



Advisors and staff users can type notes and document student meetings within Navigate, whether the interactions were drop-in visits, scheduled appointments, or impromptu emails, instant messages or phone calls.

## Login to Navigate Staff on the Web at [go.niu.edu/navigate](http://go.niu.edu/navigate)

- Use your student **A-ID** and **password** to log in.
- If you need help, contact the NIU Service Desk at 815-753-8100 or [ServiceDesk@niu.edu](mailto:ServiceDesk@niu.edu).

### Step 1: View List of Upcoming and Recent Appointments

- ❑ Click on the **Appointments** tab from your Staff view Home screen in Navigate.
- ❑ You will see two tables; one lists students who have upcoming appointments (not-yet-occurred) and another list of students with recent appoints that have occurred within the past 90 days.

### Step 2: Add an Appointment Summary to the Student's Navigate Record

- ❑ The appointment tables will display a Report Filed column.
  - If **Not Yet** is displayed then the appointment summary report has not yet been posted.
  - If the student's row display a green box with **Report Details**, then an appointment summary has been posted.
- ❑ From either the **Upcoming** or **Recent Appointments** list, click on the box next to the student's name for whom you wish to report the details from the appointment.
- ❑ Next, click on the Actions menu and select **Add Appointment Summary**.

### Step 3: Complete the Appointment Report Screen

- ❑ After selecting Appointment Summary in Step 2, a pop-up form will appear.
- ❑ Complete the form fields as shown with circles and arrows on the adjacent screen picture.
- ❑ Be sure to check the box next to the student's name so that they will be reported as attended.
- ❑ If the student was a no-show, uncheck the box.
- ❑ Click **Save this Report** when finished.
- ❑ Your advising area or department may provide additional guidance on the business processes for your area related to documenting student appointments.

**Important:** When documenting student notes, it is important to ensure that the information is appropriate and avoids assumptions, judgments, or specific personal information. Omit diagnoses and negative inferences, as well as specific medical issues.

Use the [NIU Student of Concern Report](#) form for immediate health or safety concerns.

The screenshot shows two main sections: 'Appointment Details' and 'Summary Details'. Red arrows point to the following fields:

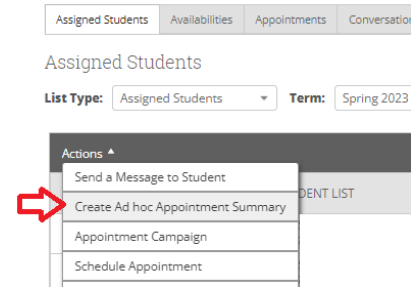
- Appointment Details:** Care Unit (dropdown), Location (dropdown), Service (dropdown), Meeting Type (dropdown), Meeting Start Time (10:00am), Meeting End Time (10:45am).
- Summary Details:** A dropdown menu for 'If the student indicated that they will leave NIU, why are they leaving?'. Radio buttons for 'Yes', 'No', and 'N/A'.
- Appointment Summary:** A text area with a red underline and the instruction 'Type your notes about the appointment here.'
- Attendees:** A list with 'Advisor Name' (checked 'Attended') and 'Student Name' (checked 'Attended').
- Attachments:** A 'Choose File' button.
- Save this Report** button at the bottom right.



## Other Ways to Document Appointments or Meetings with Students.

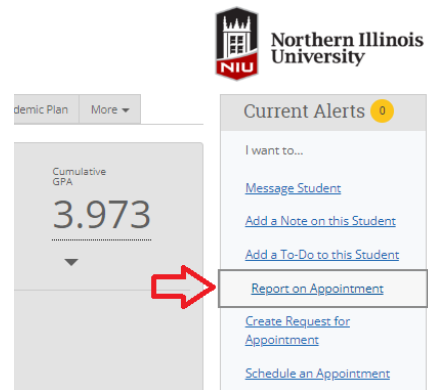
### From Your Assigned Students List

- ❑ From the list of **Assigned Students** displayed on your Navigate Home screen, click on the box next to the student's name for whom you wish to report the details from a meeting or an appointment.
- ❑ Next, click on the Actions menu and select **Create Ad hoc Appointment Summary**.



### From a Student's Home Screen

- ❑ From a student's Home screen, select the **Report on Appointment** link from the right-hand list of options.



The additional steps described above will generate the same pop-up window where you can document the appointment or meeting details.

For assistance with Navigate Staff or Navigate Student, please visit [go.niu.edu/navigate](https://go.niu.edu/navigate) to select the help link.

