



NAVIGATE GUIDEBOOK FACULTY ADVISOR

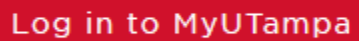
University of Tampa

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Getting Started

1. You will access the Navigate platform through your MyUTampa account.
2. To open MyUTampa, go to www.ut.edu/myutampa in any web browser (Internet Explorer, Firefox, Chrome, etc.) and click the **Log in to MyUTampa** button (image below).




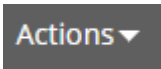


A red rectangular button with rounded corners containing the text "Log in to MyUTampa" in white.

3. **Log in** with your University of Tampa Spartan Domain Login Credentials (username and password used for accessing computers).
4. From the MyUTampa main page, **Select** the Navigate tile (image below).



5. You will automatically be taken to your Navigate **Home** page on a new tab.

Navigate Elements

Description	Visual Icons
<ul style="list-style-type: none"> The Home screen can be reached anytime by selecting the Home Icon at the top of the taskbar, on the left hand side of the screen. This is the screen you will see when you sign in and is the start for many instructions. 	
<ul style="list-style-type: none"> Select a row, or multiple rows in a table by selecting inside the Checkbox. 	
<ul style="list-style-type: none"> Where selecting only one record is possible, there will be a Radio button. Select this button to select that row. 	
<ul style="list-style-type: none"> Each table will have an Actions list that will give you options for adding or editing information. 	
<ul style="list-style-type: none"> At the top left of every screen are three buttons. The leftmost will alert you of unread messages. The second provides news and announcements, and the rightmost refers to windows that have been minimized. 	
<ul style="list-style-type: none"> At the top right of every screen are four useful tools. The leftmost allows you to toggle between terms. The second is the Quick Search bar, where you can quickly search for any student assigned to you. The third is Resources and Support, where the help center, system updates, and useful resources are located. The final tool allows you to sign out of the platform. 	

- ❖ **IMPORTANT** - All notes, appointment summaries, alerts, and messages you input on a student can be viewed by all other users who have access to that student. Private information that should not be shared with various users across campus should not be added to this system.

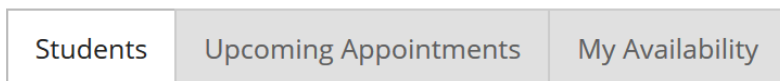
AVAILABILITY

Setting up your availability is the most important step you must take if you intend to schedule and manage appointments with students in Navigate. Setting up your availability impacts when and how students experience the scheduling workflow from their perspective. It also determines when they can schedule those appointments with you.

Setting Up Appointment Availability

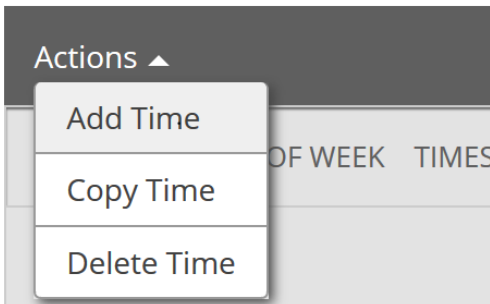
1. On the **Home Page**, select the **My Availability** tab.

Staff Home ▼



2. Select the **Actions** drop down menu (under the heading *Available Times*), and select **Add Time**.

Available Times



3. An **Add Availability** pop-up box should appear.
4. Fill in the following criteria as it appears below:
 - a. **When are you available to meet?** Select the days you are available.
 - i. **Note:** If you are available at the same time each day, you may select multiple days at this time. If you are available at different times each day, you must complete this process for each day separately.
 - b. **From:** Start Time
 - c. **To:** End Time
 - d. **How long is this availability active?**
 - i. **Semester** – Will only remain active for the currently listed semester.
 - ii. **A Range of Dates** – Will only remain active for the range of calendar dates you have selected.
 - iii. **Forever** – Will remain active with no established stop date.
 - e. **What type of availability is this?** Appointments

- f. **Care Unit:** Faculty Advising (2nd Year - Graduation)
 - g. **Location:** Online/Phone Meeting - Faculty Advising
 - h. **Services:** Faculty Advising Meeting
 - i. **Special Instructions for Student:** Generally includes the meeting location and any other pertinent notes for the student. The information that you add here will populate for every meeting scheduled by/with you for this service. **It is suggested you add your phone number or Zoom link to this area.**
 - j. **Max number of students per appointment:** Suggested setting is “1”
5. **Note:** The system automatically sets appointments for **20 minutes** each. Should you need additional time with the student, encourage them to select multiple appointment time slots when booking their appointment with you.

6. Once you are finished entering the information from above, click **Save**. You should now see your availability listed in the **Available Times** table.

Staff Home ▼

Students Upcoming Appointments My Availability Appointment Queues Appointment Requests

Available Times

Actions ▼						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
<input type="radio"/>	Mon, Wed	2:00p-4:00p	S1 2019	Faculty Advisor Office (See Directory www.ut.edu/directory/)	Faculty Advising Meeting For: Appointments	Faculty Advising (2nd Year - Graduation) Edit

To Edit your Availability

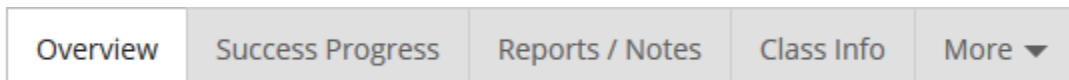
1. Click **Edit** on the **Available Times** table next to the time you wish to alter. The **Add Availability** pop-up box will appear again. Follow the process from steps 4 – 6 above to edit your availability.
2. **Note:** The system will not allow students to book appointments on the same day. Encourage them to set these appointments at least a day in advance.

STUDENT PROFILES

To view a student's profile, simply click the student's blue hyperlinked name anywhere in Navigate. If you are searching for a specific student, use the **Quick Search** bar, identified by a magnifying glass on the top right section of the screen. You can search by a student's name or Spartan ID#. Permission to view a student's profile is based on your role in the system. Generally, you can only view profiles for students who are your assigned advisees or are enrolled in your course during a specific term.

Viewing a Student's Profile

The pages listed on the following five tabs are outlined below:



1. **Overview:** This page provides a 30 second quick view of pertinent student information.
2. **Success Progress:** This page shows the student's academic summary as well how the student is progressing through the Success Marker courses in their declared major.
3. **Reports / Notes:** This page contains information on Cases, Alerts, Progress Reports, and Notes that have been added to the student's Navigate profile.
4. **Class Info:** This page shows information about Classes This Term as well as Term Details for previous semesters.
5. **More:** This page allows you to view the student's Calendar, their Study Hall Attendance, Appointments made through the platform, and Conversations.

Note: You can take action on any page in the student's profile by selecting one of the following options listed in the grey box on the right side of the screen.

1. Message Student
2. Add a Note on this Student
3. Add a Reminder to this Student
4. Report on Appointment
5. Schedule an Appointment
6. Add to Watch List
7. Issue an Alert

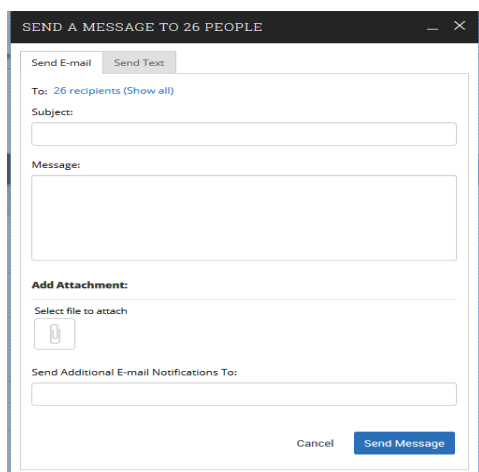
TAKING ACTION

Navigate allows you to connect with your student in a myriad of ways. This next section will outline how you can use the system to track, message, schedule meetings with, and initiate intervention with your students when needed.

Message a Student


From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student's name or Spartan ID# in the field that populates.
3. Click the hyperlinked **Message Student** listed in the grey box on the right side of the student's profile.
4. The following box will appear.

A screenshot of a web application dialog box titled "SEND A MESSAGE TO 26 PEOPLE". The dialog has a dark header bar with the title and window control icons. Below the header, there are two tabs: "Send E-mail" (selected) and "Send Text". The main content area includes a "To:" field with the text "26 recipients (Show all)", a "Subject:" label followed by a text input field, and a "Message:" label followed by a larger text area. Below these is an "Add Attachment:" section with a "Select file to attach" label and a file upload icon. At the bottom, there is a "Send Additional E-mail Notifications To:" label followed by a text input field. The dialog concludes with "Cancel" and "Send Message" buttons.

5. Compose your message and then select **Send Message**.

From the **Home Page** for your **Assigned Advisees**:

1. Go to the **Home** Page.
2. Scroll down to **My Assigned students** and select the 
3. A dropdown menu will appear and you can select either:
 - a) **My Assigned Students** (For the current term)
 - b) **My Assigned students All Terms**

4. Select the students you would like to send your message to by clicking the box next to their names.
5. If you would like to select all of your assigned advises, you can check the top grey box in the table titled **ALL**.

Actions▼

6. Once you have selected the appropriate students click
7. Select **Send Message**.
8. Follow steps 4 and 5 from the **Quick Search** instructions listed above.

Add a Note on a Student

From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student's name or Spartan ID# in the field that populates.
3. Click the hyperlinked **Add a Note on this Student** listed in the grey box on the right side of the student's profile.
4. The following box will appear.

ADD A NOTE TO STUDENT NAME

Note (Required)

B

I

☰

☰

🔗

Paragraph

↶

↷

P

Attach File

Browse...

No file selected.

Note Subject

Student Name

Junior

Marketing

Relations

Note Reason

Note URL

Visibility

☐ User Name ?

☐ Student Name ?

☐ Printed Student Report



Cancel

Save Note

5. **Enter** the text for your **Note**.

6. **Select a *Note Reason*** by from the field provided. The menu of Note reasons are pre-defined.
7. **Attach** any pertinent documents by Selecting **Attach File**.
8. Do not select any boxes listed under the **Visibility** section. By default, the note will be visible to any user who has permissions to see notes (students do not have permission to see notes unless the checkbox next to their name under visibility is selected, and this is generally discouraged).
9. **Select Save Note** to finish.

From the **Home Page** for your **Assigned Advisees**:

1. Go to the **Home** Page.
2. Scroll down to **My Assigned students** and select the 
3. A dropdown menu will appear and you can select either:
 - c) **My Assigned Students** (For the current term)
 - d) **My Assigned students All Terms**
4. Select the students you would like to add a **Note** to by clicking the box next to their names.
5. If you would like to select all of your assigned advises, you can check the top grey box in the table titled **ALL**.
6. Once you have selected the appropriate students click 
7. Select **Note**.
8. Follow steps 4 – 9 from the **Quick Search** instructions listed above.

Schedule an Appointment


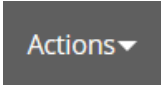
Note: You must first set your Appointment Availability in the system (see page 4 of this user guide for instructions) to be able to schedule an appointment with a student.

From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student's name or Spartan ID# in the field that populates.

3. Click hyperlinked ***Schedule and Appointment*** listed in the grey box on the right side of the student's profile.
4. The ***Schedule Appointment*** screen will appear.
5. Fill in the following criteria as it appears below:
 - a) **Care Unit:** Faculty Advising (2nd Year – Graduation)
 - b) **Location:** Online/Phone Meeting - Faculty Advising
 - c) **Service:** Faculty Advising Meeting
 - d) **Course:** No course needed
 - e) **Select:** Your name under ***Select an Organizer***
 - f) **Select a Date:** Select the date for which you need to schedule an appointment.
 - g) **Select a Time:** Available times that align with your availability and do not conflict with the student's class will be depicted in green.
 - h) **Select:** ***Save Appointment***
6. This appointment will now show on the right side of your ***Home Page*** under the ***Upcoming Appointments*** section.

From the ***Home Page*** for your ***Assigned Advisees:***

1. Go to the ***Home*** Page.
2. Scroll down to ***My Assigned students*** and select the 
3. A dropdown menu will appear and you can select either:
 - e) **My Assigned Students** (For the current term)
 - f) **My Assigned students All Terms**
4. Select the student(s) you would like to ***Schedule an Appointment*** with by clicking the box next to their name(s).
5. Once you have selected the appropriate student(s) click 
 - a. **Note:** It is advised that you only schedule appointments with one or a few students at a time under this service, as identifying a common time may be difficult within the appointment scheduler for a large number of attendees.
6. Click ***Schedule Appointment***.
7. Follow steps 4 – 6 from the ***Quick Search*** instructions listed above.

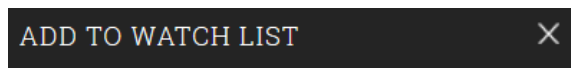
To Delete, Cancel, or Edit a Scheduled Appointment

1. Click on the **Faculty Advising Meeting** hyperlink for the meeting that you need to delete, cancel, or edit. Upcoming meetings will populate on the right side of your **Home** Page.
2. The **Manage Appointment** screen will pop up.
3. To delete the appointment, click **Delete Appointment**.
4. Then, click **Delete Appointment Instance** on the pop-up.
5. To cancel the appointment, click **Cancel Appointment**.
6. Select the following for the **Manage Appointment** pop-up.
 - a. **Cancel Appointment For:** Select the name of the person who cancelled.
 - b. **Reason:** Select the appropriate reason from those provided.
 - c. **Comments:** Add an applicable comments/notes concerning the cancellation.
 - d. Click, **Mark as Cancelled**.
 - e. Click, **Close**.
7. To edit the appointment, click **Edit**.
8. The **Edit an Event** screen will appear.
9. **Uncheck** the original meeting time from the calendar grid, and select the new date and time for your meeting.
10. Click **Save Appointment**.

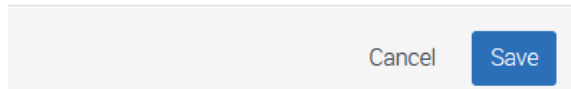
Add to Watch List

From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student's name or Spartan ID# in the field that populates.
3. Click the hyperlinked **Add to Watch List** shown in the grey box on the right side of the student's profile.
4. The following box will appear.





[Create new list...](#)



5. You can select to add the student to an already existing Watch List if you have one, or you can create a new Watch List.
6. Click **Save**.

From the **Home Page** for your **Assigned Advisees**:

1. Go to the **Home** Page.
2. Scroll down to **My Assigned students** and select the 
3. A dropdown menu will appear and you can select either:
 - g) **My Assigned Students** (For the current term)
 - h) **My Assigned students All Terms**
4. Select the students you would like to add to a **Watch List** to by clicking the box next to their names.
5. If you would like to select all of your assigned advises, you can check the top grey box in the table titled **ALL**.
6. Once you have selected the appropriate students click 
7. Select **Watch**.
8. Follow Steps 4 – 6 from the **Quick Search** instructions listed above.

Issue an Alert

From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student's name or Spartan ID# in the field that populates.

3. Click the hyperlinked **Issue an Alert** listed in the grey box on the right side of the student's profile.
4. The following box will appear.

ISSUE AN ALERT

Student

Husain Albather

Please select the reason you believe this student needs assistance

Select at least one

Is this alert associated with a specific class?

Optional

Additional Comments

Please enter a comment.

Cancel

Submit

5. **Select** the Appropriate **Alert to Refer or Positive Alert**:

- a. **May Leave UT – Needs Intervention**

- i. Currently, this Alert should only be added to freshmen cohort students and should only be placed if a student is willing to talk with someone (likely in The Academic Success Center) about the possibility of staying at UT. Students cannot see the notes associated with the Alert, but Staff/Faculty can.

- b. **Exploring a Major**

- i. This Alert is only for students who already have a declared major but are interested in changing their major and need to meet with someone to assist them with this process. This Alert should NOT be added to any students who are Undeclared, as they already receive targeted outreach from the Major Exploration Specialist.

- c. **Residential Conflict**

- i. Would include conflict with roommates, suitemates, policy issues, general complaints about residence. When a Residential Conflict Alert is issued, the student will receive outreach/intervention from a member of the Residence Life Team. In order to not duplicate efforts, specific

follow-up would happen in Symplicity not Navigate. End users can call Residence Life for additional info.



d. Campus Connection Recommended

- i. Would identify students who are frustrated or unable to connect with student orgs or peers. When a Campus Connection Recommended Alert is issued, the student will receive outreach from a member of the OSLE team. Follow-up will happen in Navigate.

e. Good Job!

- i. Sends the student an email highlighting that you submitted a Good Job Alert on them. This alert is meant to be general in nature, and does not have to be academic. The purpose of this alert is to positively reinforce those things you notice that your student is doing well.
6. If the alert aligns with a particular course, select it.
 7. Add any pertinent comments.
 8. Click **Submit**.

From the **Home Page** for your **Assigned Advisees**:

1. Go to the **Home** Page.
2. Scroll down to **My Assigned students** and select the 
3. A dropdown menu will appear and you can select either:
 - i) **My Assigned Students** (For the current term)
 - j) **My Assigned students All Terms**
4. Select the student you would like to **Issue an Alert** on by clicking the box next to their name.
 - a. **Note:** You can only issue an Alert on one student at a time.
5. Once you have selected the appropriate student click 
6. Select **Issue Alert**.
7. Follow steps 4 – 8 from the **Quick Search** instructions listed above.

REPORTING ON APPOINTMENTS

Appointment Summary Reports allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a walk-in, or the student was a no show.

Adding an Appointment Summary to an Already Scheduled Appointment

1. Ensure that your **Staff Home** role is listed at the top left corner of your **Home** Page.
 - a. **Note:** Most Faculty Advisors will also have a **Professor Home** role. This is where you can toggle between your roles as an instructor and faculty advisor.

Staff Home ▼

2. If you have a scheduled meeting with a student in the system, scroll down to the bottom of the page until you see **Reporting**.

Reporting

Recent Appointments

Recent Reports You Created

Recent Appointments

Care Unit: All care units ▼ ⓘ

3. At the scheduled meeting time, the appointment will show up under **Recent Appointments**.
4. Select the checkbox next to the student meeting for which you would like to complete a report.

Actions ▼

5. Click the **Action** drop down menu.
6. Select **Add Appointment Summary**.
7. An **Appointment Report** will populate.
 - a. Ensure that the following are selected:
 - i. **Care Unit:** Faculty Advising (2nd Year - Graduation)
 - ii. **Location:** Online/Phone Meeting - Faculty Advising
 - iii. **Service:** Faculty Advising Meeting

- iv. **Course:** No course needed.
 - v. **Meeting Type:** Select appropriate meeting type.
 - vi. Date of visit and times will automatically populate. Only change these if the meeting took place at an alternate date and time from what was scheduled.
8. Add the notes from your meeting in the **Appointment Summary** box.
 9. When finished, select the **Save this Report** button.

Notating a “No-Show” for an Already Scheduled Appointment

1. Follow steps 1 – 5 from “Adding an Appointment Summary to an Already Scheduled Appointment” instructions listed above.
2. Select Mark **No-Show**.
3. Add any pertinent notes in the **Appointment Report** that populates.
4. When finished, select the **Save this Report** button.
5. The appointment should now display under your **Recent Appointments** as a **NO SHOW** in the **Report Filed** column.


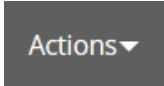
Adding an Appointment Summary Without a Scheduled Appointment

From **Quick Search**:

1. Select the **Quick Search** bar (identified by a magnifying glass) at the top right corner of the screen.
2. Type in the student’s name or Spartan ID# in the field that populates.
3. Click hyperlinked **Report on Appointment** listed in the grey box on the right side of the student’s profile.
4. An **Appointment Report** will populate.
 - a. Ensure that the following are selected:
 - i. **Care Unit:** Faculty Advising (2nd Year - Graduation)
 - ii. **Location:** Online/Phone Meeting - Faculty Advising
 - iii. **Service:** Faculty Advising Meeting
 - iv. **Course:** No course needed.
 - v. **Meeting Type:** Select appropriate meeting type.

- vi. Date of visit and times will automatically populate. Only change these if the meeting took place at an alternate date and time from what was scheduled.
5. Add the notes from your meeting in the **Appointment Summary** box.
6. When finished, select the **Save this Report** button.

From the **Home Page** for your **Assigned Advisees**:

1. Go to the **Home** Page.
2. Scroll down to **My Assigned students** and select the 
3. A dropdown menu will appear and you can select either:
 - k) **My Assigned Students** (For the current term)
 - l) **My Assigned students All Terms**.
4. Select the student you would like to report on an appointment for by clicking the box next to their name.
5. Once you have selected the appropriate student click 
6. Select **Create Appointment Summary**.
7. Follow steps 4 – 6 from the **Quick Search** instructions listed above.

ADVANCED SEARCH

The Advanced Search function within Navigate allows you to search for all students on campus while applying multiple filters to create unique populations of students based on your search parameters.

Searching for Specific Student Populations

1. Select the **Advanced Search** button on the left taskbar.



2. From here, you may begin to create a search from the fields immediately presented:

New Search

Saved Searches ▾

Show Advanced Filters

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

Students ▾

Search

☐ My Students Only ☐ Include Inactive

3. The **Show Advanced Filters** button presents you with 8 different fields to begin searching by.

New Search

Saved Searches ▾

Show Advanced Filters

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

Students ▾

Student Information

First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

▾

Enrollment History

Enrollment Terms

▾

Area of Study

College/School, Degree, Concentration, Major

▾

Performance Data

GPA, Hours, Credits

▾

Term Data

Classification, Term GPA

▾

Course Data

Course, Status

▾

Assigned To

Advisor, Peer

▾

Success Indicators

Predicted Risk Level, Success Markers


▾


Search

☐ My Students Only ☐ Include Inactive

4. Be sure to select the appropriate term for your search.
 - a. The term will default to the current term, to change this:

- i. Select **Enrollment Term** and change to the appropriate term.
5. Toggling different options under each section will alter the list of students you receive when the search is run.
 - a. **Example:** All Accounting Majors, enrolled in FA18, with cumulative GPA between 2.00 - 3.00.
6. When you have selected the appropriate parameters, select the **Search** button at the bottom of the page.



7. You will receive a list of students that match your parameters:
8. From here, you may either **Take Action** through the **Actions** menu  with one, several, or all of the students on this list, or you may **Save** your Search.
9. To save a search, click the **Save** button at the top of the page where it says **Unsaved Student Search**.
10. **Name your search**, and then select **Save Search** to save the parameters you already entered for future use.

Additional Filters

- **My Students Only** - Search only students assigned to you. Advisor assignments can be direct, one-to-one assignments or indirect major or category assignments. Tutors most commonly have direct, one-to-one student assignments. Students are assigned to professors based on their course rosters.
 - **Note:** You may not have a *My Students Only Option*, as your role in the system may only allow you to search your assigned students.
- **Include Inactive** - By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

NAVIGATE QUICK STEPS

Message a Student Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Message Student > Send Message

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select box next to student(s) name(s) or ALL > Actions > Send Message > Send Message

Add a Note on a Student Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Add a Note on this Student > Enter Text > Select Note Reason > Attach Pertinent File(s) > Do Not Check Visibility Boxes > Save Note

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select box next to student(s) name(s) or ALL > Actions > Note > Enter Text > Select Note Reason > Attach Pertinent File(s) > Do Not Check Visibility Boxes > Save Note

Schedule an Appointment with a Student Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Schedule an Appointment > Care Unit: Faculty Advising (2nd Year – Graduation) > Location: Online/Phone Meeting - Faculty Advising > Service: Faculty Advising Meeting > No Course > Select yourself as the Organizer > Select Date & Time > Save Appointment

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select box next to student(s) name(s) > Actions > Schedule Appointment > Care Unit: Faculty Advising (2nd Year – Graduation) > Location: Online/Phone Meeting - Faculty Advising > Service: Faculty Advising Meeting > No Course > Select yourself as the Organizer > Select Date & Time > Save Appointment

Add Student(s) to a Watch List Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Add to Watch List > Add to Existing List or Create New List > Save

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select box next to student(s) name(s) or Select ALL > Actions > Watch > Add to Existing List or Create New List > Save

Issue an Alert on a Student Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Issue an Alert > Add Alert reason > Add Alert Course If Applicable > Add Comments > Submit.

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select Box Next to Student Name > > Actions > Issue Alert > Add Alert Course If Applicable > Add Comments > Submit.

Adding an Appointment Summary to an Already Scheduled Appointment

Quick Steps:

- Staff Home > Reporting > Recent Appointments > Select checkbox next to student > Action > Add Appointment Summary > Ensure all selections are accurate > Add notes to Appointment Summary box > Save this Report

Notating a “No-Show” for an Already Scheduled Appointment Quick

Steps:

- Staff Home > Reporting > Recent Appointments > Select checkbox next to student > Action > No-Show > Ensure all selections are accurate > Add notes to Appointment Summary box > Save this Report

Adding an Appointment Summary without a Scheduled Appointment

Quick Steps:

From **Quick Search**:

- Quick Search > Student Name or ID# > Report on Appointment > Care Unit: Faculty Advising (2nd Year – Graduation) > Location: Online/Phone Meeting - Faculty Advising > Service: Faculty Advising Meeting > No Course > Select Meeting Type > Date/Time default to current, change if needed > Add notes to Appointment Summary box > Save this Report

From the **Home Page** for your **Assigned Advisees**:

- Home > My Assigned Students > Click Triangle > Select My Assigned Students (For the current term) or My Assigned Students All Terms > Select Box Next to Student Name > > Actions > Create Appointment Summary > Care Unit: Faculty Advising (2nd Year – Graduation) > Location: Online/Phone Meeting - Faculty Advising > Service: Faculty Advising Meeting > No Course > Select Meeting Type > Date/Time default to current, change if needed > Add notes to Appointment Summary box > Save this Report