

Activity Timeline

- Is chronology of to-dos, follow-ups, and deadlines
- User can view all activities (involving all students) they have upcoming, overdue, or completed by going to “My Activities” tab at the top of the menu bar
- User can view student specific activities by going to the Activity Timeline under the student avatar
- Filter can be used to narrow activities and activities can be edited, removed, deleted
- Activities will also be created from the AACTP (meeting and follow-ups) and Needs Inventory (referral follow-ups and meetings)
- Activities created from here will be used on *both* TS Reports

Steps:

1. Go to “My Activities” on the top menu bar
2. This will allow you to search for a student/customer within the activity form *and* it will track it on the student’s timeline
3. Fill out the form (images and descriptions below)
4. Click “Save”

(Images with details below)

Create Activity

Choose Location * Afton Workforce Center

Type of Activity * Other Activity type – other

Activity Date * April 1, 2020 With time Activity date – will default today, but can be backdated

Due Date With time

Assigned To Admin, Vault User – will default to you

Status Complete Status – complete if contact made or activity is complete

Regarding Customer In support of Customer with another support Staff

Customer Can search for student right here

Duration Short (5min) Med (15min) Long (30min) Other

Activity Code * Support Services Activity Code – 5 types of services

Outcome Goal (based on code) - Select One -

Notes Technology survey was sent on 4/1/20
John responded he does NOT have a device on 4/5 Notes/dates/details/response

If you prefer to find the student first, go to “Customers” tab, find the student

Select student name

Select Activity Timeline from under the image and proceed with same steps outlined above.