

Once your students submit a My Request form, you can begin reviewing the information they provided and finalize their placement!

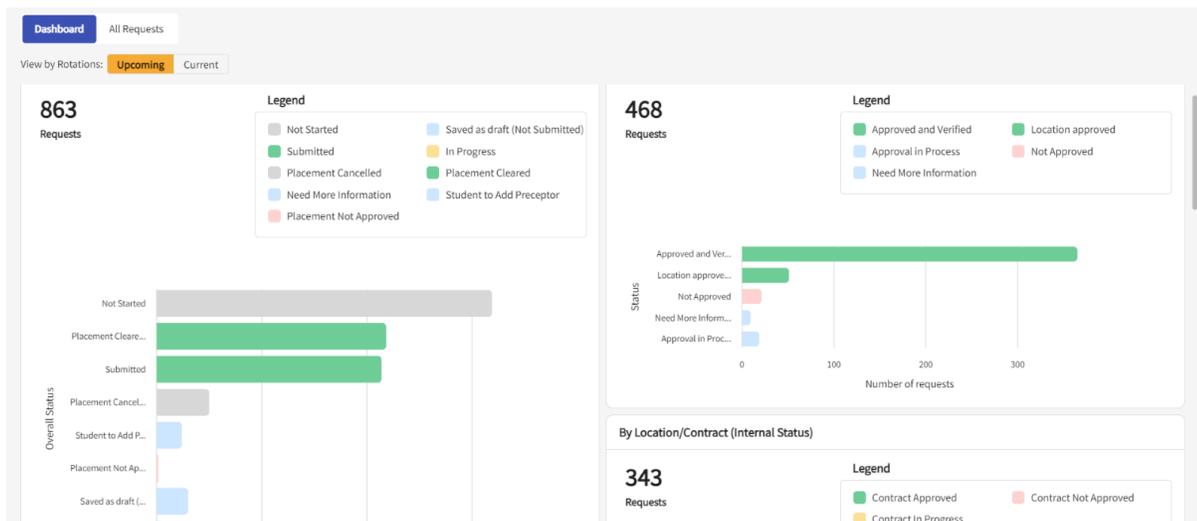
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☐ **Reviewing Dashboard and All Requests**

1. Select Process My Request from your dashboard or left menu.



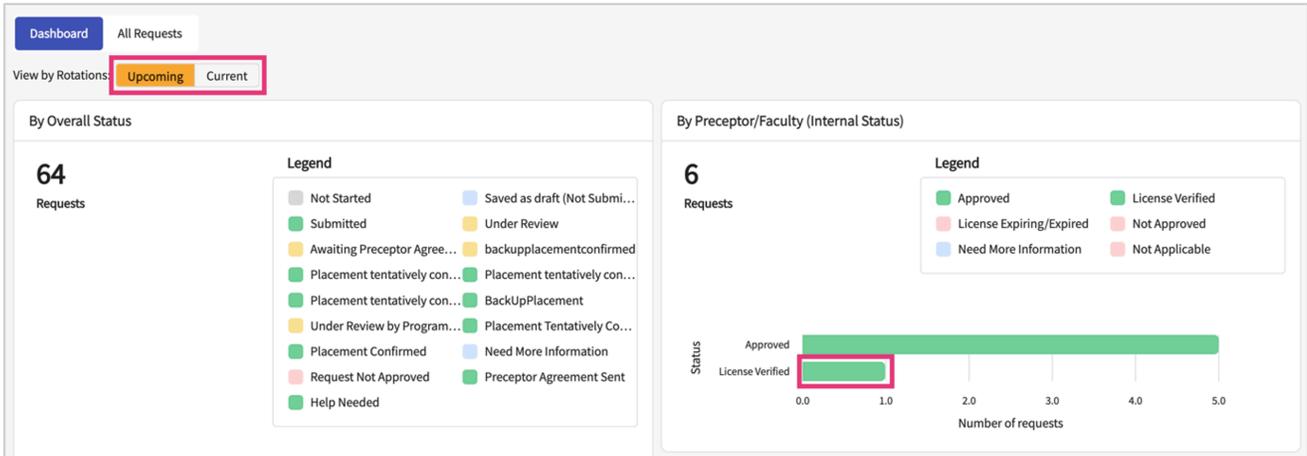
2. Dashboard View: This view provides a summary view of all requests. The graphical charts would give users a quick summary of the distribution of the requests across various statuses (overall and internal) and also on the progress made by the students (Not started, Saved as Draft and Submitted) Users can view the details based on Upcoming and Current rotations.



3. You'll be taken to the Dashboard, where you can view requests for upcoming and current rotations. View requests by:

1. Overall Status
2. By Preceptor/Faculty
3. By Compliance
4. By Location/Contract
5. By Students
6. By Course

4. The dashboard is clickable, simply click on a status you'd like to review requests for.



5. You'll be redirected to the All Requests tab where the page will filter per your selection.

The 'All Requests' tab is active. The 'View by Rotations' dropdown is set to 'Upcoming'. The search bar contains 'Search by student, student ID, location'. The filters section shows 'License Verif...' and 'Valid'. Below the filters, it indicates '1 Results Found'. The table below shows the following data:

STUDENT	COURSE	CONTRACT	COMPLIANCE	PRECEPTOR	OVERALL STATUS	
Guzman, Daniella ✓ Placed ⓘ	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	-	Approved	License Verified	Submitted Jan 31st, 2023	View ↗

6. The All Requests tab will show you a list view by student. You can view requests for upcoming, current, and past rotations.

This screenshot is identical to the previous one, showing the 'All Requests' tab with the same filters and table data.

7. Click **Download Raw Responses** to download the comprehensive raw responses report in Excel format for student placement requests. This detailed report includes all the raw data from students' placement request forms, along with additional information about students, courses,

rotations, wishlists, and request statuses.

Process My Requests

Dashboard All Requests

View by Rotations: Upcoming and Current Past

Search by student, student ID, location Filters: Submitted Valid Show more

Download Raw Responses

36 Results Found

STUDENT	COURSE	CONTRACT	COMPLIANCE	PRECEPTOR	OVERALL STATUS	ACTION
Potter, Harry	101 - Demo Course 2024 - 2025, Winter, Year 1	Contract Approved	Approved	Approved	Placement Confirmed Aug 12th, 2024	View
Potter, Harry	101 - Demo Course 2024 - 2025, Winter, Year 1	-	-	-	Placement Confirmed Aug 1st, 2024	View
Potter, Harry	101 - Demo Course 2024 - 2025, Winter, Year 1	-	-	-	Under Review Aug 6th, 2024	View
Potter, Harry	101 - Demo Course 2024 - 2025, Winter, Year 1	Contract Approved	Approved	Approved	Agreement Submitted Jul 22nd, 2024	View
Student 05, Mock	101 - Demo Course 2024 - 2025, Winter, Year 1	-	-	-	Agreement Submitted Jul 22nd, 2024	View
Barrett, Donte(Grad)*	NUR Demo 211 - BSN Course 1(Wishlists,Timesheet)* 2023 - 2024, Fall	Contract Approved	Approved	Approved	Placement Confirmed Aug 1st, 2024	View
Barrett, Donte(Grad)*	NUR Demo 211 - BSN Course 1(Wishlists,Timesheet)* 2023 - 2024, Fall	-	-	-	Agreement Submitted Aug 12th, 2024	View

Items per page: 100 1 - 36 of 36

8. List View: The page will show you requests from all students across all courses and the most recent requests will be displayed on the top.

1. The requests are categorized into two views.

1. Upcoming and Current – Lists all the requests for the ongoing and future rotations.

2. Past – Lists all the requests for the rotations which are completed already. Use the filter to focus on a smaller set of requests.

2. Use the search box to quickly locate a specific request. Use the edit column option to rearrange the columns as per your need.

3. Requests are marked as Invalid when a student is removed from the wishlist after the Wishlist has been opened.

4. The requests that are converted into placement are labeled as Placed.

9. Click View on the far right hand side of the page for the request you would like to review. You can also open the request in a new tab by clicking on the icon beside the view button, this will help you keep the list view as is and work in different tabs.

Dashboard All Requests

View by Rotations: Upcoming and Current Past

Search by student, student ID, location Filters: Submitted Valid Show more

5 Results Found

STUDENT	COURSE	CONTRACT	COMPLIANCE	PRECEPTOR	OVERALL STATUS	ACTION
Barrett, Donte(for demos-Grad)*	999 - 4th Year 2022 - 2023, Fall	-	Pending Compliance	-	Submitted Dec 19th, 2023	View
Barrett, Donte(for demos-Grad)*	NURS 557* - Child Health & Wellness (PNP and FNP - 112 clinical hours)* 2022 - 2023, Spring, Year 1	Contract Approved	Approved	Approved	Placement Confirmed Jun 16th, 2023	View
Barrett, Donte(for demos-Grad)*	999 - 4th Year 2022 - 2023, Fall	Contract Approved	Approved	Approved	Placement Confirmed Feb 14th, 2023	View
Barrett, Donte(for demos-Grad)*	NURS 557* - Child Health & Wellness (PNP and FNP - 112 clinical hours)* 2022 - 2023, Spring, Year 1	Contract Approved	Approved	Approved	Placement Confirmed Dec 8th, 2022	View
Barrett, Donte(for demos-Grad)*	NURS 557* - Child Health & Wellness (PNP and FNP - 112 clinical hours)* 2022 - 2023, Spring, Year 1	Contract Approved	Approved	License Verified	Placement Confirmed Dec 8th, 2022	View

10. Each row will show you a status for each major component that needs to be approved before placing the student:

1. Contract
2. Compliance
3. Preceptor
4. Overall Status

STUDENT	COURSE	CONTRACT	COMPLIANCE	PRECEPTOR	OVERALL STATUS
Calhoun, Jessie	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	-	-	-	Submitted May 31st, 2023
Barrett, Donte*	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	Contract Under Review	Approved	Approved	Placement Confir Apr 18th, 2023
Barrett, Donte*	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	Contract Approved	Approved	Approved	Need More Inform Mar 17th, 2023

Reviewing Student My Request Forms

7. To begin reviewing a request, click on View, or the arrow icon if you prefer to open a new tab.

STUDENT	COURSE	CONTRACT	COMPLIANCE	PRECEPTOR	OVERALL STATUS
Calhoun, Jessie	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	-	-	-	Submitted May 31st, 2023
Barrett, Donte*	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	Contract Under Review	Approved	Approved	Placement Confir Apr 18th, 2023
Barrett, Donte*	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2	Contract Approved	Approved	Approved	Need More Inform Mar 17th, 2023

8. The form will load, and each section will have an action button.

Calhoun, Jessie | NURS 593* - FNP Practicum I (FNP - 168 clinical hours)*, 2023 - 2024, Spring, Year 2 | Requests for FNP Practicum I | FNP Clinical Practicum I* [Sep 1, 2023 - Nov 30, 2023] Submitted

Basic Information Some Action Needed [View Compliance](#)

Speciality Women's Health	Duration(hours) 520	Partial/Full Full
------------------------------	------------------------	----------------------

Location Information [Search Location](#)

Location Name Hope Haven Medical Center Orthopedics	Site Name -	Contact First name John	Contact Last name Smith
Email john.smith@exxat.com	Business phone 5555555555	Business fax -	Website -
Address Line 1 123 ABC St	Address Line 2 -	City Brooklyn	State NY
Zip code			

Overall Status [Edit student response](#)

Submitted

Compliance

Preceptor/Faculty

Location/Contract

9. You will view all the details added by the student. On the top, you will be able to view the

1. Course offering name

2. Wishlist name
3. Rotation dates
4. Overall status of the request

← Barrett, Donte* NURS 557* - Child Health & Wellness (PNP and FNP - 112 clinical hours)*, 2022 - 2023, Spring/Summer, Year 1 | Requests for Child Health and Wellness Placements | Submitted

Basic Information View Compliance Edit student response

Duration(hours) 112 Partial/Full Full

Overall Status Submitted

10. **Basic Information:** this section will show you rotation information, where you can review your student’s compliance documents for overall approval. Click View Compliance.

Basic Information Some Action Needed View Compliance

Speciality Women's Health Duration(hours) 520 Partial/Full Full

11. A drawer will open showing you the overall status for each compliance item. Click on the status to review items if needed.

× Jessie Calhoun

Calhoun, Jessie Some Action Needed
 Advanced Practice/DNP | ✉ Jessie.Calhoun@exxat.com | 📞 (209) 516-0345
 NURS 593* - FNP Practicum I (FNP - 168 clinical hours)*
 Rotation Dates : Sep 01, 2023 - Nov 30, 2023

Please select any specific document to see its details

MANDATORY REQUIREMENTS (9)	STATUS	REASON	EXPIRATION DATE
COVID-19 Vaccination	Not Approved	Lot Number missing	-
Hepatitis B (HepB)	Get Started		-
Flu (Influenza)	Approved		-

12. **Location Information:** your students will provide you with location information, which you then must associate with an existing location on your database. Click Search Location.

Location Information Search Location

Location Name Hope Haven Medical Center Orthopedics	Site Name -	Contact First name John	Contact Last name Smith
Email john.smith@exxat.com	Business phone 5555555555	Business fax -	Website -
Address Line 1 123 ABC St	Address Line 2 -	City Brooklyn	State NY
Zip code 55555			

13. A drawer will open. The system will automatically look for any matches. If the location is on the list, select it using the radio button and click Save.

1. If the Location is not on the list, please head over to Sites from your left menu to add the Site and Location to the database.

× Search and Link Location
Save

Requested location
 Hope Haven Medical Center Orthopedics
 123 ABC St, Brooklyn, NY 55555

Advanced Search ▾

5 Locations found as requested Refresh

	LOCATION	STATUS	SITE
<input type="radio"/>	Hope Haven Medical Center - OB 8133 Swanson Court, 2nd Flr, Campbell, CA 95008	Active	Hope Haven Medical Center
<input type="radio"/>	Hope Haven Medical Center - Family Medicine 8133 Swanson Court, 4th Flr, Campbell, CA 95008	Active	Hope Haven Medical Center
<input checked="" type="radio"/>	Hope Haven Medical Center - Orthopedics 8133 Swanson Court, 19th Flr, Campbell, CA 95008	Active	Hope Haven Medical Center
<input type="radio"/>	Action Physical Therapy Inc 380 SUTLEY CIR, SACRAMENTO, CA 95835-2043	Active	Action Physical Therapy Inc
<input type="radio"/>	Palomar Health at San Marcos 875 Acacia St., San Marcos, CA 92069	Active	Palomar Health at San Marcos

Items per page: 50 | 1 - 5 of 5 | < < 1 > >

14. The drawer will close, and the location will be linked. You can then view contract information or update the location if needed.

Location Information
@ Hope Haven Medical Center - Orthopedics

View Contract
Update Location

Location Name Hope Haven Medical Center Orthopedics	Site Name -	Contact First name John	Contact Last name Smith
Email john.smith@exxat.com	Business phone 5555555555	Business fax -	Website -
Address Line 1 123 ABC St	Address Line 2 -	City Brooklyn	State NY
Zip code 55555			

15. **Preceptor Information:** once you have associated a location, you can associate a preceptor to this request as well.

Preceptor Information
Search Preceptor

Title -	First name Sandy	Last name Johnson	Business phone 5555555555
Mobile phone -	Email sandy.johnson@exxat.com	License Number 00000	
Have you previously precepted with this preceptor for this program? -			
Preceptor CV No files uploaded			

16. A drawer will open. The system will load any personnel associated with the location. If the preceptor you would like to add is listed, select them from the list. If not, click Add Preceptor.

Search and Link Preceptor Save

Requested Preceptor
Sandy Johnson
sandy.johnson@exxat.com Add Preceptor

Q Sandy Advanced Search ▾

Personnel of Hope Haven Medical Center - Orthopedics Refresh

	PERSONNEL	EMAIL ADDRESS	DESIGNATION	TYPE	STATUS
<input type="radio"/>	Eli Landry	Eli.Landry@site.com	Preceptor	Preceptor	Active

Items per page: 50 | 1 - 1 of 1 | << < 1 > >>

17. If adding a preceptor, a drawer will open. Fill out the form and click Save.

Add Preceptor Save

Basic Information

Prefix

First name *

Last name *

Practice settings

18. The drawer will close, and preceptor details will be listed.

Preceptor Information @Sandy Johnson Update Preceptor

Title	First name	Last name	Business phone
-	Sandy	Johnson	5555555555
Mobile phone	Email	License Number	
-	sandy.johnson@exxat.com	00000	

Have you previously precepted with this preceptor for this program?
-

Preceptor CV
No files uploaded

19. ***Users can map the preceptor documents added by students (as a part of my request) directly to the profile preceptor while processing the requests. Earlier users just could add/link the preceptor with basic details like first name, email address, etc. but not the documents uploaded.***

20. There are a total 4 sections in the preceptor profile, the documents can be mapped to
1. CV

- 2. Licensure
- 3. Board Certification
- 4. Documents

21. While processing the requests, users can map the documents to one of these sections. If there are existing documents in these sections in the preceptor profile, then for CV the document gets replaced but for others, the documents just get appended to the existing list.

22. As a part of processing the student placement requests, while searching and mapping the preceptor, in the second step users will be able to map the documents to the preceptor profile

23. Step 1:

Instructor
Search Preceptor

Title	First name	Last name	Business Phone
Dr	Test 2	Preceptor	1234567890
Mobile Phone	Email	Practice Settings	License Number
9898984545	test2.preceptor@example.com	Test practice setting	12121212
License Expiration Date			
Tue, 29 Jun 2027 18:30:00 GMT			

24. **Step 2:** Link/add the preceptor first.

Process My Requests

← Barrett, Donte(Grad)* NUR Demo 111 - Grad

Basic Information

Specialty: Urgent care (380 max hours) | Duration(hou): 150

Location Information

Location Name: Alliance Medical Center - PICU | Site Name: Alliance Medi
 Email: mary.anthony@email.com | Business pho: (490) 203-230
 Address Line 1: 423 Martin Luther Ave | Address Line:
 Zip code: 8402392

Preceptor Information

Title: Miss | First name: Alice
 Mobile phone: | Email: alice.lewis@e
 Have you previously precepted with this preceptor for this p

Search and Link Preceptor
Save

Requested Preceptor
Miss Alice Lewis
alice.lewis@email.com

1 Map Preceptor 2 Map Documents

Requested Preceptor
Miss Alice Lewis
alice.lewis@email.com

Add Preceptor

Advanced Search ▾

Personnel of Alliance Medical Center - PICU (Geocoding Enabled)* Refresh

	PERSONNEL	EMAIL ADDRESS	DESIGNATION	TYPE	STATUS
<input checked="" type="radio"/>	Alice Li	aliceli@email.com	Clinical Preceptor,Field Instructor	Preceptor	Active
<input type="radio"/>	John Jackson	johnj@email.com	Clinical Preceptor,Field Instructor	Preceptor	Active
<input type="radio"/>	Ananya Sakhuja	ananyasakhuja@email.com	Clinical Preceptor	Preceptor	Active
<input type="radio"/>	Tom Lange	tomlange@email.com	Administrator	-	Active
<input type="radio"/>	Ada* Gaines	Chda.Gaines@site.com	FWC	-	Active

25. **Step 3:** Once the preceptor is linked, the next step is the document mapping section. In this section, users can view all the documents uploaded by the student and the sections to which the documents can be mapped.

The screenshot shows a web interface for mapping documents to a preceptor profile. On the left, there is a sidebar with 'Process My Requests' and a list of fields for 'Barrett, Donte(Grad)*' including contact and address information. The main area is titled 'Search and Link Preceptor' and shows details for 'Miss Alice Lewis'. A '2 Map Documents' button is highlighted with a red box. Below it, a form allows selecting document sections for 'Preceptor Information', 'Preceptor Meeting', and 'Site Documents'. A 'Save' button is in the top right.

Note: Default sections for each of the documents will be shown if they are selected when configuring the request forms by the Exxat team. To do this configuration for any existing forms that are live already, clients can reach out to Exxat support with the details.

Users can also modify the default sections if they wish to.

26. **Step 4:** Once mapped, these documents will be automatically uploaded to the preceptor profile with a note.

The screenshot shows the preceptor profile for 'Miss Alice Lewis'. The profile includes personal information, categories, and a list of uploaded documents. A 'CV.docx' document is highlighted with a red box, showing it was uploaded on February 29, 2024. A note is associated with the document, stating it was automatically uploaded from the 'Process My Requests' section. A table at the bottom lists the document details.

DATE UPLOADED	DOCUMENT	NOTES	ACTION
February 29, 2024	Supporting Document View document	This document has been automatically uploaded from the "Process My Requests" section. Show Less	View document Delete

27. To the right of the form, you will have a place to update the status of each item. Make sure to click update once done!

[Edit student response](#)

Overall Status

Submitted 

Compliance

Pending Compliance 

Preceptor/Faculty

License Expiring/Expired 

Location/Contract

Contract Under Review 

[Audit log](#) [Update](#)

28. **Preceptor Actor in My Request Workflow** - As part of a recent enhancement Schools can now include the preceptors as a part of the My Request workflow. The preceptor form/letter/agreement can be shared with the preceptor either

1. From the admin side (once the student has submitted the request)
2. From the student side as a part of the my request submission.

When sharing from the administrator side, administrator's have the option to custom templatzize their email content to the preceptor, Exxat PRISM provides the standard template. The workflow setup is flexible, the statuses can be updated to the based on the event of sharing the form to the preceptor and submissions done from the preceptor. Schools can reach out to Exxat PRISM support to configure the forms for preceptor.

Barrett, Donte(Grad)* (Don) | NUR Demo 211 - BSN Course 1(Wishlists,Timesheet)*, 2023 - 2024, Fall | My-Request (Student Initiated Preceptor Form) | BSN Course 1 (Slots Available) [08/01/2023 - 12/24/2025] | Need More Information | Create Placement

Location Information			
Location Name	Site Name	Contact First name	Contact Last name
Abundant Health	-	Jake	Franklin
Email	Business phone	Business fax	Website
-	-	-	-
Address Line 1	Address Line 2	City	State
634 Jefferson Ave	-	Torrance	CA
Zip code			
908364			

Preceptor Information			
Title	First name	Last name	Business phone
Mr	Franklin	Anderson	(748) 204-8243
Mobile phone	Email	License Number	
-	skylar.reddy@gmail.com	47290472034	

Preceptor/Faculty: [Dropdown]
 Location/Contract: [Dropdown]
 Audit log | Update
 Comments: +
 No comments added click + button to add comments

29. To the right of the form, you will have a place to update the status for each item. Make sure to click update once done!

Edit student response

Overall Status
Submitted [Dropdown]

Compliance
Pending Compliance [Dropdown]

Preceptor/Faculty
License Expiring/Expired [Dropdown]

Location/Contract
Contract Under Review [Dropdown]

Audit log | Update

30. If you'd like to make comments on the form (which will be shared with students), add them in the Comments section.

1. Any comments students add will also be shared with you within this section.

Comments [Add]

[View all comments\(1\)](#)

You May 31st, 2023
 Contract is currently awaiting to be finalized.

Placing Students

1. Once all items have been cleared, you can create a placement!
2. Click Create Placement at the top of the page.

The screenshot shows a form for creating a placement for student Jessie Calhoun. At the top right, there is a green 'Submitted' button and a red-bordered 'Create Placement' button. Below this is a 'Basic Information' section with a red 'Some Action Needed' label and a 'View Compliance' button. The 'Basic Information' table includes: Speciality (Women's Health), Duration(hours) (520), and Partial/Full (Full). The 'Location Information' section includes a 'View Contract' and 'Update Location' button, and a table with fields: Location Name (Hope Haven Medical Center Orthopedics), Site Name (-), Contact First name (John), Contact Last name (Smith), Email (john.smith@exxat.com), Business phone (5555555555), Business fax (-), Website (-), Address Line 1 (123 ABC St), Address Line 2 (-), City (Brooklyn), State (NY), and Zip code (-). On the right side, there are dropdown menus for Overall Status (Submitted), Compliance (Pending Compliance), Preceptor/Faculty (License Verified), and Location/Contract (Contract Approved).

3. A drawer will open. Make sure to assign a setting for the placement and add any other important information. Once done, click Place.

The screenshot shows a drawer for placing the student. At the top right is a blue-bordered 'Place' button. Below the title 'Jessie Calhoun' is a blue banner with the text: 'Please confirm the below placement details and click "Place" to complete the process.' The drawer is divided into sections: 'Site' (Hope Haven Medical Center), 'Rotation' (FNP Clinical Practicum I*, Sep 1, 2023 - Nov 30, 2023), and 'Site requirements'. The 'Placement Details' section includes: Course offering (NURS 593* - FNP Practicum I (FNP - 168 clinical ...)), Program requirements, Location (Hope Haven Medical Center - Orthopedics), Setting (Setting not assigned, highlighted with a red border), Placement start date (September 1, 2023), and Placement end date (November 30, 2023).

Moving Requests

1. If changes happen, and the request the student initially submitted needs to be moved to another rotation, you can easily make that change!
 1. Please note:
 2. You can only move a request if the same My Request form is being used in another course.
 3. My Request must be enabled for the desired course/rotation.

2. When viewing a request form, click on the vertical ellipsis and select Move Request.

Calhoun, Jessie NURS 593* - FNP Practicum I (FNP - 168 clinical hours)*, 2023 - 2024, Spring, Year 2 | Requests for FNP Practicum I | FNP Clinical Practicum I* [Sep 1, 2023 - Nov 30, 2023] Submitted Create Placement

Basic Information Some Action Needed View Compliance

Specialty	Duration(hours)	Partial/Full
Women's Health	520	Full

Location Information Hope Haven Medical Center - Orthopedics View Contract Update Location

Location Name	Site Name	Contact First name	Contact Last name
Hope Haven Medical Center Orthopedics	-	John	Smith
Email	Business phone	Business fax	Website
john.smith@exxat.com	5555555555	-	-
Address Line 1	Address Line 2	City	State
123 ABC St	-	Brooklyn	NY
Zip code			
55555			

Overall Status: Submitted Delete

Compliance: Pending Compliance

Preceptor/Faculty: License Verified

Location/Contract: Contract Approved

Audit log Update

3. A drawer will open. Select the course you'd like to move it to and click Move.

Move Request Move

Current Request Details Submitted

Calhoun Jessie
NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* | 2023 - 2024, Spring, Year 2
FNP Clinical Practicum I*

Only those My Requests which have same Form configured as that of current one will be shown
If you don't find the required course/Rotation/wishlist created, please create it and then move the request

My Requests From Same Course

Search

MY REQUESTS	ROTATION	COURSE OFFERING
<input checked="" type="radio"/> FNP Practicum Requests Round II Apr 4, 2022 - May 17, 2023	-	NURS 593* - FNP Practicum I (FNP - 168 clinical hours)* 2023 - 2024, Spring, Year 2

Deleting a Request

1. When viewing a request form, click on the vertical ellipsis and select Delete.

Calhoun, Jessie NURS 593* - FNP Practicum I (FNP - 168 clinical hours)*, 2023 - 2024, Spring, Year 2 | Requests for FNP Practicum I | FNP Clinical Practicum I* [Sep 1, 2023 - Nov 30, 2023] Submitted Create Placement

Basic Information Some Action Needed View Compliance

Specialty	Duration(hours)	Partial/Full
Women's Health	520	Full

Location Information Hope Haven Medical Center - Orthopedics View Contract Update Location

Location Name	Site Name	Contact First name	Contact Last name
Hope Haven Medical Center Orthopedics	-	John	Smith
Email	Business phone	Business fax	Website
john.smith@exxat.com	5555555555	-	-
Address Line 1	Address Line 2	City	State
123 ABC St	-	Brooklyn	NY
Zip code			
55555			

Overall Status: Submitted Delete

Compliance: Pending Compliance

Preceptor/Faculty: License Verified

Location/Contract: Contract Approved

Audit log Update