

The follow up option



The follow up option allows you to display a certain applicant or student on the homepage of your EConsort instance, including the reason why this person deserves your attention. This is useful when a certain condition has to be fulfilled in order to complete a student's file.



This option can be found on a student's or applicant's profile page (found when clicking this person's name):

Follow up | File | Communication | Toolbox | Documents | Courses



A **user** is a person managing the EConsort application.

An **applicant** is an applying student.

A **student** is an applicant who has been admitted.



Printscreens in this tutorial are centered and indicated by a box.



Watch the corresponding video tutorial online by clicking the 'Play' icon.

▼ Click Add new item to student follow up:

Follow up | File | Communication | Toolbox | Documents | Courses
Add new item to student follow up

▼ Complete a **description** and a **category** for the follow up. Define the **deadline** and the **status**. (Once a follow up has been completed, you can set it to done.) You can also **add a document**. Choose **who can see the follow up**: all users or only you. Complete by clicking **the button**.

Add new follow up item

Content:

Category:

Attachment: Geen bestand gekozen

Due date: - -

Options: Status: ☐ done ☒ open

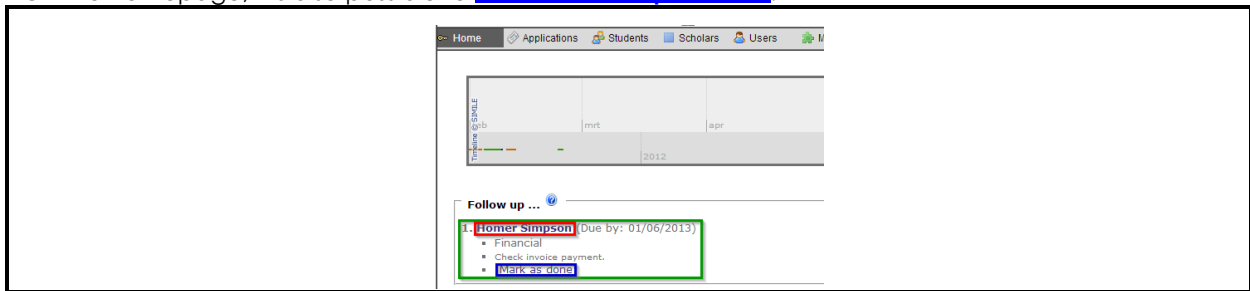
Target group: ☒ all users ☐ personal

▼ The new follow up item can be found on the *Follow up* tab page.

Category: ☒ Financial
Content: ☒ Check invoice payment.
Attachment: ☐
Posted by: Vicky Derweduwen - 27/05/2013

▲ Editing it is possible by clicking **the pencils**. Once the follow up isn't necessary anymore, you can **mark it as done**.

▼ All follow ups can be found on your homepage. Clicking the **person's name** redirects you to his/her follow up tab page, allowing you to change (a) follow up(s) or to add a new one. On the homepage, it's also possible to mark a follow up as done.



Once you've marked a follow up as done, it's no longer displayed on your homepage. However, completed follow ups can still be found on the concerning student's or applicant's profile page.