

# Make an Advising Report for students with appointments

1. From the advisor home page, select **Upcoming Appointments**.
2. From the Advisor Reporting section of the page, select the box next to the student with the appointment.
3. Select **Actions** dropdown arrow.
4. Select **Add Advising Report**.

The screenshot shows the 'Advisor Reporting' page with two tabs: 'Recent Advising' and 'Recent Reports You Created'. The 'Recent Advising' tab is active, displaying a table of advising appointments. A dropdown menu is open for the first row, showing 'Add Advising Report' and 'Mark No-Show' options. The table columns are: REASON, COMMENT, ATTENDEE, TIME, REPORT FILED?, and DETAILS.

	REASON	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS	
<input type="checkbox"/>	1/1	05/02/2018 08:54a - 09:04a	Advising	Mccausland, Paul	10 min	<a href="#">Report Details</a>	<a href="#">Details</a>

5. The advisor report page appears.

The screenshot shows the 'ADVISOR REPORT FOR Student name' form. It is divided into several sections: 'Appointment Details', 'Report Details For', 'Appointment Summary', 'Attendees', 'Attachments', and 'Suggested Followup'. The 'Appointment Details' section includes fields for Reason, Meeting Type, Course, Date of visit, and Location. The 'Report Details For' section includes a text area for Program of Interest. The 'Appointment Summary' section includes a rich text editor. The 'Attendees' section includes a list of attendees with checkboxes for 'Attended' and fields for 'Arrived' and 'Departed' times. The 'Attachments' section includes a file upload button. The 'Suggested Followup' section includes a text area and fields for 'Date' and 'Time'. A 'Save this Report' button is located at the bottom right.

**Appointment Details**  
An appointment will be created after you submit this report.  
**Reason:**   
**Meeting Type:**   
**Course:**   
**Date of visit:**   
**Location:**

**Attendees**  
☒ **Attended**  
Arrived:  Departed:   
☒ **Attended**  
Arrived:  Departed:

**Suggested Followup**  
This will be saved on the report as a suggestion. No appointment will be created.  
Date:  Time:

**Report Details For**  
**Program of Interest**  
  
**Appointment Summary**  
  
**Attachments**  
  No file chosen

[Save this Report](#)

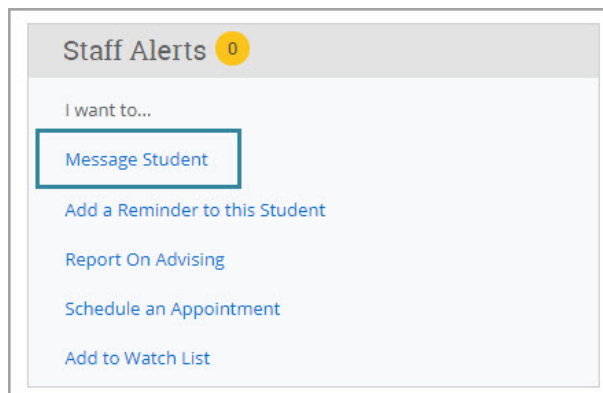
- a. Ensure date and time of meeting is correct.

**NOTE:** You will not have to enter the departure time as it is added automatically when the report is saved.

- b. Select location (your office, centre, department, etc.)
- c. Type notes in the summary area including actions that have or will be taken by all parties. This information will be shared. (Review Advising Notes: Best Practices)
- d. If you have any files to attach to the report, select **Choose File**. Locate the file on your computer and select **Open**.

**NOTE:** We recommend that students receive a copy of the report.

- e. Copy the content from the appointment **Summary Box**.
- f. Click **Save This Report** from the bottom right of the page.
- g. You are returned to the student's main profile page. Select **Message Students** from the Staff Alerts section of the page.



- h. The send a message screen appears.

SEND A MESSAGE TO

Send E-mail


To:

Subject:

Message:

Add Attachment:

Select file to attach



Send Additional E-mail Notifications To:

Cancel

Send Message

- i. Enter a subject.
- j. Paste the content from the Appointment Summary box into the message box.
- k. Add any necessary attachments.
- l. Select **Send Message**.