

# Navigate - Adding an Ad-Hoc Appointment Summary to a Student

Add a one-off custom appointment summary to a student's profile.

## 1. Open the student profile page

- Open a student profile by typing the student name or E Number into the top *Quick Search* bar. Select the appropriate student by clicking their name from the list which drops down from the *Quick Search* bar.



## 2. Add an Appointment Summary to the student

- Click *Report on Appointment* in the *Current Notification or Referrals* box on the left of the student profile page.
- An *Appointment Report For* window will appear.
- To the left, select the Care Unit from the drop-down menu under *Care Unit*.
- Select the Location (major, minor, pre-program etc.) from the drop-down menu under *Location*.
- Input OPTIONAL appointment details:
  - Select the Service(s) from the drop-down menu under *Service*.
  - Select the Course from the drop-down menu under *Course*.
  - Select the Meeting Type from the drop-down menu under *Meeting Type*.
- Select or correct the date from the drop-down calendar under *Date of Visit*.
- Select or correct the Meeting Start Time and Meeting End Time from the drop-down menus under *Meeting Start Time* and *Meeting End Time*.
- To the right, answer Yes, No, or N/A to the five *Summary Details for Students* questions.
- In the *Appointment Summary* box, type notes about the conversation and interaction with the student.
- Click *Choose File* to attach a file if desired.
- Click *Save this Report*.

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Overview Reports / Notes Courses More ▾

Student ID: E0000000 Classification: Freshman

Categories

Tags Manage Tags ▾

Current Notification or Referrals

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Create Request for Appointment](#)

APPOINTMENT REPORT FOR BUCKY BUC

You must first choose a Care Unit before adding any additional data in this form.

Appointment Details

Appointment Campaign: Select Appointment Campaign ▾

Care Unit: Select Care Unit ▾

Location: Select Location ▾

Service: Select Service ▾

Course: Start typing to search all courses ▾

Meeting Type: Select Meeting Type ▾

Date of visit: 09/09/2022

Meeting Start Time: 1:50pm Meeting End Time: to

All times listed are in Eastern Time (US & Canada).

Appointment Summary

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An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.