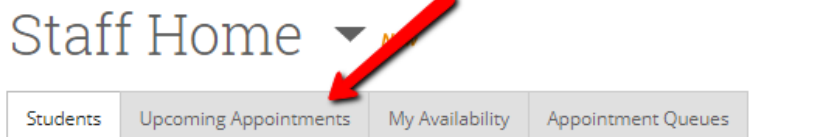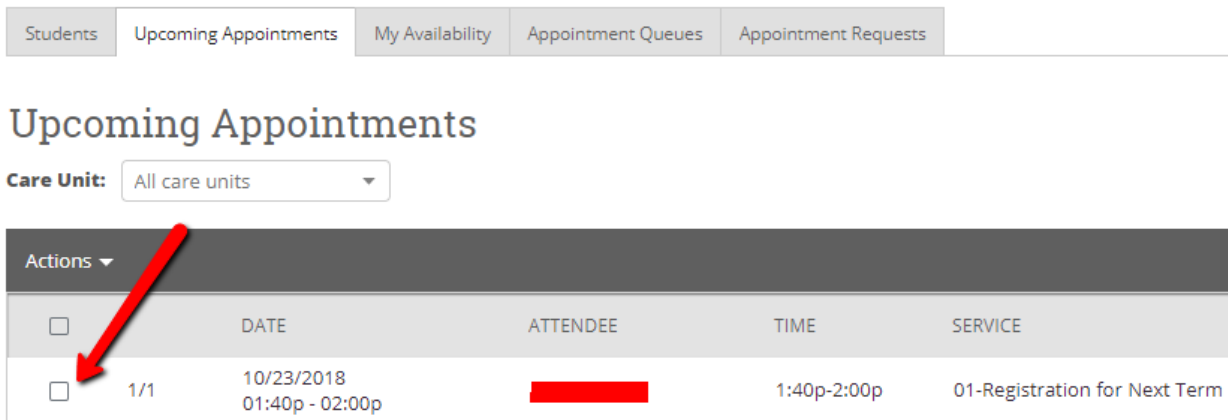# Adding Appointment Summaries from the Staff Home for Students with an Appointment

(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.
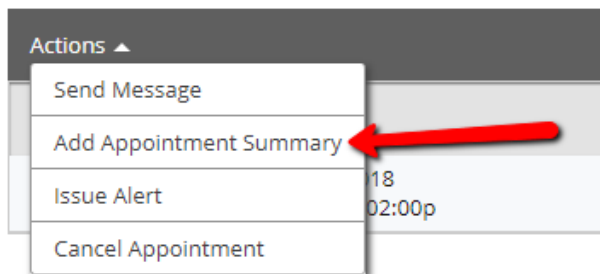

(2) Select the box next to the appointment you want to add an Appointment Summary for/Check in.

(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)

(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.

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