Guide to Appointment Reasons and Comments

Our goal with this latest release is to allow schools to track, and report on, the different reasons why users create advising and tutoring appointments. To do this, we have implemented a mechanism that will help you track exactly what those reasons are. We have also added a field called Appointment Comments that are designed to aid in appointment preparation. Please continue reading for more details on how to implement both or either of these two new features.

What if my school does not track appointment reasons, will this release affect us? The short answer is “Yes”; all schools that create appointments in GradesFirst will be affected by this release. However for those schools who do not wish to track appointment reasons, GradesFirst has created defaults to help streamline the appointment making process.

Where do I start?
The first step is to identify the type of reasons you wish to track. Below are several examples of what some valid appointment reasons could be:

<table>
<thead>
<tr>
<th>Advising Reasons</th>
<th>Tutoring Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Planning</td>
<td>Effective Study Strategies</td>
</tr>
<tr>
<td>Career Counseling</td>
<td>Using the Writing Center</td>
</tr>
<tr>
<td>Graduation Requirements</td>
<td>Visit to the Math Lab</td>
</tr>
</tbody>
</table>

Basically, if you want to know how many students are creating an appointment for “x” reason, you will want to create a reason for whatever “x” is. Once you have identified your appointment reasons, you will use Student Services to create them. If you are new to GradesFirst, you can find Student Services on the Admin tab. As mentioned above, GradesFirst will come defaulted with an advising and tutoring reason already defined. So if you are one of those schools who do not plan on tracking appointment reasons, you can skip this section.
Adding a Student Service (Reason)

Student Services is where you will add all of your appointment reasons into GradesFirst. When you click ‘Add a Student Service’, you will be given several options to define what “Type” of service you wish to add. The only types of services that affect appointment reasons are advising and tutoring.

After your appointment reasons have been defined, you will want to select one to be your “default” reasons. This reason will automatically be used, as the default, whenever a new appointment is created. While it is the default, users can certainly select a different or even multiple reasons to apply to their specific appointment.

After defining all of your appointment reasons, and selecting your defaults, users are now able to start scheduling appointments. Here is what they will see.
Scheduling an Appointment

Below is a screenshot of both the appointment reasons and comments. The ‘Reason for Appointment’ field will contain all of the specific reasons that were previously defined for that type of appointment (e.g. advising or tutoring). Users will immediately see a highlighted reason that is actually the default reason as defined in Student Services. Users will always be able to select a more appropriate, or multiple, reasons if desired. Multiple reasons can even be selected by holding down the left Ctrl key and single left-clicking on each reason.

The other new field now available to users is the ‘ Appointment Comments’. This free form text field can be used to provide additional description about the appointment.

Once the appointment has been saved, both the appointment reason(s) and comments can be seen from the calendar and report pages. Below is an example of the calendar page displaying the new fields.
Changes to GradesFirst
With the addition of the appointment reason(s) and comment fields, we had to make some changes to existing terminology for clarity purposes. First off, at the bottom of the advisor and tutor reports, we have changed the word ‘Comments’ to ‘Summary’. This was done to minimize confusion between “appointment comments” and the “comments” that appear at the bottom of each filed report.

Also, the following reports have modified to include the new appointment reason(s) and comment fields. These reports have also been changed to reflect the new ‘Summary’ verbiage, as shown above, as well.

- Tutor Appointments
- Tutor Appointment Details
- Daily Tutor Appointments
- Advisor Appointments
- Advisor Appointment Details
- Daily Advisor Appointments
- Advisor No-Shows
- Advisor & Tutor Summaries
- Advisor & Tutor Summaries Details

**New Report** Advisor Appointment Reason Stats (Name subject to change)

Lastly, we plan on releasing several more reports, over the new few weeks that will give our schools a more robust view into appointment reasons and statistics.

As always, if you have any questions, please do not hesitate to contact us at support@gradesfirst.com.