

EAB Navigate: Add Advising Summary Reports

Documenting a Student Interaction

Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page and then click on the Appointments Tab. Scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also **Mark as No-Show** for students who do not attend.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.

Staff Home

- Students
- Appointments
- My Availability
- Appointment Queues
- Appointment Requests

Upcoming Appointments

Care Unit: All care units

Reporting

- Recent Appointments
- Recent Reports You Created

Recent Appointments

Care Unit: All care units

Actions

- Add Appointment Summary
- Mark No-Show
- Issue Alert

For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.

My Assigned Students All Terms

NAME	ID	WATCH LIST	CUMULATIVE GPA	SUPPORT
	885975301		0.00	High
	658621590		2.19	High
	178436157			
	196123052			
anira	538235217		2.96	Moderate
	999777248		2.12	Moderate
	609888859		2.79	Moderate
	355089613		2.98	Moderate

2,806 total results