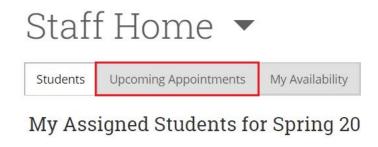
EAB Navigate - Advisor Platform March 2020

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:



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.

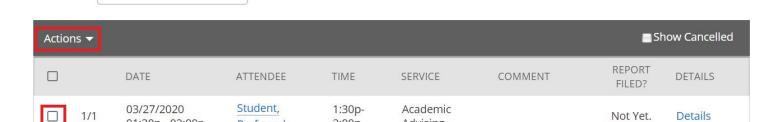
To open a report in advance of a scheduled appointment, select an appointment (by clicking a checkbox) and open the 'Actions' drop-down menu:

Upcoming Appointments

All care units

Care Unit:

Care Unit:



Advising

2:00p

Preferred

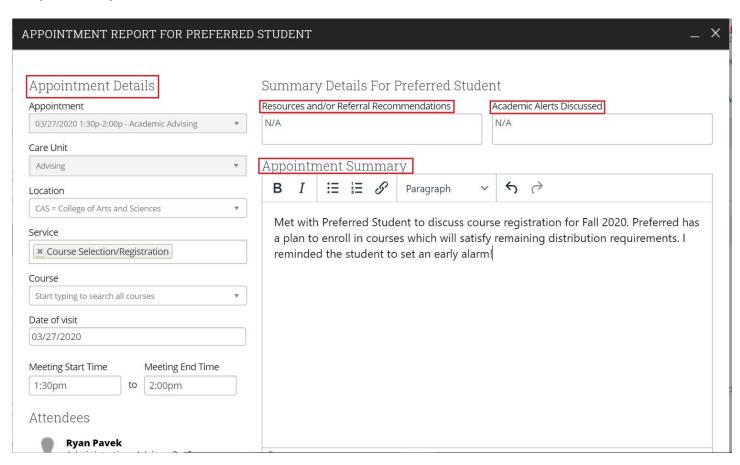
Select 'Add Appointment Summary':

Upcoming Appointments

01:30p - 02:00p



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.



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:



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.

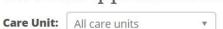
Recent Appointments





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

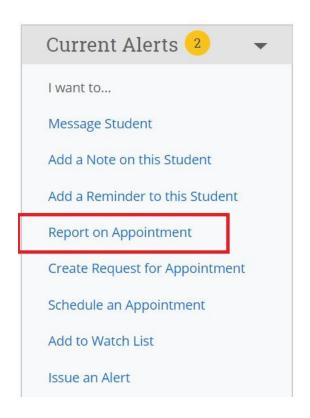




You may also add an advising summary report for an unscheduled appointment via the student's profile. You can visit an individual student page by either (1) clicking an advisee name on the Staff Home page or (2) using the Quick Search feature, accessed by clicking the magnifying glass in the top right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



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