


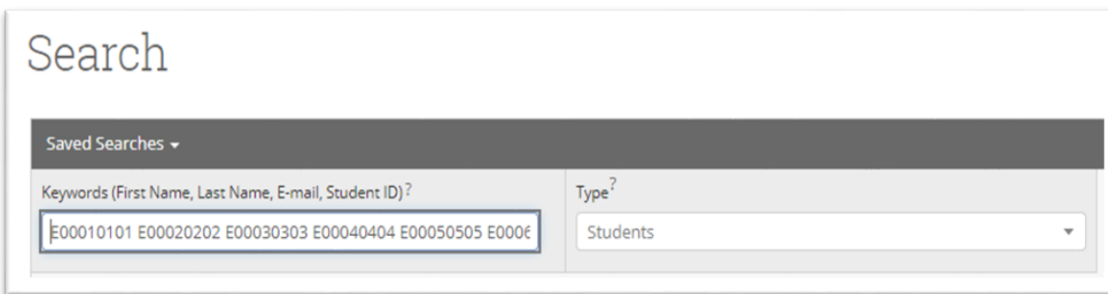
## Navigate - Adding Appointment Summaries to More than One Student

*Seamlessly add an appointment summary to more than one student profile.*

### 1. To run a report 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.



The screenshot shows a search interface with the title "Search". Below the title is a "Saved Searches" dropdown menu. The main search area has two input fields: "Keywords (First Name, Last Name, E-mail, Student ID)?" and "Type?". The "Keywords" field contains the text "E00010101 E00020202 E00030303 E00040404 E00050505 E00060606". The "Type" dropdown menu is set to "Students".

### 2. To add an Appointment Summary to the list of students:

- Click the box next to *Name* 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*.
  - 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.
- 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*.

## Assigned Students

List Type: Assigned Students Term: Fall 2022 (Default Ter...)

Relationship Type: All Relationship Types

Actions ▾

100 items on this page are selected. [Select all 392 items.](#)

NAME ID STUDENT LIST CUMULATIVE GPA PREDICTED SUPPORT LEVEL CATE

## Assigned Students

List Type: Assigned Students Term: Fall 2022 (Default Ter...)

Relationship Type: All Relationship Types

Actions ▲

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Appointment Campaign

100 items on this page are selected. [Select all 392 items.](#)

STUDENT LIST CUMULATIVE GPA PREDICTED SUPPORT LEVEL CATE

### APPOINTMENT REPORT FOR BUCKY BUC

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

#### Appointment Details

Appointment Campaign: Select Appointment Campaign

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: 09/09/2022

Meeting Start Time: 1:50pm Meeting End Time: to

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

#### 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.