



Reporting on a Non-Advising Appointment

There might be a situation where you meet with a student or communicate over e-mail, and you want to document the interaction. These are the steps on how to do that.

Step 1:

At the top of Runner Connect, there is a search bar. You can enter a student's ID number, Net ID, or CSUB email address to look up a student.

- **NOTE:** Some students who work on campus as a student assistant might show up as an "advisor" when searching for them. You will be able to change their home page after clicking on their name.

A search bar with a magnifying glass icon on the left and a close button on the right. Below the search bar, two search results are displayed: (*1285) (advisor) and (*1924) (student). A red arrow points to the first result.

Step 2:

On the student's profile, there will be an "Options" section on the right-hand side underneath the student's picture. Click on "Report on Appointment".

A screenshot of the 'Options' section on a student profile. The section is titled 'Options' and contains the text 'I want to...'. Below this text are four links: 'Message Student', 'Add a Note on this Student', 'Add a To-Do to this Student', and 'Report on Appointment'. A red arrow points to the 'Report on Appointment' link.

Step 3:

The Appointment Report will appear. The appointment details will **not** be pre-filled in. You will need to fill in the Appointment Details:

- **Care Unit**
- **Location**
- **Service**
- **Course (Optional)**
- **Meeting Type**
- **Date of Visit**
- **Meeting Start Time**
- **Meeting End Time**

A screenshot of the Appointment Report form. The form is divided into two main sections: 'Appointment Details' and 'Appointment Summary'. The 'Appointment Details' section contains several dropdown menus: 'Care Unit' (with 'Select Care Unit' text), 'Location' (with 'Select Location' text), 'Service' (with 'Select Service' text), and 'Course' (with 'Start typing to search all courses' text). Below these are 'Meeting Type' (with 'Select Meeting Type' text) and 'Date of visit' (with '09/05/2023' text). At the bottom of this section are 'Meeting Start Time' (with '3:45pm' text) and 'Meeting End Time' (with a blank text box). The 'Appointment Summary' section contains a large text area for writing the report. Below the text area is a small information icon and a message: 'An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.' A red arrow points to the 'Report on Appointment' link in the previous screenshot.

NOTE: While not required, it can be helpful to write what happened during your appointment with the student in the Appointment Summary box. It can also help other faculty and/or advisors know what happened during your appointment. For guidelines on what to write and what not to write. Read the Guidelines for Appointment Summaries.

Step 4:

Click "Save this Report".

Cancel

Save this Report



Step 5:

You will see that your report has been filed on your Recent Appointments section under your Appointment tab.

<input type="checkbox"/>	1/1	08/16/2023 2:00pm - 3:00pm PT	First Time, First Year Student Advising	N/A	60 min	Report Details	Edit
<input type="checkbox"/>	1/1	08/15/2023 4:30pm - 5:00pm PT	Check/Verify my Schedule	N/A	30 min	Report Details	Details
<input type="checkbox"/>	1/1	08/15/2023 1:30pm - 2:00pm PT	I need an Education/Academic Plan/Outline	N/A	30 min	Report Details	Details
<input type="checkbox"/>	1/1	08/15/2023 1:00pm - 1:30pm PT	Add/Drop Courses to my Schedule	N/A	30 min	Report Details	Details



Quick Tips:

- Appointment Reports made from appointments students scheduled in Runner Connect will show in Activity Reports as "Scheduled".
- Appointment Reports made from you manually adding an appointment report (Report on Appointment) will show in Activity Reports as "Drop-In".