
REPORT ON APPOINTMENTS

Advisors and staff users can type notes and document student meetings within Navigate, whether the interactions were drop-in visits, scheduled appointments, or impromptu emails, IMs or phone calls..

**Step 1: View List of Upcoming and Recent Appointments**

* Click on the **Appointments** tab from your Staff view Home screen in Navigate.
* You will see two tables; one lists students who have upcoming appointments (not-yet-occurred) and another list of students with recent appoints that have occurred within the past 90 days.

**Step 2: Add an Appointment Summary to the Student’s Navigate Record**

* The appointment tables will display a Report Filed column.
	1. If **Not Yet** is displayed then the appointment summary report has not yet been posted.
	2. If the student’s row display a green box with **Report Details**, then an appointment summary has been posted.
* From either the **Upcoming** or **Recent Appointments** list, click on the box next to the student’s name for whom you wish to report the details from the appointment.
* Next, click on the Actions menu and select **Add** **Appointment Summary**..

**Step 3: Complete the Appointment Report Screen**

* Complete the form fields that appear after Step 2.
* Be sure to check the box next to the student’s name so that they will be reported as attended.
If the student was a no-show, uncheck the box.
* Click **Save this Report** when finished.
* Your advising area or department may provide additional guidance on the business processes for your area related to documenting student appointments.

**Important**: Be sure that your student notes are appropriate and avoid assumptions, judgments, or specific personal information. Omit diagnoses and negative inferences, as well as specific medical issues. Use the [**NIU Student of Concern Report**](https://www.niu.edu/conduct/incident-reporting/student-of-concern.shtml) form for immediate health or safety concerns.

**Step 4: Other Ways to Document Appointments or Meetings with Students**

* From your **Assigned Students** list: Click on the box next to the student’s name for whom you wish to report the details from a meeting or an appointment. Then, click on the Actions menu and select **Create Ad hoc Appointment Summary**.
* From a Student’s Home Screen, select the **Report on Appointment** link from the right-hand list of options.