Completing Advising Appointment Summaries in Navigate

1. Click on “Upcoming Appointments” tab. All future scheduled appointments will show.

2. Check the box for the student you will be meeting with next, click on “Actions”, and select “Add Appointment Summary”.

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![Staff Home](https://via.placeholder.com/150)
3. The appointment summary report form will appear. Fill in applicable Appointment Details and add your Appointment Summary narrative.

4. After your appointment, click on the Home tab and scroll down to “Reporting” under your list of students. Your appointment summaries will appear here. If you choose to create the appointment summary after your meeting, it can be done from this location rather than “Upcoming Appointments”. Appointment summaries can also be edited from this location. *Reminder – These summaries are a part of a student’s educational record, and the student and other campus advisors may view them at any time. For more information, please see the Advising Notes: Best Practices document.