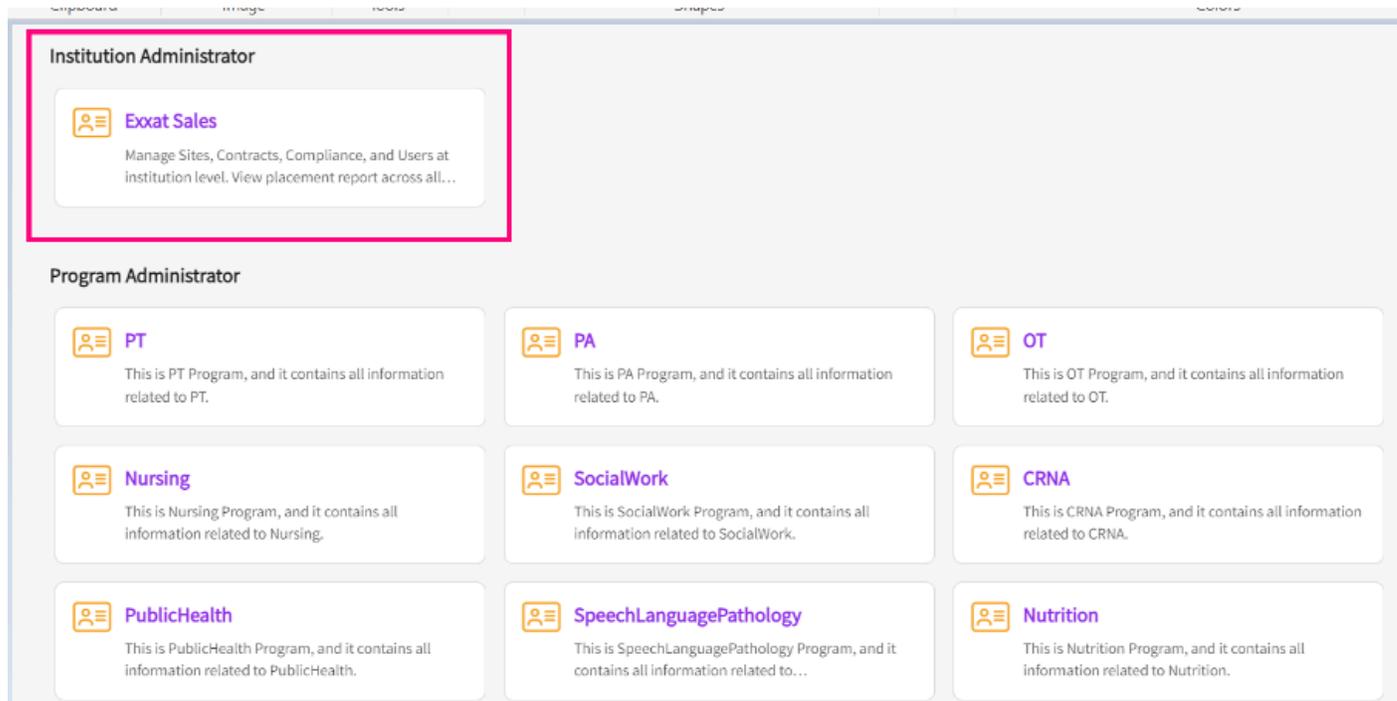
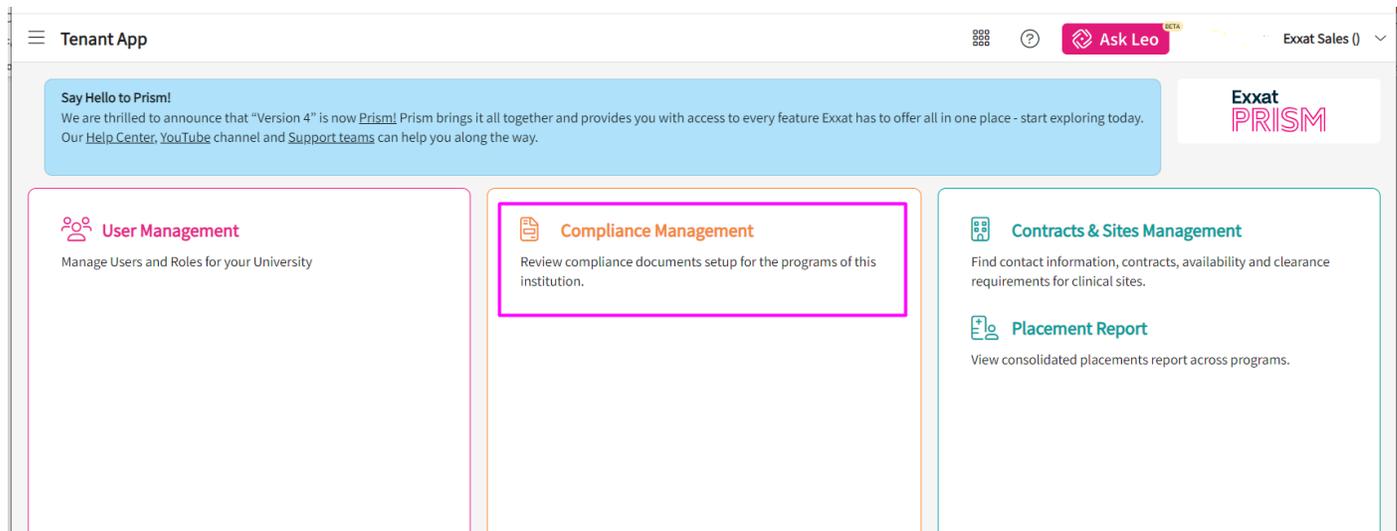


University administrators can now comprehensively review compliance across all programs within the Tenant Application through the dedicated Compliance Management section.



1. When you click on the tile for institution administrator, the following dashboard appears where you will click on "Compliance Management":



2. You will see a list of all students with the program names & the cohort information. On this page you will also see the current status for all compliance items of each student. You can also click on the funnel icon to filter results, the wrench icon to rearrange the columns or Export to download the same on an excel spreadsheet.

Compliance Management

Setup **Student** Document Review Clarifications Approve

Search Student

STUDENT NAME ↑	PROGRAM	COHORT	COMPLIANCE STATUS	COMPLIANT UNTIL	STUDENT ACTION NEEDED	PENDING FOR REVIEW
Abbott, Grace	PA	Class of 2022*	All Docs Approved	12/31/2024	0/14	0/14
Adams, Joe	Nutrition	Class Of 2025*	No Docs Started		9/9	0/9
Adkins, Brian	PT	Class of May 2025*	No Docs Started		7/7	0/7
Adkins, Brian	PA	Class of 2025*	No Docs Started		9/9	0/9
Adkins, Brian	Pharmacy	Class of 2025*	No Docs Started		9/9	0/9
Agar, Pratiksha	PT	Class of 2023	No Docs Started		12/12	0/12
Anderson, Jason	Teacher Education	Class of 2024*	No Docs Started		9/9	0/9
Bailey, Teri	PT	Class of May 2025*	No Docs Started		7/7	0/7

3. In the "Setup" Tab under "Requirements" you can see and edit the requirements defined by each program for each specific cohort.

Compliance Management

Setup **Student** Document Review Clarifications Approve

Requirements

Auto-Notifications

Student Specific Due Date

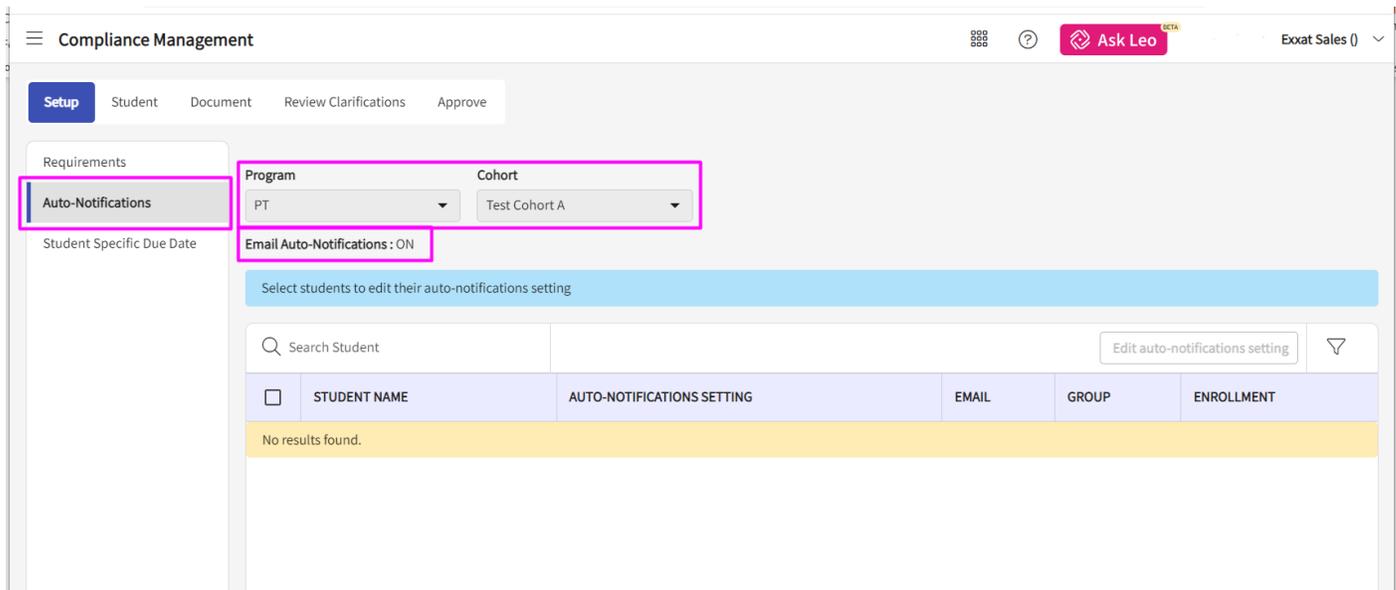
Program: PT Cohort: Test Cohort A

+ Add new category

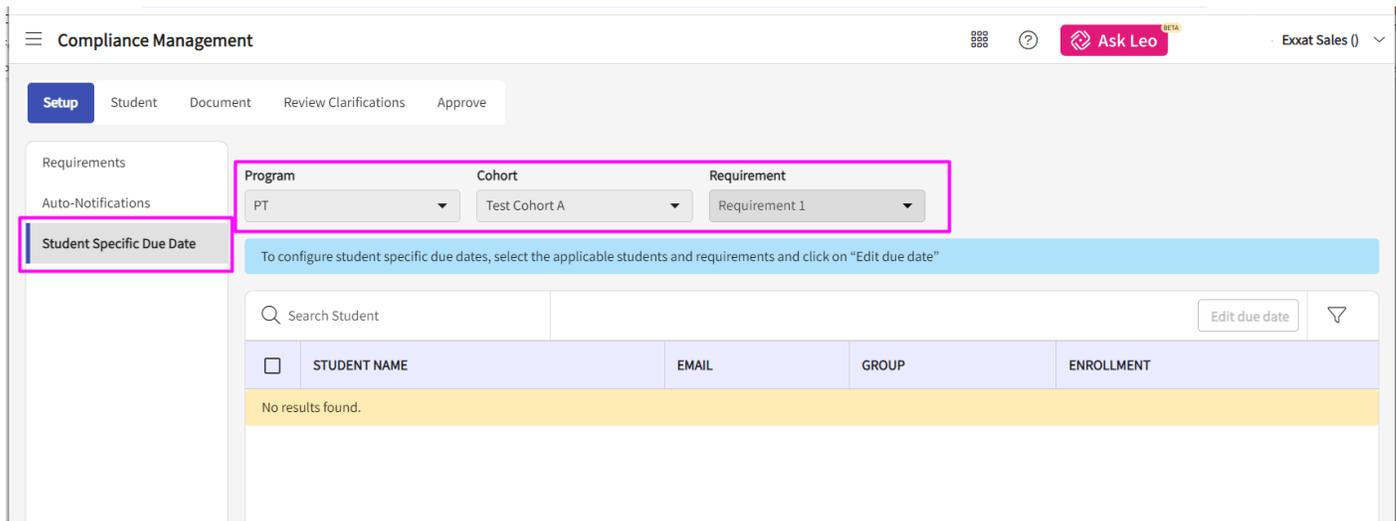
Auto-Notifications Publish

HEALTH & IMMUNIZATION	INSURANCE & LIABILITY COVERAGE
Annual Physical	Health Insurance
COVID-19 Test	Professional liability insurance
COVID-19 Vaccination	test123
Enterprise	
Enterprise 2	
MEMBERSHIPS & LICENSURE	
	Additional Licensure

4. In the "Setup" Tab under "Auto-Notifications" you can see and edit the Auto-Notification email reminders set by each program for each specific cohort.



5. In the "Setup" Tab under "Student Specific Due Date" you can see and edit the Due date for individual students set by each program for each specific cohort and a specific requirement.



6. The "Document" Tab shows the Compliance document name & the document Status for individual students in each program and the cohort. You will also see the document due date, expiration date & follow up date (if any).

Compliance Management

Setup Student **Document** Review Clarifications Approve

Search Student

DOCUMENT NAME	DOCUMENT STATUS	STUDENT NAME	PROGRAM	COHORT	DUE DATE	EXPIRATION DATE	FOLLOW UP DATE
COVID-19 Vaccination	Get Started	Johnson, Stephanie	PA	Class of 2021			
Hepatitis B (HepB)	Get Started	Johnson, Stephanie	PA	Class of 2021			
Flu (Influenza)	Get Started	Johnson, Stephanie	PA	Class of 2021			
Measles, Mumps, Rubella (MMR)	Get Started	Johnson, Stephanie	PA	Class of 2021	10/31/2021		
Physical Examination Form	Get Started	Johnson, Stephanie	PA	Class of 2021	09/30/2021		
Polio	Get Started	Johnson, Stephanie	PA	Class of 2021			
Tuberculosis (TB)	Get Started	Johnson, Stephanie	PA	Class of 2021	10/31/2021		
Health Insurance	Get Started	Johnson, Stephanie	PA	Class of 2021			

Click on the "Student Status" filter, choose the required filter option and click on apply.

Filters

Reset all

Programs

Cohorts

Groups

Enrollment

Document Status

Student Status (1)

Clear all

No Docs Started ⓘ

Some Action Needed ⓘ

All Docs Approved ⓘ

Apply

On the "Student Status" column beside each student name, click on the status.

Student Document

Search Filters: Some Action N... 1

STUDENT NAME	PROGRAM	COHORT	STUDENT STATUS	COMPLIANT UNTIL	STUDENT ACTION NEEDED	PENDING FOR REVIEW	APPR
Abbott, Grace	PA - MSPAS	Class of 2022*	Some Action Needed	Jun 01, 2022	4/14	0/14	10/14
Barrett, Donte	Nursing	Advanced Practice/DNP	Some Action Needed	Apr 17, 2022	3/9	2/9	4/9
Bartlett, Jared	Nursing	Advanced Practice/DNP	Some Action Needed	Apr 17, 2022	7/9	0/9	2/9
Bishop, Esperanza	Nursing	BSN Students	Some Action Needed	Apr 17, 2022	5/9	2/9	2/9
Blair, Osvaldo	Nursing	BSN Students	Some Action Needed	Apr 17, 2022	3/9	0/9	6/9
Blair, Marty	PT - DPT	Class of 2025	Some Action Needed	Dec 30, 2022	7/7	0/7	0/7
Booker, Sanai	Nursing	BSN Students	Some Action Needed	Apr 17, 2022	7/9	0/9	2/9
Brewer, Donald	PT - DPT	Class of 2023	Some Action Needed	Aug 31, 2022	6/12	0/12	6/12
Brown, Janet	SW	BSW - Class of 2024*	Some Action Needed	May 11, 2023	4/8	1/8	3/8

A drawer will open to view the consolidated detailed status of all the documents for that individual student.

× Barrett, Donte*

BD **Barrett, Donte*** 
Donte.Barrett@exxat.com | (310) 984-1299
Advanced Practice/DNP | FNP Track

4 Documents | Approved **2** Documents | Pending Review **3** Documents | Needs Attention

Please select any specific document to see its details

MANDATORY REQUIREMENT (9) ↑	STATUS	DUE DATE	FOLLOW-UP DATE	EXPIRATION DATE
COVID-19 Vaccination	Approved	Sep 01, 2022	-	-
CPR	Expired	Sep 01, 2022	-	Apr 17, 2022
Flu (Influenza)	Approved	Oct 31, 2022	-	-
Health Insurance	Approved	Sep 01, 2022	-	-
Hepatitis B (HepB)	Pending Review	Sep 01, 2022	-	-
Measles, Mumps, Rubella (MMR)	Approved (E)	Sep 01, 2022	-	-
Medical Records Form	Expired	Sep 01, 2022	-	Mar 22, 2023
Polio	Get Started	Sep 01, 2022	-	-

Review detailed information for that student. You can update the document status, select the reason from the drop down and provide comments (if needed). Once done, click Update Status.

X Hepatitis B (HepB)

Hepatitis B (HepB)
Barrett (Donte.Barrett@exat.com)

Pending Review
Due on Sep 01, 2022

Guidelines For Students
Individual dates for all 3 vaccinations and numerical titer value required
If you have partially completed your 3 dose series and/or have a negative or equivocal titer and are awaiting a booster shot, please complete a declination form.

Required Action Status History

Document Status: Pending Review Reason: [Dropdown]

Comment
Paragraph [Rich Text Editor]
2000 characters left

Update Status
Last updated by Barrett, Donte* on Aug 28, 2023 12:27 AM

Declination Form [Edit Icon]

Date: May 23, 2023
View Document

Edit compliance item details

View any uploaded documents

The status will change, and the requirement will update. Close the drawer to review other compliance items or go back to the main page.

X Hepatitis B (HepB)

Hepatitis B (HepB)
Barrett (Donte.Barrett@exat.com)

Approved [E] Add New Record
Due on Sep 01, 2022

Guidelines For Students
Individual dates for all 3 vaccinations and numerical titer value required
If you have partially completed your 3 dose series and/or have a negative or equivocal titer and are awaiting a booster shot, please complete a declination form.

Required Action Status History

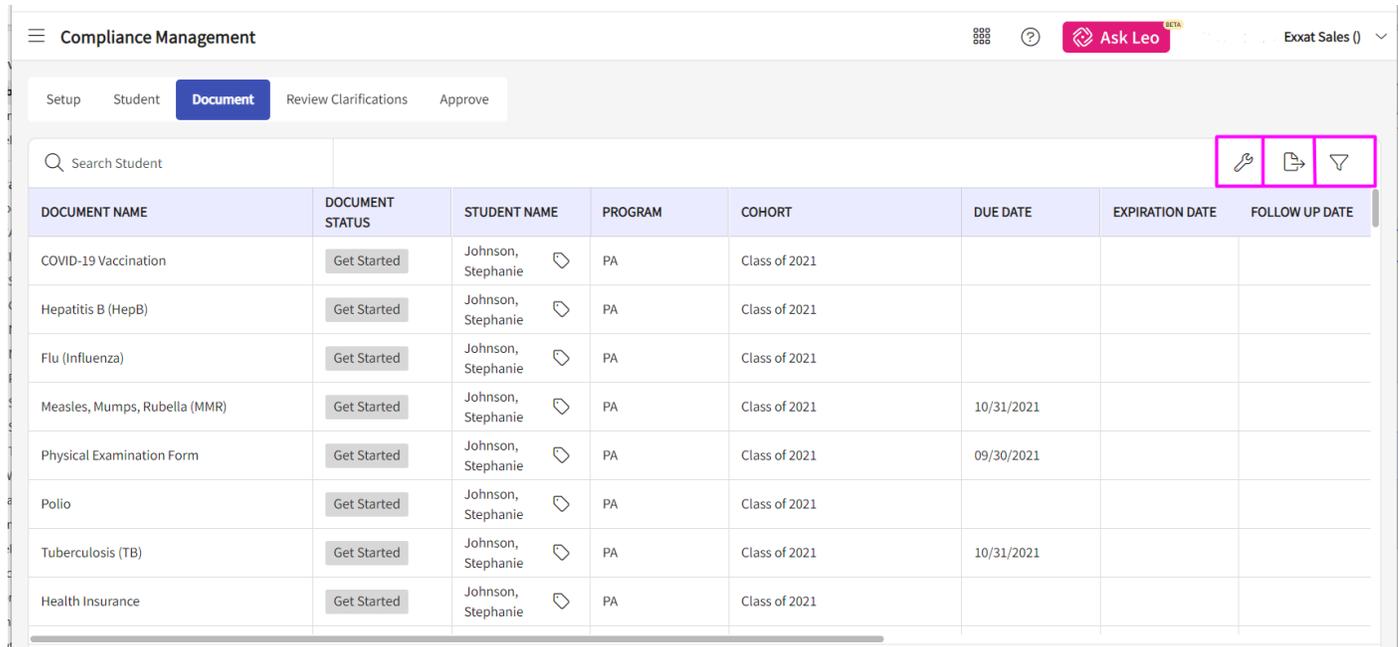
Document Status: Approve Reason: Approved with Declination

Comment
Paragraph [Rich Text Editor]

Update Status

Document has been approved successfully.

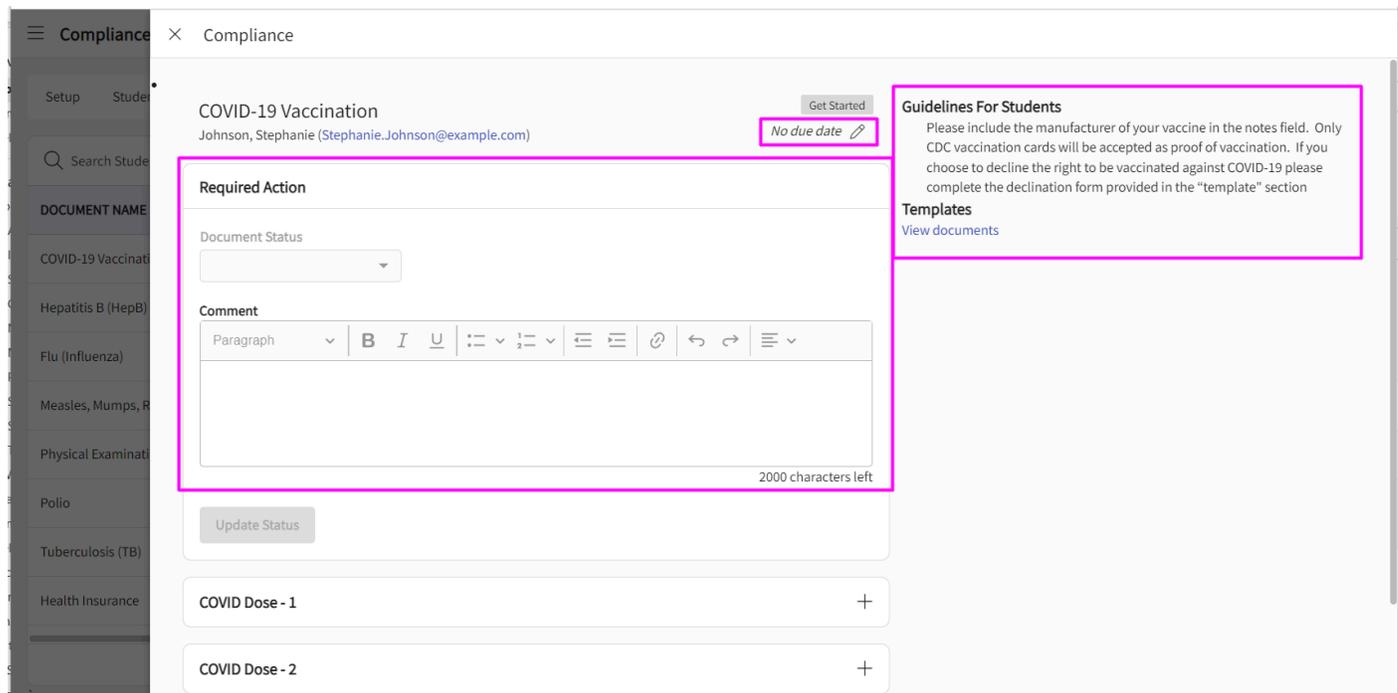
7. You can click on the funnel icon to filter results, the wrench icon to rearrange the columns or Export to download the information on an excel spreadsheet.



The screenshot shows the 'Compliance Management' interface. At the top, there are navigation tabs: 'Setup', 'Student', 'Document' (selected), 'Review Clarifications', and 'Approve'. A search bar for 'Search Student' is on the left. On the right, there are icons for editing, exporting, and filtering. The main table lists various document requirements for a student named Johnson, Stephanie.

DOCUMENT NAME	DOCUMENT STATUS	STUDENT NAME	PROGRAM	COHORT	DUE DATE	EXPIRATION DATE	FOLLOW UP DATE
COVID-19 Vaccination	Get Started	Johnson, Stephanie	PA	Class of 2021			
Hepatitis B (HepB)	Get Started	Johnson, Stephanie	PA	Class of 2021			
Flu (Influenza)	Get Started	Johnson, Stephanie	PA	Class of 2021			
Measles, Mumps, Rubella (MMR)	Get Started	Johnson, Stephanie	PA	Class of 2021	10/31/2021		
Physical Examination Form	Get Started	Johnson, Stephanie	PA	Class of 2021	09/30/2021		
Polio	Get Started	Johnson, Stephanie	PA	Class of 2021			
Tuberculosis (TB)	Get Started	Johnson, Stephanie	PA	Class of 2021	10/31/2021		
Health Insurance	Get Started	Johnson, Stephanie	PA	Class of 2021			

8. When you click on the "Document Status" a new drawer opens with more details about the specific requirement, where you can see the Guidelines for Students or any templates. This page also allows you to edit the Due date for the requirement.



The screenshot shows the 'Document Status' drawer for 'COVID-19 Vaccination' for student 'Johnson, Stephanie'. The drawer includes a 'Required Action' section with a 'Document Status' dropdown menu and a 'Comment' section with a rich text editor. A 'No due date' link is visible. On the right, there are sections for 'Guidelines For Students' and 'Templates'. At the bottom, there are 'COVID Dose - 1' and 'COVID Dose - 2' sections with plus signs.

9. The tabs "Review Clarifications" & "Approve" are only available when you are signed up for Exxat's Approve Service. **Reach out to Arpija**



Setup Student Document **Review Clarifications** Approve

This screen is applicable only for clients signed up for Exxat's Approve service.