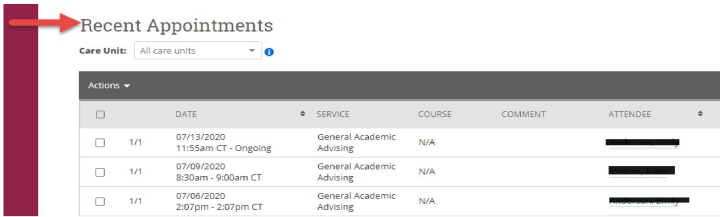


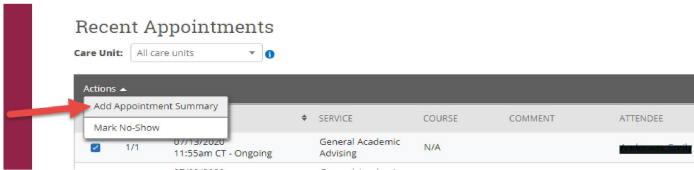
Navigate @ LUC Training
Adding Appointment Summaries*

*Appointment Summaries are appropriate for documentation related to specific appointments.
For all other notes, see "Adding Notes to a Student"



View Recent Appointments

From your homepage, scroll down to view recent appointments.



Select Student

Select the appointment you would like to document.

Select "Add Appointment Summary"

APPOINTMENT REPORT FOR [REDACTED]

Visit Details

Care Unit:

Location:

Service:

Course:

Meeting Type:

Date of visit:

Meeting Start Time: to Meeting End Time:

All times listed are in Central Time (US & Canada).

Attendees

Attended

Attended

Checkin: to Checkout:

Suggested Followup:

Summary Details For [REDACTED]

Referrals Made:

Action Items & Deadlines Discussed:

Student was prepared for the appointment? Yes No N/A

Student is on academic probation? Yes No N/A

Student is considering withdrawing or transferring? Yes No N/A

Student is considering taking summer classes elsewhere? Yes No N/A

Student expressed academic concerns? Yes No N/A

Student expressed financial concerns? Yes No N/A

Appointment Summary

B I Paragraph

Attachments

No file chosen

Document Appointment

All boxes under "Visit Details" are pre-populated.

Referrals, Action Items, and questions here are optional.

Add notes from appointment.

Attach files, if any

If student was a no-show, uncheck the Attended checkbox.

Click the blue Save button.