

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.



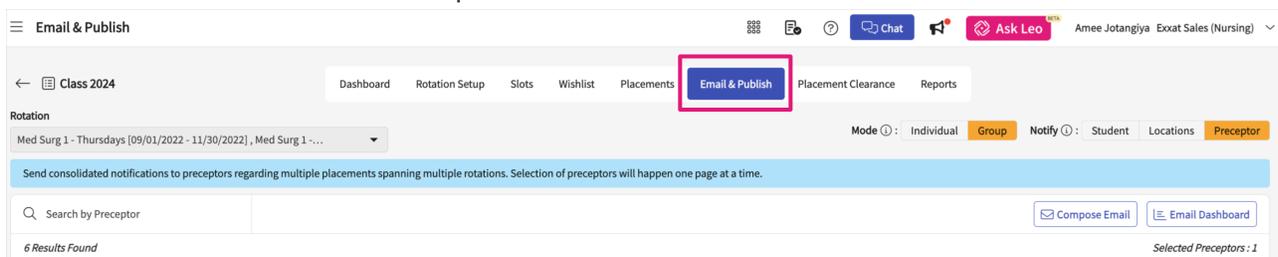
Navigate the process of matching students to sites from start to finish.

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



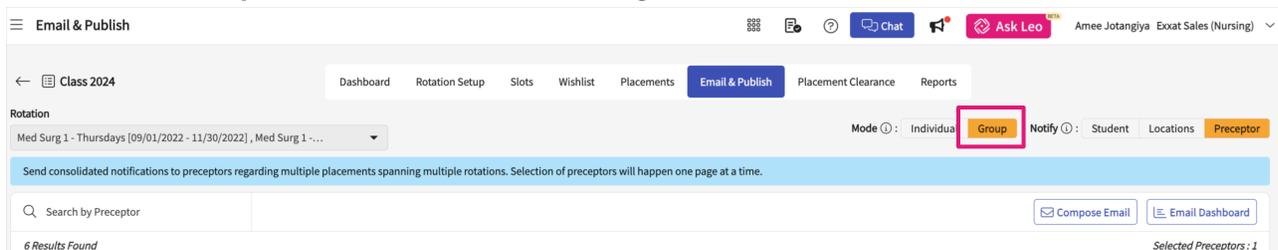
2. Open Email and Publish

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



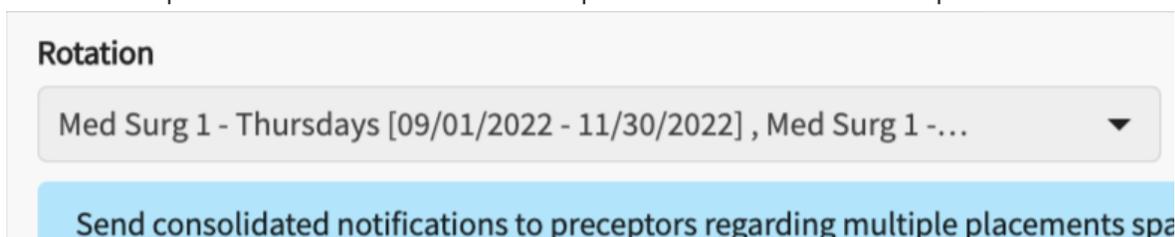
3. Select Group Mode

- Choose the **Group** mode for bulk email sending.



4. Choose the Desired Rotation

- Select the specific **rotation** for which compliance documents are required.



5. Specify Recipients

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

Send consolidated notifications to preceptors regarding multiple placements spanning multiple rotations. Selection of preceptors will happen one page at a time.

Search by Preceptor Compose Email Email Dashboard

6 Results Found Selected Preceptors: 1

PRECEPTORS	PLACEMENT DETAILS	LATEST STATUS
<input checked="" type="checkbox"/> Adriana* Bentley	1 Placements 1 Published View details	
<input type="checkbox"/> Ashish Maharaja	4 Placements 0 Published View details	
<input type="checkbox"/> Cristina Stevens <small>Added by student</small>	1 Placements 1 Published View details	
<input type="checkbox"/> Kunal Vaishnav*	1 Placements 0 Published View details	
<input type="checkbox"/> Madhura Prabhu <small>Added by student</small>	1 Placements 1 Published View details	
<input type="checkbox"/> Sai Krishna <small>Added by student</small>	1 Placements 1 Published View details	

Items per page: 50 | 1 - 6 of 6 | 1

6. Click on "Compose Email"

7. Verify the recipients and click on "Next"

1 Recipients Template Preview

Copy selected recipient email addresses

Recipients 2 selected recipients

- Adriana* Bentley (Adriana.Bentley@site.com)
- Ashish Maharaja (ashish.maharaja@example.com)

Override Recipient's Email

Reply to *

amee.j@exat.com

CC

BCC

You have 25.00 MB remaining for attachments in Recipients Tab

Upload files

Browse to upload

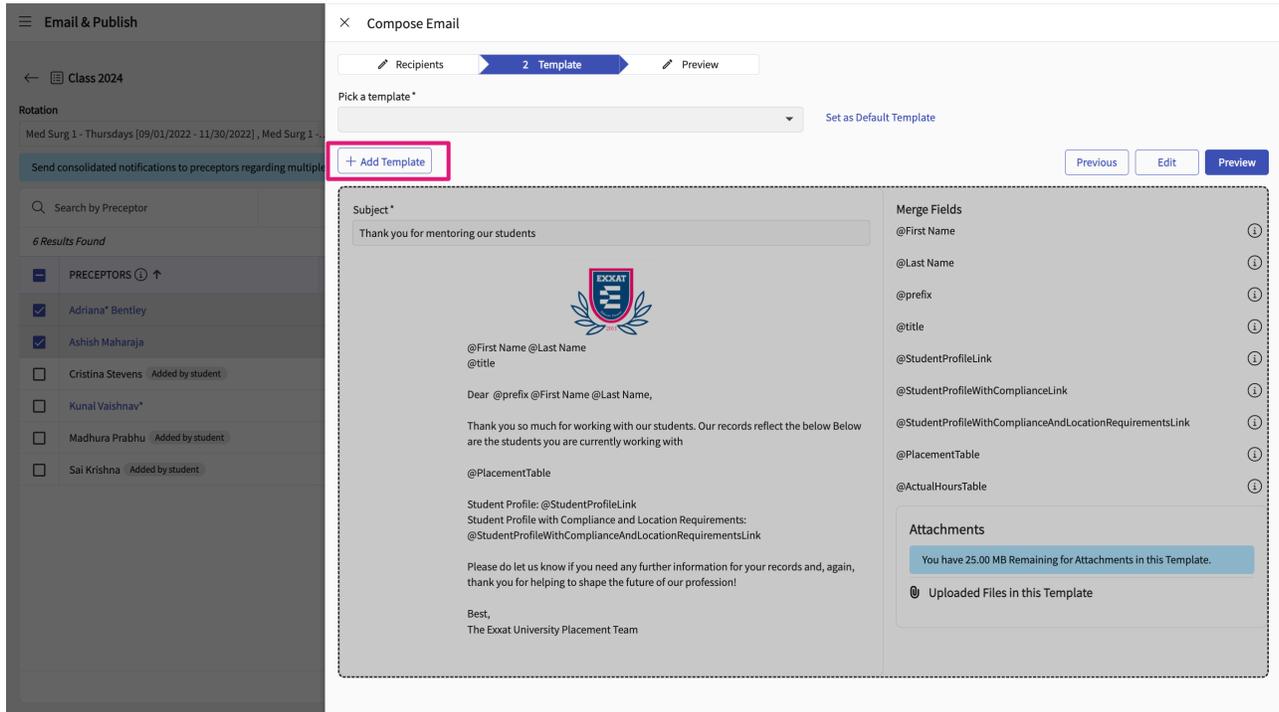
Supported formats: pdf, doc, jpeg, png, heic, docx, xlsx, pptx, pptm, potx, potm, ppt, rtf, xls, docm, bmp, csv, gif, tiff, mp4

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

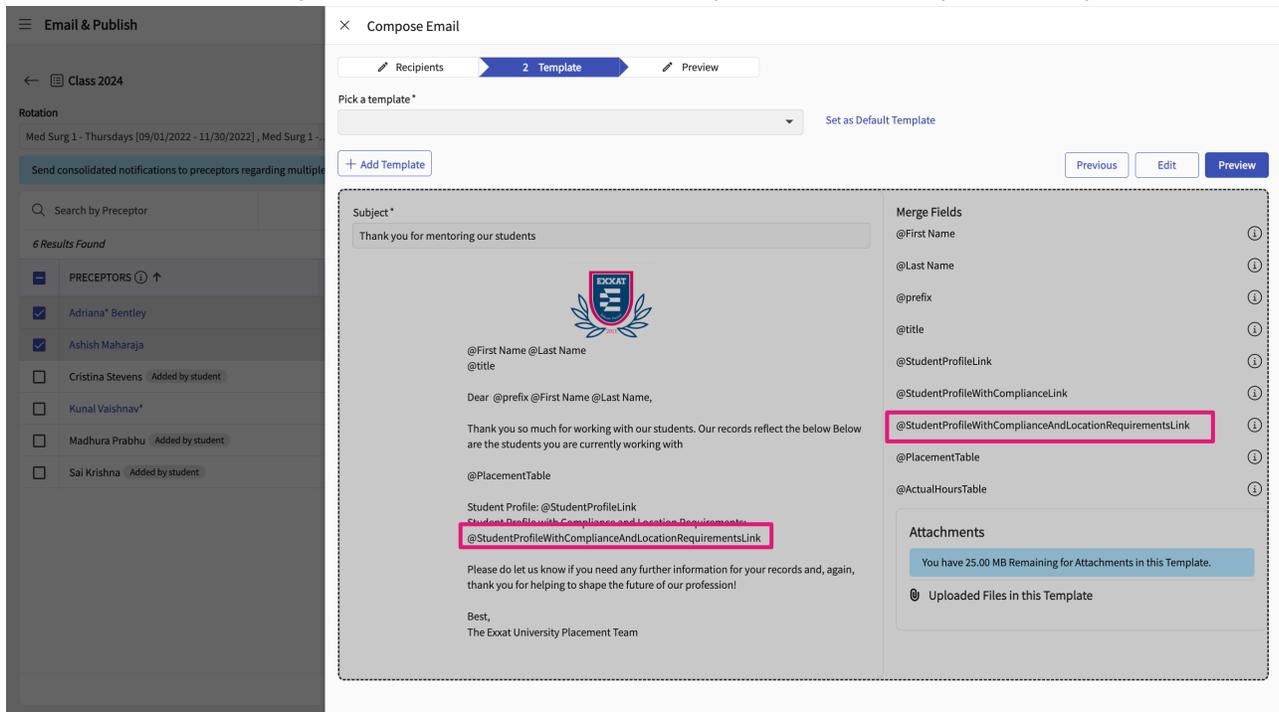
- To create a custom email, click **Add Template** and compose your message.

- 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.



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.

The screenshot shows the 'Compose Email' interface. On the left, there is a sidebar with 'Email & Publish' and a list of preceptors. The main area is titled 'Compose Email' and has tabs for 'Recipients', 'Template', and '3 Preview'. The email content is a thank-you message for mentoring students, including the ExoKat logo and personalized fields like '@First Name @Last Name', '@title', and '@PlacementTable'. On the right, there are two radio button options: 'Send email now' (which is selected and highlighted with a red box) and 'Send email at specific date and time'. Below these are sections for 'Attachments from Template' and 'Attachments from Recipient Tab', both showing 'No Attachments'. At the top right, there are 'Previous' and 'Send' buttons, with 'Send' highlighted by a red box.

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

This screenshot is similar to the one above, but the 'Send email at specific date and time' radio button is selected and highlighted with a red box. The 'Date Time' field is also highlighted with a red box and contains the value '01/30/2025, 11:00 AM' with a calendar icon. The 'Send' button in the top right corner is replaced by a 'Schedule' button, which is also highlighted with a red box. The rest of the interface, including the sidebar and email content, remains the same.