

## Creating Appointment Summary After a Scheduled Appointment

The Staff Home screen lists “Upcoming Appointments” and “Recent Appointments.” These are appointments that have been scheduled using the app and need to have appointment summaries associated with them.

Oksana Anderson (staff) ▾

Assigned Students | Availabilities | Appointments | Conversations | Calendar

### Upcoming Appointments

Care Unit: All care units ▾

Actions ▾	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	10/29/2020 9:00am - 9:30am ET	Student, Sample	9:00am - 9:30am ET	Pre-registration advising		Not Yet.	Details

### Recent Appointments

Care Unit: All care units ▾

Actions ▾	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	10/07/2020 11:30am - 12:00pm ET	Pre-registration advising	N/A	Kenya Benton: I want to discuss the Math requirement.	Benton, Kenya	30 min	Not Yet.	Details
<input type="checkbox"/>	10/07/2020 11:00am - 11:30am ET	Academic Standing	N/A		Baxley, Zackary	30 min	Report Details	Details
<input type="checkbox"/>	10/07/2020 10:00am - 10:31am ET	Pre-registration advising	N/A		Benton, Kristen	1 min	Report Details	Details

To create an appointment summary for a scheduled appointment, click the check box next to the appointment, and then click the “actions” arrow to add an appointment summary.

Upcoming Appointments

Care Unit: All care units ▾

Actions ▾	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	10/29/2020 9:00am - 9:30am ET	Student, Sample	9:00am - 9:30am ET	Pre-registration advising		Not Yet.	Details

### Recent Appointments

Care Unit: All care units ▾

Actions ▾	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	Pre-registration advising	N/A	Kenya Benton: I want to discuss the Math requirement.	Benton, Kenya	30 min	Not Yet.	Details
<input type="checkbox"/>	Academic Standing	N/A		Baxley, Zackary	30 min	Report Details	Details

Actions ▾

- Add Appointment Summary
- Mark No-Show
- Issue Alert

Click on “Add Appointment Summary” to report on the details of your advising session.

APPOINTMENT REPORT FOR KENYA BENTON

### Appointment Details

Appointment: 10/07/2020 11:30am - 12:00pm ET - Pre-registratio...

Appointment Campaign: [Empty]

Care Unit: Advising

Location: My Advisor's Virtual Office

Service: Pre-registration advising

Course: Start typing to search all courses

Meeting Type: Select Meeting Type

Date of visit: 10/07/2020

Meeting Start Time: 11:30am to Meeting End Time: 12:00pm

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

### Attendees

- Oksana Anderson**  
Advisor, Professor  
 Attended
- Kenya Benton - [Redacted]**  
Sophomore  
Psychology Trans Pathway  
 Attended

### Summary Details For Kenya Benton

Objectives of the Session: [Empty]

Barriers Delaying Academic Progress: [Empty]

Degree Progress: [Empty]

Goals for Next Session/Next Steps: [Empty]

Student is on track to graduate on time.  Yes  No  N/A

Student has discussed possibility of transferring/disenrolling.  Yes  No  N/A

Student came prepared to meeting.  Yes  No  N/A

Referral made to tutoring.  Yes  No  N/A

Student shared personal or financial concerns.  Yes  No  N/A

### Appointment Summary

**B I** [List Icons] Paragraph [Undo] [Redo]

[Empty Text Area]

### Attachments

Attach File  
Choose File No file chosen

The appointment summary template is used as a data collection and recordkeeping tool, so it is important to complete one for each advising session.

For information on appointment summaries, adding availability, and requesting students schedule an appointment, you can view the video here:

<https://eab.zoom.us/rec/share/pQiWa2ywc2mSEt6-7N1IX3u9UOUwPAOw6q7530Ht8QpK4Do9pM8PjZ4YkiNJ4c6t.nZ8sDB2E3f8WUFAg>

Passcode: =kSgkr?8

**Please feel free to contact Brandi Elliott if you have questions about adding appointment summaries.**