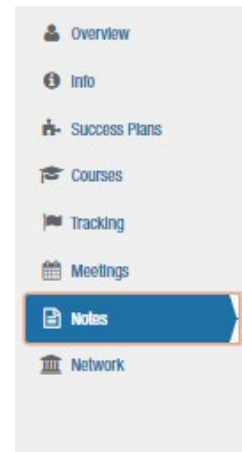
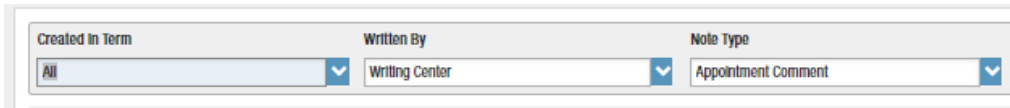


Filtering Student Records and Lists for Meetings:

On the Student's Individual Record:

Review the Meetings Tab and/or the Notes Tab

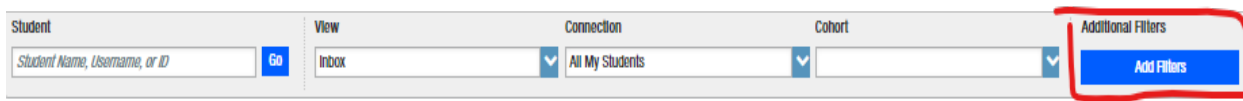
- The Meetings tab is organized in chronological order with most recent meetings at the top. There are no options to filter or to sort meetings in this view.
- The Notes tab offers the option to filter the record by Note Type, Select Appointment Comments



To filter your My Students or Tracking Tabs:

Add Filters button to add additional filters

- Click on the blue Add Filters button



- Go to Meetings
- Check the box for Students
- Select either “Who have had/scheduled meetings” OR “Who have not...”
- Find the type of meeting you wish to view (you will only see meeting types where you have permissions to review results)
- Click on the Appointment Type you wish to review (you can review all for an appointment type or select specific reasons under any type)
- Set the date range you wish to review then click Submit

