

# Documenting Advising Interactions

Document advising using the features on the screen below. All advisors have access to these advising reports. The report is not sent to the student, but is disclosable to students through FERPA.

APPOINTMENT REPORT FOR \*\*\*\*\*

### Appointment Details

Care Unit: Advising **Select "Advising"**

Location: Select Location **Select "Location"**

Service: Select Service **Select the "Service" that best describes the reason for the advising meeting**

Course:

Meeting Type: Select Meeting Type **Select the "Meeting Type"**

Date of visit: 07/01/2018

### Summary Details For \*\*\*\*\*

Desired Transfer or Career Goals:  **Brief description here**

### Appointment Summary - Use Guidelines

**Summarize appointment here.**  
**Use Guidelines.**

### Attendees

**Your information will appear here.**

Attended  
Arrived: 9:21pm Departed:

**The student's information will appear here.**

Attended  
Arrived: 9:21pm Departed:

**Times will autofill, but you can adjust them.**

### Attachments

Attach File **Do not attach sensitive or private information.**  
Choose File No file chosen **Do not attach documents that belong in ImageNow (i.e. transcripts.)**

**An appointment will be created after you submit this report.**

### Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date:  Time:

**Save your report.**