

# Navigate360: Adding an Ad-Hoc Appointment Summary to a Student

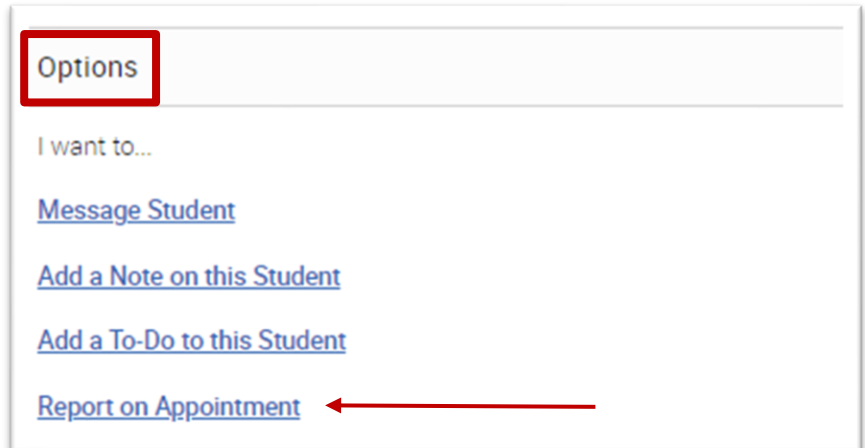
Creating an Ad-Hoc Appointment Summary is an option in the Actions menu, used to report on and track drop-in appointments

## 1. Open the student profile page

- Open a student profile by typing the student's name or E Number into the top *Quick Search* bar. Select the appropriate student by clicking their name from the list which drops down from the *Quick Search* bar.

## 2. Add an Appointment Summary to the student

- Click *Report on Appointment* in the *Options* box on the right of the student profile page.
- An *Appointment Report For* window will appear.
- To the left, select the Care Unit from the drop-down menu under *Care Unit*.
- Select the Location (major, minor, pre-program etc.) from the drop-down menu under *Location*.
- Input OPTIONAL appointment details:



- Select the Service(s) from the drop-down menu under *Service*.
- Select the Course from the drop-down menu under *Course*.
- Select the Meeting Type from the drop-down menu under *Meeting Type*

- Select or correct the date from the drop-down calendar under *Date of Visit*.

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- Select or correct the Meeting Start Time and Meeting End Time from the drop-down menus under *Meeting Start Time* and *Meeting End Time*.
- To the right, answer Yes, No, or N/A to the five *Summary Details for Students* questions.
- 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 BUCKY BUC (THEY/THEM)

You must first choose a Care Unit before adding any additional data in this form.

**Appointment Details**

Care Unit  
Select Care Unit

Location  
Select Location

Service  
Select Service

Course  
Start typing to search all courses

Meeting Type  
Select Meeting Type

Date of visit  
03/14/2024

Meeting Start Time: 12:59pm to Meeting End Time

**Appointment Summary**

B I Paragraph

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

Save this Report