

Creating a 'Report on Appointment'



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Report on Appointment

- There are a few ways to create a report for a student appointment.
 - If you have a scheduled appointment with a student an initial report will generate under the **Reporting** section in SSC.
 - If you are entering notes for a walk-in [or making a record notation], you can create a **Report on Appointment** by looking up the student

Reporting on Appointment

- Under the **STAFF** Homepage, scroll down to the **Reporting** section

Campus
Student Success Collaborative

Reporting

Recent Appointments | Recent Reports You Created

All recent appointments will show up under the Reporting section.

Recent Appointments

Care Unit: All care units

Actions		SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>		Change of Major/Minor	N/A			8:59p	Not Yet.	Details
<input type="checkbox"/>	1/1	Study Abroad Non Madrid	N/A			10/10/2018 02:29p - 02:29p	Not Yet.	Details

1. Check the box next to the student you want to add a report.
2. From the **Actions** drop down menu, select **Add Appointment Summary**

Appointment Summary

Appointment: Lists the appointment details (time of appointment, reason)

Care Unit: Advising Services

Location: [select office/department]

Services: Select Appointment Reason

Course: (should be left blank)

Meeting Type: Select "In Person"

Date of visit: [verify information is correct]

Attendees: This list both the advisor and student. Times need to be adjusted for start and end time of appointment

APPOINTMENT REPORT FOR [REDACTED]

Appointment Details

Appointment: 10/10/2018 4:00p-4:30p - Change of Major/Minor

Care Unit: Advising Services

Location: Undergraduate Academic Advising Center (73 Tre...)

Service: Change of Major/Minor

Course: Start typing to search all courses

Meeting Type: Select Meeting Type

Date of visit: 10/10/2018

Attendees

Stephannie Barboza
Advisor, Professor, Student

Attended
Arrived: 10:36am Departed: []

[REDACTED]
Student, Tutor

Attended
Arrived: 10:36am Departed: []

Suggested Followup

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

Date: [] Time: []

Appointment Summary

Enter appointment notes here

Attachments

Attach File
Choose File No file chosen

You can attach documents (word docs, pdf's to appointment report)

Save this Report

Report for Walk-In Students

- On the top right corner of homepage, verify the semester information is current and enter Student Name or ID



Report on Appointment

- Select “Report on Appointment” to create appointment summary

The screenshot displays the 'Campus Student Success Collaborative' interface. At the top, there is a navigation bar with the 'Campus' logo and 'Student Success Collaborative' text. A dropdown menu shows 'Fall 2018'. Below the navigation bar, the student's name 'Oprah Winfrey' is displayed. A horizontal menu contains 'Overview', 'History', 'Class Info', 'Path', and 'More'. The main content area is divided into sections: 'Student ID', 'Advisors', and 'Tutors'. A message at the bottom states 'There was an error retrieving this information.' On the right side, a 'Current Alerts' sidebar shows a list of actions: 'I want to...', 'Message Student', 'Add a Note on this Student', 'Add a Reminder to this Student', 'Report on Appointment' (highlighted with a red box), and 'Schedule an Appointment'.

Appointment Summary

Appointment: Lists the appointment details (time of appointment, reason)

Care Unit: Advising Services

Location: [select office/department]

Services: Select Appointment Reason

Course: (should be left blank)

Meeting Type: Select “Walk-In” or “Record Notation Only”

Date of visit: [verify information is correct]

Attendees: This list both the advisor and student. Times need to be adjusted for start and end time of appointment

APPOINTMENT REPORT FOR [REDACTED]

Appointment Details

Appointment: 10/10/2018 4:00p-4:30p - Change of Major/Minor

Care Unit: Advising Services

Location: Undergraduate Academic Advising Center (73 Tre...)

Service: Change of Major/Minor

Course: Start typing to search all courses

Meeting Type: Select Meeting Type

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Suggested Followup

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Date: [] Time: []

Appointment Summary

Enter appointment notes here

Attachments

No file chosen

SAVE REPORT

Save this Report

You can attach documents (word docs, pdf's to appointment report)