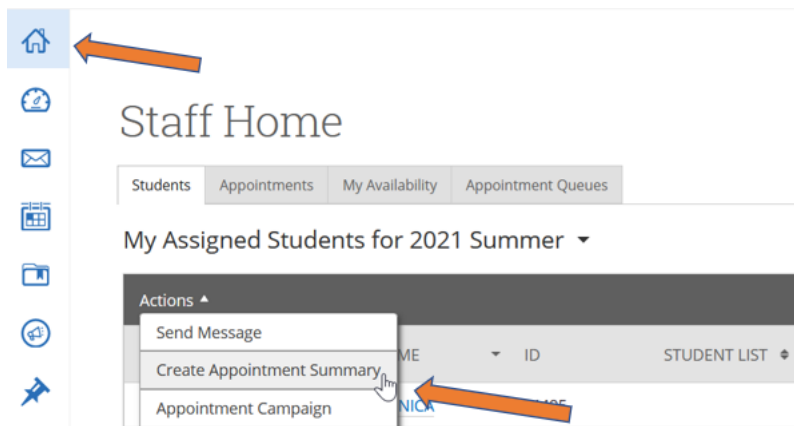


Creating an Appointment Report

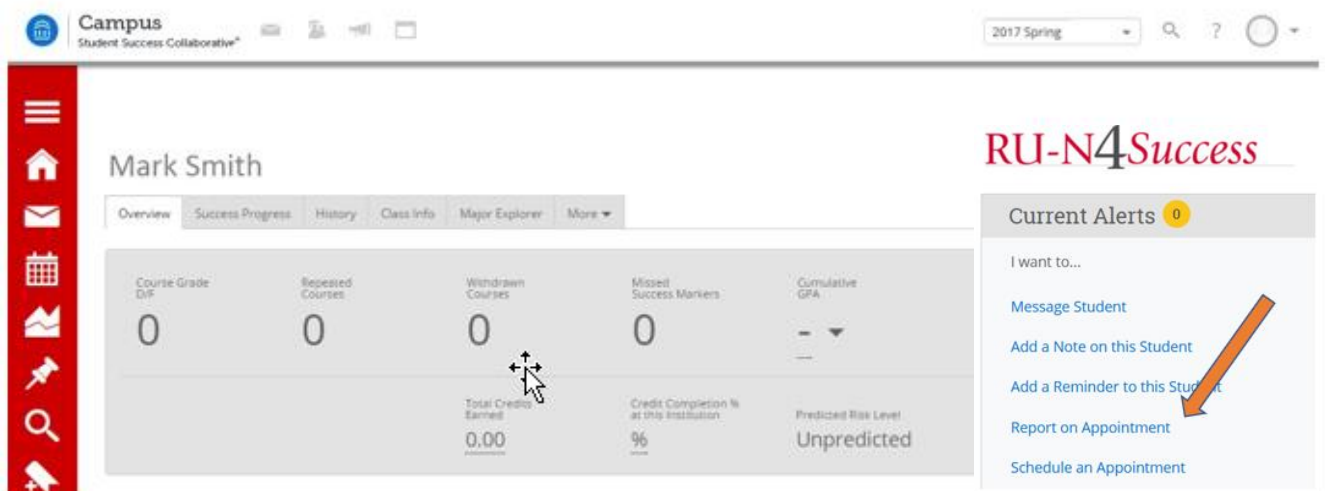


Every time that you have a substantive meeting with a student (i.e. a face-to-face, phone, or email encounter in which you give advice or prescribe action), you should create an Appointment Report to record the details and make the information available to colleagues who may be working with the same student.

1. From your home screen (house icon), highlight the student's name and click Create Appointment Summary.



Another option is to go to the student's main profile page, click on **Report on Appointment**



2. Complete the form that opens. The fields along the left side (items a-f below) allow for an office or department to do summary reporting across many students. The fields on the right side (fields g-i) give specific details about the content of the appointment.
 - a. Select **Care Unit** from the drop down menu.
 - b. Select **Location** (your office or department location, or 'virtual' for remote meetings).
 - c. Select the type of **Service**.
 - d. If the report is about a specific **course**, you can select it from the Course drop down menu.
 - e. Select the **Meeting Type** (email, in person, phone, or video conference).
 - f. Make sure the **Date** of your meeting as well as **Start and End Time** is correctly populated.
 - g. Add **Student's Cell Phone #** if it is not on their profile page.
 - h. Type your notes in the **Appointment Summary** area. *This information can be seen by other staff members and should relate to the student questions and concerns, as well as the actions that have been or will be completed by all parties.*
 - i. **Attach** any documents that need to be saved to this report.

3. Click on **Save this Report**

APPOINTMENT REPORT FOR TEST A TEST A
— ×

Appointment Details

Care Unit
 x

Location

Service

Course

Meeting Type

Date of visit

Meeting Start Time to Meeting End Time

All times listed are in Eastern Time (US & Canada).

Summary Details For TEST A TEST A

Student's Cell Phone #:

Referred student to:

Student arrived on time and was ready to begin our session. Yes No N/A

Student requires a follow-up appointment. Yes No N/A

Referred student to academic department to discuss major/second concentration. Yes No N/A

This student's questions/concerns were addressed during this appointment. Yes No N/A

Appointment Summary

Attachments

Attach File

No file selected.

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.