


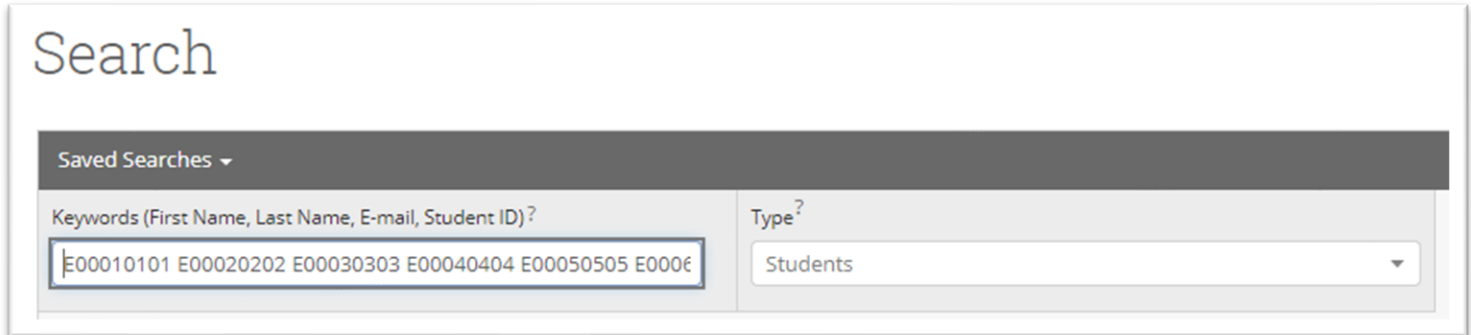
# Navigate360: Adding Appointment Summaries to More than One Student

Appointment Summary Reports provide Staff and Faculty the ability to record interactions with students pertaining to a specific appointment

## 1. Search a mass list of students

- Click on the *Advanced Search*  icon from the left navigation.
- Type or paste the student E Number(s) into the *Keywords (First Name, Last Name, E-mail, Student ID)* box under *New Search*. Click *Search*.

NOTE: More than one E Number may be included in one search. E Numbers must be separated by a space. E Numbers can be copied and pasted from a list in an Excel spreadsheet.



## 2. Add an Appointment Summary to the list of students

- Click the box next to *ALL* to select all of the students in the list.
- Click *Actions* and select *Create Ad hoc Appointment Summary* from the drop-down menu.
- An *Appointment Report for Multiple Students* box 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*.
- 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.
  - **NOTE:** Do not add a file with any personal identifying student or student contact information. This file will be added to the note for all students. As an example, if attaching an email which was sent to the list of students bcc, do not include an email which reveals student email addresses.



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- **NOTE:** The student will not be able to see other students when viewing the Appointment Summary. To the student, the Appointment Summary will look like it was only applied to them.

- Click *Save this Report*.

### APPOINTMENT REPORT FOR MULTIPLE STUDENTS

#### Appointment Details

Care Unit  
Advising

Location  
Select Location

Service  
Select Service

Course  
Start typing to search all courses

Meeting Type  
Select Meeting Type

Date of visit  
05/31/2024

Meeting Start Time  
9:32am

Meeting End Time  
to

All times listed are in Eastern Time (US & Canada).

#### Attendees

#### Summary Details For 2 Students

Discussed Academic Alerts.  Yes  No  N/A

Discussed ESPR grades.  Yes  No  N/A

Discussed Withdrawing from ETSU (All Courses).  Yes  No  N/A

#### Appointment Summary

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**Attachments**

Attach File

Choose File No file chosen

**i** 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**