

## Appointment Reports

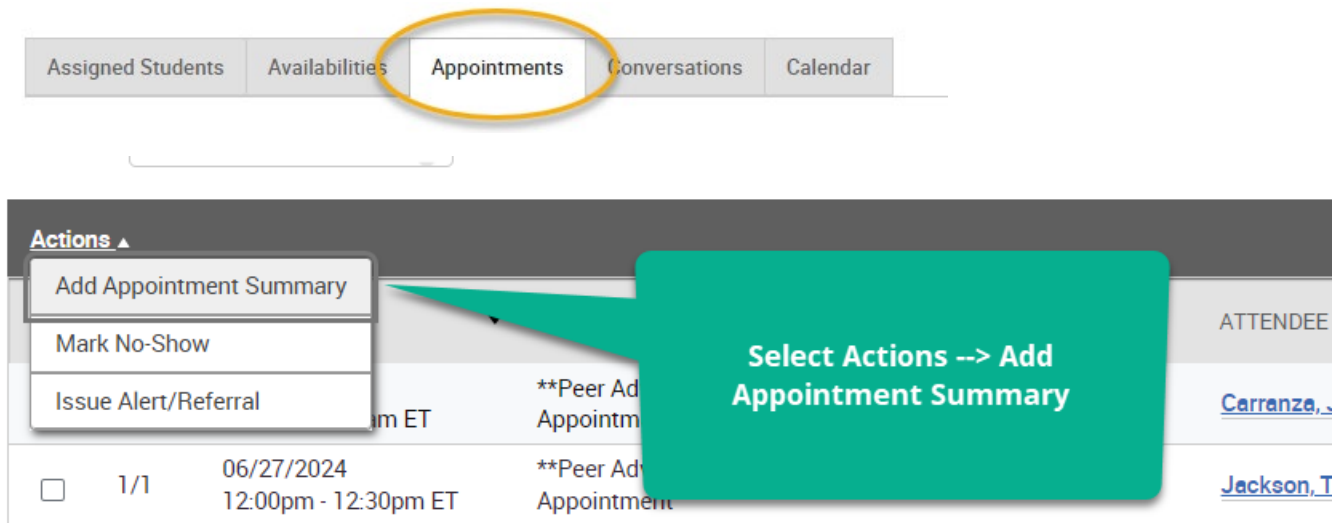
Appointment Reports are summaries of student interactions that are attached to the student's history for staff and faculty to view\*. Students cannot see Appointment Summaries. Follow these instructions to ensure you are filing reports – either for pre-scheduled appointments or drop-ins (see Pg. 4).

\*Appointment reports for the following areas are restricted and not viewable to others: Ombuds office; Offices of the President, VPs, and Deans

### Reporting on a pre-scheduled appointment

**\*\*Important – for prescheduled appointments you must follow this process. Do NOT file a report directly through the Student's Profile.\*\***

1. From the Appointments tab, select Action → Add Appointment Summary



|                          | Assigned Students | Availabilities                     | Appointments             | Conversations | Calendar                                |
|--------------------------|-------------------|------------------------------------|--------------------------|---------------|---|
| <b>Actions</b>           |                   |                                    |                          |               |   |
| <input type="checkbox"/> | 1/1               | 06/27/2024<br>12:00pm - 12:30pm ET | **Peer Ad<br>Appointment |               | ATTENDEE<br><a href="#">Carranza, S</a> |
| <input type="checkbox"/> | 1/1               | 06/27/2024<br>12:00pm - 12:30pm ET | **Peer Ad<br>Appointment |               | <a href="#">Jackson, T</a>              |

**\*\*You can also mark the Appointment as a no show**

Next page...

## 2. Complete the Appointment Report and Save

Care Unit  
Advising & Career

Career Goals

Need to follow-up ☐ Yes ☐ No ☐ N/A

Location  
Peer Advisor Academy

Service  
\*\*PEER ADVISING APPOINTMENT X CAREER X  
TRANSFER X  
Select Service

Course  
Start typing to search

Meeting Type  
IN-PERSON X  
Select Meeting Type

Date of visit  
06/28/2024

Appointment Summary  
Paragraph  
Student wanted to discuss... encouraged student to... discussed transferring...

Attachments  
Attach File  
Choose File No file chosen

Find the correct Location to ensure your report is linked to the right office

Add internal Service tags if applicable

Enter your meeting notes

POWERED BY CKEditor

Meeting Type  
VIRTUAL (ZOOM, TEAMS, ETC.) X  
Select Meeting Type

☐ Email  
☐ In-person  
☐ Live Chat (SIC only)  
☐ Phone  
☐ Texting  
☒ Virtual (Zoom, Teams, etc.)

Appointment Summary  
Paragraph B I @ := v 1= v

Select the Modality/Meeting Type - When completing a report, only one type should be selected

Cancel

Save this Report

Don't forget to Save this Report!

Under Recent Appointments, see if you filed a report or if you still need to complete

| Show Cancelled |                                |        |                                |                         |
|----------------|--------------------------------|--------|--------------------------------|-------------------------|
| COMMENT        | ATTENDEE                       | TIME   | REPORT FILED?                  | DETAILS                 |
|                | <a href="#">Carranza, Jose</a> | 30 min | <a href="#">Report Details</a> | <a href="#">Details</a> |
|                | <a href="#">Jackson, Terry</a> | 30 min | Not Yet.                       | <a href="#">Details</a> |

If your front desk checks students in using the Appointment Center or Kiosk, you will receive a notification at the top of the screen notifying you. As an alternative to the process above, you can open the Appointment Report through the Appointment Queue.

The screenshot shows the top navigation bar with icons for a person, an envelope, and a document. Below this is the 'Appointment Queue' section. A callout box points to the 'Start Appt' button. A green callout box contains the text: 'By clicking Start Appt you will open up the Appointment Report'.

Appointment Queue

[Jose Carranza](#) [Start Appt](#)

(Current wait: 0 min)

ly Availability Appointment Queues

Term: 2024 Spring Term Relationship Types

## Reporting on a drop-in appointment

1. Go directly to the Student Profile and select Report on Appointment to open an Appointment Report. Follow the steps above to complete the report.

