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 not ideal, especially as these queues can get quite long and may not refresh quickly enough.

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.