

How to enter advising summary reports:

There are two methods of entering advising summary reports in Navigate.

First, via the 'Upcoming Appointments' on your Home Screen:

Staff Home ▾

My Assigned Students for Spring 20

This tab allows you to both (1) open an summary report before or during an appointment and (2) complete a report for a recent appointment. This page will display appointments set up through campaigns.

To open a report in advance of a scheduled appointment, select an appointment (by clicking a checkbox) and open the 'Actions' drop-down menu:

Upcoming Appointments

Care Unit:

Actions ▾ Show Cancelled							
<input type="checkbox"/>	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input style="border: 2px solid red;" type="checkbox"/>	1/1 03/27/2020 01:30p - 02:00p	Student, Preferred	1:30p-2:00p	Academic Advising		Not Yet.	Details

Select 'Add Appointment Summary':

Upcoming Appointments

Care Unit:

Actions ▲ Show Cancelled							
<input type="checkbox"/>	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>		Student, Preferred	1:30p-2:00p	Academic Advising		Not Yet.	Details

Send Message

Add Appointment Summary

Issue Alert

Cancel Appointment

The appointment summary template has three main components: resources and/or referral recommendations, academic alerts discussed, and the appointment summary. If you are reporting on a scheduled, as opposed to drop-in, appointment, most fields in the 'Appointment Details' column will be completed for you.

APPOINTMENT REPORT FOR PREFERRED STUDENT
— ✕

Appointment Details

Appointment
03/27/2020 1:30p-2:00p - Academic Advising

Care Unit
Advising

Location
CAS = College of Arts and Sciences

Service
Course Selection/Registration

Course
Start typing to search all courses

Date of visit
03/27/2020

Meeting Start Time 1:30pm **Meeting End Time** 2:00pm

Attendees
Ryan Pavek

Summary Details For Preferred Student

Resources and/or Referral Recommendations

N/A

Academic Alerts Discussed

N/A


Appointment Summary

B I [List Icons] [Link Icon] Paragraph [Dropdown] [Undo] [Redo]

Met with Preferred Student to discuss course registration for Fall 2020. Preferred has a plan to enroll in courses which will satisfy remaining distribution requirements. I reminded the student to set an early alarm!


At the bottom of the template is an additional option to add attachments to your appointment summary. Click the blue 'Save this Report' button before closing the template:

Attendees



Ryan Pavek
Administration, Advisor, Professor,
Student, Super User

Attended



Preferred Student
Advisor, Student

Attended

Checkin [] **Checkout** []

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.

Date [] **Time** []

Attachments


Attach File

Choose File No file chosen

Save this Report

Once you have saved your report, you will return to the Upcoming Appointments tab. Scroll down to find a list of ‘Recent Appointments.’ This list allows you to identify which appointments do not yet have summaries.

Recent Appointments

Care Unit: 

Actions ▾										Show Cancelled
<input type="checkbox"/>	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS		
<input type="checkbox"/>	1/1 03/23/2020 08:30a - 09:00a	Academic Advising	N/A		Student, Preferred	30 min	Not Yet.	Details		

After you have filed an advising summary report, your recent appointments list will be updated to include a direct link to your report:

Recent Appointments

Care Unit:

Actions ▾										Show Cancelled
<input type="checkbox"/>	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS		
<input type="checkbox"/>	1/1 03/23/2020 08:30a - 09:00a	Academic Advising	N/A		Student, Preferred	30 min	Report Details	Details		

You may also add an advising summary report for an unscheduled appointment via the student’s profile. You can visit an individual student page by either (1) clicking a name on the Staff Home page or (2) using the Quick Search feature, accessed by clicking the magnifying glass in the top right corner of each page:



Once on a student page, note the options under the ‘Current Alerts’ menu, which appears on the right side of each student’s profile page:

Current Alerts 2 ▼

- I want to...
- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment**
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert

Selecting 'Report on Appointment' initiates the same process covered earlier in this guide.