NAVIGATE U

Staff and Faculty Guide

Reporting on an Appointment

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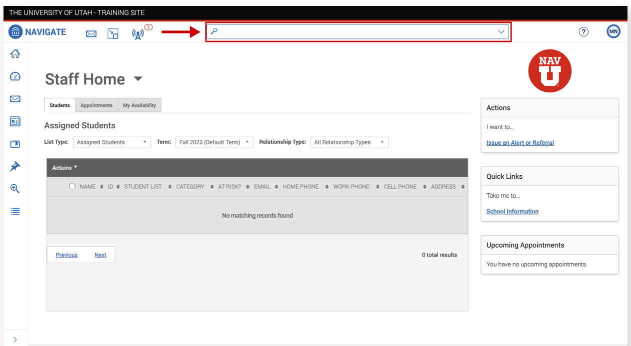
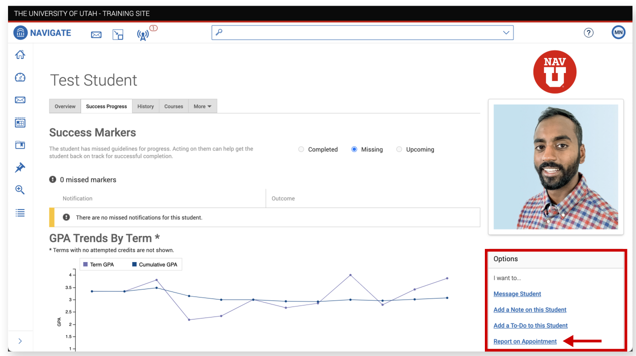
Making a Report for an appointment is similar to adding an appointment summary, but Reporting is used to make advising notes for appointments that weren't scheduled on the Navigate U platform—like walk-in meetings.

1 From the Staff Home, search for the student that you met with in the **quick search bar** at the top of the page, and click on their name

2 Once you're on the student's page, click on **Report on Appointment** in the **Options** section on the right side of the screen, and begin filling in the necessary appointment details

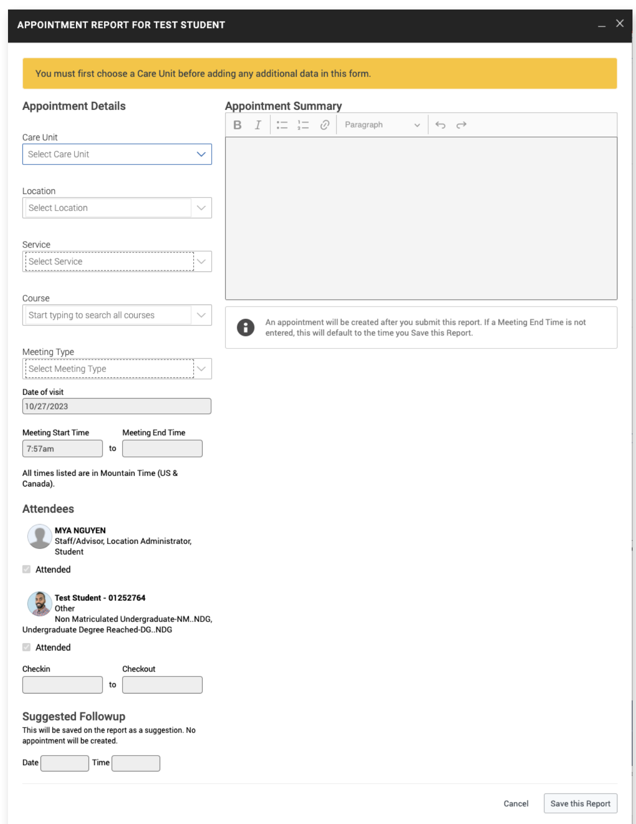




Report Anatomy

3 Required Fields:

- **Care Unit:** Student Affairs
- **Location:** Student Affairs Department (ex: Advising)
- **Service:** general meeting or specialized meeting (ex: major/minor question vs transferring out of major into new college, capable of adding multiple reasons)
- **Meeting Type:** In-person, Zoom, Phone, or E-mail are all appropriate responses.
- **Date of Visit:** will default to the date of note submission, if not done day of, so enter the appropriate date of the original meeting or the last time you emailed with the student.



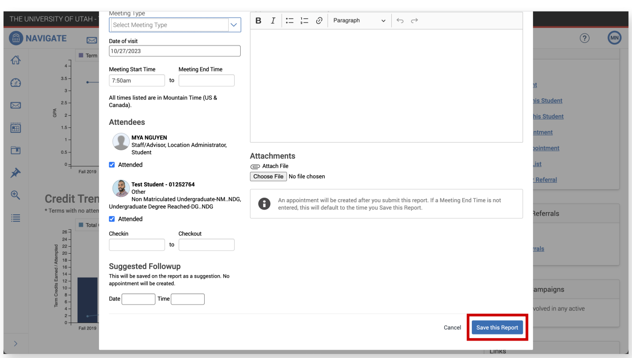
Optional Fields:

- **Course:** if the meeting is about a specific course, you've been communicating with the faculty member of that course about the student, you need to add the course number. Otherwise you can leave this blank if it's a general student affairs meeting.

- **Meeting Start/End times:** if your office tracks this information please fill it out, but it's not need otherwise.

When you have the sidebar filled out, you can move into entering the meeting information in the **Appointment Summary** box. You should keep brief notes with details that correlate to important discussion points during the meeting and next steps discussed with the student. You can also copy and paste the direct discussion from email communication with students as also being appropriate records of communication. The student does not have access to view appointment summary notes.

4 Once you've finished filling out the report, click **Save this Report**, and you'll see a confirmation message in the bottom right



5 You can view the report by navigating to the Staff Home and scrolling down to **Reporting** under the **Appointments** tab