

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

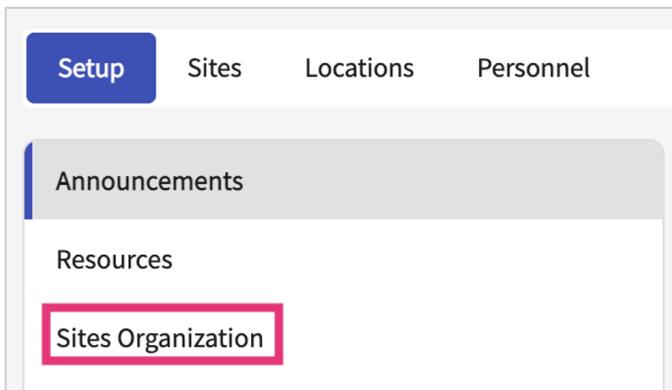
1. Select Sites from your left-menu or dashboard.



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



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

Major Medical Center Outpatient Conglomerate Private Practice Stand-Alone Clinic

Contract Categories

Annual Addendum Single Use Contract Umbrella Contract

Personnel Categories

No category setup yet. Click + to add

Location Area

Bay Area Central Coast In-Area North Coast Out of Country Out Of State Out-Area
Sacramento Valley San Joaquin Valley Southern California

5. A drawer will open.

1. Click on + Add to create new options.

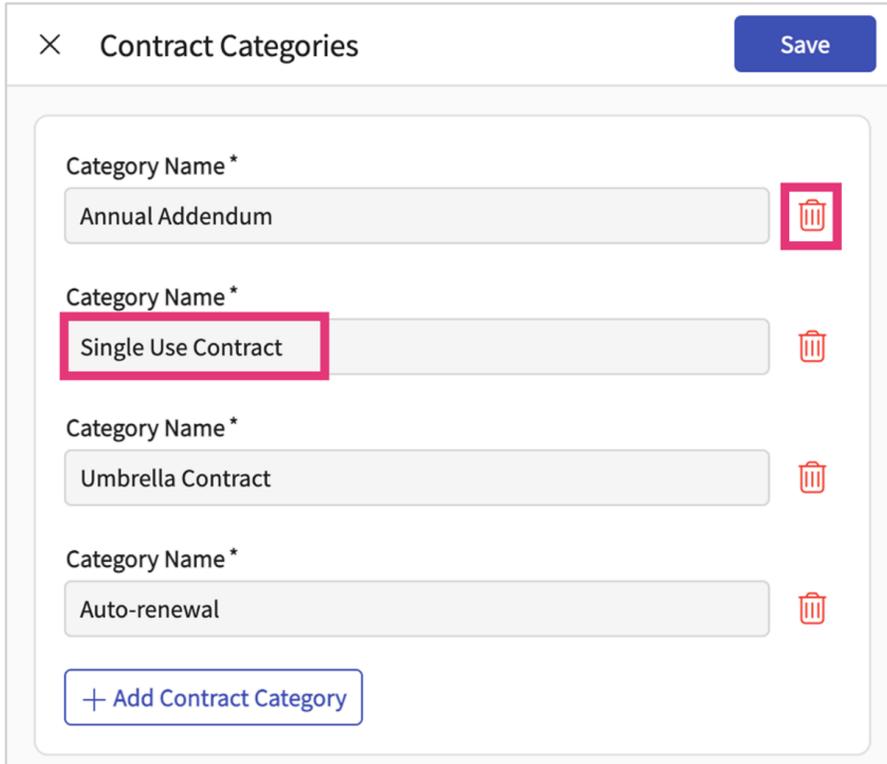
Personnel Categories

Save

+ Add Personnel Category

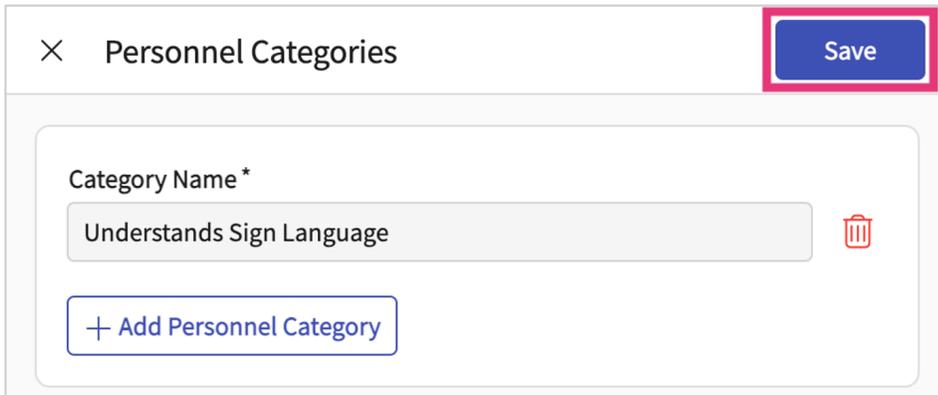
2. You can edit existing options by typing directly within the text box.

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



The screenshot shows a form titled "Contract Categories" with a "Save" button in the top right corner. The form contains a list of four categories, each with a "Category Name *" label and a trash bin icon to its right. The categories are: "Annual Addendum", "Single Use Contract", "Umbrella Contract", and "Auto-renewal". The "Single Use Contract" category is highlighted with a red border. At the bottom of the form is a button labeled "+ Add Contract Category".

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



The screenshot shows a form titled "Personnel Categories" with a "Save" button in the top right corner, which is highlighted with a red border. The form contains a list of one category, "Understands Sign Language", with a "Category Name *" label and a trash bin icon to its right. At the bottom of the form is a button labeled "+ 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.

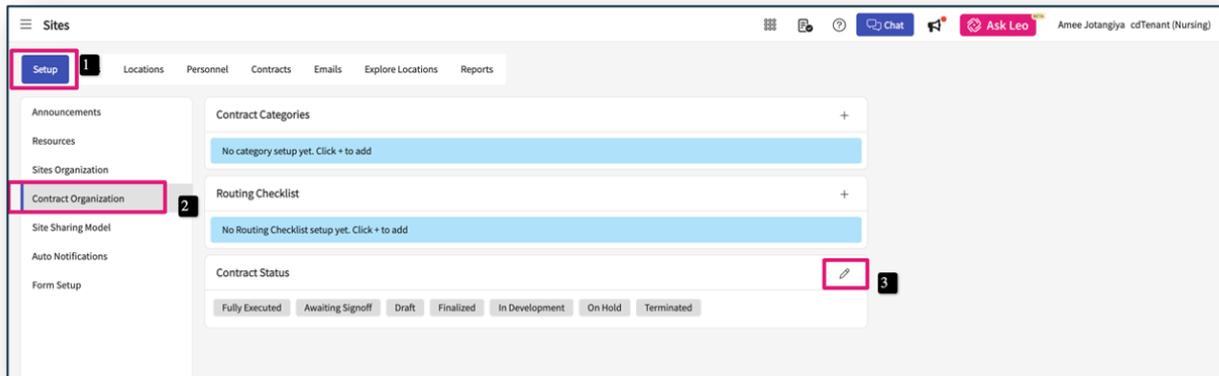
1. Select Sites from your left menu or dashboard.



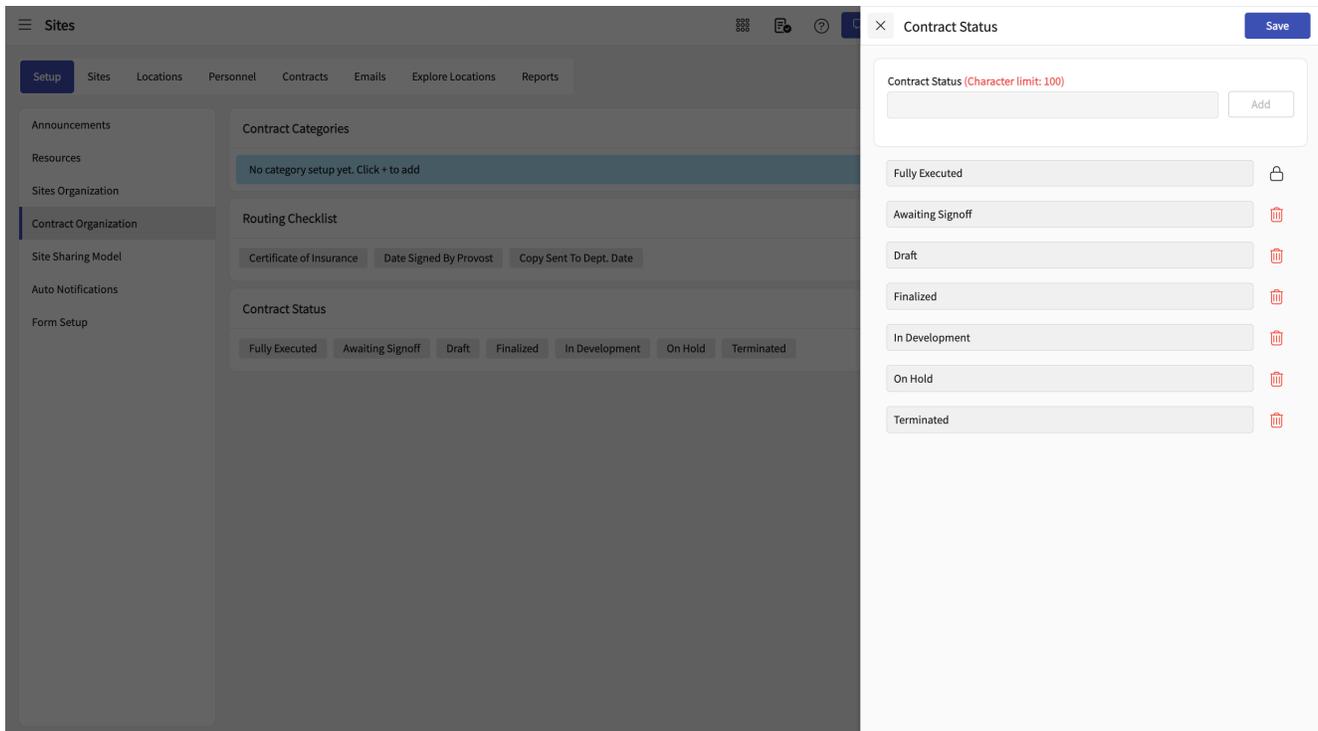
2. Click on Setup from the ribbon at the top of the page.



3. Select Contract Organization from the left panel.



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



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:

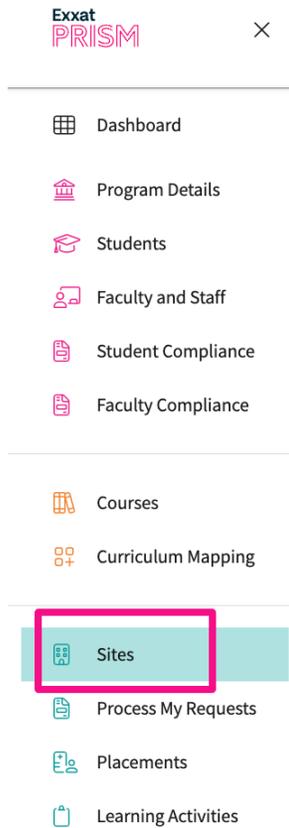
1. Go to Dashboard and click Sites.

Sites

Find contact information, contracts, availability and clearance requirements for all clinical sites.

OR

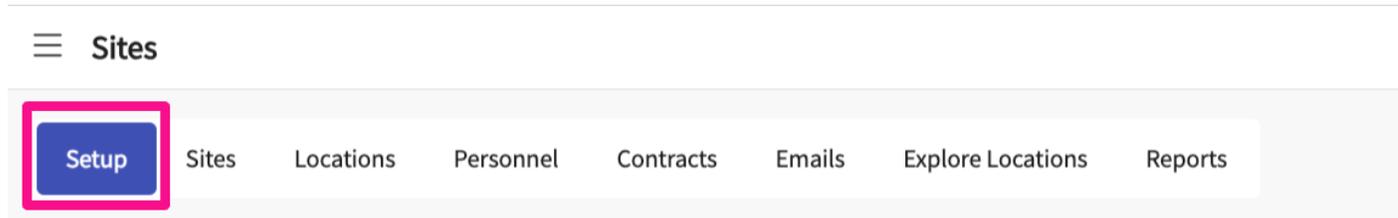
Go to the menu on the top left corner and click Sites.



Exxat PRISM ×

- Dashboard
- Program Details
- Students
- Faculty and Staff
- Student Compliance
- Faculty Compliance
- Courses
- Curriculum Mapping
- Sites**
- Process My Requests
- Placements
- Learning Activities

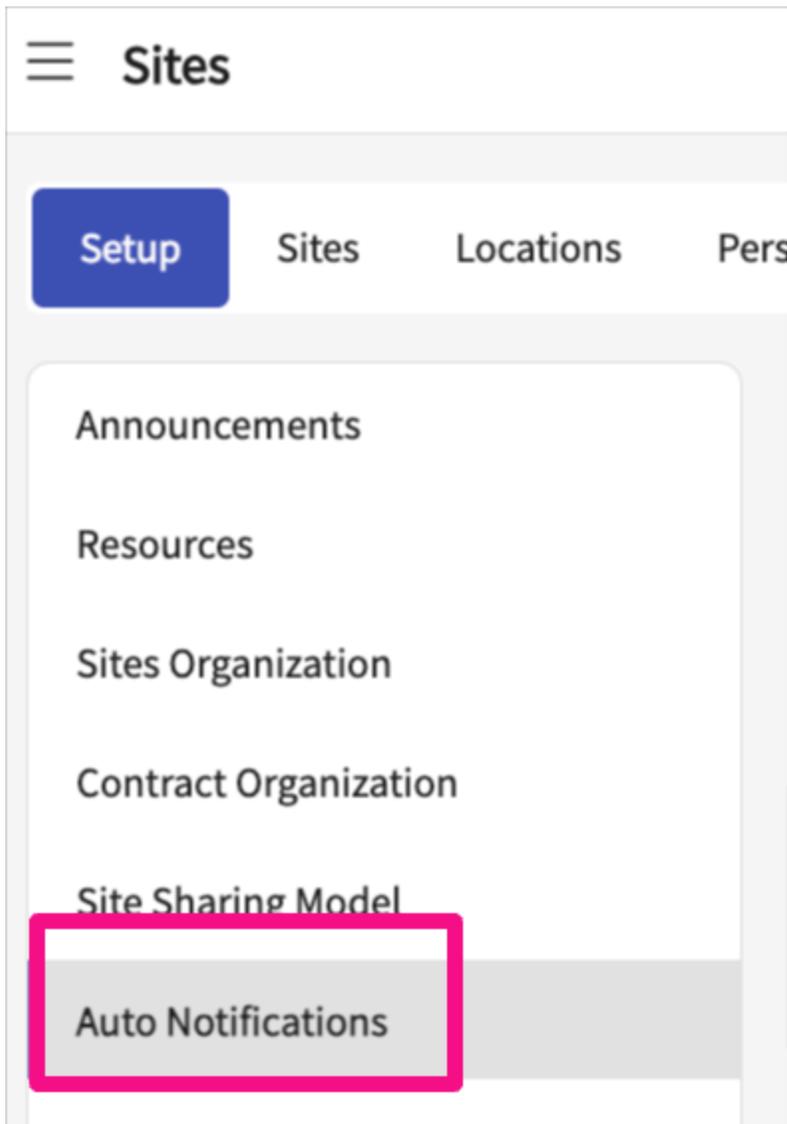
2. Click **Setup** on the **Sites** window.



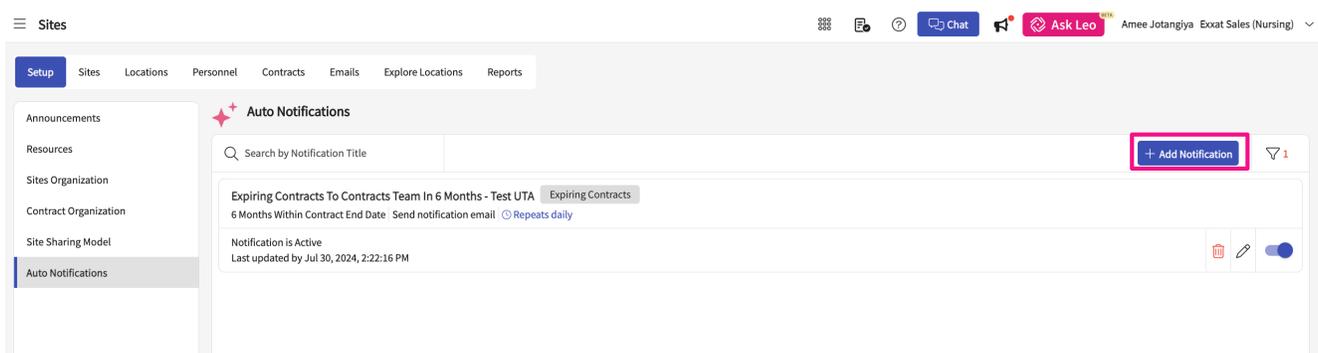
≡ Sites

Setup Sites Locations Personnel Contracts Emails Explore Locations Reports

3. Click **Auto Notifications** from the left menu.



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 is

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

1. On the **Setup Configuration tab**, specify the following, and click Save and Continue.

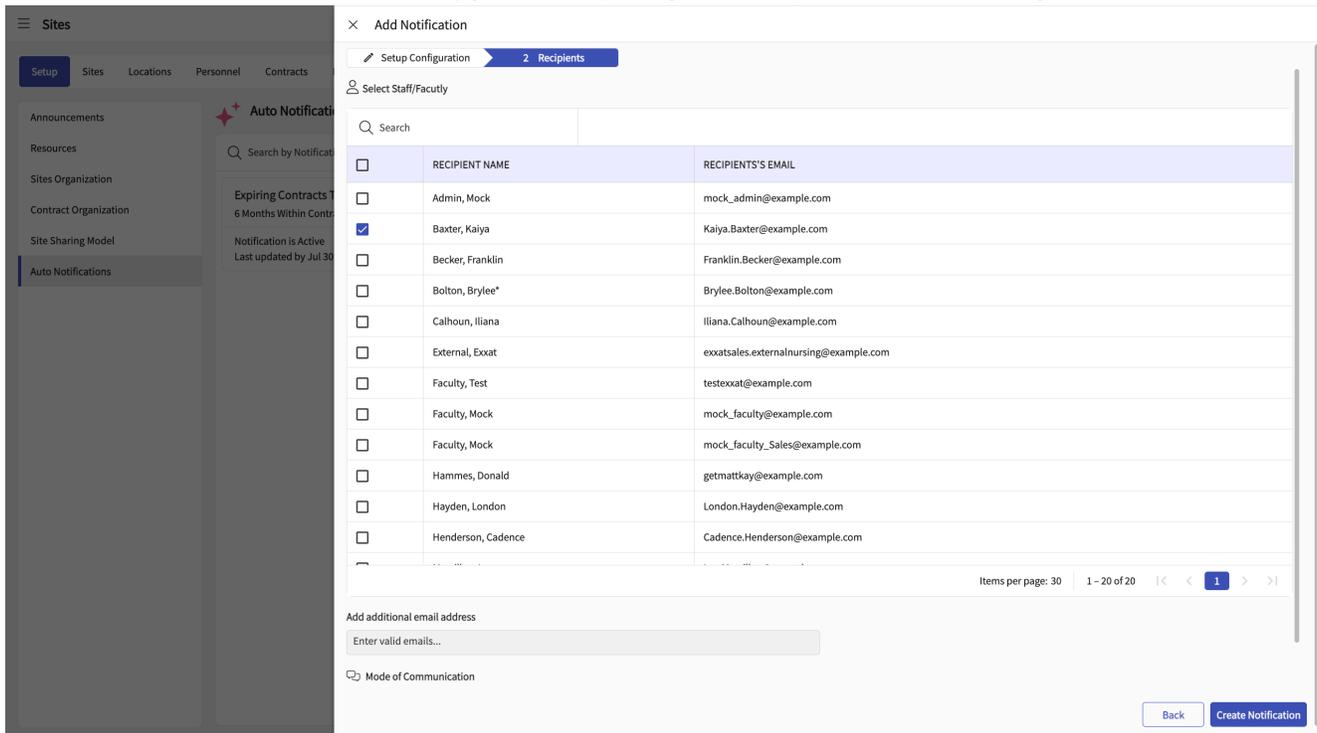
- **Notification Type** – Expiring Contract is the default selected option.

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.

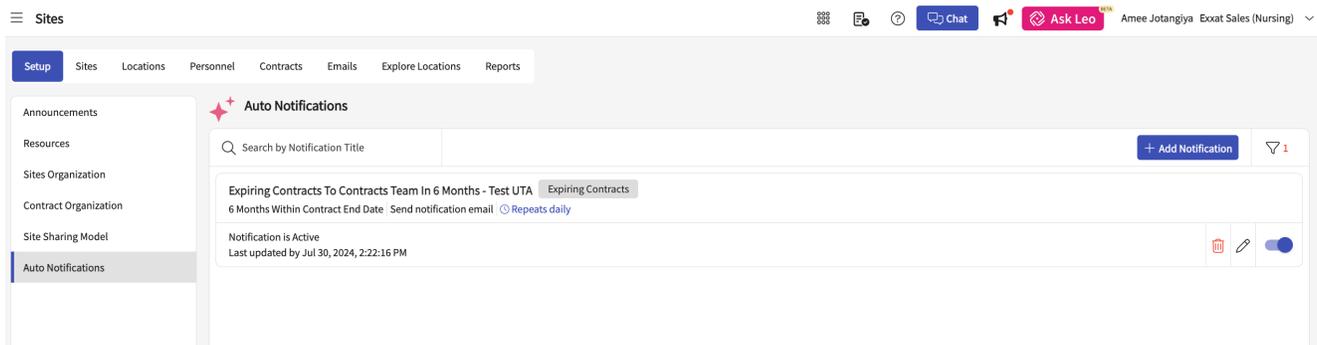
2. On the **Recipients** tab, select the staff or faculty from the recipient list or specify an email address in the **Add additional email address** text box.

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:



1. Click  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.

× 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  to edit the notification.

4. Click the button  to enable or disable a scheduled notification.