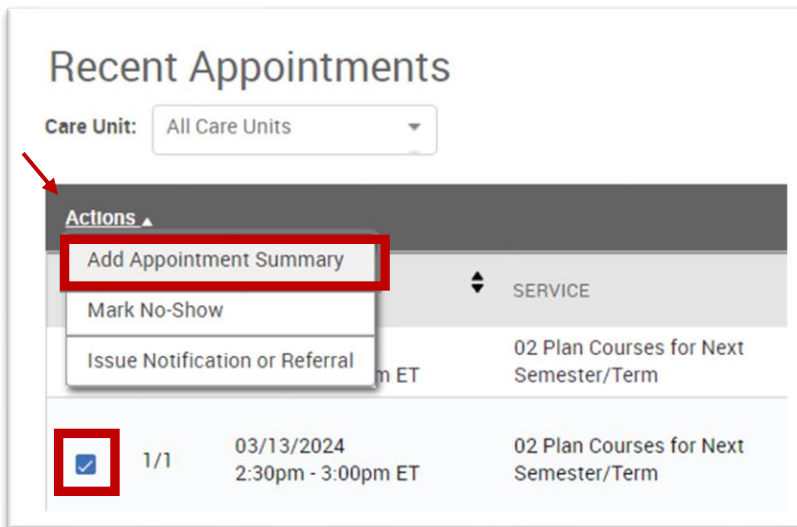
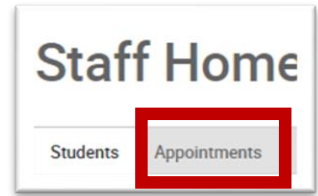


Navigate: Adding an Appointment Summary to a Student for a Scheduled Appointment Instance

Appointment summary reports provide staff and faculty with the ability to document information and interactions pertaining to specific student appointments

1. Open the Appointment Summary window for a completed student appointment

- From the *Staff Home* page, click the *Appointments* tab.
- Scroll down to *Recent Appointments* under *Reporting*.
- Check the box to the left of the appointment/student to report on.
- Click *Actions* in the top left corner of the box. Then click *Add Appointment Summary*.



2. Add an Appointment Summary to the student

- An *Appointment Report For* window will appear.
- To the left, the *Care Unit, Location, Service, Meetings Type, Date of Visit, Meeting Start Time, and Meeting End Time* will be auto-completed.
- To the right, answer Yes or No to the three *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*.

A screenshot of the 'APPOINTMENT REPORT FOR MAYA MURCHISON' form. The form is divided into several sections. On the left, there are fields for 'Appointment Details' (02 Plan Courses for Next Semester/Term, 03/13/2024 11:00am - 11:30am ET), 'Appointment Campaign' (SU/FA24 Semester Advisement- Soph.- ...), 'Care Unit' (Advising), 'Location' (Management (Hospitality, Human Resour...)), 'Service' (02 Plan Courses for Next Semester/Term), 'Course' (Start typing to search all courses), and 'Meeting Type' (Virtual). On the right, there are 'Summary Details For' questions: 'Discussed early alerts.' (Yes No N/A), 'Discussed ESPR grades.' (Yes No N/A), and 'Discussed withdrawing from ETSU.' (Yes No N/A). Below these is the 'Appointment Summary' text area with a rich text editor toolbar. At the bottom right, there is an 'Attachments' section with 'Attach File' and 'Choose File' buttons. A 'Save this Report' button is located at the bottom right of the form.