



Reporting on an Advising Appointment

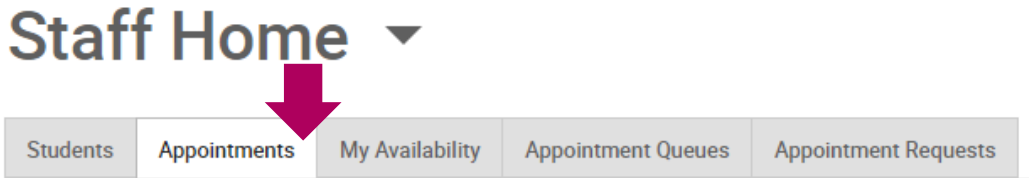
Step 1:

Make sure your home page is set to "Staff Home". If is not set on your "Staff Home" you can change it by clicking on the down arrow and choosing "Staff Home".



Step 2:

Click on your "Appointments" tab.



Step 3:

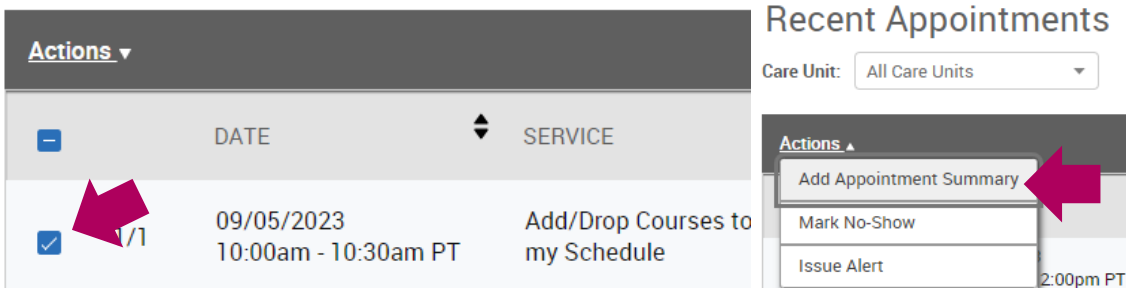
Scroll down until you see your "Reporting" section.

Reporting



Step 4:

Check the box on the left hand side of the student you want to make a report on. Click on "Actions" and then click on "Add Appointment Summary".



Step 5:

The Appointment Report will appear. The appointment details will be pre-filled in.

- **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.

APPOINTMENT REPORT FOR _ X

Appointment Details

Am I On-Track to Graduate
09/05/2023 11:30am - 12:00pm PT

Care Unit
Advising

Location
Arts and Humanities Student Center

Service
AM I ON-TRACK TO GRADUATE

Course
Start typing to search all courses

Meeting Type
IN PERSON/ON CAMPUS MEETING

Date of visit
09/05/2023

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

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

Summary Details For

Student Supports Discussed

Referrals Made

Session Objectives

Follow-ups Needed

Student Arrived on Time Ready to Start the Session Yes No N/A

Student brought necessary documents (Academic Worksheet, necessary forms, etc) Yes No N/A

Student enrolled in 15+ units in current term Yes No N/A

Student on track to complete 2/4 year graduation Yes No N/A

Appointment Summary

B I | | | | Paragraph

Attachments

Attach File

Choose File No file chosen

Step 6:

Click "Save this Report".

Cancel Save this Report

Step 7:

On your Recent Appointments section under your Appointment tab, you will see that your report has been filed.

<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	Details
<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

*** What if a student makes an appointment and doesn't show up? ***

Step 1:

Scroll down until you see your "Reporting" section.

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All Care Units

Actions Show Cancelled

Step 2:

Check the box on the left hand side of the student you want to make a report on. Click on "Actions" and then click on "Mark No-Show".

	DATE	SERVICE
<input checked="" type="checkbox"/>	09/05/2023 10:00am - 10:30am PT	Add/Drop Courses to my Schedule

Step 5:

The Appointment Report will appear. Under "Attendees", it will automatically have the Attended box unchecked. This signifies that the student did not attend the appointment.

Attendees

Advisor, Professor, Student, Tutor

Attended

Junior Communications - BA

Attended

Step 6:

Click "Save this Report".

Cancel **Save this Report**

Step 7:

On your Recent Appointments section under your Appointment tab, you will see that your report has been filed.

	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	09/06/2023 2:30pm - 3:00pm PT	I need an Education/Academic Plan/Outline	N/A			30 min	NO SHOW	Details