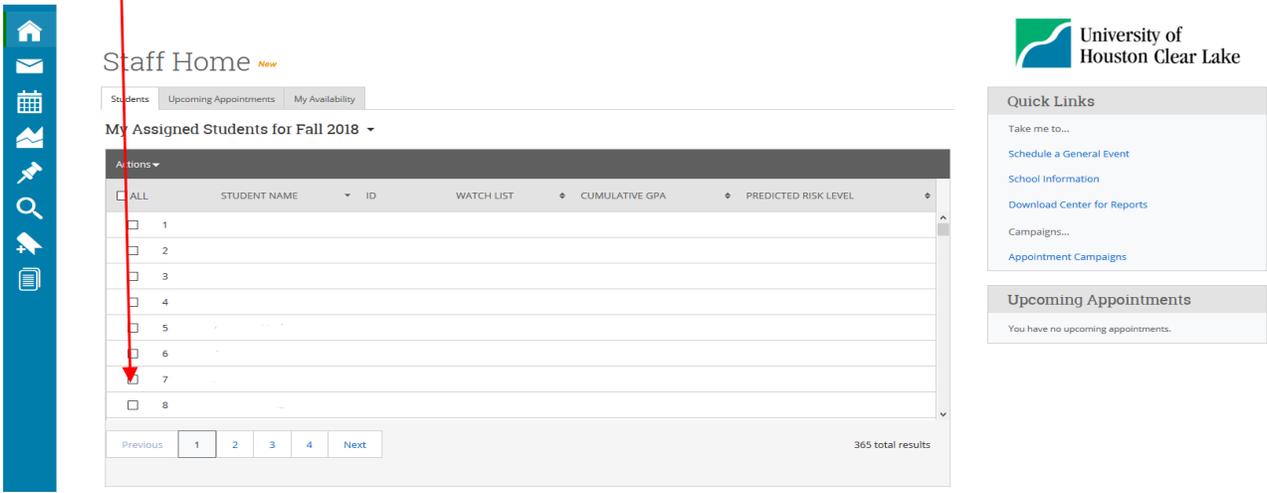
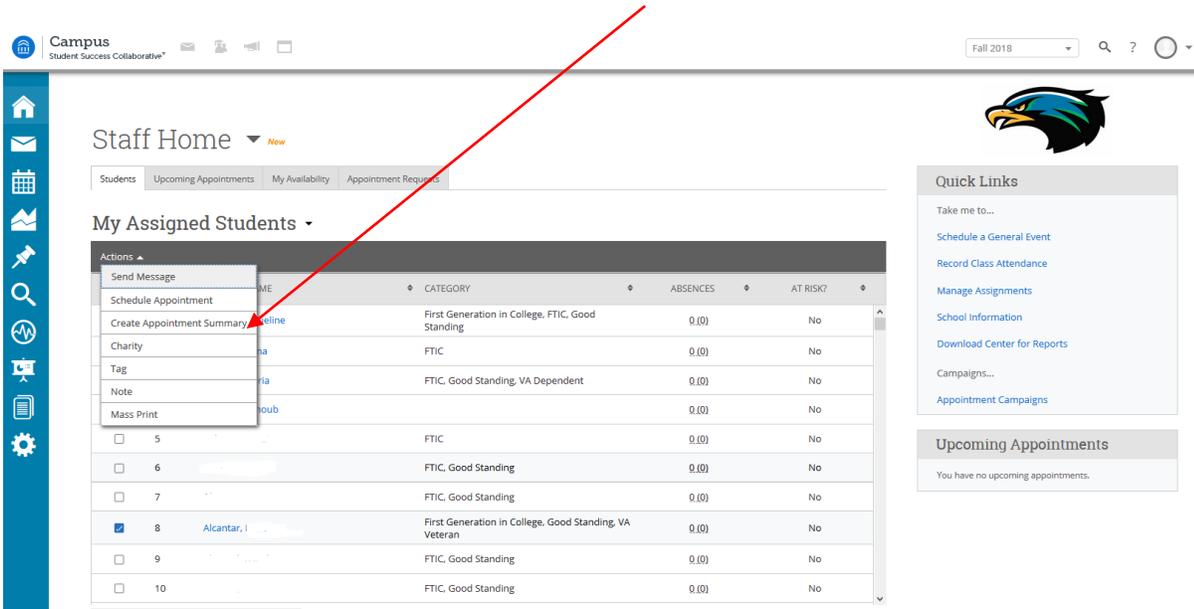


How to write an Appointment Summary document a student's appointment with an advisor.

Steps	Descriptions
1.	Enter your UHCL user ID/user name and password to login to Navigate.
2.	<p>There are two ways to write an advising summary report (Option 1: if students did not check-in at the Navigate Kiosk START at My Assigned Students or Option 2: if student did check-in at the Navigate Kiosk, start at Recent Appointments)</p> <p>Option 1 Starting Point: Click: Box next student that you are writing an advising summary report from your assigned students.</p> 
3.	<p>Click: Actions drop down and select Create Appointment Summary (official note)</p> 

4.

Click: **Care Unit** drop down
Select: **Advising**

APPOINTMENT REPORT FOR RICHARD ALCANTAR

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

Appointment Details

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: 11/16/2018

Attendees

Advisor, Study Hall Monitor, Super User, Tutor

Attended: Arrived [] Departed []

Other: Mathematical Science BS

Attended: Arrived [] Departed []

Suggested Followup

This will be saved on the report as a suggestion. No appointments will be created.

Date: [] Time: []

Save this Report

DONE

5.

Option 2 Starting Point:

Click: **Box** next student that you are writing an advising summary report from *Recent Appointments* then
Click: **Actions** drop-down box and click on **Add Appointment Summary**.

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All care units

Actions		SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input checked="" type="checkbox"/>	1/1	12/05/2018 10:09a - Ongoing	Considering changing my Major	N/A	[]	In Progress	Not Yet.	Not Available
<input type="checkbox"/>	1/1	11/20/2018 08:59a - 09:02a	Considering changing my Major	N/A	[]	3 min	Not Yet.	Details
<input type="checkbox"/>	1/1	10/19/2018 02:00p - 02:45p	Probation Advising	N/A	[]	45 min	Not Yet.	Details
<input type="checkbox"/>	1/1	10/19/2018 08:45a - 09:30a	Probation Advising	N/A	[]	45 min	Not Yet.	Details

6. Complete: **Appointment Report form below (You are able to attach files as needed.)**
Click: **Save this Report**

Appointment Report Form

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: 11/16/2018

Attendees

- Advisor, Study Hall Monitor, Super User, Tutor
 Attended
Arrived: 3:28pm Departed: []
- Other
Mathematical Science BS
 Attended
Arrived: 3:28pm Departed: []

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.
Date: [] Time: []

Summary Details For Richard Alcantar

Primary Reason for the meeting: [] Barriers delaying academic progress: []
Referral Made: [] Appointment Follow up to be scheduled: []

We discussed selecting courses and/or degree progress: Yes No N/A
Student has viewed the online DPR at least once: Yes No N/A
Core Complete according to DPR: Yes No N/A
We discussed progress in current courses: Yes No N/A
Student is decided on their major: Yes No N/A
Student Concerns/Questions were resolved: Yes No N/A

Appointment Summary

Attachments

Attach File
Browse... No file selected.

Save this Report

DONE