



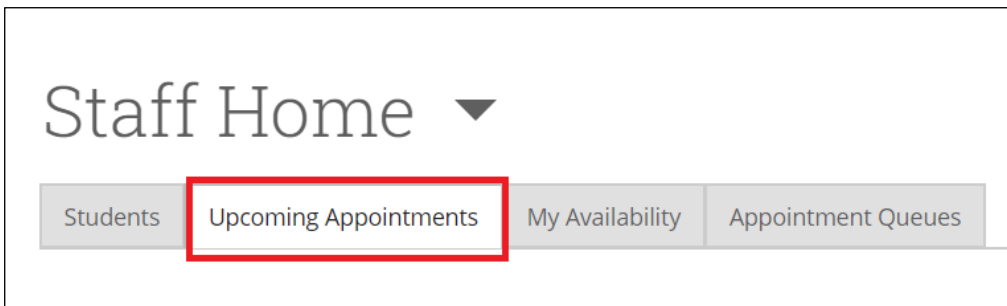
## Appointment Summaries Report \_ Batch

Date: 4/2/21

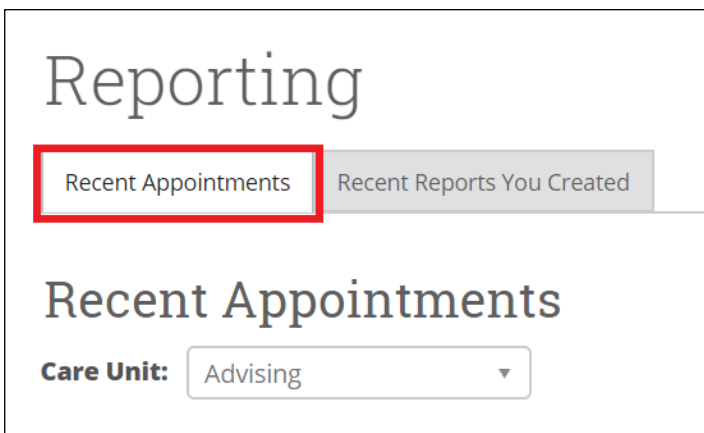
### OVERVIEW

Use Appointment Summary Report to complete attendance and summaries for group appointments, such as workshops, advising, and registration. Advisor can create batch appointment summaries from their Home page in two locations.

Select **“Upcoming Appointments”** tab on user’s home page



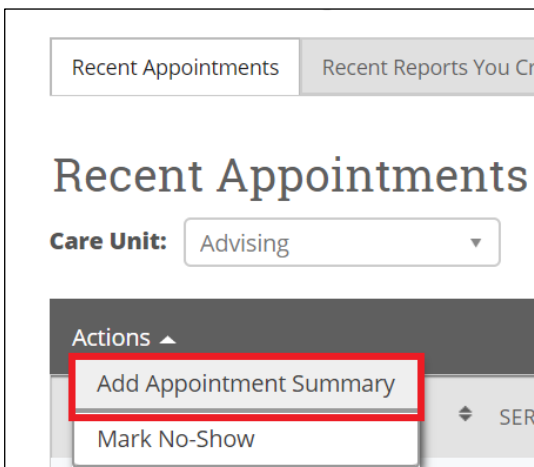
Then, select **“Recent Appointments”** tab on the bottom of page



**Select all the appointments you would like to make a batch appointment summary for**

Actions ▾			
<input checked="" type="checkbox"/>	DATE	↕	SERVICE
<input checked="" type="checkbox"/>	35/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	36/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	37/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	38/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	39/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	40/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	41/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	42/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	43/44	07/21/2020 12:33pm - 1:33pm PT	General Advising
<input checked="" type="checkbox"/>	44/44	07/21/2020 12:33pm - 1:33pm PT	General Advising

**Select “Add Appointment Summary” in drop-down for Actions**



Recent Appointments    Recent Reports You Cr

## Recent Appointments

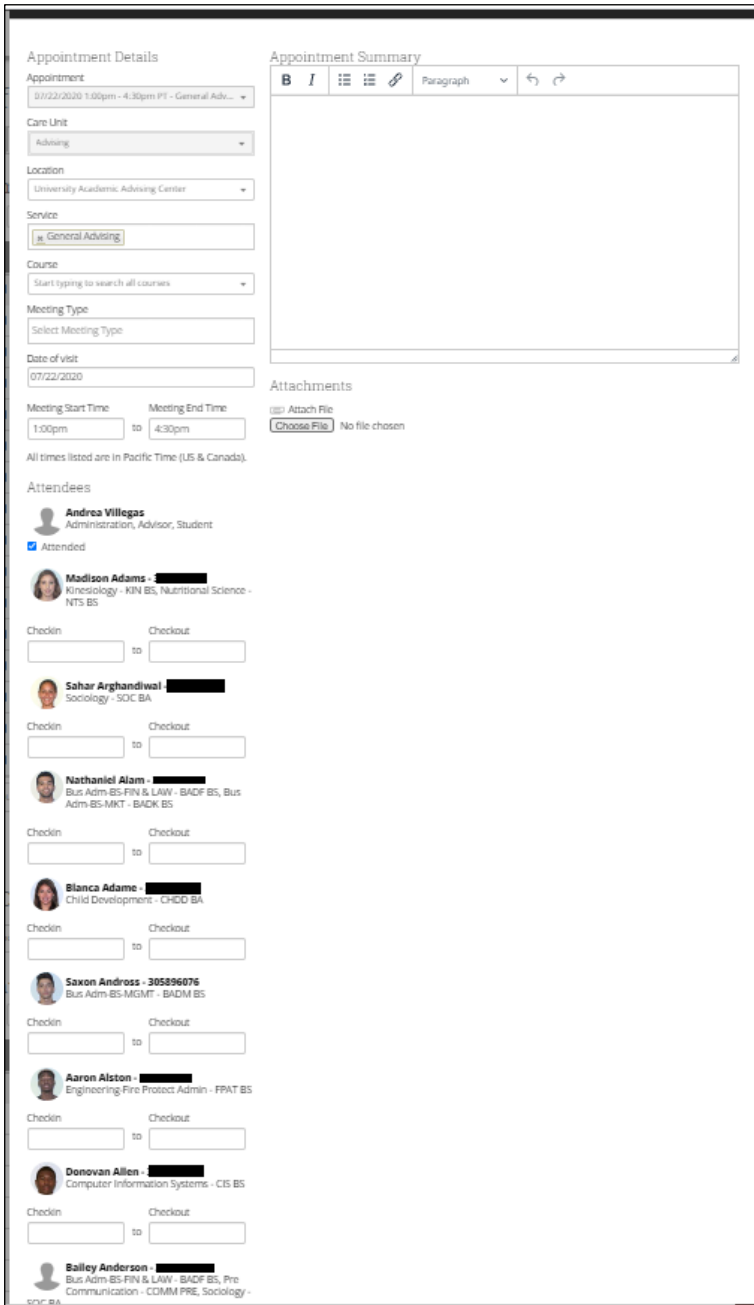
Care Unit: Advising ▾

Actions ▲

- Add Appointment Summary
- Mark No-Show

### All the student appointments selected will be visible in the batch appointment summary

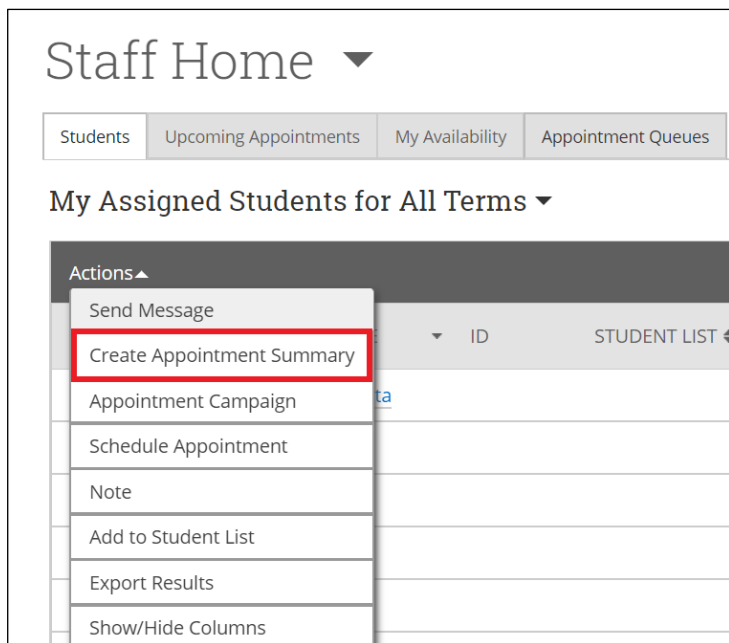
- All students will receive the same Appointment summary record
- Note: campaign summary reports will have additional fields to select



The screenshot displays the 'Appointment Summary' form. On the left, the 'Appointment Details' section includes fields for Appointment (07/22/2020 1:00pm - 4:30pm PT - General Adv...), Care Unit (Advising), Location (University Academic Advising Center), Service (General Advising), Course (Start typing to search all courses), Meeting Type (Select Meeting Type), Date of visit (07/22/2020), Meeting Start Time (1:00pm), and Meeting End Time (4:30pm). Below these are 'Attendees' listed with names, titles, and 'Checkin'/'Checkout' time slots. The 'Appointment Summary' area on the right is a rich text editor with a toolbar (B, I, bulleted list, numbered list, link, Paragraph, undo, redo) and a large text area. An 'Attachments' section at the bottom right shows an 'Attach File' button and a 'Choose File' button with the text 'No file chosen'.

## Batch Appointment Summary available on Staff Home

- Create batch appointment summaries for student caseload
- Create batch appointment summaries for “student lists”



The screenshot displays the 'Staff Home' interface. At the top, there are navigation tabs: 'Students', 'Upcoming Appointments', 'My Availability', and 'Appointment Queues'. Below these is a section titled 'My Assigned Students for All Terms'. An 'Actions' menu is open, listing several options: 'Send Message', 'Create Appointment Summary' (highlighted with a red box), 'Appointment Campaign', 'Schedule Appointment', 'Note', 'Add to Student List', 'Export Results', and 'Show/Hide Columns'. The background shows a table with columns for 'ID' and 'STUDENT LIST'.