



# March 1<sup>st</sup> Mailing

**HOST: BECK ROTHKE, CSR**

# Agenda

1. Overview
2. Clinical Sites
3. Clinical Personnel
4. Sessions
5. Save the Date Email
6. Configuring Your Slot Request
7. M1M Coordinator
8. Next Steps

# Overview

**LET'S TALK STATS, DATES & TASKS**

# Exxat Stats

- We have been helping clients with their March 1<sup>st</sup> Mailing for over four years.
- In 2017, we assisted 50 schools with their March 1<sup>st</sup> Mailing.
- In 2018, we plan on assisting over 80 schools with their March 1<sup>st</sup> Mailing.

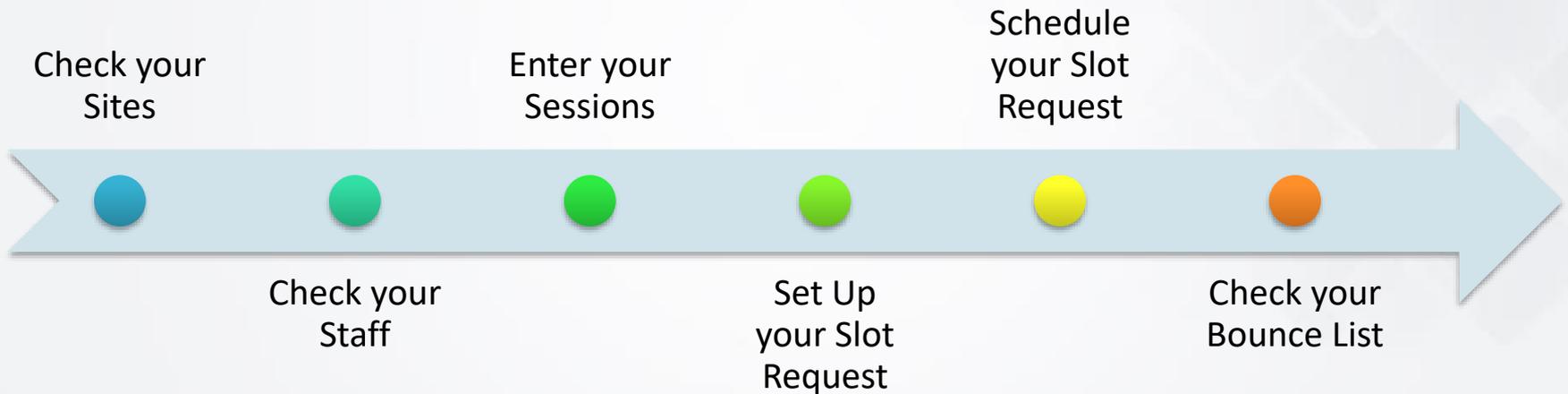
# Timeline

Your March Mailing isn't just about March 1<sup>st</sup>

- January 10<sup>th</sup> & 11<sup>th</sup>: March 1<sup>st</sup> Mailing Webinar
- January 16<sup>th</sup> – February 23<sup>rd</sup>: Schedule Meeting with M1M Coordinator
- **On or Before February 1<sup>st</sup>**: Configure your Save the Date (sent out by Exxat within 24 hrs of the date/time specified)
- **February 25<sup>th</sup>**: Deadline for any slot request changes.
- March 1<sup>st</sup>: Slot Requests sent out by Exxat within 2 hrs of date/time specified
- March 2nd and beyond: Check Analyze tab for bounce list, slots, and more

# Slot Request Workflow

We all know that the March 1<sup>st</sup> Mailing isn't just about one task. Here's what you'll be doing to get ready!



# Clinical Sites

**IS YOUR SITE LIST READY?**

# Clinical Sites

- All active clinical sites are included in the March 1<sup>st</sup> Mailing.
- If there are active sites you don't want to receive slot requests, make sure you set Include this site during slot requests? to No by going to Edit Site Information

**Other Configurations**

Does this site prefer paper based request?	<input type="checkbox"/> No	Does this site require special application from students?	<input type="checkbox"/> No
Is this site based in a rural area?	<input type="checkbox"/> No	Does this site provide services for a medically underserved area or population?	<input type="checkbox"/> No
Category	Nothing selected	Show on Map of Affiliation?	<input checked="" type="checkbox"/> Yes
Site initiated by	-Select-	Does this site qualify for reimbursement?	<input type="checkbox"/> No
Does this site precept students from other programs?	<input type="checkbox"/> No		
<b>Include this site during slot requests?</b>	<input checked="" type="checkbox"/> Yes		

Please enter notes to be shared with site during slot request

Normal text **Bold** *Italic* Underline [List Icons]

# Clinical Sites: Settings

- You can set up your sites to offer slots for all settings or only for the settings they are set up for in your system.
- Make sure you have entered accurate data on your site's settings.
- View and edit settings at Configuration > Advanced Options > Site Setting
  - Use Advanced Search to look for sites missing a setting
  - Use the Green Edit Pencil icon to edit the setting at a site

# Clinical Sites: Site Categories

- If you don't want to send the same slot request to all sites, you can set up site categories and configure each request by category.
- Examples might include sites based on location or based on the type of slot you want (CE1, CE2, etc.)
- To create groups of sites, you will need to have Support add site categories for you. Please discuss this in your meeting with your M1M Coordinator.

# Clinical Sites: Useful Tips

- For sites with lots of locations, you might want to create a new site for the group (like AA Test Site, Midwest region) and allow the CCCE to add slots for that general site.

# Clinical Personnel

**IS YOUR SITE STAFF READY?**

# Clinical Personnel

To receive slots, clinical personnel must:

- have accurate contact information
- be associated with at least one site
- Have 'Include Staff in Bulk Email' set to Yes

# Clinical Personnel

- Use the Site Staff Report to review which clinical staff will receive the M1M
- When staff are assigned to more than one site, they will see the list of all active sites on the same landing page and receive just one email
- Clinical staff roles (who receives the mailing, who shows up on the placement, etc.) can be easily edited in Clinical Personnel

# Clinical Personnel: Review

- Quickly review site staff from the Site Staff Report
- Clinical Personnel > Personnel Reports > Site Staff Report

## Site Staff Report

[Help](#)

Instructions: This page displays a list of Site Names, Contract End Dates and corresponding Site Staff.

[Site Staff Report](#)[Sites with No Staff Report](#)[Tools](#) [Advanced Search](#)

Show 50 Records



Filter By: [Active Sites : true](#) [Show on Send Slot Request : true](#) [Show Staffs with Notify Email : true](#) [Include in bulk mailing : true](#)

[Notes for Students](#) [Notes for School](#)

Site Name	Contact Info	Site Area	Contract End Date	Site Staff	Notes
Apple Crest Nursing Center 1922 Water Street, Anaheim, California(CA)- 92801	Phone:202-555-0199 Fax: N/A	In Area	12/31/2020	Gilbert, Jason (jason.gilbert@example.com) CCCE Goodwin, Joshua (joshua.goodwin@example.com) Clinical Instructor	
BayHealth Hospital 4150 Chicago Ave, Riverside, California(CA)- 92507	Phone:562-795-5367 Fax: 202-555-0258	In Area	10/01/2019	Hoffman, David (david.hoffman@example.com) CCCE Brenner, Lisa (lisa.brenner@example.com) Clinical Instructor	

# Clinical Personnel: Editing

To set staff to be included in the mailing:

- Search Staff > Edit Staff Information
- Set Include Staff in Bulk Email to Yes

### Edit Staff Information - Jason Gilbert

Designation \*

CCCE

Should They Receive Placement Notifications?

Yes

**Include Staff in Bulk Email?**

Yes

Show This Staff On Student's Placement View?

Yes

Should They Receive Evaluations?

No

Date for start of relationship

10/2/2017

# Sessions

**HAVE YOU SET-UP YOUR SESSIONS?**

# Sessions

- In order for session to appear on a slot request, they must be set up.
- Placements > By Session > Add New

By Session

Help

**Instructions:**

This page displays a list of Session details. Please note that the default is filtered by Active and Favorite Sessions. You may remove the default filters. Click Add Session to add a new Session. You may use Quick Search to search a specific Session by Session Label, Batch Label and so on.

Tools ▾ **+ Add Session** Quick Search... 🔍 ▾

Calendar Year **Equals ▾** Enter Value      Session Label **Contains ▾** Enter Value      Batch Label **Equals ▾** -Select- ▾

Is Active **Equals ▾**  Yes  No  
 N/A

Favorite Only **Q Search** **Clear All**

**Filter By :** **Is Active : true ✕** **Favorite Only : true ✕**

	Session Label	Min Weeks	Start Date	Calendar Year	Batch Label	Session Setup	Placement	Post Placement
★	Clinical Education 1	6	01/08/2018	2018	Class of 2018	➔	➔	➔
★	Clinical Education 2	8	03/05/2018	2018	Class of 2018	➔	➔	➔

# Sessions

- Give sessions have a clear title! Sites will see titles!
- Enter accurate dates for each session.
- Missing the Calendar Year or Batch you need? Add it in Configuration.
- Configuration > School Configuration
  - Help Document on Adding a new Calendar Year:  
<https://help.exxat.com/adding-a-new-calendar-year-steps-pt/>
  - Help Document on Adding a new Batch:  
<https://help.exxat.com/adding-editing-managing-student-batches-exxat-steps/>

# Save the Date Email

**DON'T FORGET ME**

# Save the Date Email

- Prepare sites for your mailing by sending a Save the Date or similar email in advance.
- These emails are great for:
  - Updating contact information on bounced emails
  - Introducing your partnership with Exxat to your sites (for newer clients)
  - Notifying your clinical partners of any process changes with your school

# Save the Date Email

- We recommend sending a Save the Date email **on or before February 1<sup>st</sup>** so you have time to view/edit your bounce list. (Exxat will send this for you!)
- To ensure your Save the Date and slot request emails are delivered, have your clinical partners put Exxat emails on their safe list.
- Add [noreply@exxat.com](mailto:noreply@exxat.com) and email.amazonse.com

# Configuring Your Slot Request

**READY, SET, GO!**

# Configuring Your Slot Request

- We have enhanced the slot request configuration dashboard to improve your experience and streamline the process.
- Go to Configuration > Activity Box > Slot Request Configuration

# Configuring Your Slot Request

The Slot Request Configuration dashboard shows past and current slot requests with some new features

- Site View
- Edit
- Schedule Notification
- Analyze

Slot Request Configuration

Help

Instructions: To create a new slot request, click the green Create New Slot Request button. Click Edit to view or edit an existing request. Click Site View to see an example of what the request will look like for your sites. Click Analyze to view email performance details and reports.

+ Create New Slot Request

March 1st Requests for 2017



Site View



Edit



Schedule  
Notification



Analyze

# Adding a NewSlot Request

- Click 'Create New Slot Request'
- You can create the request from scratch or copy an existing request

## Slot Request Configuration

Help

Instructions: To create a new slot request, click the green Create New Slot Request button. Click Edit to view or edit an existing request. Click Site View to see an example of what the request will look like for your sites. Click Analyze to view email performance details and reports.

+ Create New Slot Request

March 1st Requests for 2017



Site View



Edit



Schedule  
Notification



Analyze

# Basic Configuration

Basic Configuration allows you to enter the basic details about the slot request.

## Basic Configuration

Help

Slot Request Configuration > Basic Configuration >

Instructions: Enter basic details for your slot request here, starting with the title. Be sure to give each slot request a clear, unique name such as 2019 Slot Request. When you have completed all details, click Save to go on to Email Configuration.

Enter a slot request title

### BASIC CONFIGURATION

Select a slot layout for the request

PTLayout

Show only settings available at the individual site?

Yes

Set confirmed slots to Active?

Yes

Allow sites to offer FCFS slots?

Yes

Enter FCFS slot instructions for sites:

Send request only to designated group of sites?

No

Enter due date for slot request responses (optional)

### TO DO LIST

**BASIC CONFIGURATION**  
Set up the basic information for this slot request

**EMAIL CONFIGURATION**  
Set up the details for each email connected to this slot request

**CONTACT INFORMATION CONFIGURATION & ATTACHMENTS**  
Set up your contact information and add instructions and attachments for your sites

**SESSION SELECTION** Check the box next to each session that would be included in this request.

Search:

Select	Session Information Name (Sequence) - Duration	Dates Start Date - End Date (Calendar Year)	Batch Name
<input type="checkbox"/>	CohereX - Columbus 2017 (1) - 6.0 Weeks	10/30/2017 - 3/2/2018 (2017)	Class of 2015 (Campus XX)
<input type="checkbox"/>	Clinical Internship II 2018 (1) - 3.0 Weeks	1/1/2018 - 1/19/2018 (2018)	Class of 2019
<input type="checkbox"/>	Tentative Rotation (1) - 4.0 Weeks	1/1/2018 - 1/19/2018 (2018)	Class of 2019

Save & Next

# Email Configuration

Email Configuration allows you to select and edit email templates related to the slot request.

## Email Configuration

[Help](#)

Slot Request Configuration > Email Configuration >

Instructions: Now it's time to configure the details of your email. Click Configure Email to set up templates, subject lines, attachments, and more.

### EMAIL CONFIGURATION

Select the type of emails which you would like to send to the sites and select the template required template against them

Select	Email Category	Description	Template	CC/BCC Email	Actions
<input type="checkbox"/>	Save the Date	An email to sites notifying them of your upcoming slot request	Alert.Site.SaveTheDa	CC: BCC:	<a href="#">Configure Email</a>
<input checked="" type="checkbox"/>	Slot Request	An email to sites requesting slots for the selected session(s)	Alert.Site.Slot.Reque	CC: BCC:	<a href="#">Configure Email</a>
<input type="checkbox"/>	Slot Confirmation Reminder	An automated email sent to when they offer sites without confirming them.	Alert.Site.PendingSlo	CC: BCC:	<a href="#">Configure Email</a>
<input type="checkbox"/>	Slot Acknowledgement from Site	An automated email sent to sites and school when a site confirms an offered slot	Alert.Site.AnnualSlot	CC: BCC:	<a href="#">Configure Email</a>

### TO DO LIST

- BASIC CONFIGURATION  
Set up the basic information for this slot request
- EMAIL CONFIGURATION  
Set up the details for each email connected to this slot request
- CONTACT INFORMATION CONFIGURATION & ATTACHMENTS  
Set up your contact information and add instructions and attachments for your sites

[Save & Next](#)

# Contact Information Configuration & Attachments

Contact Information Configuration & Attachments allows you set up what contact details and other information will appear on the slot request landing page.

Other Configuration

Help

Slot Request Configuration > Other Configuration >

Instructions: Enter the contact information and an optional image to be shown on the site view of the slot request.

## CONTACT INFORMATION CONFIGURATION & ATTACHMENTS

Share contact information with your sites ?



Upload a picture

Name

Email

Phone

## TO DO LIST

- BASIC CONFIGURATION  
Set up the basic information for this slot request
- EMAIL CONFIGURATION  
Set up the details for each email connected to this slot request
- CONTACT INFORMATION CONFIGURATION & ATTACHMENTS  
Set up your contact information and add instructions and attachments for your sites

Save & Close

# Slot Request Configuration Tips

- You can make one-time changes to the template that will be saved for use with this mailing.
- If you need to make permanent changes to the template, go to configuration > Advanced Options > Email Template Editor
- You can only add one photo and contact information to the contact information configuration page.
- Consider adding other team member's contact information in the message or additional information sections.

# Configuring Your Slot Request

Once your slot request is configured, use the slot request configuration dashboard to perform other actions.

View a preview of your slot request



Site View

Make changes to your slot request



Edit

Input the date/time you want your slot request sent



Schedule Notification

View your bounce list, slots, reports, etc.



Analyze

# Site View

- Click site view to see what your sites see
- Select the email you want to review
- Make any needed changes

## MESSAGE FROM SCHOOL

As we continue to educate the next generation of healthcare professionals, we want to thank you for your role in mentoring our students. As we plan for the year ahead, we hope that we can continue our partnership with your facility. Please use this form to enter your availability for clinical experiences. Next to the clinical site name, select "Yes," "No," or "Not at this time" to indicate your availability for the 2019 calendar year. Clicking "Yes" will provide you with the opportunity to select the timeframe, setting(s), and other information. Choosing "Not at this time" will allow you to select a date after which you would prefer that we follow up. If prefer to respond in hard copy, a downloadable PDF version is available in the resource section.

**Resources:** [Hardcopy Slot Request Form](#)  [Clinical Instructor Benefits](#) 

**Please respond by:** 4/1/2018

## CONTACT INFORMATION



**Carlos Anguiano**  
Carlos.Anguiano@example.com  
870-429-8455

## DO YOU HAVE SLOTS TO OFFER FOR: 2016,2017,2021,2014

Site Location	Response	Slot Details
#1 PT Clinic 100 N Main Street, Indiana(IN), 46307,	<input checked="" type="radio"/> Yes, I have slots to offer <a href="#">+ Add Slot</a> <input type="radio"/> Not at this time.Please contact me in the future <input type="radio"/> No, I don't have slots to offer	Acute Care(Inp) <span>1</span>  <b>Confirmed</b> Clinical Education I(CE - 1, CE - 2), Lymphedema <span>1</span>  <b>Confirmed</b> test session(1), Aquatic <span>1</span>  <b>Confirmed</b> Jenns Bridge 1 and 2(1, 2), Manual Therapy <span>1</span>  <b>Confirmed</b> Clinical Education I(CE - 1, CE - 2), Neuro Rehab (Inp) <span>1</span>  <b>Confirmed</b> Jenns Bridge 1 and 2(1, 2), Aquatic <span>1</span>  <b>Confirmed</b> Jenns Bridge 1 and 2(1, 2),

# Scheduling & Sending

- Exxat will send your Save the Date and slot request emails.
- You must give us the send dates and times.
- Exxat will send Save the Date emails within 24 hours of the date/time specified.
- Exxat will send slot request emails within 2 hours of the date/time specified.

# Scheduling & Sending: Option 1

- Go to Slot Request Configuration > Email Configuration
- Click the Configure Email button for Save the Date
- Enter the send date and time

 EDIT EMAIL TEMPLATE ✕

Template

Recipient(s) Designation

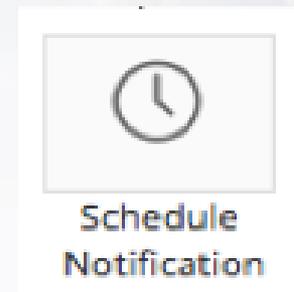
Subject

Send date   
Email will be sent in one hour of the time specified

CC

# Scheduling & Sending: Option 2

- Or click the Schedule Notification icon on the Slot Notification Configuration page
- Enter the date and time



Schedule Notification For March 1st Requests for 2017

Help

Slot Request Configuration > Send/Schedule Notification >

Instructions: This page displays a list of Site Staff that will be notified for Slots Requests. Please note that the names displayed are after applying various default filters. You may remove the filters to view all Names. To queue multiple Slot Requests, select required names and click Schedule Request button. To send the queued requests, click Pending Notifications, select required records and click Send. You can view all sent notifications on clicking Notification History button.

Email Category	Description	Template	Schedule for a later date	Action
Save the Date	An email to sites notifying them of your upcoming slot request	Alert.Site.SaveTheDate	1/9/2018 1:25:15 AM	<input type="button" value="Send"/> Last Sent on : N/A
Slot Request	An email to sites requesting slots for the selected session(s)	Alert.Site.Slot.Request.Reminder	1/5/2018 5:00:46 PM	<input type="button" value="Send"/> Last Sent on : 1/5/2018

# Scheduling & Sending

- You must have your slot request configured by **Sunday, February 25th, 2018.**
- If you don't have it completed and a date/time specified our team can't send your requests.
- After your request has been configured and scheduled, our team will send your email.
- DO NOT SEND THEM YOURSELF!!!!!!!!!!!!!!!!!!!!!!

# Analyze

## View statistics & reports on your request

### Slot Request Statistics

106

EMAILS



[EMAILS SENT REPORT](#)

83

LINKS



[LINKS CLICKED REPORT](#)

4

EMAILS



[EMAILS BOUNCED REPORT](#)

132

SLOTS



[TOTAL SLOTS OFFERED REPORT](#)

## Emails Sent Report for Exxat Slot Requests 2019

Help

Analyze > Emails Sent >

Instructions: This report shows a list of all recipients who were sent a slot request email.

**Please note:** not all sent emails are read by their recipients. Emails that go into a spam folder will show as sent. Click on View Sites to view associated sites.

Advanced Search ▾

Show 50 Records



First Name	Last Name	Phone	Email Address	No. Of Email Sent	Associated Sites
Abraham	Aaron	3234427712	gupta.sapna@exxat.com	62	<a href="#">View Sites 27</a>
Adam	Allan	323-999-1559	aarti.vaishnav@exxat.com	1	<a href="#">View Sites 2</a>

# Analyze

View additional reports

## Slot Request Reports

	Call Later For Slots	10
	Sites who have not responded to slot request	30
	Sites who have not offered slots	5
	Slots processed in another location	0
	Manage FCFS slots	9
	Pending/Cancelled site slot list	1
	Interview required slots	0

# M1M Coordinator

HELLO, MY NAME IS...

# Introducing Your M1M Coordinator

Your M1M Coordinator is Sierra Rome. She works out of LA and will assist you with any questions regarding your March 1<sup>st</sup> Mailing.



- Schedule a meeting with her by visiting:  
<https://calendly.com/sierra-rome>
- Email: [sierra.rome@exxat.com](mailto:sierra.rome@exxat.com)
- Phone: (747) 272-7259

# Next Steps

**JUST KEEP GOING!**

# Next Steps

- Schedule an appointment with Sierra Rome
- If your school has unique requirements, schedule your appointment sooner rather than later.
- Visit our Help Center for helpful documents related to the M1M Mailing. <https://help.exxat.com>
- Ask Sierra or Beck for help along the way!

# Next Steps

- Attend our upcoming M1M webinars:
  - 1/24/18 M1M Save the Date Emails
  - 2/15/18: M1M Configuration & FCFS Management
  - 3/7/18: Slot Management 101

# Thanks & Survey

**PLEASE FILL OUT OUR SURVEY AND LET US KNOW  
HOW WE DID TODAY!**