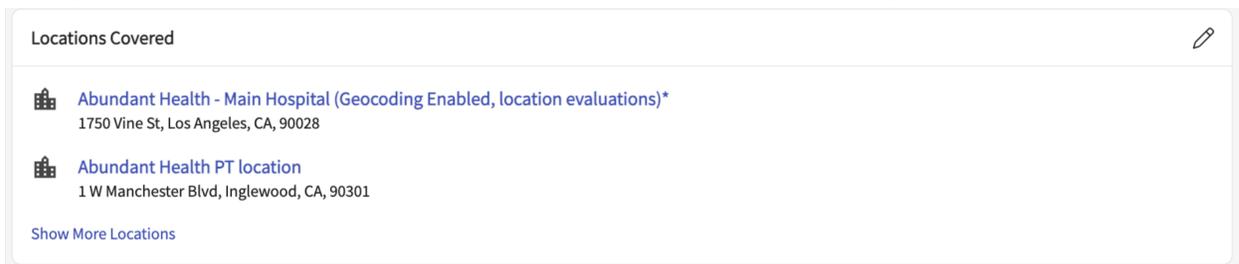
the programs that covers the same contract for different disciplines.



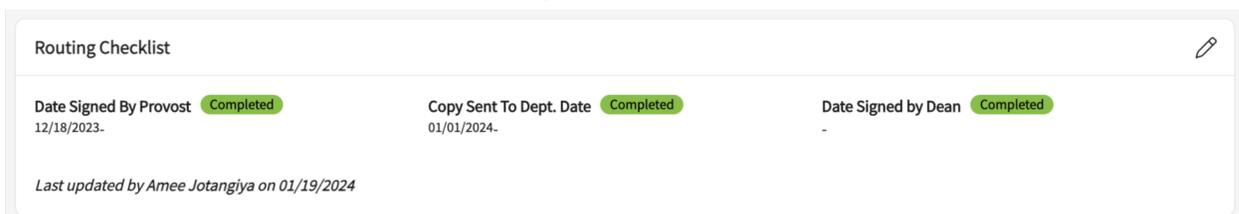
- Categories if any added for the contract. These Categories can be created under "Sites > Setup" page for contracts and can be applied to contract for better organization and grouping. These are useful when applying filters for contract to easily search and organize them better.



- Locations covered for this contract can be updated. If the same contract is covering multiple locations within that site then this association can easily be done.



- Routing Checklist is updated at the institutional level. You can add and update the information for each contract accordingly.



- Contract documents can also be uploaded under this section. You can easily archive old document.

Contract Documents				
General documents				
DATE UPLOADED	DOCUMENT	SHARED WITH STUDENT	NOTES	ACTION
01/01/2022	Contract 2022 View document	✓	-	
01/01/2021	Contract 2021 View document	✗	-	
Archived documents				
DATE UPLOADED	DOCUMENT	SHARED WITH STUDENT	NOTES	ACTION
10/01/2023	Contract 2020 View document	✗	-	

Last updated by Divyansh Parmarhi on 03/01/2024

5. Within the Contract Generation tab, you will have your program’s templates available to generate a contract for download.

- a. If you do not have any templates available, contact prism-support@exxat.com to get started.

About Contract Generation

Choose a template and click the purple "Generate" button below to export a word document automatically filled with the details for this site.

Select Template

COVID_Amendment.doc [View Template](#)

Exxat_University_Boilerplate.docx [View Template](#)

Generate

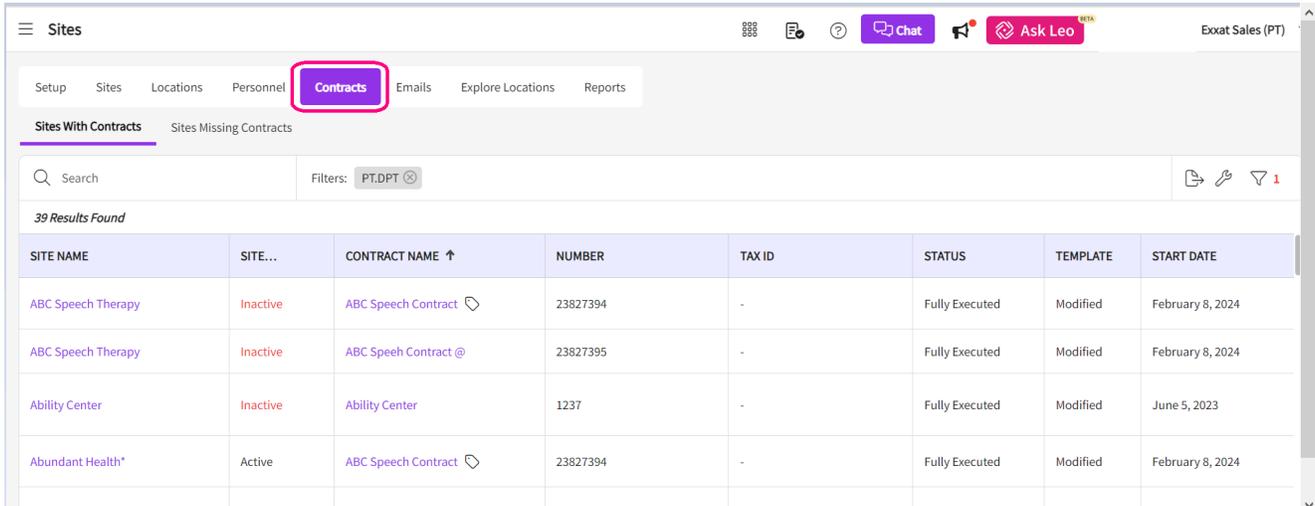
Unlinking a Contract Prism

Once the contract is Linked and for some reason if it needs to be Un-linked. PRISM will allow you to do that. Unlinking contracts only work when the same contract is associated to multiple sites and it needs to be removed from the current site. It doesnt delete the contract, it still shows up on other sites wherever linked.

1. Select Sites from your left menu or dashboard. OR use 2nd Step from below

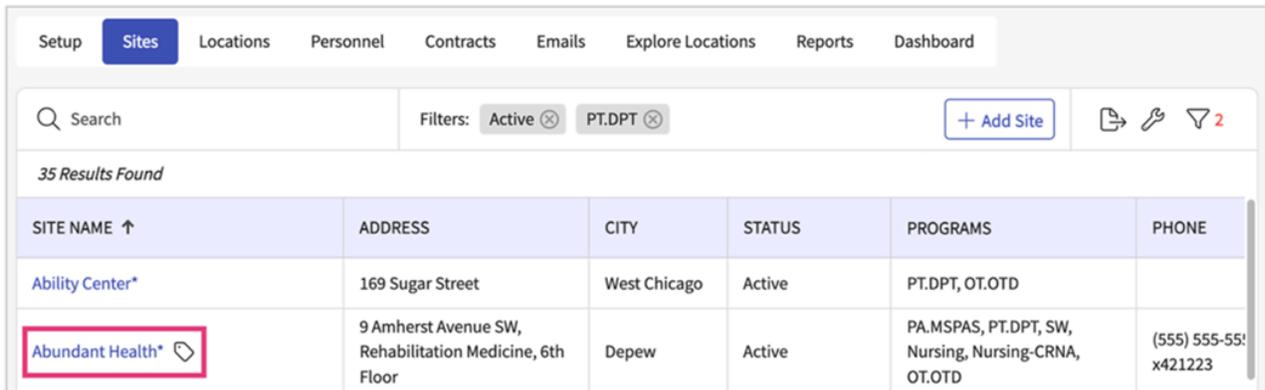


2. Select Sites from your left menu or dashboard and click on contracts from ribbon at the top of the page.



3. Find and select the Site you'd like to unlink the contract.

1. Pro-tip: use search box and filters to find what you're looking for whether you are on sites page or the contracts page. The filter option allows you search by state, tags and categories to make it easier to look for the contract for specific sites.



4. On the ribbon at the top of the page, click on Contracts.

5. On the Contracts tab, you will have a left panel that shows you all the contracts available for that Site. To unlink the contract, you can click on the contract from the left panel. And click Unlink

Contract button.

Abundant Health*
415 Diamond St, Redondo Beach, CA 90277

Contracts

List Of Contracts

ABC Speech Contract

ABC Speech Contract Fully Executed
02/08/2024 - 08/23/2024 (Expired) Modified

Contract number 23827394 Tax ID 8497283 Contract Initiated by ABC University

Contract notes
This contract is expired, we need to collaborate with the site to re-establish this contract.
Last updated by Joanna Perry on 08/28/2024

Contact Details
Primary Contact Person
John Doe | Site Faculty | (492) 045-7937
johndoe@email.com

Programs Covered
PT.DPT SpeechLanguagePathology

Categories

Unlink Contract

6. A pop-up will show up, type the mentioned number, and click Unlink.

Are you sure you want to unlink "Advent Professionals" from "Abundant Health*"
? Please note, unlinking will not delete this contract and it will continue to be associated to other sites where it is linked.

Displayed number 14 Enter displayed number to continue:

14

Cancel Unlink

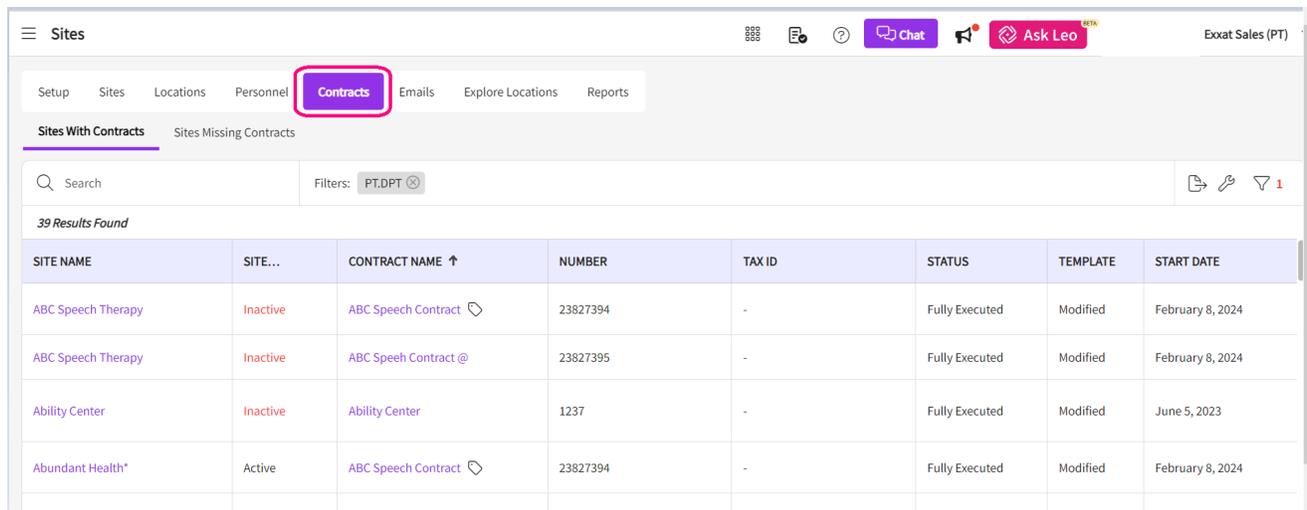
Deleting a Contract Prism

Once the contract is added for some reason it needs to be deleted. PRISM will allow you to do that. Deleting contract shows up where the contract is associated with that one site only and you can delete the contract. The contracts that are linked to other sites cannot be deleted.

1. Select Sites from your left menu or dashboard. OR use 2nd Step from below

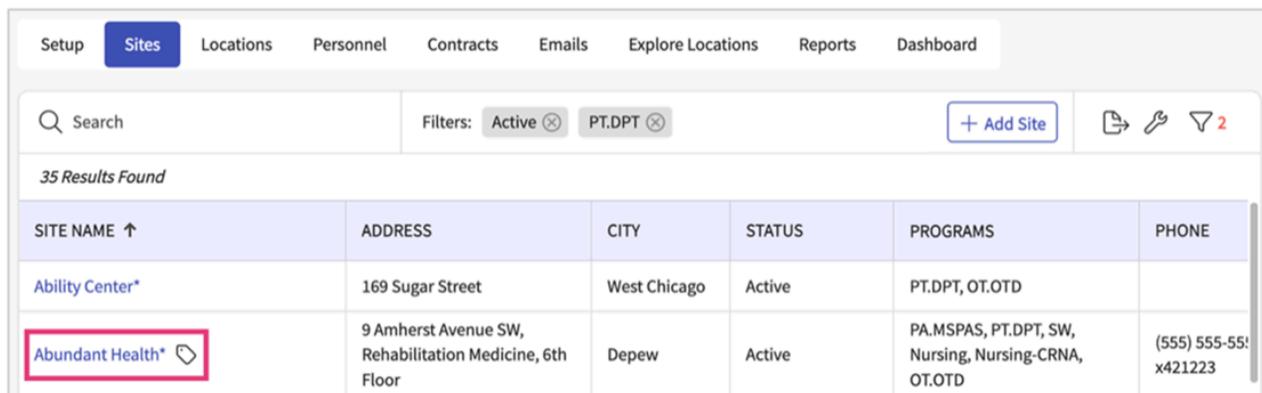


2. Select Sites from your left menu or dashboard and click on contracts from ribbon at the top of the page.



3. Find and select the Site you'd like to delete the contract.

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



4. On the ribbon at the top of the page, click on Contracts.

5. On the contracts tab, you will have a left panel that shows you all the contracts available for that Site. To delete the contract, you can click on the delete contract button

The screenshot shows a web application interface for 'Abundant Health'. At the top, there are navigation icons and user information: 'Amee Jotangiya Exxat Sales (PA)'. Below the header, the site name 'Abundant Health*' and address '415 Diamond St, Redondo Beach, CA 90277' are displayed. A navigation menu includes 'About', 'Contracts' (highlighted), 'Locations', 'Personnel', 'Slots', 'Placements', 'Interventions', 'Assessments', and 'Communications'. On the right, there is a 'Delete Site' button. The main content area is split into two panes. The left pane, titled 'List Of Contracts', contains a search bar and a list of contract entries: 'ABC Speech Contract', 'AH Contract (with expired contract)', 'Ability center addendum', 'Abundant Health', 'Contract A', and 'Main Hospital'. The right pane, titled 'Contract Generation', shows details for the 'ABC Speech Contract'. It includes a status 'Fully Executed' with an 'Expired' tag, a date range '02/08/2024 - 08/23/2024', and a 'Modified' indicator. Below this, there are fields for 'Contract number' (23827394), 'Tax ID' (8497283), and 'Contract Initiated by' (ABC University). A 'Contract notes' section contains the text: 'This contract is expired, we need to collaborate with the site to re-establish this contract.' and 'Last updated by Joanna Perry on 08/28/2024'. Further down, there are sections for 'Contact Details' (Primary Contact Person: John Doe | Site Faculty | (492) 045-7937, johndoe@email.com), 'Programs Covered' (PT.DPT, SpeechLanguagePathology), and 'Categories'. A red box highlights the 'Unlink Contract' button in the top right corner of the details pane.

6. A pop-up will show up to confirm the delete contract, enter the mentioned number.

The screenshot shows a confirmation dialog box. The text reads: 'Are you sure you want to delete this contract? Deleting this contract will remove the contract details, documents, routing checklist. Once deleted, this data cannot be retrieved. Do you want to continue?'. Below the text, there is a label 'Displayed number' followed by the number '47'. To the right, there is a label 'Enter displayed number to continue:' followed by an empty input field. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Delete'.

Creating and Managing Auto Notifications

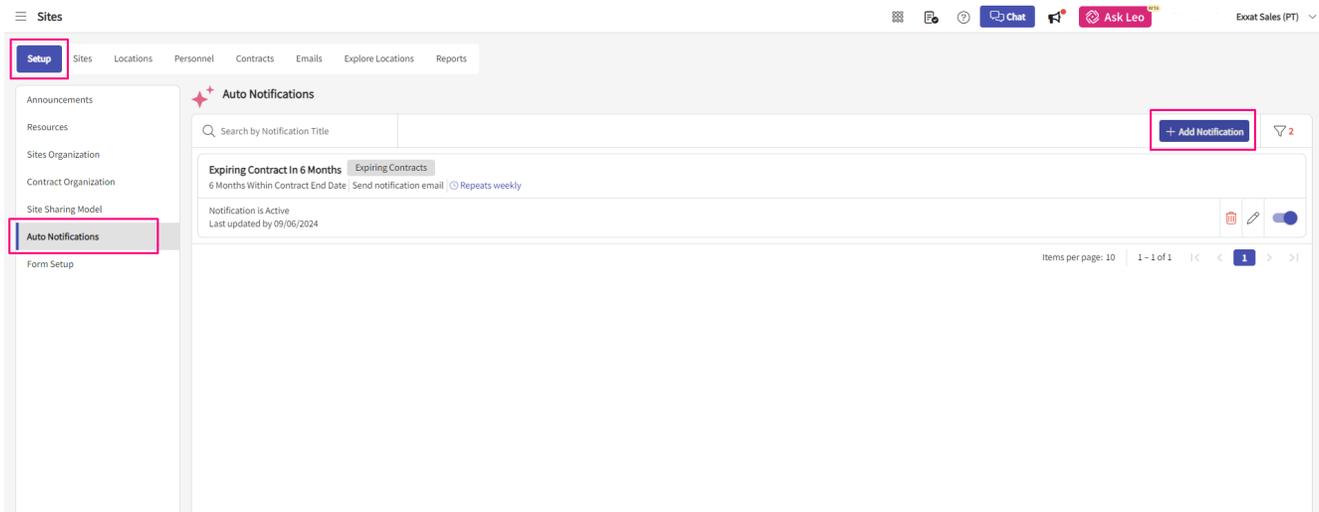
To stay informed about upcoming contract expirations, you can set up personalized email alerts. You have the flexibility to create, modify, pause, or delete multiple notifications for each contract. This feature enables you to schedule timely reminders for your expiring contracts.

To create auto notifications, perform the following:

1. Select Sites from your dashboard or left menu.



2. Select Setup from the ribbon at the top and select 'Auto Notifications' then click 'Add Notifications'.



3. What to include in alerts – Schedule notifications as a reminder for your expiring contracts by selecting the number of days, weeks, and months before the contract ends. Set up notifications to identify contracts expiring within the next 90 days, 6 months, and so on. Do not wait until just 30 days before a contract expires.

Note: Contract end date and within are the default options.

4. Notification Type – Expiring Contract is the default selected option.

Note: Currently, Expiring Contract is the only available option.

5. Notification Title – Specify the required title that must be displayed for your notification on the Auto Notifications screen. This will help you to differentiate notifications that are set up for two different groups of users.

How frequently these alerts should be sent – Select the frequency at which you want the recipient to receive the reminder emails. You can select Daily, Weekly, Monthly, and Yearly from the drop-down menu. On the Add Notifications window, you can perform the following steps:

× Add Notification

1 Setup Configuration 2 Recipients

Notification Type *
Expiring Contracts

Notification Title *

Max 100 characters are allowed.

What to include in alerts
Include all the Contract(s) whose is

How frequently these alerts should be sent
 Notifications will be sent Everyday at 9:00 AM EST

6. On the Recipients tab, select the recipients who should receive the notifications, in the Add additional email address text box, specify the email addresses of the recipients you want to send the contract reminders to if their name is not reflecting in the list. Click on 'Create Notification'

Setup Configuration 2 Recipients

Select Staff/Faculty

Search

<input checked="" type="checkbox"/>	RECIPIENT NAME	RECIPIENTS'S EMAIL
<input checked="" type="checkbox"/>	Chapman, Stacey	stacey.chapman@example.com
<input checked="" type="checkbox"/>	Dave, Eric	eric.dave@example.com
<input checked="" type="checkbox"/>	Einstein, Albert	albert@mailinator.com
<input checked="" type="checkbox"/>	ExxatSales, Mock	ExxatSales.ReadOnlyAdmin@example.com
<input checked="" type="checkbox"/>	ExxatSales-PowerBI, Mock	mock.ExxatSales-PowerBI@example.com
<input checked="" type="checkbox"/>	Faculty, Test	testexat@example.com
<input checked="" type="checkbox"/>	Herrera, Jermaine	Jermaine.Herrera@example.com
<input checked="" type="checkbox"/>	Jones, Erin	erin.jones@example.com
<input checked="" type="checkbox"/>	Menon, Chitra	chitra.menon@student.com
<input checked="" type="checkbox"/>	Miller, Taylor	TaylorMiller@example.com
<input checked="" type="checkbox"/>	Ortega, Meredith	meredith.ortega@example.com
<input checked="" type="checkbox"/>	S, Rahul	srahul575380@example.com

Items per page: 30 | 1 - 16 of 16 | 1

Add additional email address

Mode of Communication

Back Create Notification

Viewing Contract Report

You may want to revise contracts you have on file, or easily find any Sites who do not yet have contracts added. The Contracts section of the system will show you the following information:

1. Select Sites from your dashboard or left menu.

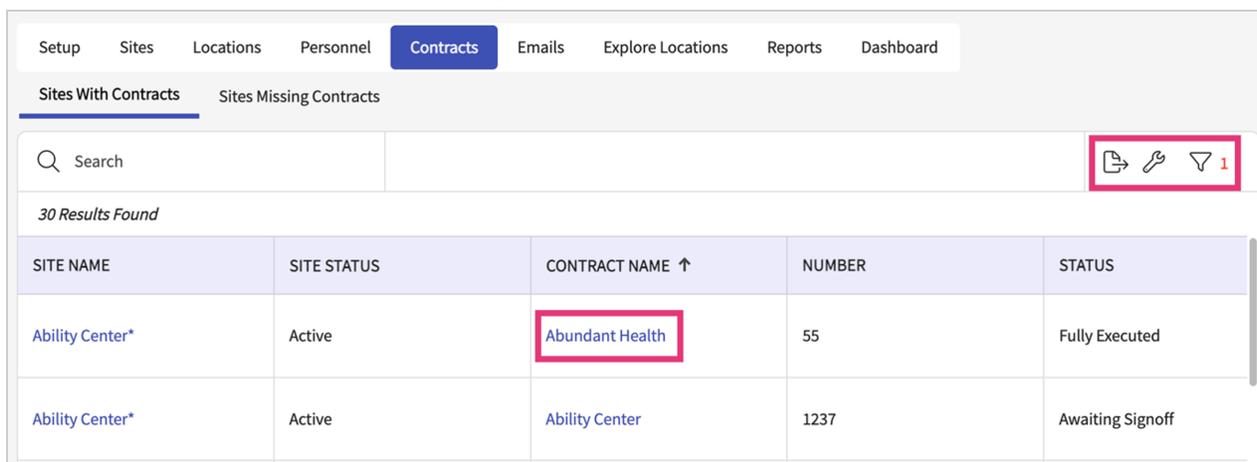


2. Select Contracts from the ribbon at the top.



3. The page will display all sites with contracts. If you'd like to manage any contract, click on the Contract Name.

1. You can export to excel using the sheet and arrow icon.
2. Rearrange the columns you see using the wrench icon.



4. Filter your list using the funnel icon. Here you are able to filter out contracts and check which ones are expiring in 30 days, 60 days etc.

× Filters Apply

Reset all

Site Status

Status

Expiration

Programs (1) ●

Contract Tags

Categories

Expiring in 30 Days

Expiring in 60 Days

Expiring in 90 Days

Expired

Open Ended

From To

5. To view sites without contracts, click on Sites Missing Contracts.

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

Sites With Contracts **Sites Missing Contracts**

Search 📄 🔧 ⏮ 1

30 Results Found

SITE NAME	SITE STATUS	CONTRACT NAME ↑	NUMBER	STATUS
Ability Center*	Active	Abundant Health	55	Fully Executed

6. The page will display all sites without contracts. Click on the site name to add contact information.

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

Sites With Contracts **Sites Missing Contracts**

Search 📄 🔧 ⏮

SITE NAME ↑	SITE STATUS	EIN	PROGRAMS
Abundant Health	Active		
Advantia Health	Active		OT.OTD, PH