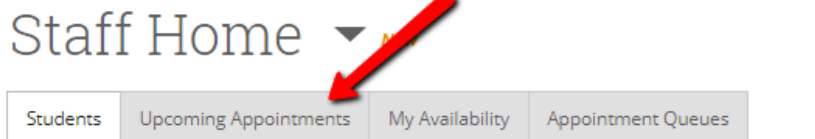
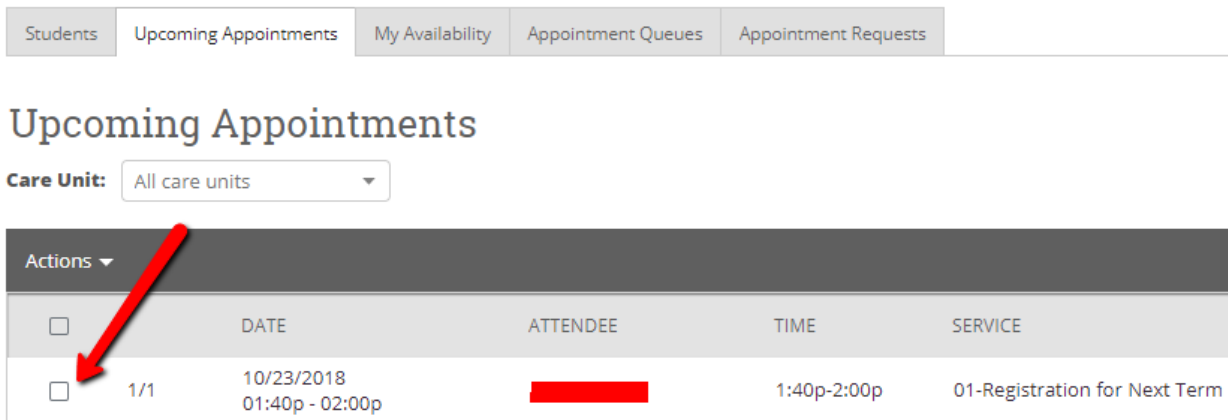


Adding Appointment Summaries from the Staff Home for Students with an Appointment (For Offices not using a Kiosk or the Appointment Center)

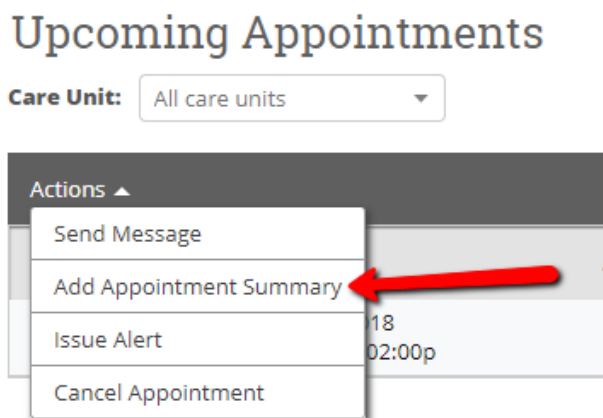
(1) To add an Appointment Summary (i.e., to check a student into an appointment), click on the Upcoming Appointments tab.



(2) Select the box next to the appointment you want to add an Appointment Summary for/Check in.



(3) Under Actions, click on the “Add Appointment Summary” option (or you can cancel the appointment if needed).



(4) Once you select the “Add Appointment Summary” action, the Appointment Report for the student opens. Fill out the Meeting Type by clicking on the selection in the drop down. Fill out the Appointment Summary area with notes from your appointment.

Note. If the student did not choose the correct “service” you can change that here. If you need to add an attachment, you can add that here.

Note. BEST PRACTICE: If adding an attachment, please put Attached: (what the document is) as your first line in the appointment summary and then begin your notes on Line 2. This makes it easier to find later. (e.g., Attached: Plan of Study)

The screenshot shows a web form with two main sections: "Appointment Details" and "Appointment Summary".

- Appointment Details:** Includes dropdowns for Appointment (10/23/2018 1:40p-2:00p - 01-Registration for Next ...), Care Unit, Location, Service (01-Registration for Next Term), Course (Start typing to search all courses), Meeting Type (Select Meeting Type), and Date of visit (10/23/2018).
- Attendees:** Includes a redacted name, a checked "Attended" checkbox, and time input fields for Arrived (1:53pm) and Departed.
- Attachments:** Includes an "Attach File" button and a "Choose File" button with the text "No file chosen".
- Appointment Summary:** A large text area with a rich text editor toolbar (B, I, bulleted list, numbered list, link, unlink, undo, redo).

Red arrows in the image point to the Service dropdown, Meeting Type dropdown, Attach File button, and the "Attended" checkbox.

(5) Appointment Arrived and Department times are auto filled with the time you open the Report on Appointment and the time you save the Report on Appointment. If you need to alter them, please alter both yourself and the student’s times.

Arrived 1:53pm Departed 2:06pm

(6) When you are done, click the “Save this Report” button.

Save this Report