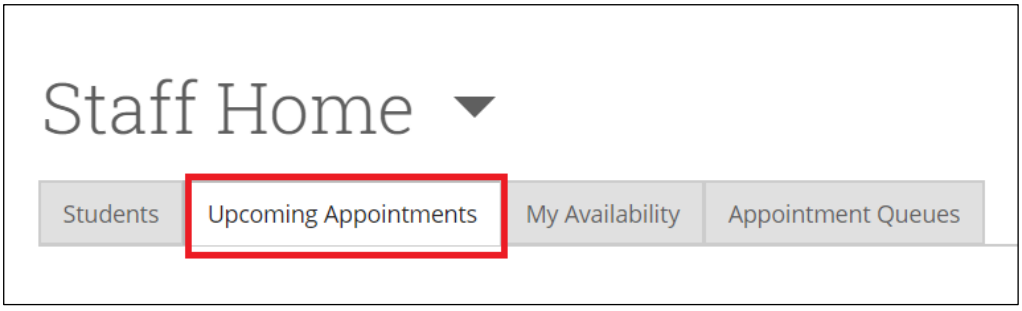
Appointment Summaries Report _ Batch

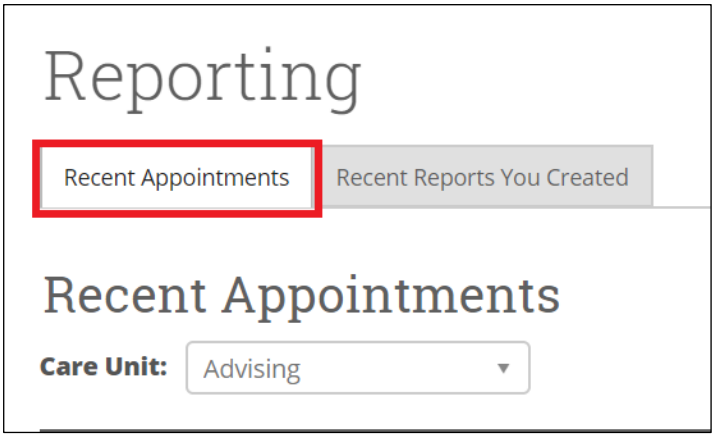
Date: 4/2/21

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.

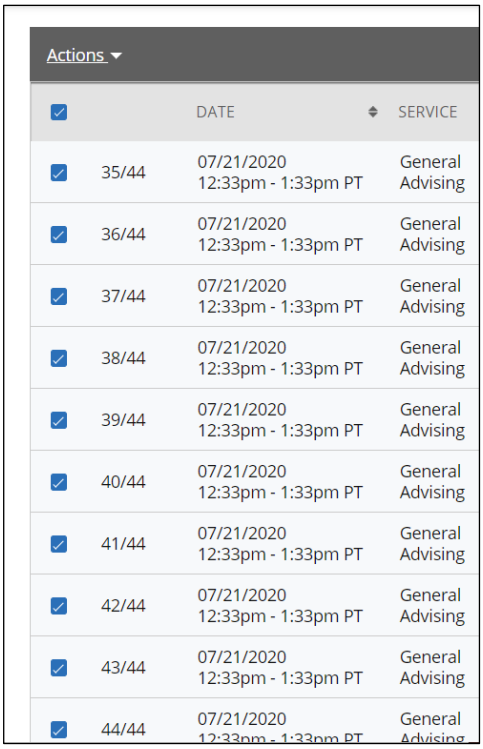
Select "Upcoming Appointments" tab on user's home page



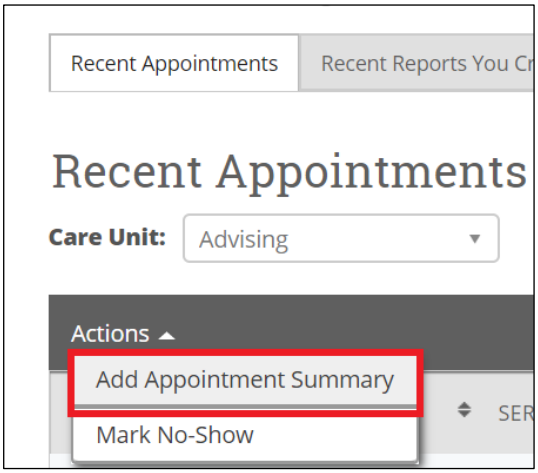
Then, select "Recent Appointments" tab on the bottom of page



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

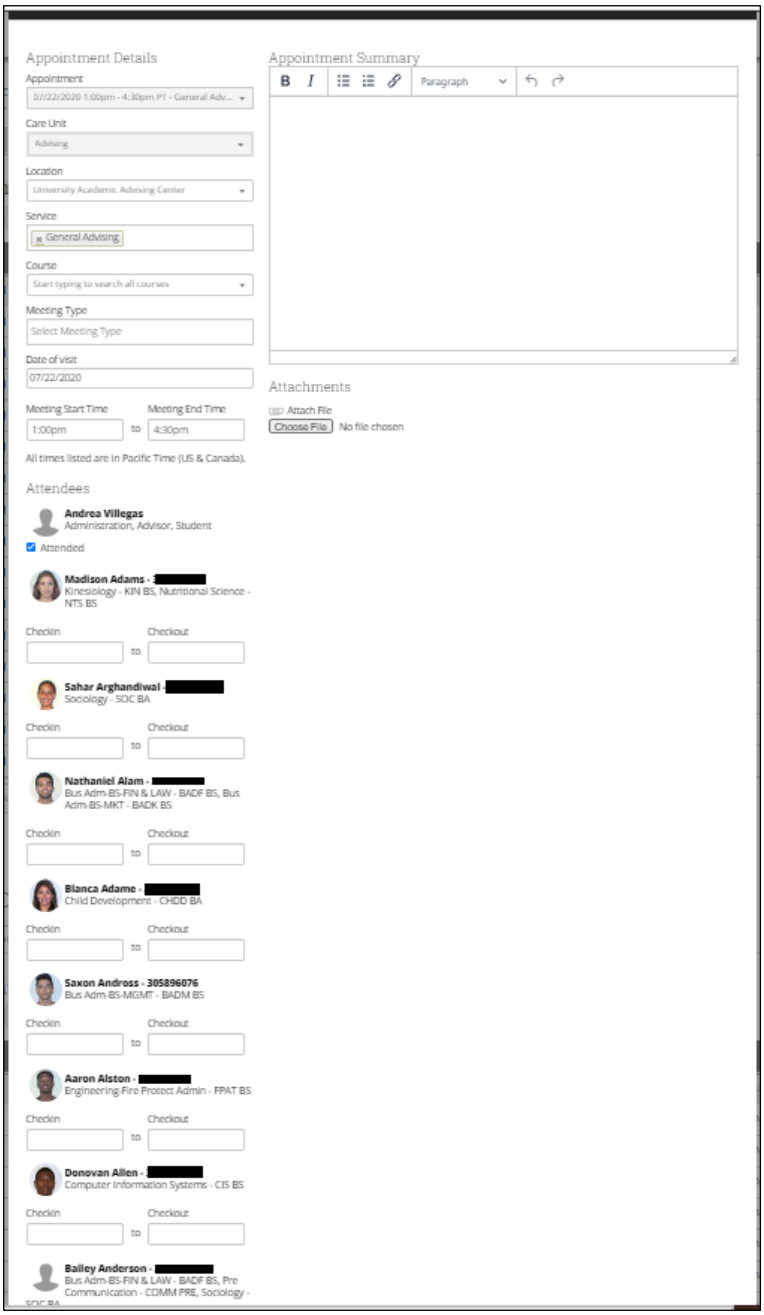


Select "Add Appointment Summary" in drop-down for Actions



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



Batch Appointment Summary available on Staff Home

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

