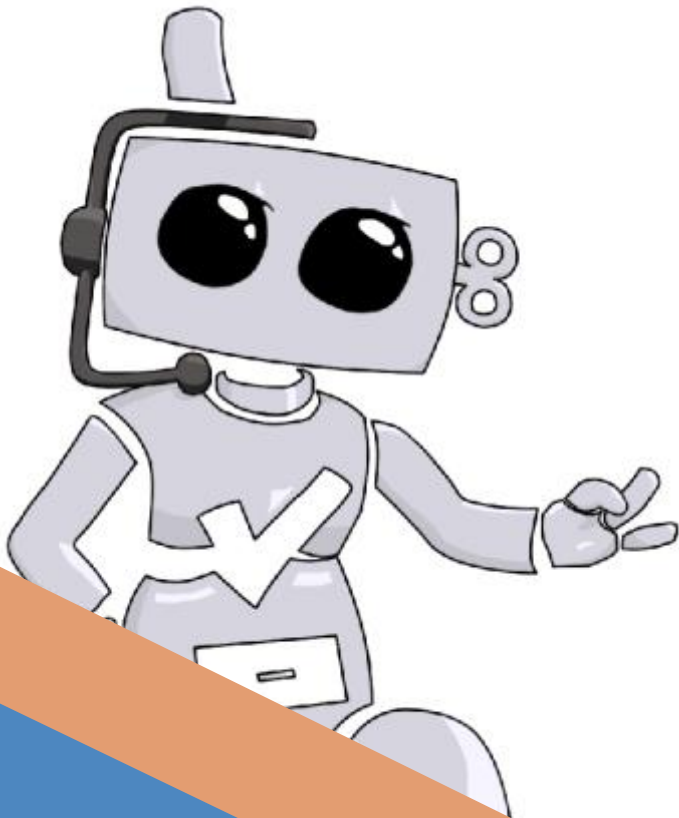


complio

by American DataBank



Admin

Clinical Rotation User Guide

Create a Clinical Rotation

The screenshot shows the 'Manage Existing Rotations' form in the American DataBank system. The 'Services' dropdown menu is open, with 'Rotations' selected. The 'Agency' dropdown menu is also open, with 'ABC Company' selected. The 'Add New Rotation' button is highlighted. The form includes fields for Institution, Compio ID, Program, # of Students, Time, Agency Status, # of Groups, Type/Specialty, Term, Days, End Date, Department, Unit/Floor or Location, Shift, and Instructor/Preceptor.

1. From the Services dropdown menu, select *Rotations*, then **Manage Rotation**.
2. Select the *Agency* from the Agency List.
3. Click **Add New Rotation**.
4. Fill out as much rotation information as possible. The agency uses this to locate and track students. Click Save.

Assign the Clinical Orientation Tracking Package to the Rotation

The screenshot displays the American DataBank interface for managing a rotation. At the top, the logo and navigation menu are visible. The main content is divided into three sections: 'Rotation Details', 'Other Details', and 'Rotation Requirement Packages'. The 'Rotation Details' section contains a grid of input fields for Agency, Department, Unit/Floor, Shift, Complio ID, Program, # of Students, Time, Rotation Name, Course, # of Recommended Hours, Dates, Type/Specialty, Term, Days, and Instructor/Preceptor. The 'Other Details' section shows Agency Status and # of Groups. The 'Rotation Requirement Packages' section includes two identical blocks for 'Package Currently Assigned' (N/A) and 'Select Package' (dropdown menu), with buttons for 'Assign Package to Rotation' and 'Add New Package'.

Rotation Details			
Agency:	Complio ID:	Rotation Name:	Type/Specialty:
ABC Company	RT-40-40	RT-33-55	Heart
Department:	Program:	Course:	Term:
Cardiology	BSN	Nursing	Spring
Unit/Floor or Location:	# of Students:	# of Recommended Hours:	Days:
Cardiac and Vascular Center	10	200	Monday, Wednesday, Friday, Saturday
Shift:	Time:	Dates:	Instructor/Preceptor:
Morning	3:00AM-10:30AM	07/27/2016-10/03/2016	Chief Nurse

Other Details

Agency Status: Active # of Groups: 1

Rotation Requirement Packages

Package Currently Assigned: N/A

Select Package: --SELECT-- [Assign Package to Rotation](#) [Add New Package](#)

Instructor/Preceptor Rotation Package

Package Currently Assigned: N/A

Select Package: --SELECT-- [Assign Package to Rotation](#) [Add New Package](#)

1. Return to the **Manage Rotations** page (Services > Rotations > Manage Rotations).
2. Search for the Rotation by selecting the Agency to which the Rotation is assigned, then clicking **Search**.
3. Click the "Detail" link located to the right of your Rotation's Name.
4. Under "Rotation Requirement Package," select the appropriate Rotation Package.
5. Click "Assign Package to Rotation".

Assign Students to the Rotation

Assign to Rotation

User Group:

Applicant First Name:

Applicant Last Name:

Email Address:

SSN/ID Number:

Date of Birth:

Institution Hierarchy:

Page size: 50 94 item(s) in 2 page(s)

<input type="checkbox"/>	Applicant First Name	Applicant Last Name	Institution	Email Address	Date of Birth	User Group	SSN/ID Number
<input checked="" type="checkbox"/>	Jackie	Testing	ADB University	jackiew@americandatabank.com	01/10/1986	Childrens Hospital, class of 17, Cohort 1, Courtney's Students, David Afternoon, fall 2015, Fall 2016, Fall 2018, Gean's Morning Class, Glenn 2015, Hospital C, Janie 15, Jill's Class 2017, kaiser, Morning Class, Nursing fall 2015, Port Arthur, Psychology, spring 2018, Spring Nursing 2015, Summer 2016, Summer CNA, Susan 2017, Susan Spring 2015, test123, testing	111-11-1111
<input checked="" type="checkbox"/>	Brittany	Testing	ADB University	lclemente+012345@americandatabank.com	12/13/1980	Courtney's Students, David Afternoon, David Morning, day 2015, fall 2015, Fall 2016, Fall 2018, Gean's Morning Class, Glenn 2015, Hospital C, Jill's Class 2017, kaiser, Morning Class, Port Arthur, Psychology, spring 2018, Susan 2017, Susan 2018, Susan Spring 2015, test123, testing	222-88-2222
<input checked="" type="checkbox"/>	Jessica	Test	ADB University	jmcwhirt@americandatabank.com	12/18/1988	class of 17, Cohort 1, David Afternoon, fall 2015, Gean's Morning Class, Glenn 2015, Hospital C, Jill's Class 2017, kaiser, Morning Class, Psychology, Summer CNA, Susan 2015, Susan 2017, Susan 2018, Susan Spring 2015, UTM fall	111-11-1111

1. After the package is assigned, scroll down to "Assign to Rotation."
2. Search for the students you want to assign to the rotation using the various fields.
3. Check the box next to the student's name.
4. Click the "Assign to Rotation" button.
5. You will see the student was assigned successfully under the "Rotation Members" section above. To un-assign, click the checkbox next to their name, then click "Remove from Rotation."

Rotation Members

Page size: 50 4 item(s) in 1 page(s)

<input type="checkbox"/>	First Name	Last Name	Email Address	Date Of Birth	SSN/ID Number	User Group	Custom Attributes	School Compliance	Agency Compliance
<input type="checkbox"/>	Jackie	Testing	jackiew@americandatabank.com	01/10/1986	111-11-1111	Childrens Hospital, class of 17, Cohort 1, Courtney's Students, David Afternoon, fall 2015, Fall 2016, Fall 2018, Gean's Morning Class, Glenn 2015, Hospital C, Janie 15, Jill's Class 2017, kaiser, Morning Class, Nursing fall 2015, Port Arthur, Psychology, spring 2018, Spring Nursing 2015, Summer 2016, Summer CNA, Susan 2017, Susan Spring 2015, test123, testing		Not Compliant	Not Compliant
<input type="checkbox"/>	Brittany	Testing	lclemente+012345@americandatabank.com	12/13/1980	222-88-2222	Courtney's Students, David Afternoon, David Morning, day 2015, fall 2015, Fall 2016, Fall 2018, Gean's Morning Class, Glenn 2015, Hospital C, Jill's Class 2017, kaiser, Morning Class, Port Arthur, Psychology, spring 2018, Susan 2017, Susan 2018, Susan Spring 2015, test123, testing		Not Compliant	Not Compliant
<input type="checkbox"/>	Jessica	Test	jmcwhirt@americandatabank.com	12/18/1988	111-11-1111	class of 17, Cohort 1, David Afternoon, fall 2015, Gean's Morning Class, Glenn 2015, Hospital C, Jill's Class 2017, kaiser, Morning Class, Psychology, Summer CNA, Susan 2015, Susan 2017, Susan 2018, Susan Spring 2015, UTM fall		Not Compliant	Not Compliant
<input type="checkbox"/>	David	Tester	hmdaverf@comcast.net	07/04/1976	887-66-0077	Class of 2020, Fall 2016, Hospital C, Psychology, Renewal, Spring Nursing 2015, Susan 2017, Susan Spring 2015, UTM fall		Not Compliant	Not Compliant

Assign to Rotation

User Group:

Applicant First Name:

Applicant Last Name:

Email Address:

E-sign the Agency Attestation and Profile Share by Rotation

Rotation Members

Refresh Download

Page size: 50 3 Item(s) in 1 page(s)

	First Name	Last Name	Email Address	Date Of Birth	SSN/ID Number	User Group	Custom Attributes	School Compliance	Agency Compliance
<input type="checkbox"/>	David	Tester	hmdaverf@comcast.net	07/06/1976	887-66-0077	Class of 2020, Fall 2016, Hospital C, Psychology, Renewal, Spring Nursing 2015, Susan 2017, Susan Spring 2015, UTM fall		Not Compliant	Not Compliant
<input type="checkbox"/>	Lynda	Gilbert	lyndag-9999@americandatabank.com	01/02/1980	789-80-9890			Compliant	Compliant
<input type="checkbox"/>	Ben	Grimm	temple@americandatabank.com	08/08/1988	111-11-1111	3rd Year Students, Afternoon Class, Class of 2017, Class of 2020, Cohort, Course 123, Darlene's Class of 2016, EMT Night Class, fall 2015, Fall 2016, Graduation 2020, Morning Class, Night Class, Spring Nursing 2015, Summer 2016, Summer CNA, Susan 2015, Toshi summer 15, UTM fall		Not Compliant	Not Compliant

Page size: 50 3 Item(s) in 1 page(s)

Remove from Rotation Profile Share

1. When the students assigned to the Rotation reflect "Compliant" under the Agency Compliance column, you can Profile Share.
2. Review the Rotation Details and scroll down to the Attestation Statement.
3. Electronically sign in the E-Sign box using your mouse or touchpad.
4. Select "Submit Now" to share the profile(s) immediately or select "Submit Later" to schedule a future date.

APB American DataBank

Setup Communication Orders Approvals Services People and Places Reports

Student Attestation

School Name: ADB University School Representative: ADBUniversity Admin Date of Attestation: 07-20-2016

Attestation Report Text:

As a designated representative of ADB University, I attest that the above information is present in the student's file and that the above named students have been determined to be competent for the field of study and assigned area.

I further attest that the above information is present in the faculty member's file. I further attest that the background investigation report does not include any information about prior or pending investigations, reviews, sanctions or peer review proceedings; or limitations of any licensure, certification, or registration. This attestation is provided in lieu of providing a copy of the background investigation report for each student.

Signature:

Clear Signature

Expiration Criteria

Would you like to restrict this invite until a specific date or for a set number of views?

Yes No

Submit Now Submit Later

*The system is already configured to share the information required for the agency and to the authorized users.

Monitor the Agency Review Status

Share History

Institution: ADB University

Agency: ABC Company

User Group: 2017 Graduates

Applicant First Name: [] Applicant Last Name: [] Email Address: []

SSN/ID Number: [] Date of Birth: []

Rotation ID/Name: [] Department: [] Program: []

Start Date: [] End Date: []

Search [] [] []

1. From the **Services** tab, select **Rotation**, then **Profile Sharing History**
2. Search for the rotation(s) using one or more of the search fields. Click **Search**.

Other Details

Agency Status: [] # of Groups: []

Search [] [] []

Refresh Download

Agency	Invitee Name	School Representative	Share Status	Invitation Date	Expiration Date/Number Of Views	Rotation ID/Name	Clinical Start Date	Clinical End Date	Time	Clinical Days	First Name	Last Name	Agency Review Status	Detail Shared	View Attestation
ABC Company	Courtney	AOS/University Admin	Not Viewed	11 Jul 2016	Test for Mock UP	09 May 2016	26 May 2016				PeterTEST	ParkerTEST	Pending Review	Rotation & Tracking	View Attestation
ABC Company	Courtney test2	AOS/University Admin	Viewed	11 Jul 2016	Test for Mock UP	09 May 2016	26 May 2016				PeterTEST	ParkerTEST	Pending Review	Full	View Attestation
ABC Company	Courtney AgencyTest	AOS/University Admin	Viewed	11 Jul 2016	Test for Mock UP	09 May 2016	26 May 2016				PeterTEST	ParkerTEST	Pending Review	Rotation & Tracking	View Attestation
ABC Company	Courtney test2	AOS/University Admin	Viewed	11 Jul 2016	Test for Mock UP	09 May 2016	26 May 2016				PeterTEST	ParkerTEST	Pending Review	Full	View Attestation

3. The “Agency Review Status” column reflects if your Profile Share has been *Viewed* or *Not Viewed* by the Agency.
4. Click the **Download** button to export the results.
5. Click **View Attestation** to see a copy of the signed attestation.

Rotation Member Search

This search allows you to find rotation information by rotation details or students.

1. To run the **Rotation Member Search**, go to: Services > Rotations > Rotation Member Search
2. Use the search fields to find your student.
3. Click **Detail** on the far right of your student's name. This will take you to the Tri-Panel Screen to review the Agency-Specific requirement details.

Verification Queue

Administrators can attest to students' clinical orientation requirement completeness and compliance through the Tri-Panel Review screen.

The screenshot shows the American DataBank interface for the 'Rotation Requirement Verification queue'. The navigation menu includes Setup, Communication, Orders, Approvals, Services, People and Places, and Reports. The 'Approvals' menu is open, showing options like Assignment Queue, User Work Queue, Assignment Exception, User Work Exception, All Client Assignment, Verification Queue (highlighted), Agency Review, and Manage Un-archive Request. The main form includes fields for Institution (ADB University), Agency (-SELECT-), Applicant First Name, Applicant Last Name, Rotation End Date, Submission Date, Requirement Package Type, and Applicant Rotation Package. There are Search, Reset, and Cancel buttons. Below the form is a table with 5 items, 1 page(s). The table has columns for Applicant First Name, Applicant Last Name, Agency, Rotation Start Date, Rotation End Date, and Submission Date. The 'Detail' link in the last column is highlighted. The page size is set to 50.

Applicant First Name	Applicant Last Name	Agency	Rotation Start Date	Rotation End Date	Submission Date	
Ariana	Lucero	Broward Health	01/04/2016	06/01/2016	12/23/2015	Detail
Sean	Test	Broward Health	01/04/2016	06/01/2016	12/18/2015	Detail
Kathleen	Test	Broward Health North	04/04/2016	06/27/2016	12/07/2015	Detail
Leigh	Test	Broward Health	01/04/2016	06/01/2016	12/18/2015	Detail
Mai	Lee	Broward Health	01/04/2016	06/01/2016	12/23/2015	Detail

1. From **Approvals**, click **Verification Queue**.
2. Select the **Requirement Package Type** to review students' requirements. Click **Search**.
3. Click **Detail** to review the student's clinical orientation requirement completeness and compliance.

Questions?

©American DataBank is always happy to help. You may call, email, or message us with any questions or concerns you have about Complio, your account, or your students' statuses.

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Phone: 303-302-9207

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