

Clinical Agreement Cycle and Activities

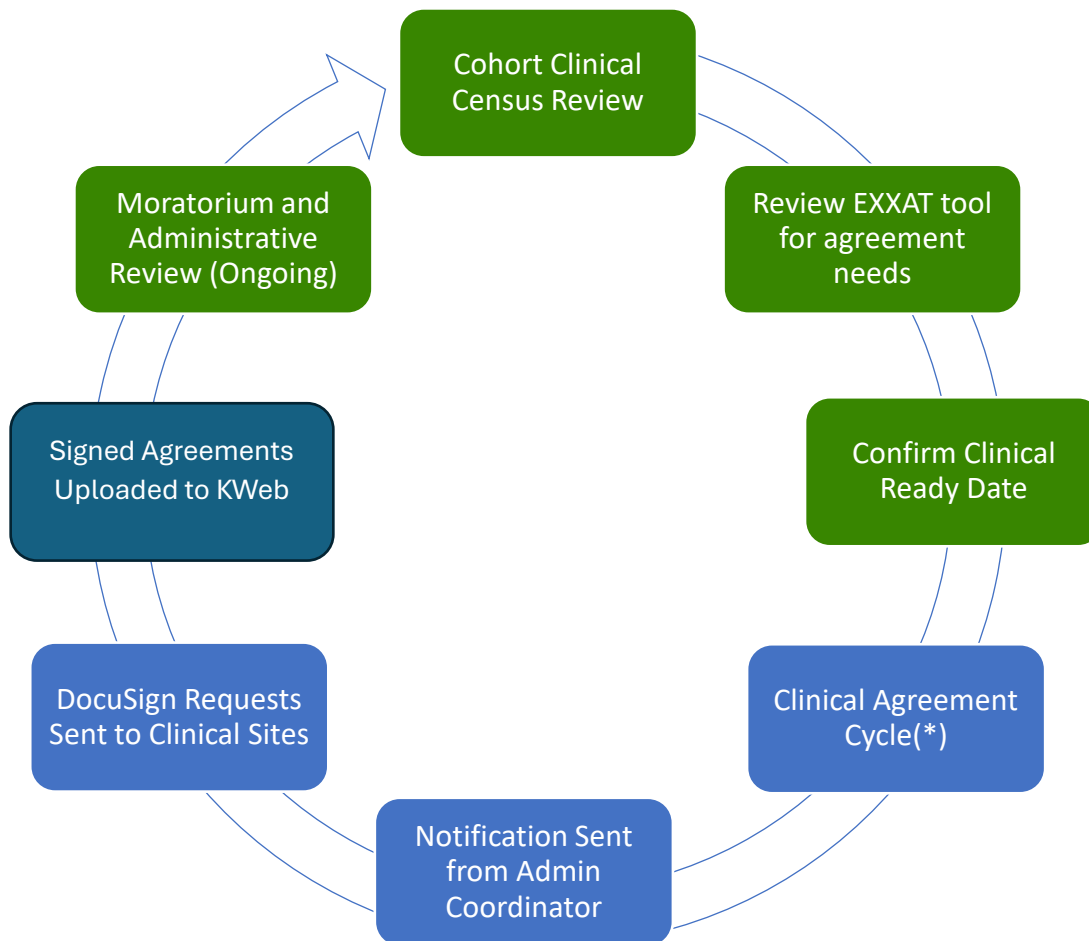
ACTIVITY	ACTION/PARTICIPANTS/TIMELINES
<p>Clinical Site Need by Student Cohort Number</p> <p>Review and Update of EXXAT contract information</p>	<p>During each moratorium and administrative review period within the cycle programs should be evaluating their clinical site need and identifying how many students will be in their cohort, what specialty rotations are needed and what facilities can provide those services. This review activity should occur within the EXXAT tool.</p> <p>All programs are asked to confirm that the contact information (vetting, signer, site supervisor, etc.) is accurate for all agreement requests. The goal is to maintain a roster of current sites and utilize the agreement cycles for renewal of existing agreements or requests for newly identified sites to support student clinical needs.</p> <p>Contingency site planning should be a part of the planning process. Programs should proactively identify and plan for contingency clinical sites when there is an anticipated risk that a primary site (particularly one supporting specialized modalities) may be unavailable for a specific semester or may experience an interruption during a student’s clinical or practicum experience.</p> <p>The information for the Complio system such as vetting contacts will be pulled from EXXAT by the Clinical Compliance Specialist so it can be entered and updated into the Complio system. This information is used for the profile share process and will help ensure timely site compliance and student placement activities.</p> <p>The agreement cycle and moratorium period with the cycle are as follows:</p> <ul style="list-style-type: none"> • <i>Agreement Cycle Spring/Summer Cycle Requests: October – December(mid)</i> • <i>Agreement Moratorium: December (mid) – February (end)</i> • <i>Agreement Cycle Fall Cycle Requests: March (mid) – May (end)</i> • <i>Agreement Moratorium: June – August (end)</i> • <i>Administrative Review Period: Month of September</i> <p>Owners: Program Staff: Associate Deans and Deans, PAHCI Team</p>
<p>Program Staff Regularly Reviews Updates Contact information.</p>	<p>Program Staff, Preceptors, or designee should review the clinical site information in EXXAT and ensure a Master Spreadsheet is always in the KWeb folder as a backup. A spreadsheet can be downloaded from EXXAT. Please be sure to download the spreadsheet from the “Contract report” as this will have all the contact information that you have entered.</p>

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	<p>The naming convention “Master Spreadsheet EXXAT (Program Name)AY 2025-2026” as an example should be used.</p> <p>Owners: Program Staff, Associate Deans and Deans</p>
<p>Clinical Site Request Completed in EXXAT</p>	<p>We will continue to follow the process of ensuring that agreements are renewed timely. Continue to update your agreement contact information in EXXAT during the moratoriums to ensure updates occur no later than 60-90 days before the next agreement cycle to ensure the information is current.(PAHCI office actions will follow cycle guidelines).</p> <p>**Reminder: Please confirm all contact information at the site locations is accurate in EXXAT and ensure signer, vetting and clinical supervision information is accurate to avoid delay in obtaining signatures as all documents are sent via DocuSign for signature.</p> <p>Programs are asked to remind contacts at the clinical site to communicate with the PAHCI office during this process as warranted. Programs, please let your contact know the agreement will be sent via DocuSign so they are aware.</p> <p>Owners: Program Staff, Associate Dean and Deans</p>
<p>Clinical Agreement Request Procedure and Activities</p>	<p>The PAHCI office staff will send the required notifications to programs to remind them of the upcoming clinical request cycle.</p> <p>The PACHI office staff will ensure that all required information for the profile share process is current in ADB-Complio so only new additions will require action. The team will also pull updated/new information from EXXAT as warranted and update the associated ADB-Complio profiles.</p> <p>The PAHCI department designee will submit requested agreements via DocuSign to the clinical site signer contact for execution within 24-48 hours of the notification request.</p> <p>NOTE: DocuSign is set to send reminders every 2 days until the agreement is signed. Your program will be contacted if after these two reminders the agreement has not been signed. If the wrong signer has been provided for the DocuSign process, a new request will need to be sent and the existing one voided, the previous recipient cannot forward it.</p> <p>Once the agreement has been sent to the contact via DocuSign the indicator in the EXXAT system will be changed to “Awaiting Sign Off.” Programs should follow up with the clinical site to confirm the agreement has been received by the correct person for signature as in DocuSign there is no way to transfer the “envelope” to another individual. In those cases, a “corrected envelope” will be sent to the correct person.</p> <p>If the affiliate site requests modifications either to our document or they</p>

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	<p>want to use their own document, the PAHCI will update the status in EXXAT to “Review Pending” as a potential delay that could result. All “material” changes and external affiliation documents must be reviewed and approved by the legal department.</p> <p>Fully executed agreements are uploaded to the Clinical Agreements KWeb central repository for storage (Healthcare Education - Clinical Experience Agreements - All Documents). Program staff should ensure the appropriate alerts are established in KWeb so that they receive notifications of these uploads and regularly check the statuses in EXXAT during the active agreement cycle. (Please view the PPT presentation for reminders on how to set KWeb alerts)</p> <p>All “current” active agreements are labeled “fully executed” in EXXAT and are in the appropriate cycle folder by date in KWeb. For example, an agreement executed in 2025 will be in the 2025-2029 folder unless it is a unique cycle or special situation for a student need.</p> <p>** All agreements will be sent via Docusign. Please make your contact aware of how the agreement will be received from the college when you are in communication with them. These documents should not be removed from the system and sent to the programs by the clinical sites at any time.**</p> <p>Owners: AVP, Clinical Compliance and Education Specialist, Administrative Coordinator</p>
<p>Document Retention and Storage of Agreements</p>	<p>All executed clinical/practicum agreements are housed in the central KWeb repository for recordkeeping (Healthcare Education - Clinical Experience Agreements - All Documents).</p> <p>If programs store a copy of agreements for ease of access for accreditation requirements they should be housed on a department drive for the designated department and ensure leadership has access. The PAHCI office will engage in an archiving activity to get duplicate documents archived so that the active documents are more easily accessible in the KWeb folder. No agreements will be “deleted” from the system.</p> <p>These college documents should not be stored on a personal “H” or “C” drive.</p> <p>Owner: PAHCI staff and Program Staff</p>
<p>Discussions and Cycle Review Activities</p>	<p>Twice per year during the moratorium period all stakeholders Associate Deans/Deans and designee from the PAHCI office will meet with each program to have discussions about site needs and use of current locations. The goal is to always have active agreements and sustain relationships.</p>

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	<p>Best practice – Programs should always be reviewing their roster for clinical site needs. The goal is to always have an adequate number of clinical sites and backup options for the students in the program which should support projected enrollment and growth.</p> <p>Program Staff: Please remember: Students cannot be at the clinical site in any capacity unless the agreement is signed by both the college and the site. This is especially important when “new “agreements are being executed. Renewals often have a “grace period” where the previously approved agreement is technically “still valid” while the new agreement is being executed (case by case basis). Please “discourage” sites sending agreements directly to you they must be sent to the PAHCI office directly to avoid delay.</p> <p>Owners: All Process Stakeholders</p>

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(*) Clinical Cycle for Administrative Action:

Administrative Coordinator will send notification to program contacts for clinical agreement management within the program **“thirty days”** before the cycle to begin the process. This staff will also ensure all program staff have access to the system and coordinate action with the vendor when there is an access issue.

Clinical Compliance and Education Specialist will ensure for the profile share process, that all the relevant information needed is in the EXXAT system and added to ADB-Complio so that only new location information will need to be added on an AD-HOC basis.

AVP will ensure that the agreement templates are in DocuSign for the agreement execution and signature and support the requests for COI from the Compliance and Risk Management office.

Program Staff are to run reports as needed to manage these workflows. **Associate Deans are to ensure that reports are run during each cycle.**