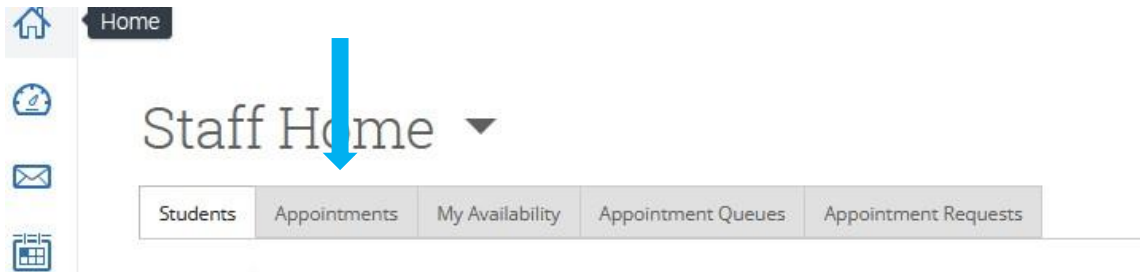


CU Navigate Training | Advisor Role

Adding Appointment Summaries to Scheduled Appointments

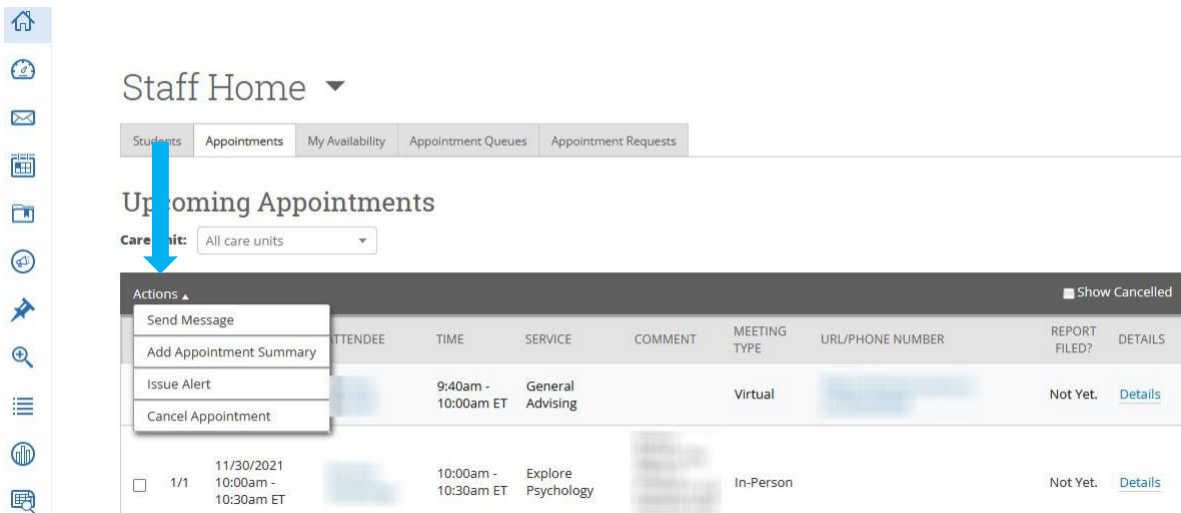
*Appointment summaries are appropriate for documentation related to an appointment. Follow these instructions for documenting scheduled appointments. See page 2 for how to create a report for nonscheduled meetings.

From your home screen click the **Appointments Tab**



Click the box next to the student's name in either **Upcoming Appointments** or **Recent Appointments** (student will show in different area depending on if the appointment time has opened or not).

Click **Actions** and **Add Appointment Summary**



Fill out the appointment summary and click **Save this Report**

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Adding Appointment Summaries to Non-Scheduled Appointments

To add an appointment summary for non-scheduled appointments, go to the student's profile and click **Report on Appointment**

The screenshot shows the CU Navigate interface for a student profile. The top navigation bar includes the 'NAVIGATE' logo, a search bar, and a 'Terms' dropdown set to 'Fall 2021'. The main content area displays student statistics: Course Grade D/F (0), Repeated Courses (0), Withdrawn Courses (0), Missed Success Markers (0), and Cumulative GPA (3.00). Below these are 'Total Credits Earned' (0.00), 'Credit Completion % at this Institution' (96%), and 'Support' (LOW). The student's major is 'Psychology' and the institution is 'Behavioral, Soc and Hlth Sci'. On the right, the 'Current Alerts' sidebar lists several actions, with 'Report on Appointment' highlighted by a blue arrow.

Fill out the **Appointment Details** then the **Appointment Summary**. Click **Save this Report**.

The 'Appointment Report' form is displayed in a dark header. A yellow banner at the top states: 'You must first choose a Care Unit before adding any additional data in this form.' The form is divided into two main sections: 'Appointment Details' and 'Appointment Summary'. The 'Appointment Details' section contains five dropdown menus: 'Care Unit' (with a 'Select Care Unit' placeholder), 'Location' (with a 'Select Location' placeholder), 'Service' (with a 'Select Service' placeholder), 'Course' (with a search prompt 'Start typing to search all courses'), and 'Meeting Type' (with a 'Select Meeting Type' placeholder). The 'Appointment Summary' section features a rich text editor with formatting options (Bold, Italic, Bulleted List, Numbered List, Link) and a 'Paragraph' dropdown. Below the editor is an information icon and a message: '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.'