

Taking notes on a scheduled appointment is slightly different than if you are taking notes on a drop in appointment, or one that was scheduled outside the system. Instead of looking the student up and then 'reporting on appointment', you'll want to find the existing appointment in Navigate.

The screenshot shows the Navigate interface. On the left is a vertical sidebar with icons for Home, Mail, Calendar, Reports, Charts, Pins, Search, Location, Health, Documents, and Settings. The main content area is titled 'Upcoming Appointments' and includes a 'Care Unit' dropdown menu set to 'All care units'. Below this is a table of appointments with columns for Actions, DATE, ATTENDEE, TIME, SERVICE, COMMENT, REPORT FILED?, and DETAILS. The table contains six rows of appointment data, with the first row selected. A 'Show Cancelled' checkbox is visible in the top right of the table area.

Actions	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	02/10/2020 03:30p - 04:00p	[REDACTED]	3:30p-4:00p	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>
<input type="checkbox"/>	02/11/2020 11:30a - 12:00p	[REDACTED]	11:30a-12:00p	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>
<input type="checkbox"/>	02/12/2020 01:30p - 02:00p	[REDACTED]	1:30p-2:00p	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>
<input type="checkbox"/>	02/13/2020 11:00a - 11:30a	[REDACTED]	11:00a-11:30a	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>
<input type="checkbox"/>	03/06/2020 11:00a - 11:30a	[REDACTED]	11:00a-11:30a	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>

Select the appointment you want to add notes to, and then click on the small triangle under actions to get a dropdown menu. From the menu select "Add Appointment Summary".

This image is a close-up of the 'Actions' dropdown menu for an appointment. The menu is open, showing four options: 'Send Message', 'Add Appointment Summary', 'Issue Alert', and 'Cancel Appointment'. A black arrow points from the left towards the 'Add Appointment Summary' option. The appointment row below the menu is partially visible, showing a checked checkbox in the 'Actions' column and the date '02/13/2020'.

Actions	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input checked="" type="checkbox"/>	02/13/2020 11:00a - 11:30a	[REDACTED]	11:00a-11:30a	Academic Planning	[REDACTED]	Not Yet.	<a href="#">Details</a>

The first three fields should be autopopulated for you. If the appointment was part of a campaign it will also show the name of it. You can now enter any additional details you'd like, but none are required – just hit save when you're done.

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### APPOINTMENT REPORT FOR MACKENZIE SOMERS

  

#### Appointment Details

**Appointment**  
02/13/2020 11:00a-11:30a - Academic Planning

**Care Unit**  
Advising

**Location**  
Academic Advising Center

**Service**  
Academic Planning

**Course**  
Start typing to search all courses

**Meeting Type**  
Select Meeting Type

**Date of visit**  
02/13/2020

**Meeting Start Time** 11:00am **Meeting End Time** 11:30am

#### Summary Details For Mackenzie Somers

<b>Academic or Career Goals</b> <input type="text"/>	<b>Goals for next session/next steps</b> <input type="text"/>
Student has discussed possibility of transferring/withdrawing.	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Student shared personal/financial concerns.	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Advisor explained any program application requirements or major/career information (if applicable). Appointment was a drop-in.	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Is this student your assigned advisee?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

#### Appointment Summary

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