Documenting a Student Interaction

Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.

Reportin	ıg									
Recent Appointments	Recent Repo	orts You Creat	ed							
Recent App	ointm nits	ents • •								
Actions 🔺									∎ S	how Cancelled
Add Appointment S	Summary	٥	SERVICE	COURSE	COMMENT	ATTENDEE	٥	TIME	REPORT FILED?	DETAILS
Issue Alert			Choosing Schedule	N/A		Abdel, Masen		30 min	Not Yet.	Details

For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.

1	Actions										
	Send Message	ΛE		D		WATCH LI	ST Ø	CUMULATIVE GPA	♦ SUPPORT ♦		
1	Appointment Campaign		88	5975301				0.00	High		
	Schedule Appointment	658621590						2.19	High		
	Тад	178436157									
	Note	196123052					0				
	Mass Print	ianira	53	8235217				2.96	Moderate		
	Charity		99	9777248				2.12 2.79	Moderate		
	Watch		60	9888859					Moderate		
	xport Results 355089613								Moderate		
	Show/Hide Columns										
	Previous 1 2 3	4	5		29	Next			2,806 total results		

How to Add Advising Summary Reports (cont'd)

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You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Reminder: When creating an ad-hoc Appointment Summary Report to track walk-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments: The primary way to mark a student as a noshow for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.

Staff Alerts 🧕
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

Important Note: Any information you enter into Navigate pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).