

## Navigate - Adding an Appointment Summary to a Student for a Completed Appointment

*Add an appointment summary to a student's profile for a completed appointment.*

1. To open the Appointment Summary window for a completed student appointment:

- From the *Staff Home* page, click the *Appointments* tab.
- Scroll down to *Recent Appointments* under *Reporting*.
- Check the box to the left of the appointment/student to report on.
- Click *Actions* in the top left corner of the box. Then click *Add Appointment Summary*.

The screenshot shows the 'Staff Home' navigation menu with 'Appointments' selected. The 'Reporting' section contains 'Recent Appointments' with a 'Care Unit' dropdown set to 'All Care Units'. An 'Actions' menu is open over a table row, with 'Add Appointment Summary' highlighted. The table row is for an appointment on 09/08/2022 from 3:00pm to 3:30pm ET for 'Major Exploration'.

Actions	DATE	TIME	SERVICE	COURSE
<input checked="" type="checkbox"/> 1/1	09/08/2022	3:00pm - 3:30pm ET	Major Exploration	N/A

2. To add an Appointment Summary to the student:

- An *Appointment Report For* window will appear.
- To the left, the *Care Unit, Location, Service, Meetings Type, Date of Visit, Meeting Start Time, and Meeting End Time* will be auto-completed.
- 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*.

APPOINTMENT REPORT FOR
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**Appointment Details**

Appointment Campaign  
Select Appointment Campaign

Care Unit  
OUTREACH INITIATIVES

Location  
ACADEMIC ADVISEMENT

Service  
EARLY OUTREACH

Course  
Start typing to search all courses

Meeting Type  
VIRTUAL

**Appointment Summary**

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**Attachments**

Attach File

Choose File No file chosen

**Privacy**  
This report is hidden from student view.

**Report Information**  
Created By: Marc Tucker on 09/08/2022 4:27pm ET