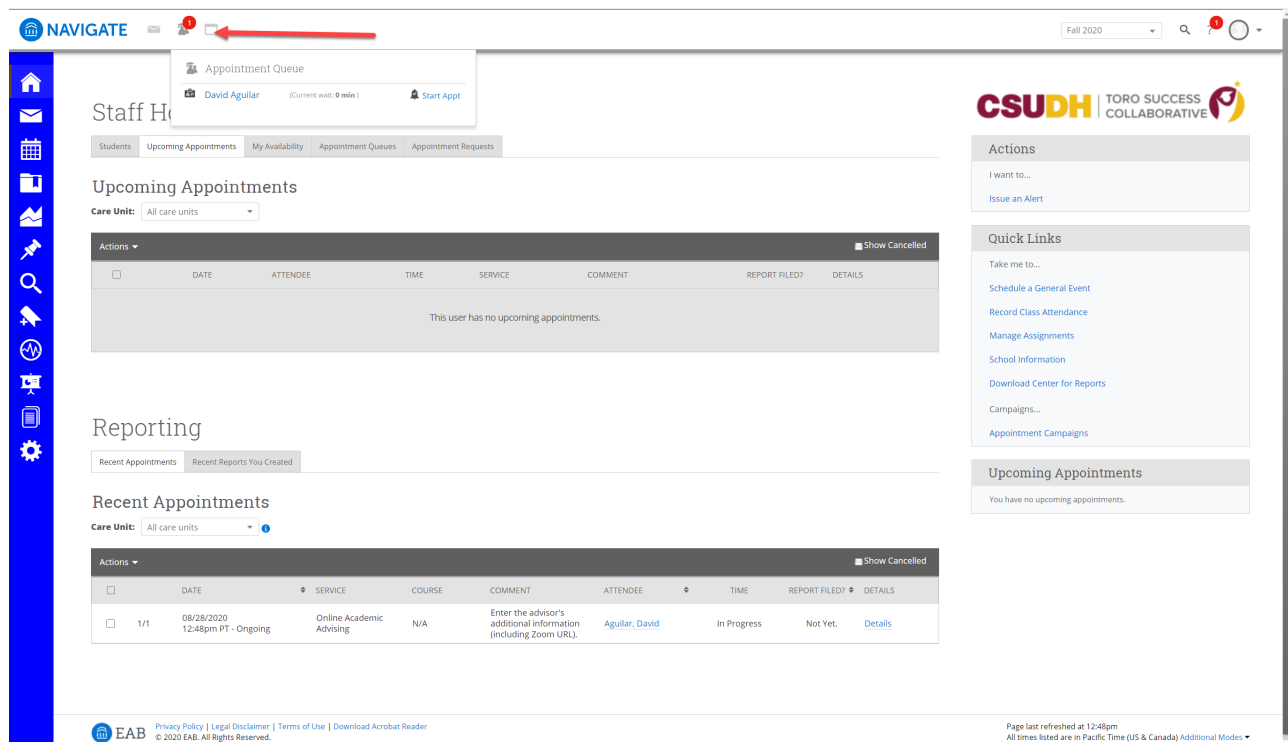


HOW TO START A SCHEDULED APPOINTMENT FOR ADVISORS

Pre-requisite: Prior to starting your scheduled appointment, it is the assumption that you have already opened up your zoom link for the appointment.

1. Login in to TSC.
2. If a student has checked in or is Checked in by a staff person, you will be notified by seeing it in the Appointment queue at the top of the Navigate bar. Click on the icon and you will see students who are checked in. It will display the student's name and the current wait time.



The screenshot shows the TSC interface. At the top, there is a 'NAVIGATE' bar with an 'Appointment Queue' icon highlighted by a red arrow. Below this, the 'Appointment Queue' is displayed for 'David Aguilar' with a 'Start Appt' link. The main content area is divided into 'Upcoming Appointments' and 'Recent Appointments' sections. The 'Recent Appointments' section contains a table with the following data:

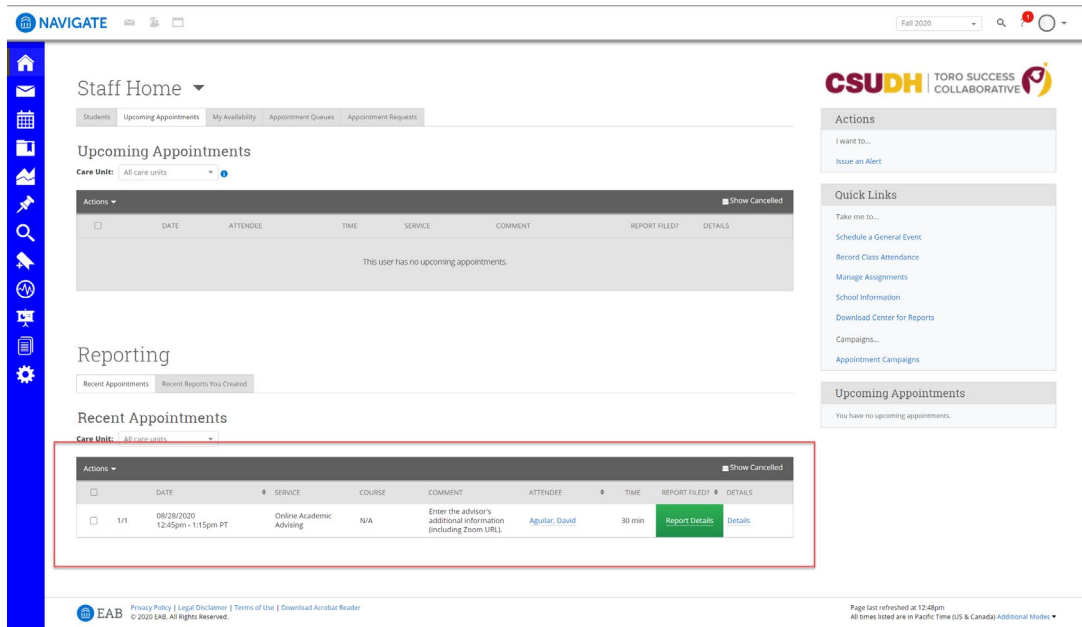
Actions	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	08/28/2020 12:48pm PT - Ongoing	Online Academic Advising	N/A	Enter the advisor's additional information (including Zoom URL).	Aguilar, David	In Progress	Not Yet	Details

3. When you are ready to start the appointment, click on the Start Appt link right next to the student's name.
4. The system will now open up the Appointment Summary Report. (Refer to Page 4 for definitions about each of the fields.)
 - ❖ Appointment Summary Reports provide staff and faculty with the ability to record interactions with students pertaining to a specific appointment.
 - ❖ Only specific authorized persons can delete appointment summary reports.

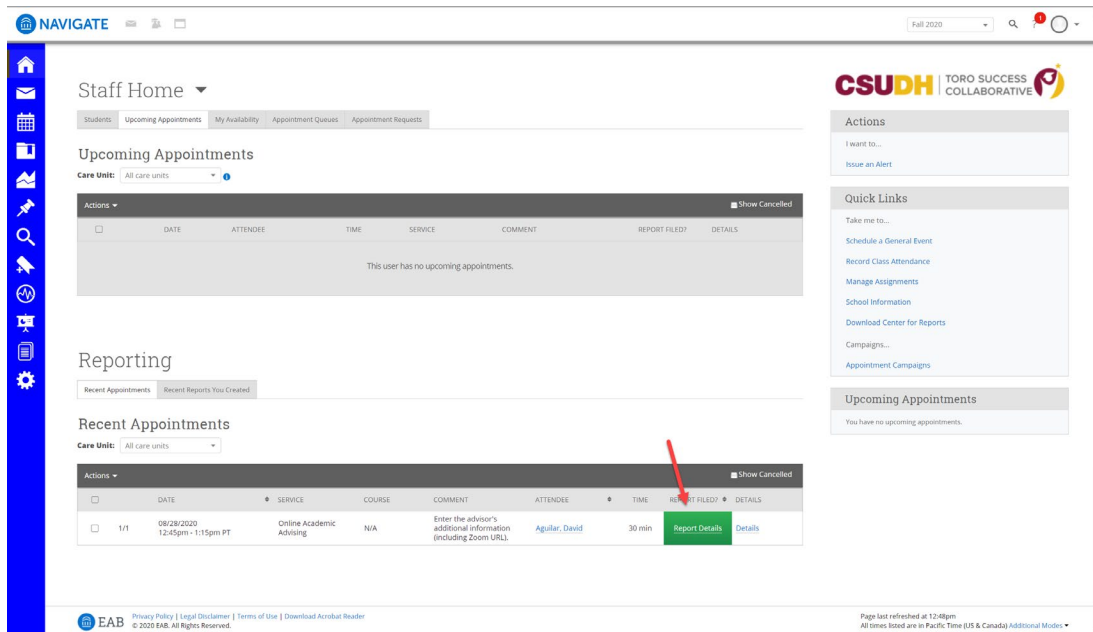
- ❖ It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.
- ❖ **Important Note:** Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

5. Once you have completed the summary form, click on **Save and Check out Student** button. If you need to edit the summary report later, you can do that.

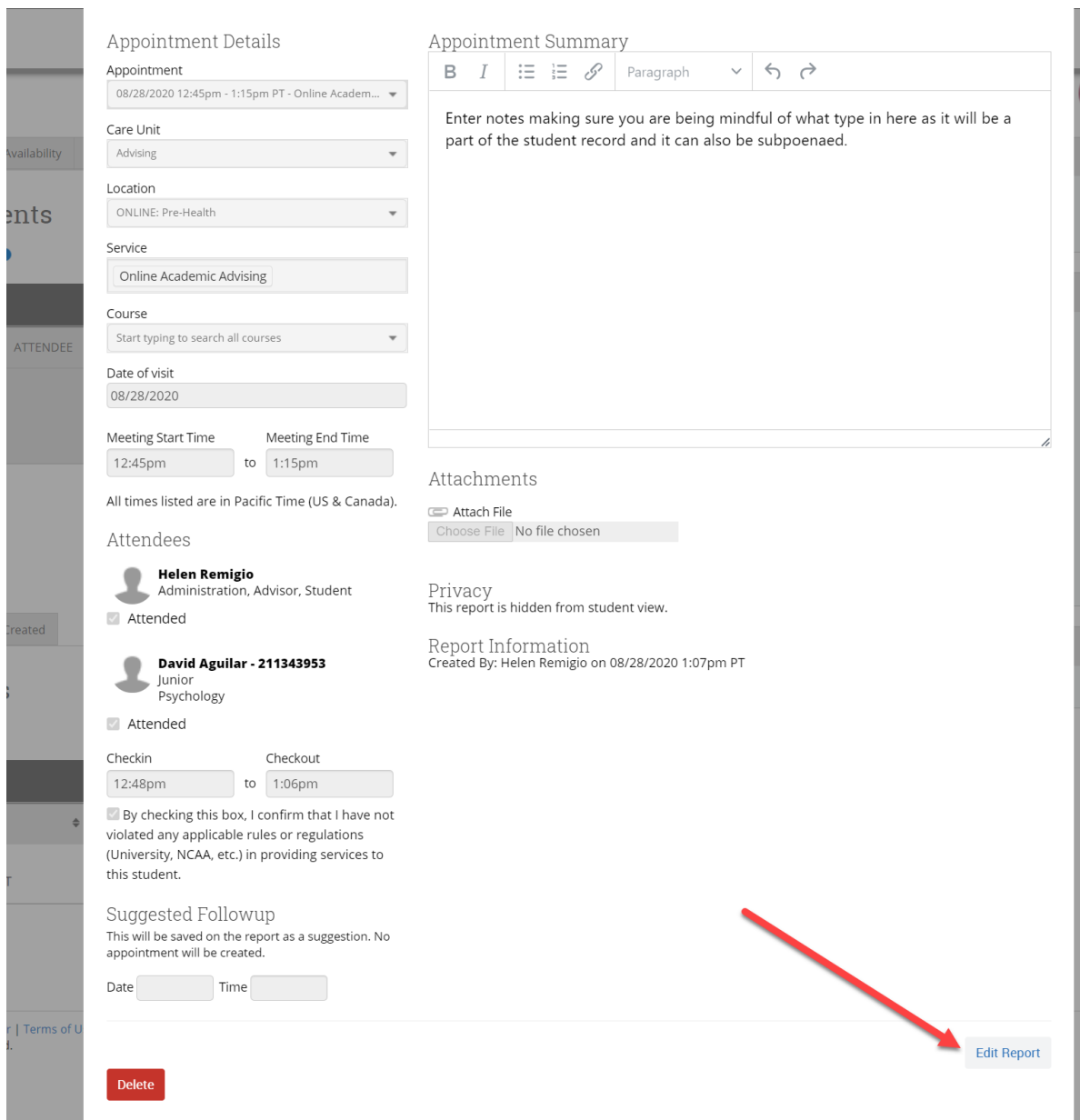
- The system will save and return you back to your home page where it will now display at the bottom of your screen under the Recent Appointments section.



- If you need to edit the report, click on **Report Details** (the green box) for the student you want to edit.



8. Click the Edit Report at the bottom of the screen.



The screenshot shows a web interface for an appointment report. On the left is a sidebar with navigation options like 'Availability', 'ATTENDEE', and 'Created'. The main content area is divided into several sections:

- Appointment Details:** Includes fields for Appointment (08/28/2020 12:45pm - 1:15pm PT - Online Academ...), Care Unit (Advising), Location (ONLINE: Pre-Health), Service (Online Academic Advising), Course (Start typing to search all courses), Date of visit (08/28/2020), Meeting Start Time (12:45pm) to Meeting End Time (1:15pm), and Checkin (12:48pm) to Checkout (1:06pm).
- Attendees:** Lists Helen Remigio (Administration, Advisor, Student) and David Aguilar - 211343953 (Junior, Psychology). Both have 'Attended' checked.
- Privacy:** A checkbox for 'Attended' is checked, with a note: 'By checking this box, I confirm that I have not violated any applicable rules or regulations (University, NCAA, etc.) in providing services to this student.'
- Attachments:** An 'Attach File' button is present, with a 'Choose File' button and 'No file chosen' text.
- Report Information:** States 'Created By: Helen Remigio on 08/28/2020 1:07pm PT'.
- Suggested Followup:** A section for adding follow-up notes with 'Date' and 'Time' input fields.

At the bottom right, there is a blue 'Edit Report' button, which is highlighted by a red arrow pointing to it from the left.

Appointment Summary Reports should only include information related to that specific appointment. Within an Appointment Summary Report, you can include the following information:

- **Appointment:** Gives the date, time, and scheduled Service for the appointment.
- **Care Unit:** Indicates the Care Unit associated with the appointment. This field will be locked if scheduled in advance.

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- **Location:** The location where the appointment occurred. This field will be locked if scheduled through an appointment campaign.
 - **Service:** Indicates the student service associated with the appointment. Only services associated with the selected Location will display as options in your summary report.
 - **Course:** You can associate the appointment with one specific course. The student's currently enrolled courses will display when selecting this dropdown, but you may search for any course regardless of the student's enrollment. Please note - the course should populate on the report automatically if the session was scheduled for a course or the student dropped in for a specific course.
 - **Date of Visit:** The date the appointment occurred.
 - **Meeting Start/Meeting End:** For appointments scheduled in advance, the Meeting Start and End times will default to the scheduled start and end times for the appointment. For walk-in/drop-in appointments, the Meeting Start time will default to the time the summary report is created and End time will default to the time the summary report is saved. You can edit the fields as needed.
 - **Attendees:** The checkboxes will be checked or not to indicate attendance for each appointment attendee. Not checking the box indicates a no show. **Summary Details:** These fields and questions are optional and can be completed to your discretion. These options are configured by your institution and some choose not to populate these additional fields.
 - **Check-in/Checkout:** These fields will default to the times when the student checked in and checked out via Kiosk or Appointment Center. In cases where the student did not check in or check out for the appointment, the fields will remain blank. In cases where the student checked in but did not check out, the Checkout time will default to the time the summary report is saved.
 - **Summary:** Use this field to summarize your interaction with the student. Please remember that any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).
 - **Attachments:** This allows you to attach a file to the summary report, such as a plan or tutoring schedule. The system will not allow attachments with certain special characters in the title.
 - **Suggested Follow-up:** These fields are used for informational purposes only. No appointment will be created as a result of filling them out.