How to Create an Appointment Summary

To record the details of an advising appointment or other interaction with a student, document your visit by creating a **Report on Appointment** (also called **Appointment Summary** and **Appointment Report**). These reports capture the most data for your office or department. For support centers using a front desk or kiosk for appointment sign-in or drop-in queues, this action is required to clear the student from that queue.

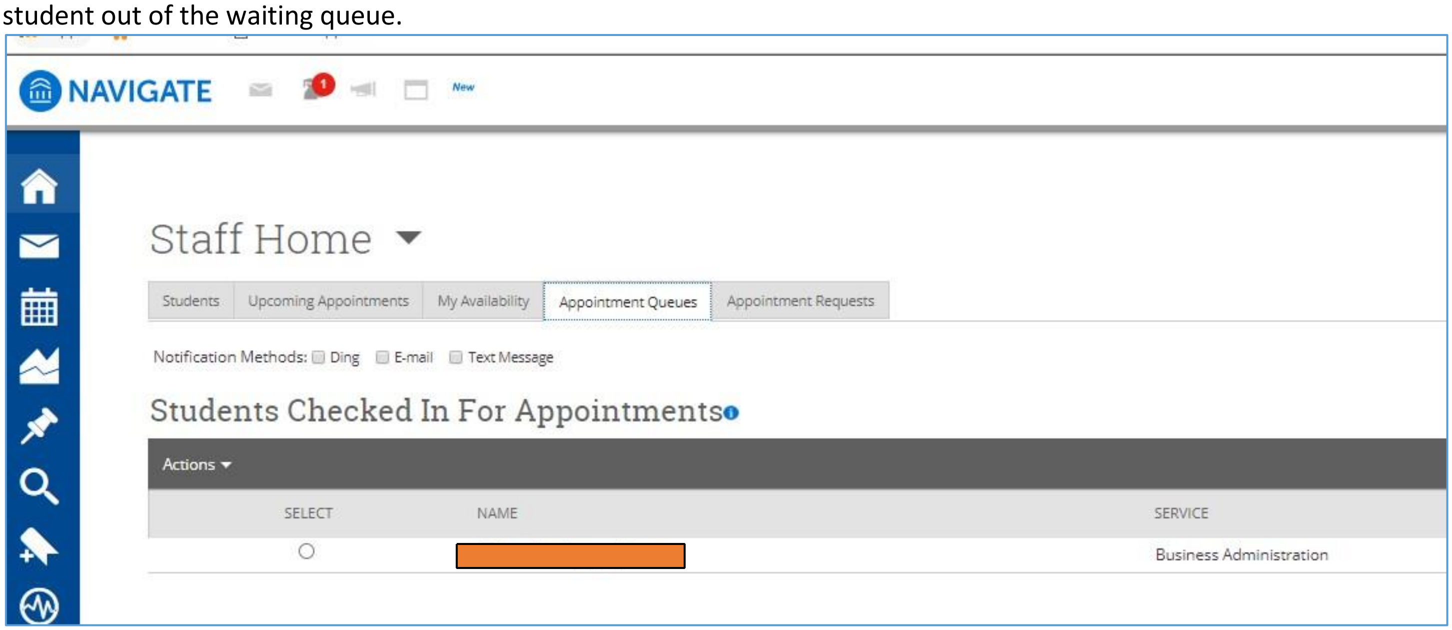
Campus Connect can be confusing as we use both **Appointment Summaries** and **Notes**, and both are contained on the Reports/Notes tab on a student profile. We upload DegreeWorks notes nightly into the Campus Connect **Notes** section. **Appointment Summaries** are live – they are available immediately in the platform. Appointment Summaries are **not** visible to the student – but they are visible to any other user on campus who has the appropriate-level role. Keep in mind that this is a student record and may be subject to open records requests under the Freedom of Information Act.

Appointment Summaries can be initiated or "started" in a number of different ways – from the Appointment Queues or Upcoming Appointments tabs, or for an ad-hoc visit or documentation, although they are completed basically the same.

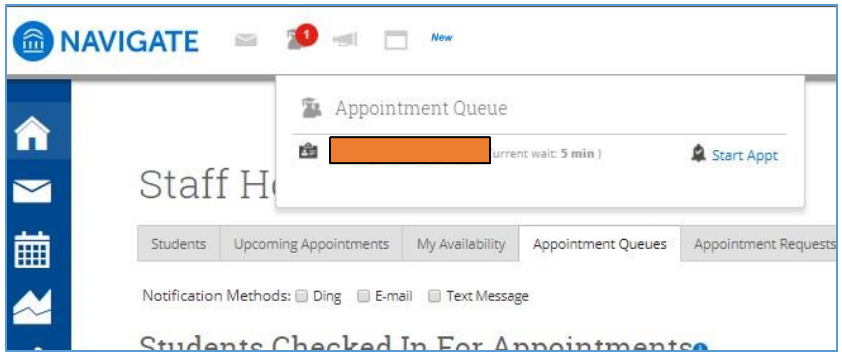
One final note/reminder: *Campus Connect is optimized for use with **Chrome** as the browser.*

From the Appointment Queues Tab

From your **Staff Home** page > **Appointment Queues** tab, you can see a list of students checked in for appointments specifically with you, as well as for drop-ins and with other advisors in your Location. In the **Students Checked In For Appointments** section, select the radio button to the left of the student's name, then from the **Actions** drop-down menu in the dark grey bar, select **Start Appointment**. This opens the Appointment Report popup window and takes the student out of the waiting queue.



You can also open the **Appointment Queue** icon in the top bar of the screen (student with a cap and gown) and then select the **Start Appt** link to the right of the student's name. This will also open up the **Appointment Report** in a popup window and clear the student from the queue.



Regardless of how you opened it, closing out of the **Appointment Report** without saving it will put the student back in the queue.

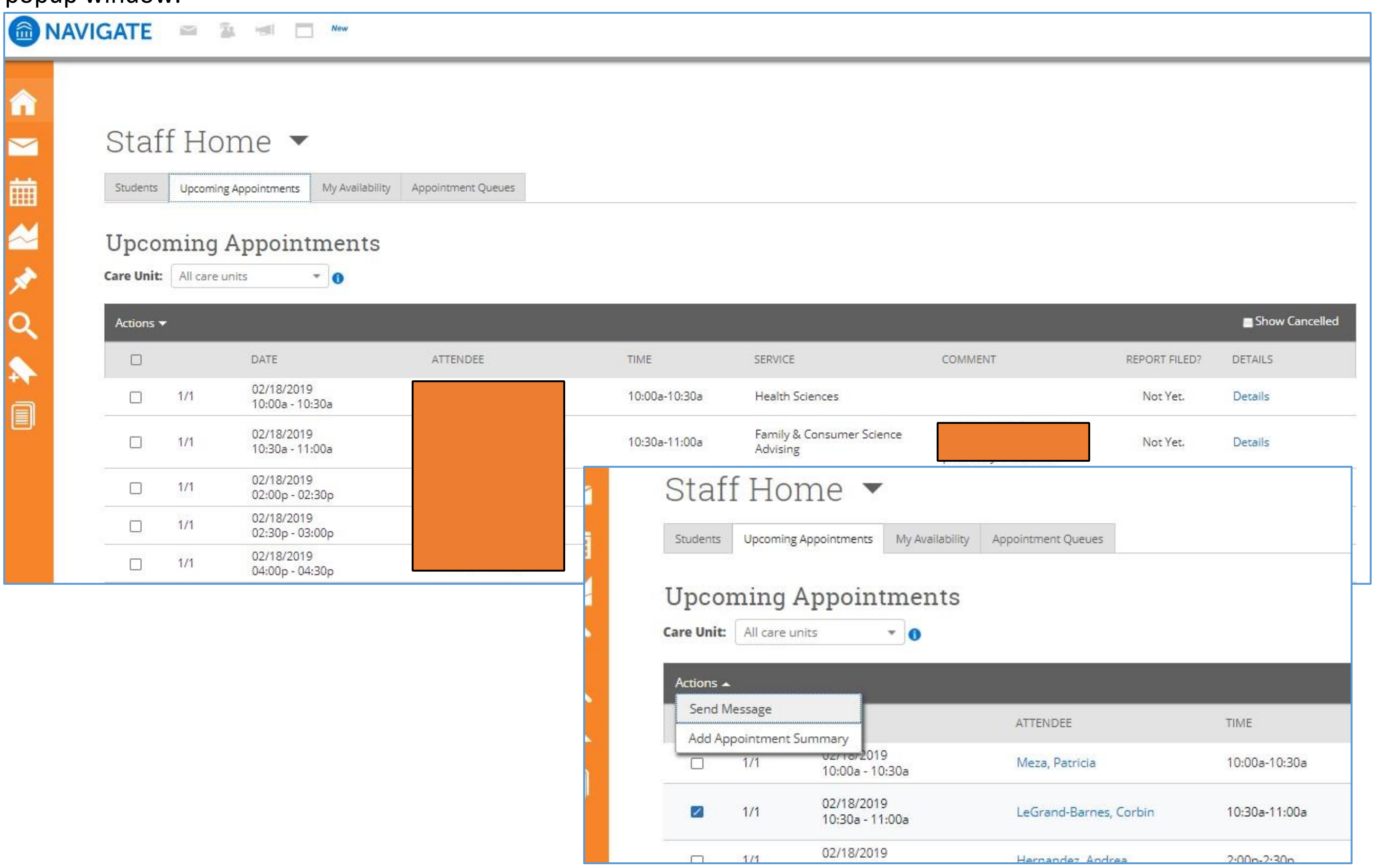
For support centers that might have longer queues, ***working from the Appointment Queue icon is <u>not ideal</u>,*** especially as these queues can get quite long and may not refresh quickly enough.

From the Upcoming Appointments Tab

For those seeing students with scheduled appointments outside of a support center or without a check-in front desk or kiosk, there is a slightly different way to access the **Appointment Summary**.

In this case, from your **Upcoming Appointments** tab found on your Staff home page you should see a list of students who have upcoming appointments with you. However, as soon as the appointment time starts, this appointment entry will move down the page to the **Reporting – Recent Appointments** section.

From either the **Upcoming** or **Recent** sections, select the checkbox to the left of the student's name, then from the **Actions** drop-down menu in the dark grey bar, select **Add Appointment Summary** to open the **Appointment Summary** popup window.

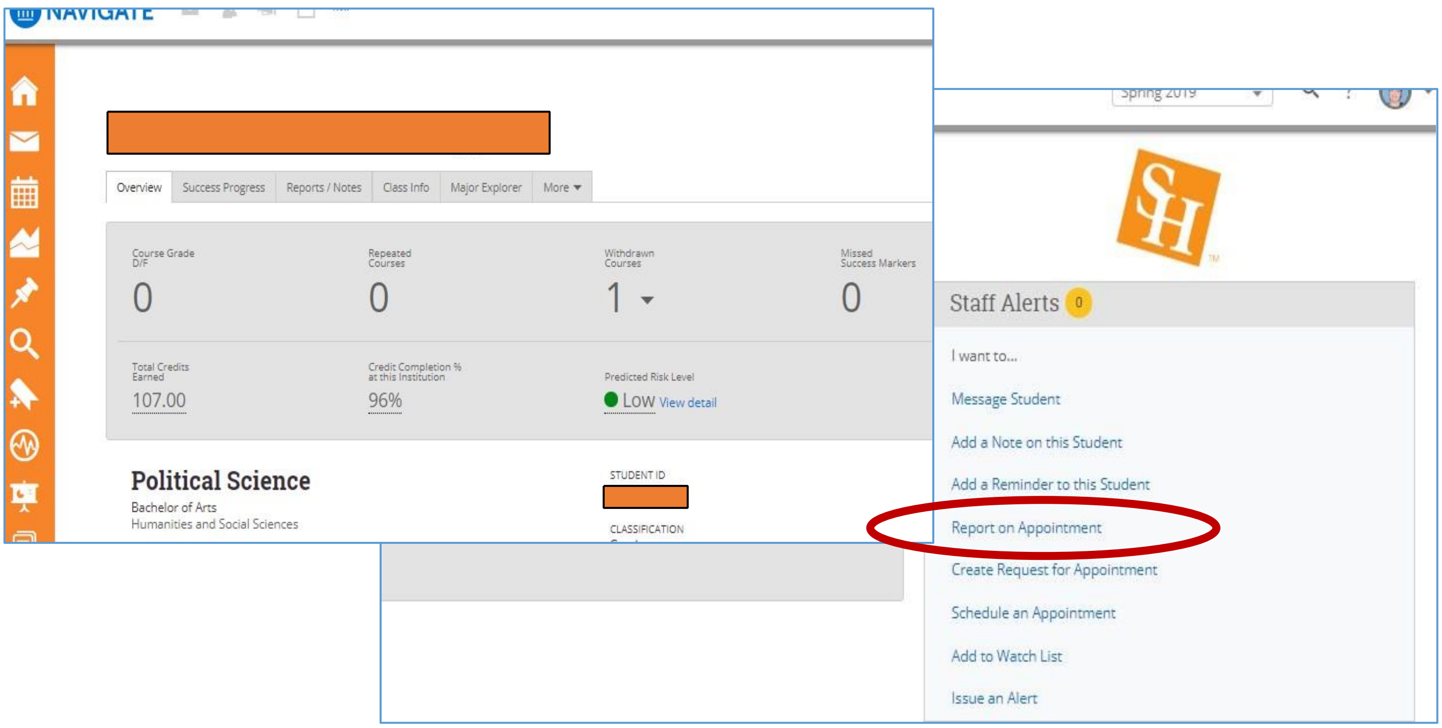


For an "Ad-Hoc" Interaction

(not logged as a drop-in or appointment)

To document an ad-hoc action, search for the student using the **Quick Search** bar at the top of the page on the right-hand side. As a reminder, you can search for a student using their Sam ID, name (using format first last), or user ID.

Select the student, then from their home page, select the **Report on Appointment** link from the right-hand menu. This opens the **Appointment Report** popup window. This differs only in that some of the required fields are not prepopulated as they would be if the student had checked in through a front desk or kiosk. You will need to select a **Care Unit, Location, Service** (as many as are appropriate), and **Meeting Type** options from the available drop-down menus.



Completing the Form

No matter the method you used to start an **Appointment Summary**, completing one is basically the same. Your center may require use of some template or standardized language; please check with your Center Administrator for details.

To complete an ad-hoc **Appointment Summary**, several items should be filled in. [The first three listed here—Care Unit, Location, and Service (or Reason) are pre-filled for students "checked in" at a front desk or kiosk.]

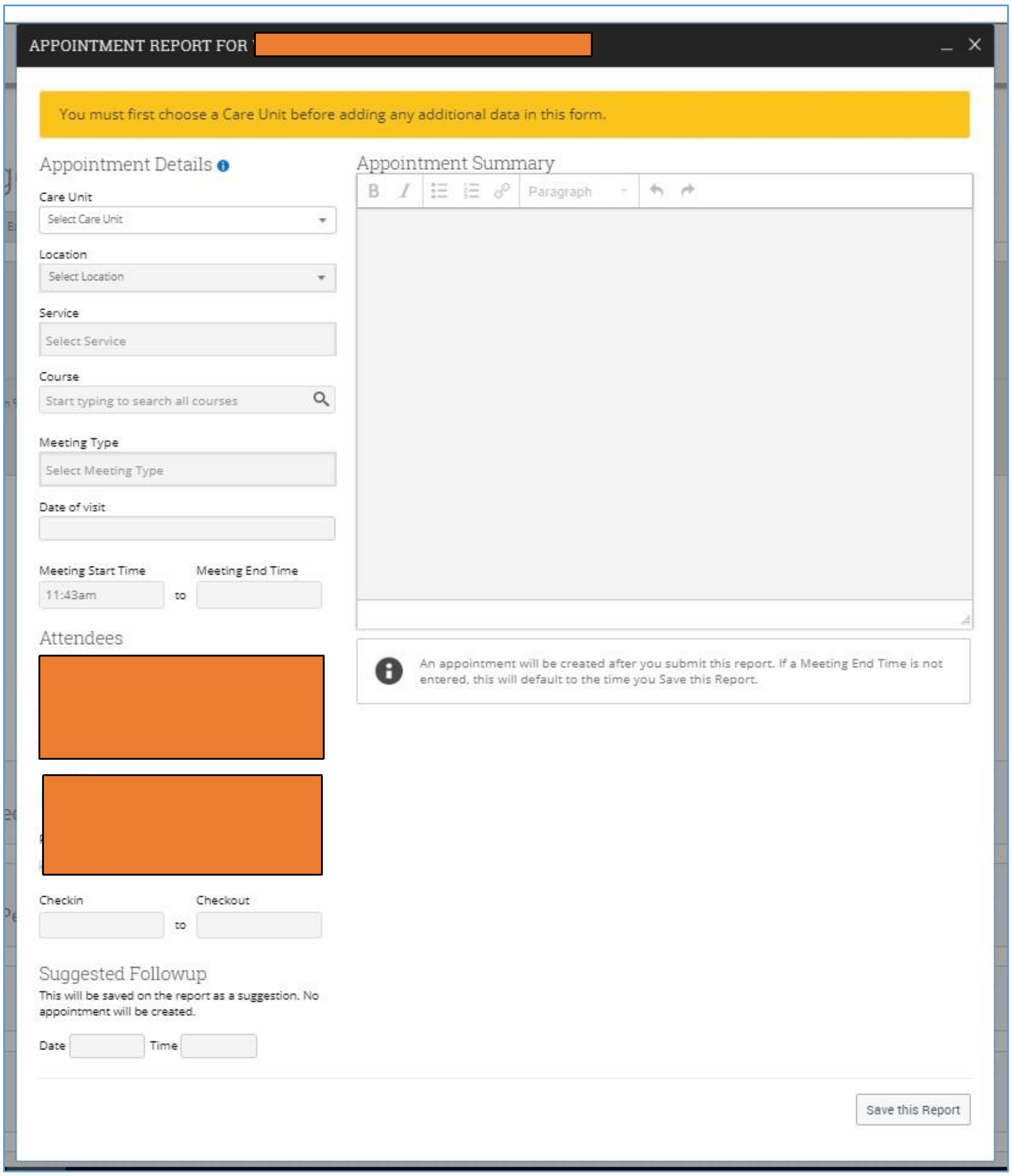
- **Care Unit**: [Required; also, must be selected in order to complete any other fields]
- **Location:** [Required]
- **Service:** [Required] Add appropriate services (reason(s)) to reflect your interaction with the student. You can select multiple reasons, and you can change the original reason if it does not apply.
- **Course**: You are able to select only one course from the student's current semester's schedule.
- **Meeting Type:** May be required by your center as part of their business processes. Options include: Email, Appointment, Drop-in, Online, Phone, Documentation, Video, or Referral. You would use "Documentation" if recording any actions taken on behalf of a student, whether or not there was a direct interaction with the

student. (For example, an Advisor may create an Appointment Summary indicating the student's records had been audited, and the results.)

- **Date of Visit**: [Required, but auto-populates]
- **Meeting Start/End Time**: These are auto-filled by Campus Connect when you start the appointment or open the report and when you **Submit** or **Save** the report.
- **Appointment Summary**: Your office/department may have required language or templates to use in completing this section; please check with your supervisor.

As these reports are live in the platform, you can now view it, as can other Advisors, on the specific student's Reports/Notes tab. However, once you **Save**, you cannot reopen and edit it!

Also, Appointment Summaries are not available to students; but they are available to all other personnel across campus. Students **can** see their advising notes created in DegreeWorks in Campus Connect – they're loaded nightly into the Notes section.



++++