School admins may require compliance documents completed by students for specific requirements set by sites. Follow these steps to send the necessary emails:

Steps to Send Compliance Emails:

1. Access Placement Module

• Navigate to **Placement** on your dashboard.

Placements

Placements

Navigate the process of matching students to sites from start to finish.

• Alternatively, click the **hamburger menu** and select **Placement**.

2. Open Email and Publish

<u>t</u>lo

• Click on the **Email and Publish** option in the Placement module.

≡ Email & Publish						000	Đ	?	모:) Chat	A	🐼 Ask Leo	Amee Jotan	giya Exxat Sal	es (Nursing)	~
\leftarrow (E) Class 2024	Dashboard	Rotation Setup	Slots	Wishlist	Placements	Email & Publish	Pl	acemen	t Clearance	Reports					
Rotation Med Surg 1 - Thursdays [09/01/2022 - 11/30/2022] , Med Surg 1	•				I				Mode 🛈 :	Individual	Group Notify	(i): Student	Locations	Preceptor	
Send consolidated notifications to preceptors regarding multiple p	lacements spar	ining multiple rotation	ns. Selectio	on of precepto	ors will happen o	one page at a time.									
Q Search by Preceptor												Compose Email	E Email	Dashboard	
6 Results Found													Selected F	Preceptors : 1	

3. Select Group Mode

- Choose the Group mode for bulk email sending. ⊟ Email & Publish 🇱 🗟 🕐 🖓 Chat 🛛 📢 🐼 Ask Leo 🎬 Amee Jotangiya Exxat Sales (Nursing) 🗸 Email & Publish ← 🗉 Class 2024 Wishlist Placements Placement Clearance Dashboard Rotation Setup Slots Reports Rotation Mode (i) : Individual Group Notify (i) : Student Locations Med Surg 1 - Thursdays [09/01/2022 - 11/30/2022] , Med Surg 1 -... -Send consolidated notifications to preceptors regarding multiple placements spanning multiple rotations. Selection of preceptors will happen of Q Search by Preceptor Compose Email 6 Results Found elected Preceptors : 1
- 4. Choose the Desired Rotation
 - Select the specific **rotation** for which compliance documents are required.

Rotation Med Surg 1 - Thursdays [09/01/2022 - 11/30/2022], Med Surg 1 -... Send consolidated notifications to preceptors regarding multiple placements spa

5. Specify Recipients

- Choose whom to send the email to: either **Location** or **Preceptor**.
- Select the recipients you want to include.

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← 🔳 Rotation Med Su] Class 2024 rg 1 - Thursdays [09/01/2022 - 11/30/2022] , Med Surg 1	Dashboard	Rotation Setup	Slots	Wishlist	Placements	Email & Publish	Place	ment Clearance Mode (i) :	Repo	orts dual Group Notif	iy(i): Stud	lent Locations Preceptor
Send o	consolidated notifications to preceptors regarding multiple p	blacements span	ning multiple rotatio	ns. Selecti	on of precept	ors will happen o	ne page at a time.						
Qs	iearch by Preceptor											Compose E	mail 🔳 Email Dashboard
6 Resu	ults Found												Selected Preceptors : 1
	PRECEPTORS (j) ↑			PI	LACEMENT D	ETAILS					LATEST STATUS 🛈		C
	Adriana* Bentley			1	1 Placements 1 Published				View de	tails			
	Ashish Maharaja			4	4 Placements 0 Published			View de	tails				
	Cristina Stevens Added by student			1	1 Placements 1 Published View details			tails					
	Kunal Vaishnav*			1	Placements	0 Published			View de	tails			
	Madhura Prabhu Added by student			1	Placements	1 Published			View de	tails			
	Sai Krishna Added by student			1	Placements	1 Published			View de	tails			
											Items per page: 50	1 - 6 of 6	

- 6. Click on "Compose Email"
- 7. Verify the recipients and click on "Next"

≡ En	nail & Publish	× Compose Email					
← ा Rotation] Class 2024	1 Recipients	Next				
Med Su	rg 1 - Thursdays [09/01/2022 - 11/30/2022] , Med Surg 1	Recipients 2 selected recipients	If override is specified, ALL email notifications will be sent to THIS email instead of the original recipients.				
Q s	iearch by Preceptor	 ✓ Adriana* Bentley (Adriana.Bentley@site.com) ✓ Ashish Maharaja (ashish.maharaja@example.com) 	Override Recipient's Email Reply to *				
	PRECEPTORS (1) 个		amee.j@exxat.com 🛞				
	Adriana* Bentley		сс				
	Ashish Maharaja Cristina Stevens Added by student		BCC				
	Kunal Vaishnav*		You have 25.00 MB remaining for attachments in Recipients Tab				
	Madhura Prabhu Added by student		Upload files				
	Sai Krishna Added by student		(n) Browse to upload				
l			Supported formats: .pdf.doc,jpg.jpeg_png.heic,.docx,.xlsx,.pptx,.pptm,.potx,.potm,.ppt,.rtf,.xls,.docm,.bmp,.csv,.gif,.tiff, .mp4 You can only upload files with file size under 25 MB. We recommend switching to PDF format if you encounter issues viewing the uploaded file in other formats.				

8. Add or Select an Email Template

• To create a custom email, click **Add Template** and compose your message.

• Alternatively, select an existing template from the list.



9. Include the Merge Field

- Ensure the merge field @StudentProfileWithComplianceAndLocationRequirementsLink is added to the email.
- This link ensures site personnel can access student profiles and compliance requirements.

∃ En	nail & Publish	× Compose Email	
← [] Class 2024	Recipients 2 Template Preview Pick a template*	
Rotation			
Med Su	rg 1 - Thursdays [09/01/2022 - 11/30/2022] , Med Surg 1		
Send	consolidated notifications to preceptors regarding multiple	+ Add Template Previous Edit	Preview
Q s	earch by Preceptor	Subject* Merge Fields	
6 Rest	ults Found	Thank you for mentoring our students @First Name	í
	PRECEPTORS (i) ↑	@Last Name	(i)
	Adriana* Bentley	@prefix	(i)
	Arbich Maharaia	@title	í
		@First Name @Last Name @title @StudentProfileLink	í
	Cristina Stevens Added by student	Dear @prefix @First Name @Last Name, @StudentProfileWithComplianceLink	í
	Kunal Vaishnav*	Thank you so much for working with our students. Our records reflect the below Below @StudentProfileWithComplianceAndLocationRequirementsLin	k i
	Madhura Prabhu Added by student	are the students you are currently working with	
	Sai Krishna Added by student	@PlacementTable	
		@ActualHoursTable	(i)
		StudentProfile/WithComplianceAndLocationRequirementsLink Attachments	
		Please do let us know if you need any further information for your records and, again,	iplate.
		thank you for helping to shape the future of our profession!	
		Best,	
		The Exxat University Placement Team	
			/

10. Preview Your Email

• Click the **Preview** button to review your email before sending.

11. Send or Schedule Email

- You can choose to:
 - Send Now Dispatch the email immediately.



• Schedule – Set a specific date and time to schedule the email.

≡ Email & Publish	× Compose Email	
← 🗐 Class 2024	Recipients Template 3 Preview	Previous Schedule
Rotation Med Surg 1 - Thursdays (09/01/2022 - 11/30/2022), Med Surg 1 - Send consolidated notifications to preceptors regarding multiple Send consolidated notifications to preceptors regarding multiple <i>Results Found</i> PRECEPTORS ① ↑ Adriana* Bentiey Adriana* Bentiey Kunal Vaishnaw* Madhura Prabhu Added by student Sai Krishna * Added by student	First Name (Last Name) @First Name (Last Name) @First Name (Last Name) @Think You so much for working with our students. Our records reflect the below Below are the students you are currently working with @PlacementTable Student Profile: (@StudentProfile.linkts: (@StudentProfile.linkts: @StudentProfile.linkts: @StudentProfile.linkt	Send email now Send email at specific date and time Date Time* 01/30/2025, 11:00 AM MU/DD/YYY, H4:MM Attachments Attachments Attachments No Attachments No Attachments