Catalyst Integration: Taking Notes using Appointment Outcomes

1. Go to **canopy.uc.edu** and log-in with your UC username and password.
2. Under **Tools** on the left-side of the page, click **Starfish**.
3. Open the student appointment. There are several ways to open an appointment.
   a. One place to do this is directly from the **Appointments** tab while viewing the calendar. To open the appointment, you’ll need to hover over the **calendar** button next to the student’s name and then select the **Outcomes** button.
b. Additionally, you can open an appointment from the waiting room if your office uses the kiosk function. The appointment opens when selecting the Start Meeting button.

4. While an appointment is open, you can still access the student folder while in the appointment. Select the Scheduling tab and then the student's name to open their full student folder.
5. After the appointment, add actual **start and end time** along with any notes about the appointment in the **Comment box**. All three of these fields, outlined below, must be populated for the note to then be sent to Catalyst.
6. If a student no-shows for the appointment, just select check box next to Student Missed Appointment. You do not need to mark or populate any additional fields. It will be sent to Catalyst as a No-Show appointment.

![Add Walk-In Meeting](image)

**SpeedNotes** is an option for advisors to place quick information from a pre-determined list of phrases within a note. SpeedNotes are customizable by college and can cover general topics that are addressed in appointments. Below is a sample selection of SpeedNotes.

7. To use SpeedNotes just select the checkbox next to the **Topic** that applies to your appointment and place any student specific information in the Comments box on the Outcomes tab. **IMPORTANT:** The actual start and end time, along with comments box must still be populated for the note to come over to Catalyst! If you’re just using SpeedNotes and no specific student comments, simply time SpeedNotes in the Comments box on the outcomes tab.
8. Once all of the necessary fields are completed, just hit the **Submit** button at the top or bottom of the appointment box. Appointment Outcomes will then be loaded into Catalyst overnight and available the next day. If you need to edit a note after the day has completed, visit Catalyst to add information.

Below are examples of how Appointment Outcomes will appear in Catalyst.
Example 1: Appointment outcome with SpeedNotes

Example 2: Student Missed Appointment Checkbox showing as “No-Show”

The University of Cincinnati does not discriminate on the basis of disability, race, color, religion, national origin, ancestry, medical condition, genetic information, marital status, sex, age, sexual orientation, veteran status or gender identity and expression in its programs and activities. The complete Notice of Nondiscrimination can be found at http://www.uc.edu/about/policies/non-discrimination.html.