Managing and organizing your data within Prism is now more efficient, thanks to the enhanced features for Sites, Locations, Contracts, and Notifications. These tools allow institutions to create curated categories, manage contract statuses, and set up auto-notifications to ensure timely updates for expiring contracts. This guide provides step-by-step instructions for utilizing these functionalities to streamline workflows.

- Organizing Sites and Locations
- Managing Contract Status
- Creating and Managing Auto Notifications

Organizing Sites and Locations

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



2. Click on Setup from the ribbon at the top of the page.

Setup Sites Locations Personnel Contracts Emails Explore Locations Reports Dashboar	ł
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3. Select Site Organization from the left panel.



- 4. The system will display all your existing Categories and Location Area options.
 - 1. To edit your categories or areas, click on the pencil icon.

2. If you have not created any curated lists yet, click on the + icon.

Categories	
Site/Location Categories	Ø
Major Medical Center Outpatient Conglomerate Private Practice Stand-Alone Clinic	
Contract Categories	Ø
Annual Addendum Single Use Contract Umbrella Contract	
Personnel Categories	+
No category setup yet. Click + to add	
Location Area	Ø
Bay AreaCentral CoastIn-AreaNorth CoastOut of CountryOut Of StateOSacramento ValleySan Joaquin ValleySouthern California	ut-Area

5. A drawer will open.

1. Click on + Add to create new options.

× Personnel Categories	Save
+ Add Personnel Category	

2. You can edit existing options by typing directly within the text box.

3. You can delete existing options by clicking on the trash bin icon.

Contract Categories	Save
Category Name *	
Annual Addendum	Ŵ
Category Name *	
Single Use Contract	Ū
Category Name* Umbrella Contract	Ŵ
Category Name*	
Category Name* Auto-renewal	Ŵ

6. If you are adding a new option, enter in your new category or location area. Click Save once done.

× Personnel Categories	Save
Category Name *	
Understands Sign Language	Û
+ Add Personnel Category	

Managing Contract Status

Multi-Program:

- Shared contracts: Status managed at the institutional level, accessible to all programs.
- Non-shared contracts: Managed independently by each program.

Single Program:

• Contract status is managed by individual programs.

1. Select Sites from your left menu or dashboard.



2. Click on Setup from the ribbon at the top of the page.

Setup Sites Locations Personnel Contracts Emails Explore Locations Reports Dashboard	
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3. Select Contract Organization from the left panel.

≡ Sites			₩ E o (· 모) Chat	Þ	🐼 Ask Leo	Amee Jotangiya cdTenant (Nursing)
Setup 1. Locations Perso	nnel Contracts Emails Explore Locations Reports						
Announcements	Contract Categories			+			
Resources	No category setup yet. Click + to add						
Contract Organization 2	Routing Checklist			+			
Site Sharing Model	No Routing Checklist setup yet. Click + to add						
Auto Notifications	Contract Status		Г	0			
rom and p	Fully Executed Awaiting Signoff Draft Finalized In De	opment On Hold Terminated					
			_	_	_	_	

4. Under Contract status click on the pencil icon to edit the status

\equiv Sites		··· E• ⑦ E	× Contract Status	Save
Setup Sites Locations Pers	onnel Contracts Emails Explore Locations Reports		Contract Status (Character limit: 100)	
Announcements	Contract Categories			Add
Resources Sites Organization	No category setup yet. Click + to add		Fully Executed	ð
Contract Organization	Routing Checklist		Awaiting Signoff	i i
Site Sharing Model	Certificate of Insurance Date Signed By Provost Copy Sent To Dept. Date		Draft	Û
Auto Notifications	Contract Status		Finalized	Ŵ
Form Setup	Fully Executed Awaiting Signoff Draft Finalized In Development On Hold	Terminated	In Development	i
			On Hold	Û
			Terminated	Û

Managing Auto Notifications

You can set email alerts for faculty and staff about expiring contracts at the program or institutional level. You can create, edit, pause, and delete multiple notifications for each category. This helps you schedule notifications as a reminder for your expiring contracts.

To create notifications, perform the following:

1. Go to Dashboard and click Sites.



OR

Go to the menu on the top left corner and click Sites.



	1						
Setup	Sites	Locations	Personnel	Contracts	Emails	Explore Locations	Reports

3. Click Auto Notifications from the left menu.

≡ Sites							
Setup	Sites	Locations	Pers				
Announc	ements						
Resource	S						
Sites Organization							
Contract	Organizati	ion					
Site Shar	ing Model	-					
Auto Noti	fications						

4. Click Add Notifications.



5. On the **Add Notifications** window, you can perform the following steps:

× Add Notification						
1 Setup Configuration	2 Recipients					
Notification Type *						
Expiring Contracts				-		
Notification Title *						
☑ What to include in alerts						
Include all the Contract(s) whose	Contract End Date	•	is Within	•	•	•
() How frequently these al	erts should be sent					
Daily Notification	s will be sent Everyday at 9:	00 AM EST				

- 1. On the **Setup Configuration tab**, specify the following, and click Save and Continue.
- Notification Type Expiring Contract is the default selected option.
 Note: Currently, an Expiring Contract is the only available option.
 - **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.
 - 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: Currently, Contract end date and Within are set as default and are the only available options.
 - 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.
- 2. On the **Recipients** tab, select the staff or faculty from the recipient list or specify an email address in the **Add additional email address** text box.

≡ Sites		imes Add Not	ification		
Setup Sites Locations Pe	ersonnel Contracts	🖉 Setup Co	onfiguration 2 Recipients		
		Select Staff/F	acutly		
Announcements	Auto Notificatio	Q Search			
Resources	Q Search by Notificat		RECIPIENT NAME	RECIPIENTS'S EMAIL	
Sites Organization	Expiring Contracts T		Admin, Mock	mock_admin@example.c	om
Contract Organization	6 Months Within Contr		Baxter, Kaiya	Kaiya.Baxter@example.co	m
Site Sharing Model	Notification is Active Last updated by Jul 30		Becker, Franklin	Franklin.Becker@example	e.com
Auto Notifications			Bolton, Brylee*	Brylee.Bolton@example.	com
			Calhoun, Iliana	Iliana.Calhoun@example.	com
			External, Exxat	exxatsales.externalnursin	g@example.com
			Faculty, Test	testexxat@example.com	
			Faculty, Mock	mock_faculty@example.c	com
			Faculty, Mock	mock_faculty_Sales@exa	mple.com
			Hammes, Donald	getmattkay@example.com	m
			Hayden, London	London.Hayden@exampl	e.com
			Henderson, Cadence	Cadence.Henderson@exa	imple.com
					Items per page: 30 1 – 20 of 20 < < 1 > >
		Add additional e	mail address		
		Enter valid em	ails		
		🖓 Mode of Cor	nmunication		
					Back Create Notification

Note: For institutional level users, you can specify the recipient email directly.

- 6. Click Create Notifications.
- 7. On the **Auto Notifications** window, you can perform the following:

\equiv Sites	🇱 🛃 🕜 💭 Chat 🗖 🚫 Ask Leo 📅 Amee Jotangiya Exo	at Sales (Nursing) 🗸 🗸	
Setup Sites Locations Personnel Contracts Emails Explore Locations Reports			
Announcements	↓ Auto Notifications		
Resources	Q. Search by Notification Title + Add Notifica	ition 🖓 1	
Sites Organization Contract Organization	Expiring Contracts To Contracts Team In 6 Months - Test UTA Expiring Contracts 6 Months Within Contract End Date Send notification email () Repeats daily		
Site Sharing Model	Notification is Active Last updated by Jul 30, 2024, 2:22:16 PM		
Auto Notifications			

1. Click $\ensuremath{\boxed{2}}$ to filter the notifications with based on the following criteria:

- Notification Type select Expiring Contracts to view all the contracts that will expire.
- Notification Status Select Active, Inactive or both to filter the notifications based on the selected preference.

Note: Notification recipients for expiring contracts will receive alerts for contracts with active sites only.

imes Filters	Save
Reset all	Clear all
Notification Type (1)	Expiring Contracts
Notification Status (1) 🛛 ●	

- 2. On your created notifications, you can do the following:
 - 1. Click within the **Search by Notification** text box and specify the notification title to view the required notification.
 - 2. Click the delete icon to delete the notification.
 - 3. Click the pencil icon \checkmark to edit the notification.
 - 4. Click the button to enable or disable a scheduled notification.