During a placement, if your program uses standard or custom forms that need to be completed by Sites, you can distribute them when needed!

1. Select Courses from your dashboard or left menu.



2. On the Course Offerings page, find and select the course you'd like to manage.

Setup Course Catalog	Course Offerings							
Q Search + Add Course Offering								$\mathbb{B} \not \supset \nabla$
COURSE NUMBER	COURSE NAME	ACADEMIC YEAR	TERM	COHORT	PROFESSIONAL YEAR	FACULTY/STAFF	REGISTERED STUDENTS	ACTION
DPT 950	Clinical Practice IV* P	2023 - 2024	Summer	Class of 2022*	3rd Year	Jermaine Herrera, Stacey Chapman	6	0 🛍
DPT 950	Clinical Practice IV* P	2023 - 2024	Spring	Class of 2026	3rd Year		2	0 🛍
101	Mock Course P	2023 - 2024	Fall	0. Mock Cohort	2nd Year	Erik Huff	1	0 🗊
DPT 975	Health Care Delivery*	2023 - 2024	Summer	Class of 2022*	2nd Year	-	0	0 🗊
DPT 950	Clinical Practice IV* P	2023 - 2024	Summer	Class of 2022*	2nd Year	Jermaine Herrera, Stacey Chapman	8	0 🗊
DPT 513	Pathophysiology of disease I*	2023 - 2024	Fall	Class of 2022*	2nd Year	-	1	0 🖻
DPT 900	Clinical Practice III* P	2023 - 2024	Summer	Class of 2028		-	1	0 🛍
DPT 850	Clinical Practice II* P	2023 - 2024	Summer	Class of 2028			1	0 🗊
DPT 800	Clinical Practice I* P	2023 - 2024	Summer	Class of 2028	-		6	0 🖻

3. Expand the Learning Activities option on the left panel and select Review.

4. Click on Forms/Evaluations Distribution from the left panel.

Evaluations - Management				000 000	⑦ 🖓 Chat	📢 🐼 Ask Leo	Amee Jotangiya Exxat Sales (PA)					
Learning Activities Home > Forms/Eva	luations Distribution Rotation 1 (Timesheet Hours)* (Oct 1, 202	2 - Jun 29, 2024)										
Student Evaluation of Co Student evaluation of gu Student Evaluation of Pre	 Introducing Auto Distribution Saves time and effort in manual form distribution. Ensures timely delivery of forms. Setup auto distribution in 4 steps: Go to Forms/Evaluations Setup Choose the form Go to edit form Scroll down to "Automation" and setup automation 											
Student Self Evaluation:	ion of Pre Form(s) Email Dashboard											
Volunteering and service	Q Search by Form, Course, Status											
Behavioral Medicine End	FORM		NO. OF PLACEMENTS	COURSE	STATUS		ACTION					
End of Rotation Precepto	Preceptor Final Evaluation of Student - Er	nergency Medicine	1	PA Demo 609 - Elective (Patient Logs, Timesheets 2024 - 2025 Clinical Term)* Distribute On Oct 6,2	ed 023 12:28 AM						
End of Rotation-Elective	Preceptor Final Evaluation of Student - Er	nergency Medicine	1	PA Demo 610 - Elective II (Patient Logs, Timeshee 2024 - 2025 Clinical Term	ts)* Not Distri	ibuted						
Preceptor Evaluation of S Preceptor Evaluation of S	End of Rotation - Family Medicine - Mock		1	PA Demo 606 - Family Medicine (FM Forms, Patier Logs, Timesheets)* 2021 - 2022 Clinical Term Clinical Year	Not Distri	ibuted						
Preceptor Evaluation of S Preceptor Evaluation of S	Preceptor Evaluation of Student (Family M	ledicine)	1	PA Demo 606 - Family Medicine (FM Forms, Patier Logs, Timesheets)* 2021 - 2022 Clinical Term Clinical Year	Not Distri	ibuted						
Preceptor Evaluation of S												
Preceptor Final Evaluatio												
Forms/Evaluations Distributi												
Patient Log												
Timesheet												
Time Off												
Student Performance Review												

- 1. Select the forms you want to distribute, redistribute, or schedule for a future date.
 - 1. If you select one form to distribute, then click Distribute under the Action column for the required form.

Evaluations - Management						000	Eø	0 🗣	Chat 두	🌔 🛞 Ask Leo	Amee Jotangiya	a Exxat Sales (Nursing) 🗸 🗸
Learning Activities Home > Forms/Ev	aluatior Mocl	ns Distribution < Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)										
Forms/Evaluations Summary A	For	Email Dashboard										Distribute
Faculty Evaluation of Clinic FNP Clinical Evaluation Tool	•	FORM		NO. OF PLACEMENTS	COURSE				STATUS		ACTION	-
Nurse Educator Evaluation		Competency Tracking - Quantitative		1	2024 - 2025 Winter Year 1				Not Distri	outed	Distribute	
PhD Student Annual Review Skills Checklist		Competency tracking (NONPF-preceptor e final) - Quantitative	valuation of student-	1	101 - Demo Course 2024 - 2025 Winter Year 1				Distribute On Aug 1,20	d 124 6:19 PM	Redistribute View History]
Student Evaluation of Cour		Competency tracking (NONPF-preceptor e mid) - Quantitative	valuation of student-	1	101 - Demo Course 2024 - 2025 Winter Year 1				Distribute On May 3,2	d 024 10:10 AM	Redistribute View History]
Volunteering and service le												
Competency Tracking - Qu												
Competency tracking (NO Competency tracking (NO												
Forms/Evaluations Distribution												
Patient Log												
Student Performance Review												

2. If you want to distribute multiple forms, then select the checkboxes for the required forms and click Distribute above the forms table.

≡	Evaluations - Management						000 000	Eø	ଡ 🗨	Chat	🅈 🛞 Ask Lee	Amee Jotangiya Exx	at Sales (Nursing) 🗸 🗸
L	earning Activities Home > Forms/Ev	aluation	s Distribution										
	Q Search <	Mock	Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)									_	
	Forms/Evaluations Summary	For	n(s) Email Dashboard										Distribute
	CNS Clinical Activities Log	Q	Search by Form, Course, Status										
	Faculty Evaluation of Clinic		FORM		NO. OF PLACEMENTS	COURSE				STATUS		ACTION	
	FNP Clinical Evaluation Tool		Competency Tracking - Quantitative		1	101 - Demo Course 2024 - 2025 Winter Year 1				Not Distri	buted	Distribute	
	Nurse Educator Evaluation	_	Competency tracking (NONPF-preceptor ev	aluation of student-		101 - Demo Course				Distribute	d	Redistribute	
	Skills Checklist		final) - Quantitative		1	2024 - 2025 Winter Year 1				On Aug 1,2	024 6:19 PM	View History	
	Student Evaluation of Cour		Competency tracking (NONPF-preceptor ev	aluation of student-	1	101 - Demo Course				Distribute	d	Redistribute	
	Student Self Evaluation: Pr	-	niu) - Quantitative			2024-2025 Winter Tear 1				On May 3,2	024 10:10 AM	View History	
	Volunteering and service le												
	Competency Tracking - Qu												
	Competency tracking (NO												
	Competency tracking (NO												
	Forms/Evaluations Distribution												
	Patient Log												
	Timesneet												

2. On the Distribute Form(s) window, you can view the selected form name. In the Select Primary Evaluator section, select the evaluator you want to send the forms to and click Continue.

<	Mock	Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)				
valuations Summary	For	m(s) Email Dashboard				
linical Activities Log	Q	Search by Form, Course, Status				
ty Evaluation of Clinic		FORM	Dis	stribute Form(s)	STATUS	ACTION
Inical Evaluation Tool		Competency Tracking - Quantitative	â	Selected Form(s)	Not Distributed	Distribute
itudent Annual Review		Competency tracking (NONPF-preceptor ev		Competency Tracking - Quantitative Competency tracking (NONPF-preceptor evaluation of student-final) - Competency tracking (NONPF-preceptor evaluation of student-final) - Competence of the statement of the sta	Distributed	
Checklist				Competency tracking (NONPF-preceptor evaluation of student-mid) - Output:	017A0g 1,2024 0.13 FM	
ent Evaluation of Cour		Competency tracking (NONPF-preceptor ev mid) - Quantitative	Ē	Select Primary Evaluator	On May 3,2024 10:10 AM	View History
teering and service le				 ✓ Preceptor ✓ Added by School ✓ Added by Student 		
etency Tracking - Qu				✓ Placement Faculty ✓ Site/Location contacts		
etency tracking (NO			'	Cancel		
etency tracking (NO						
valuations Distribution						
et						

3. Select the recipient to whom you want to send the forms. Click filter icon ∇ to filter the evaluator list.

≡ Ev	aluations - Management				iiii 🖪 💿 🖵 d	at 📌 🛞 Ask Leo 🎬 Amee.	Jotangiya Exxat Sales (Nursing) 🚿					
~	Distribute Form(s) Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026)											
0 1	Selected Form(s) Competency Tracking - Quantitative 🕥 🗈 Competency tracking (NONPF-preceptor evaluation of student-final) - Quantitative 🕢 💼 Competency tracking (NONPF-preceptor evaluation of student-mid) - Quantitative 💮											
0	Choose for whom you wish to send the forms											
Q	Search						V					
	STUDENTS Evaluee	FORM	COURSE	PLACEMENT DETAILS	PRECEPTOR Evaluator	PLACEMENT FACULTY Evaluator	SITE/LOCATION CONTACTS Evaluator					
	Student 05, Mock mockstudent503@example.com	Competency Tracking - Quantitative	101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A					
	Student 05, Mock mockstudent503@example.com	Competency tracking (NONF preceptor evaluation of student-final) - Quantitative	F- 101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A					
	Student 05, Mock mockstudent503@example.com	Competency tracking (NONF preceptor evaluation of student-mid) - Quantitative	F- 101 - Demo Course 2024 - 2025 Winter	Test Site Med Surg	Prec, Mock A akshika.panicker@exxat.com Added by student	N/A	N/A					

- 4. Click Compose Email.
 - 1. In the Create Notifications screen, in the Recipients tab, specify the following:

≡ E\	valuations - Management		× Create Notification	
 Distribute Form(s) Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026) Selected Form(s) Competency tracking -Quantitative () Competency tracking the Choose for whom you wish to send the forms Choose for whom you wish to send the forms 		Sep 17, 2026)	Recipients 2. Template 3 Preview CD Copy selected recipient email addresses	Next
		Competency tracking (NC	Recipients 3 selected recipients	If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients. Override Recipient's Email
		he forms	 Prec, Mock A (akshika,panicker@exxat.com) Prec, Mock A (akshika,panicker@exxat.com) Prec, Mock A (akshika,panicker@exxat.com) 	Reply to " amee j@exxat.com ③
	STUDENTS Evaluee	FORM		сс
	Student 05, Mock mockstudent503@example.com	Competency Tracking Quantitative		BCC
	Student 05, Mock mockstudent503@example.com	Competency tracking (preceptor evaluation o student-final) - Quantit		You have 10.00 MB remaining for attachments in Recipients Tab Upload files
	Student 05, Mock mockstudent503@example.com	Competency tracking (preceptor evaluation o student-mid) - Quantit		Browse to upload
				Supported formats: , opt.d.co.;, ope.g., pg., pei.e., docx., xisx., optc., potm., ppt., rtf, xis, docm, bmp, csv., gif, tiff, mp4 You can only upload files with file size under 10 MB. We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.

- 1. Select the checkboxes for the required recipients.
- 2. In the Override Recipient's Email text box, add the email address. Click Copy selected recipient email addresses and past the selected recipient in the override text box. Note: If override is specified, all the email notifications will be sent to the specified email address instead of the original recipents
- 3. Specify the CC (carbon copy) and BCC (blind carbon copy) email addresses, if required.

- 4. Click **Browse** the upload to attach any relevant files.
- 5. Click Next.
- 5. In the **Template** section, you can perform the following:

≡ E	valuations - Management		× Create Notification		
 Distribute Form(s) Mock Rotation - 1 (Jul 19, 2022 - Sep 17, 2026) Selected Form(s) 		Sep 17, 2026)	Recipients 2 Template 3 Preview Pick a template Standard		
Û	Competency Tracking - Quantitative 🛞	Competency tracking (NC)	+ Add Template	Previous	Preview
			Subject*	Merge Fields	0
C	Choose for whom you wish to send t	he forms	@First name @Last Name Evaluation - @Form name	@First name	0
C	Search		DXXII	@Last Name	(i)
		50014		@Form name	(i)
	STUDENTS Evaluee	FORM		@Preceptor first name	(i)
	Student 05, Mock	Competency Tracking	Dear @Prefix @Preceptor first name @Preceptor last name,	@Preceptor last name	(i)
	mockstudent503@example.com	Quantitative	Thank you for the time that you have devoted to our student. Your expertise and commitment are invaluable and greatly	@Delegate Link	(i)
	Student 05, Mock	Competency tracking (preceptor evaluation of	appreviated.	(a) Droffy	0
	mockstudent503@example.com	student-final) - Quantit	Please submit the @Form name evaluation of @First name @Last Name by clicking here.	(Grienk	
	Student 05, Mock	Competency tracking (If clicking the link does not work, copy and paste the URL in a new browser window.	@title	(i)
	mockstudent503@example.com	student-mid) - Quantit	@Delegate Link	You have 10.00 MB Remaining for Attachments in this Template	
			Once the evaluation completed, please click the 'Submit' icon at the top of the evaluation.	Uploaded Files in this Template	
			If you have received this letter and are not the student's evaluator, please reply to this email immediately so that the student's evaluation is sent to the correct personnel.		
			Please do not hesitate to contact the program with any questions or additional feedback.		
			Thank you.		
			Best Regards,		

- 1. From the **Pick a template** drop-down menu, select the required template. The selected template is displayed.
- 2. Click **Preview** to view the email before sending it.
- 3. In the **Template name** text box, specify the name.
 - 1. In the **Subject** text box, specify the subject for the email.
 - 2. In the text box, specify the content of the email.
 - 3. You can select the
 - 1. Header and footer layout from the following
 - 2. Exxat logo on the footer
 - 3. University logo on the header
 - 4. No logos on the header and footer
 - 5. University logo on the header and Exxat logo on the footer
- 4. Share Profile University logo on the header and Exxat logo on the footer.

- 5. In the **Upload Files in this Template** section, click **Browse to upload** to upload files in the template.
- 6. Click Save. The new template will be displayed in the Pick a Template drop-down menu.
- 2. On the **Preview** section, you can review your email and select one of the following:



- 1. Send email now if you select this option,
- 2. Send email at specific date and time from the Date Time calendar select the date, month, year, and time to schedule the email.
- 3. Click Send.