

## Instructions for Monitoring Clerkship Checklist Items via Academic History

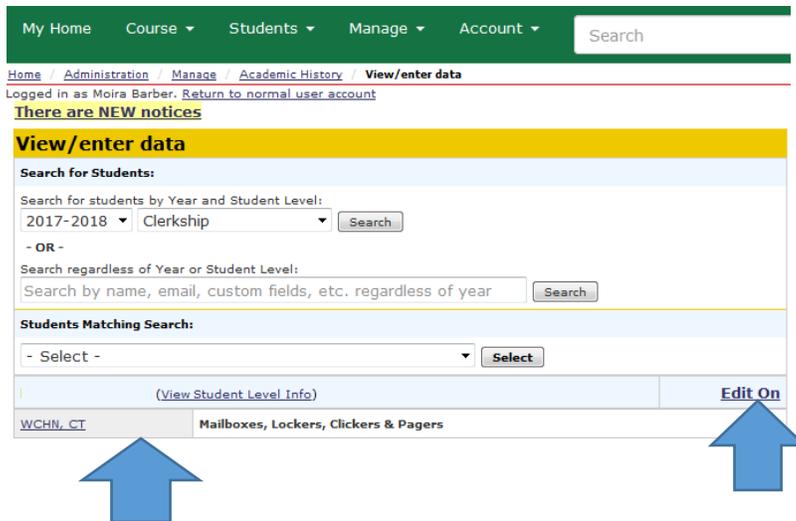
Notifications may be enabled or disabled according to preference; they may prove too annoying/confusing. If you want to check on an individual student's file or the whole class here's how to do it:

### Individually

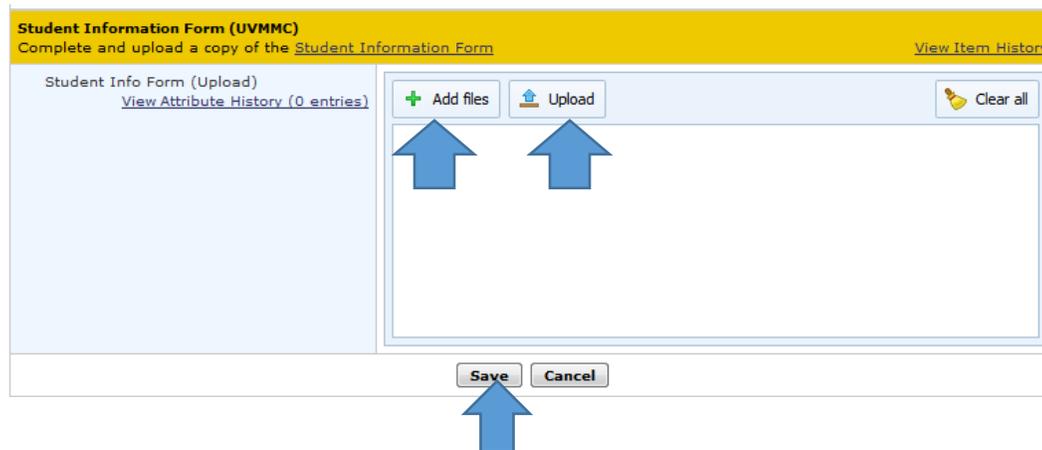
Choose the green MANAGE button at the top of the screen, then select ACADEMIC HISTORY and click on VIEW/ENTER DATA.

Select the student. You can enter the first few letters of the last name then hit search. Or you may select the current year (2020-2021) and the appropriate student level (Clerkship). Either way. You'll pick the desired student's name from the generated drop-down menu.

Pick the desired tab. Click "Edit On" if you will be uploading or entering information. (You only need to hit 'Edit On' to upload or enter data, otherwise, "Edit Off" makes the screen a bit more manageable.)



Click on "Add file" to browse for the file on your computer, then click on "Upload" to import the file to the dialog box. Finally, click on "Save" at the bottom of the screen to save the uploaded document to the student's file.



### To check on the whole class:

Choose the green MANAGE button at the top of the screen, then select REPORTS and pick ACADEMIC HISTORY as the report you'd like to run. Select the current year (2020-2021) and the appropriate student level (Clerkship).

Then I find it very helpful to hit “Select/Deselect All Data Groups” at the top of the screen, so that your resulting report doesn’t include too many columns. This allows you to check only the items you are actually monitoring at the moment.

Year	2018-2019 ▾
Report	Academic History ▾
Report Description	User can select one or more Student Levels and items to include in the report based on access.
Student Level(s)	<ul style="list-style-type: none"><li>Administrative LOA</li><li>Advanced Integration</li><li>Clerkship</li><li>Dismissed</li><li>Fellowship Year</li><li>Foundations1</li><li>Foundations2</li><li>Leave of Absence</li><li>PhD 1</li><li>PhD 2</li></ul>
Select Academic History to include	<p><input type="checkbox"/> <b>Include Student Email</b> This column must be removed to match Manage &gt; Academic History &gt; Data import</p> <p><input type="checkbox"/> <b>Include Student Year and Level</b> These two columns must be removed to match Manage &gt; Academic History &gt; Data import</p> <p>Academic History Report Groups: <input type="text" value="Select an Academic History Report Group"/> ▾</p> <p style="text-align: right;"><a href="#">Select/Deselect All Data Groups</a></p>



The resulting spreadsheet will show a file name after the student’s name indicating that a file has been uploaded. “View Report” will allow the user to sort by and click on uploaded files from the on screen report.