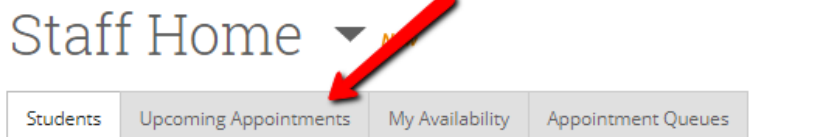
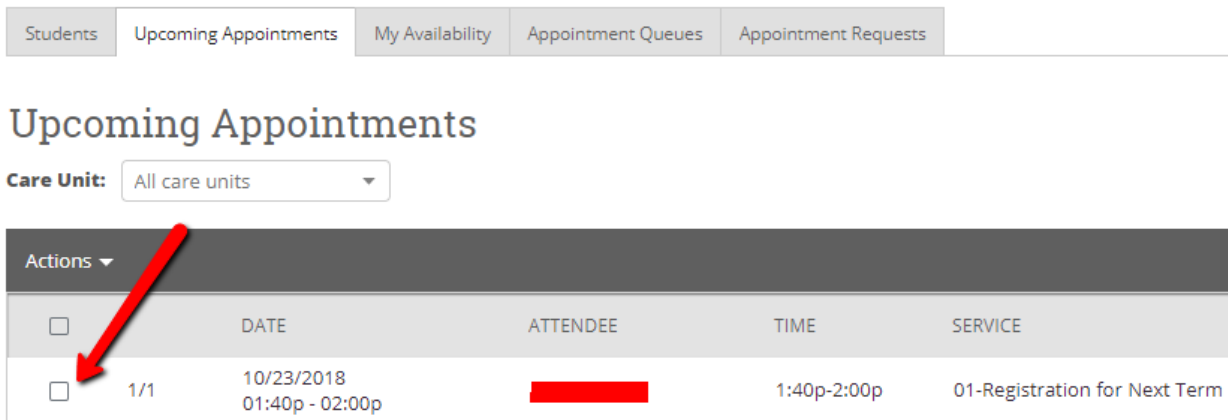


# Adding Appointment Summaries from the Staff Home for Students with an Appointment (For Offices not using a Kiosk or the Appointment Center)

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



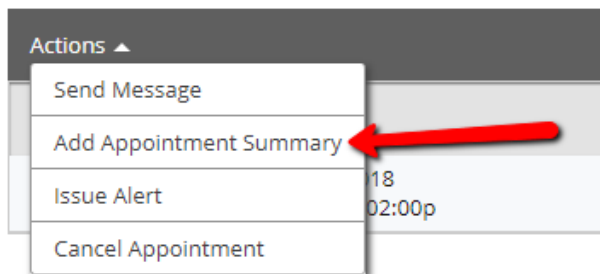
(2) Select the box next to the appointment you want to add an Appointment Summary for/Check in.



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

## Upcoming Appointments

Care Unit: All care units



(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" on the left and "Appointment Summary" on the right. The "Appointment Details" section includes dropdown menus for "Appointment" (10/23/2018 1:40p-2:00p - 01-Registration for Next ...), "Care Unit" (1- Campus Appointments), "Location" (ENG:Aerospace & Mechanical Engineering (2620 H...)), "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). Below this is the "Attendees" section with a redacted name, a checked "Attended" box, and "Arrived" (1:53pm) and "Departed" (empty) time fields. The "Appointment Summary" section is a large text area with a rich text editor toolbar (B, I, bulleted list, numbered list, link, unlink, undo, redo). Below the text area is the "Attachments" section with "Attach File" and "Choose File" buttons, and the text "No file chosen". Red arrows point to the "Service" dropdown, the "Meeting Type" dropdown, the "Attach File" button, and the "Attendees" section.

(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