BoilerConnect – Appointment Campaigns

Documenting a Student Appointment – No Kiosk – Before Appointment Begins

Step 1:
From the Staff Home page, click on the “Appointments” tab. Check the box next to the name of the student you wish to document.

Step 2:
Click “Actions” and choose “Add Appointment Summary”.

Step 3:
Document the appointment.

All appointment details are pre-populated from when the appointment was created.

Fill in your notes here.
Documenting a Student Appointment – Kiosk – At the Time of the Appointment

**Step 1:**
You have two options of pathways to start the appointment once a student has checked in using the kiosk.

*Option 1* – Click on the student icon with the notification near the top left of the screen. Then choose “Start Appt”.

*Option 2* – Navigate to the “Appointment Queues” tab on the Staff Home page and click on the radial button next to the student you are meeting with. Click on “Actions” and choose “Start Appointment”.

Both options will open the Appointment Report Summary box for that student. You can then minimize the report and complete it after the appointment has ended by clicking on the document icon with the notification near the top left of the screen.
**Step 3:**
Document the appointment.

![Appointment Report for Imogene Student](image)

- All appointment details are pre-populated from when the appointment was created.
- Fill in your notes here.
Documenting a Student Appointment – Kiosk or No Kiosk – After Appointment has Ended

**Step 1:**
From the Staff Home page, click on the Appointments tab and scroll down to the “Recent Appointments” section. Check the box next to the name of the student you wish to document.

**Step 2:**
Click “Actions” and choose “Add Appointment Summary”.

**Step 3:**
Document the appointment.

- All appointment details are pre-populated from when the appointment was created.
- Fill in your notes here.