

Creating an Appointment Summary Report

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Creating a report for your appointments allows students to review what was discussed during their appointment, via their Navigate Student mobile app. It will also populate the appointment summary report in your students' History tab, for your own review.

You can create reports for existing Navigate appointments and for appointments not scheduled in Navigate.

Creating an Appointment Summary Report for existing Navigate appointments:

Step 1:

Select the Appointments tab from your Staff home page.

Staff Home

Students	Appointments	My Availability	Appointment Queues	Appointment Requests
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If you have questions, need assistance, or would like to learn more about what Navigate can offer, please contact our campus Navigate Administrator, Greg Lang, at Navigate@uwsp.edu. Greg also offers dedicated one-on-one meetings, training for departments, and other services to help you use Navigate to its full potential. We are here to help!

Step 2:

Locate the appointment for which you are submitting a report under “Upcoming Appointments,” or “Recent Appointments” section. Select the appointment using the checkbox to the left of the appointment.

Recent Appointments

Care Unit: All Care Units

Actions		DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILE	DETAILS	PRE APPT QUESTIONS
<input checked="" type="checkbox"/>	1/1	08/16/2024 9:30am - 10:00am CT (30m)	Adding or Dropping Courses	N/A		Student Name	Not Yet.	Details	N/A

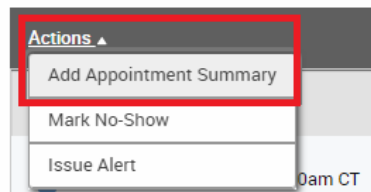
Step 3:

Next, select “Actions,” and “Add Appointment Summary.” This will open an Appointment Summary Report window for you to complete.

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Recent Appointments

Care Unit:



Creating an Appointment Summary Report for appointments not scheduled in Navigate:

Step 1:

From your assigned students list, or by using the quick search tool atop your screen, go to a student's profile page in Navigate. On the right hand-side, you can select, Report on Appointment. An Appointment Summary Report window will open.

Because this report is for an appointment that was not scheduled in Navigate, you will need to indicate which Care Unit the report is for.

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Options

I want to...

[Message Student](#)

[Add a Note on this Student](#)

[Report on Appointment](#)

[Create Request for Appointment](#)

[Schedule an Appointment](#)

[Add to Student List](#)

[Issue an Alert](#)

APPOINTMENT REPORT FOR STUDENT NAME

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

Appointment Details

Care Unit

Select Care Unit

Advising

Career Services

Appointment Summary

Paragraph

B

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Help Is Available!

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