

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 ▼

Students **Upcoming Appointments** My Availability

My Assigned Students for Spring 20

This tab allows you to both (1) open an advising 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: All care units ▼

Actions ▼								Show Cancelled
<input type="checkbox"/>	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS	
<input checked="" 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: All care units ▼

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 to 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 [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: [] to Checkout: []

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


Date: [] Time: []

Attachments

No file chosen

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: All care units 

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: All care units

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 an advisee 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.