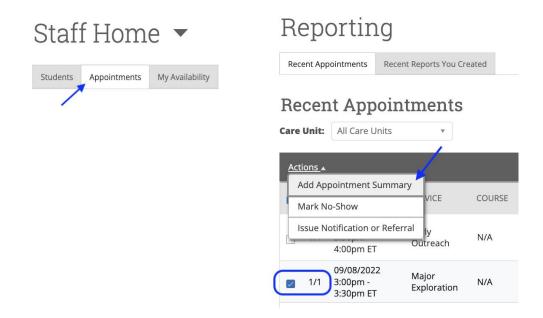# Navigate - Adding an Appointment Summary to a Student for a Completed Appointment

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:

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

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

×

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
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