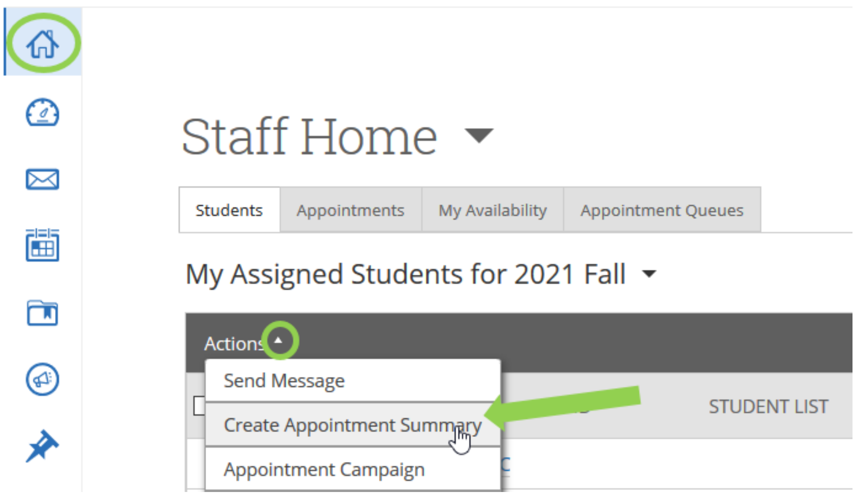
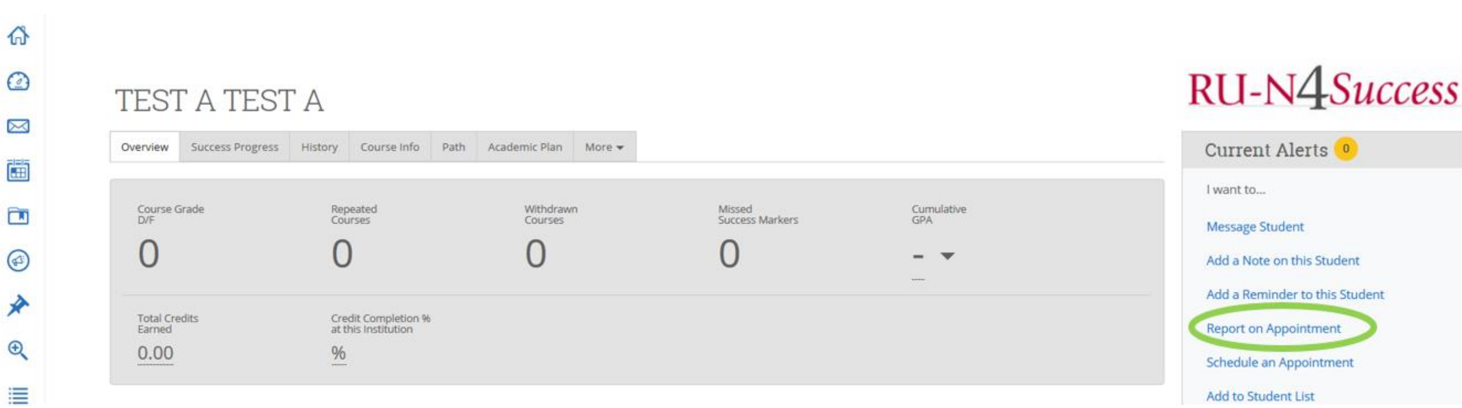
Creating an Advising Report

Every time that you have a substantive meeting with a student (i.e. a face-to-face, phone, or email encounter in which you give advice or prescribe action), you should create an Advising Report to record the details and make the information available to colleagues who may be working with the same student.

1. From your home screen , highlight the student's name and click Actions | Create Appointment Summary.



Another option is to go to the student's main profile page, click on **Report on Appointment**



2. Complete the form that opens. The fields along the left side (items a-f below) allow for an office or department to run summary reporting across many students. The fields on the right side (fields g-i) give specific details about the content of the appointment.
    a. Select **Care Unit** from the drop down menu.
    b. Select **Location** (your office or department location, or 'virtual' for remote meetings).
    c. Select the type of **Service**.
    d. If the report is about a specific **Course**, you can select it from the Course drop down menu.
    e. Select the **Meeting Type** (email, in person, phone, or video conference).
    f. Make sure the **Date** of your meeting as well as **Start and End Time** are correctly populated.
    g. Add **Student's Cell Phone #** if it is not on the profile page.
    h. Type your notes in the **Appointment Summary** area. *This information can be seen by other staff members and should relate to the student questions and concerns, as well as the actions that have been or will be completed by all parties.*
    i. **Attach** any documents that need to be saved to this report.

3. Click **Save this Report**