

Staff users can fill out an Appointment Summary following an interaction with a student. Your institution can customize Appointment Summary questions to fit your needs for each Care Unit. Customizing Appointment Summary questions requires Administrator-level permissions.

APPOINTMENT REPORT FOR LOUIS HOLIDAY

Appointment Details

Transfer Orientation
09/25/2023 3:00pm - 3:30pm ET

Care Unit
Advising

Location
Select Location

Service
Select Service

Course
Start typing to search all courses

Meeting Type
SKYPE X
Select Meeting Type

Date of visit
09/25/2023

Meeting Start Time
3:00pm to Meeting End Time
3:30pm

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

Summary Details For Louis Holiday

Items Discussed

Areas of Concern

Follow up items for Advisor

Follow up items for Student

Student arrived on time and was ready to begin our session. Yes No N/A

Student came prepared with questions. Yes No N/A

Student presented a non-academic concern. Yes No N/A

Student indicated a lack of engagement on campus. Yes No N/A

Student is struggling with class attendance. Yes No N/A

Student is struggling with time management. Yes No N/A

Appointment Summary

B I Paragraph

To access the templates for your institution, go to **Administration > Appointment Summary Templates**.

Appointment Summary Templates

[Add a New Template](#)

[Academic Advising](#) ⓘ

[Tutoring](#) ⓘ

[Career Services](#) ⓘ

[Financial Aid](#)

[Veteran's Office](#) ⓘ

[Transfer Office](#) ⓘ

[Tutoring Care Unit](#)

Click **Add a New Template** to create a new template or click a template name to edit.

Creating Appointment Summary Templates

Click **Add a New Template** to get started if you are creating a new Appointment Summary Template.

Appointment Summary Templates > Add New Summary Tem...

General Settings

Name

Textbox Settings

Comments Box Label

Appointment Summary

Textbox 1 Visible

Textbox 1 Label

Assignments Discussed

Textbox 2 Visible

Textbox 2 Label

Objectives of the Session

Textbox 3 Visible

Textbox 3 Label

Study Skills Used

Textbox 4 Visible

Textbox 4 Label

Goals For Next Session

Checkbox Settings

Yes/No 1 Visible

Yes/No 1 Label

Student arrived on time and was ready to begin our session.

Yes/No 2 Visible

Yes/No 2 Label

Student was prepared (attended class, read lesson, had notes, etc.)?

Yes/No 3 Visible

Yes/No 3 Label

Student asked for explanation of material not understood?

Yes/No 4 Visible

Yes/No 4 Label

Student responded positively to instruction (as you suggested)?

Yes/No 5 Visible

Yes/No 5 Label

Student was aware of future assignments?

Yes/No 6 Visible

Yes/No 6 Label

Student shows a better understanding of the material since our last session.

Save

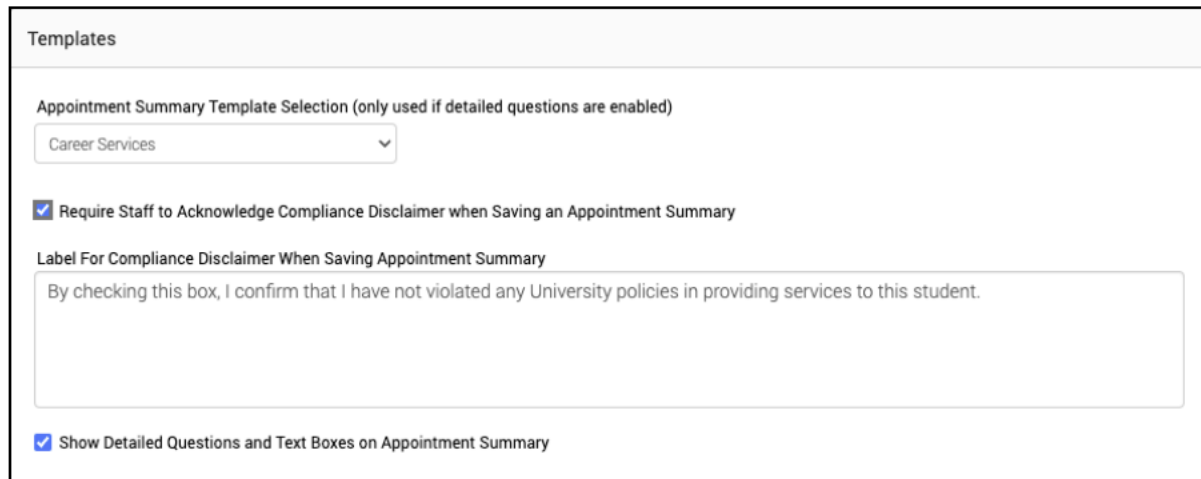
cancel

The fields you can customize are four open text boxes and six yes or no questions. You do not need to use all of the text boxes or yes/no checkboxes. To make a question active, check the **Textbox [#] Active** or **Yes/No [#] Visible** checkboxes and enter your custom text.

Once you have finished creating the questions, click **Save**.

Using Appointment Summary Templates

To use an Appointment Summary template, open a Care Unit and scroll to the **Templates** section of the Overview tab.



Templates

Appointment Summary Template Selection (only used if detailed questions are enabled)

Career Services

Require Staff to Acknowledge Compliance Disclaimer when Saving an Appointment Summary

Label For Compliance Disclaimer When Saving Appointment Summary

By checking this box, I confirm that I have not violated any University policies in providing services to this student.

Show Detailed Questions and Text Boxes on Appointment Summary

Choose the Appointment Summary Template from the dropdown for the Care Unit. Click **Save Settings** to save the changed Appointment Summary Template.