

Report: Appointment Summaries


Advisors-Pulling Students with Appointment Summaries

What is an appointment summary?

Appointment Summaries provide **staff** and **faculty** with the ability to record interactions with students pertaining to appointments, emails, phone calls, and drop-ins.

Pulling Appointment Summaries by Location

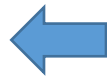
This will provide all of the summary reports created based on a location for all students' appointment summaries during the specified timeline.

1. Click on the Reports icon (left side panel) from Staff Home page. 
2. Click on Intervention Reports → Cases

Appointment/Visit
Reports

[Appointments](#)

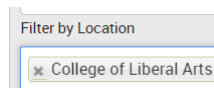
[Appointment Summaries](#)



3. Set the timeline you wish to review



4. Filter by location- add your location.



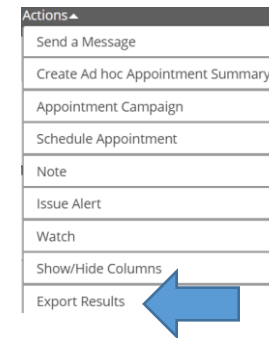
5. Click Search

Pulling Appointment Summaries by Location, continued

6. Select All (be sure it selects all if more than 100 students)



7. Click actions and export results, then choose the columns to export.



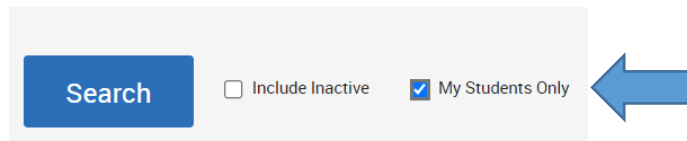
8. File downloads as a CSV file, recommend saving as an excel workbook file before editing.
9. You can then filter by the "staff organizer name" in the excel sheet to find only your summary reports. **Tip: Keep a copy as excel and save as CSV file to [create a student list](#) from your edited list.*

Report: Appointment Summaries

Pulling Appointment Summaries by Assigned Students

This will provide a report of the students' appointment summaries for those assigned in SGAADV to the staff or faculty member pulling the report.

1. Complete **steps 1-3** from page one.
2. Scroll to "My Students Only" near the search button. Check the box.

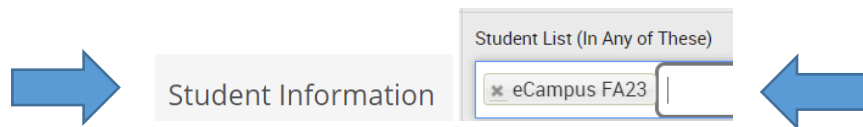


A screenshot of a search interface. On the left is a blue button labeled "Search". To its right are two checkboxes: "Include Inactive" (unchecked) and "My Students Only" (checked). A blue arrow points to the "My Students Only" checkbox.

3. Complete **steps 5-9** from page one.

Pulling Appointment Summaries by Student list

1. Complete **steps 1-3** from page one.
2. Click on student information, click in the student list box, and choose the student list or lists.

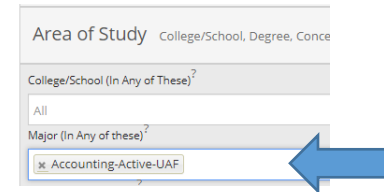


A screenshot of a form with a "Student Information" button. To its right is a dropdown menu labeled "Student List (In Any of These)" with "eCampus FA23" selected. Blue arrows point to both the button and the dropdown menu.

3. Complete **steps 5-9** from page one.

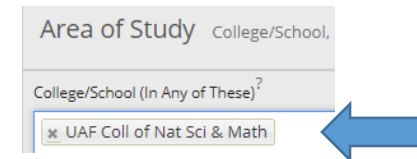
Pulling Appointment Summaries by Major or College

1. Complete **steps 1-3** from page one.
2. If by Major: Click on area of student and type in the major/majors in the "in any of these" box.



A screenshot of a form with a dropdown menu labeled "Area of Study" with the text "College/School, Degree, Conce" below it. Below that is another dropdown menu labeled "College/School (In Any of These)?" with "All" selected. Below that is a third dropdown menu labeled "Major (In Any of these)?" with "Accounting-Active-UAF" selected. A blue arrow points to the "Major" dropdown menu.

3. If by College: Click on area of student and type in the college in the "in any of these" box.

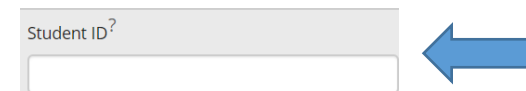


A screenshot of a form with a dropdown menu labeled "Area of Study" with the text "College/School," below it. Below that is another dropdown menu labeled "College/School (In Any of These)?" with "UAF Coll of Nat Sci & Math" selected. A blue arrow points to the "College/School" dropdown menu.

4. Complete **steps 5-9** from page one.

Pulling Appointment Summaries by Student ID

1. Complete **steps 1-3** from page one.
2. Click on student information and enter student ID number.



A screenshot of a form with an input field labeled "Student ID?". A blue arrow points to the input field.

3. Complete **steps 5-9** from page one.