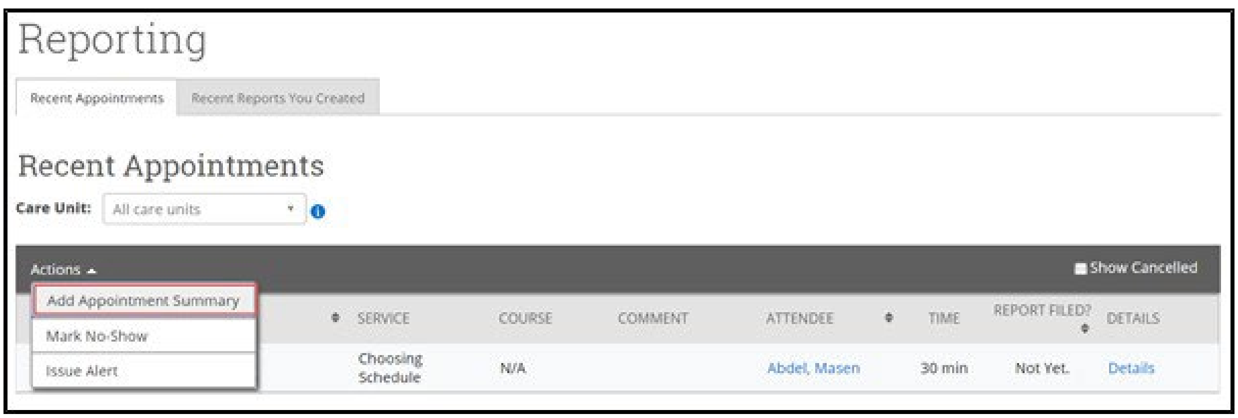
Creating Appointment Summary Reports

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

For Scheduled Appointments

To add an Appointment Summary for a past scheduled appointment, open the Staff Home **Students** tab. Find your **Recent Appointments** table at the bottom of the page. Select a student and choose **Add Appointment Summary** from the **Actions** menu. You can **also** access this section from the Staff Home Appointments tab.

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



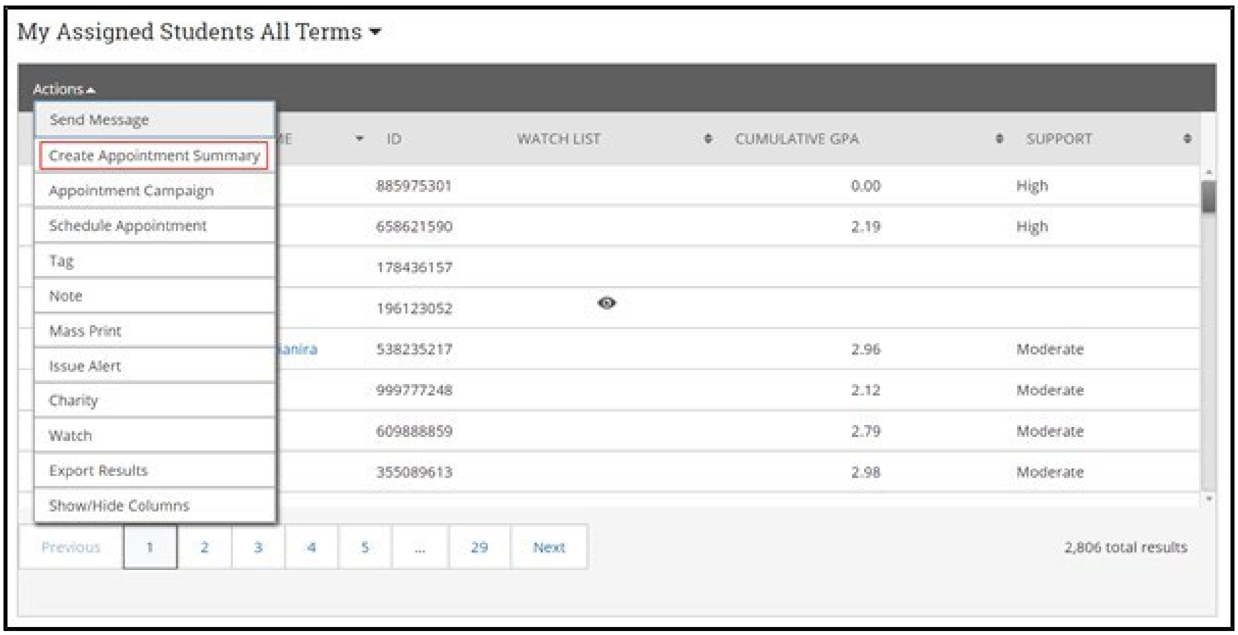
You can add an appointment summary report to an appointment in progress from the Staff Home **Appointment Queues** tab. The **Students Checked in for Appointments** table lets you select a student who has arrived for their scheduled appointment and choose **Start Appointment** from the **Actions** menu. This opens an Appointment Summary Report. If you wish to view other information in the platform while the appointment progresses, minimize the dialog and return later.


Students Checked In For Appointments
Actions
Start Appointment
Send Message
Check Out
Remove
NAME
SERVICE
Abajian, Vienna
Change Major/Minor

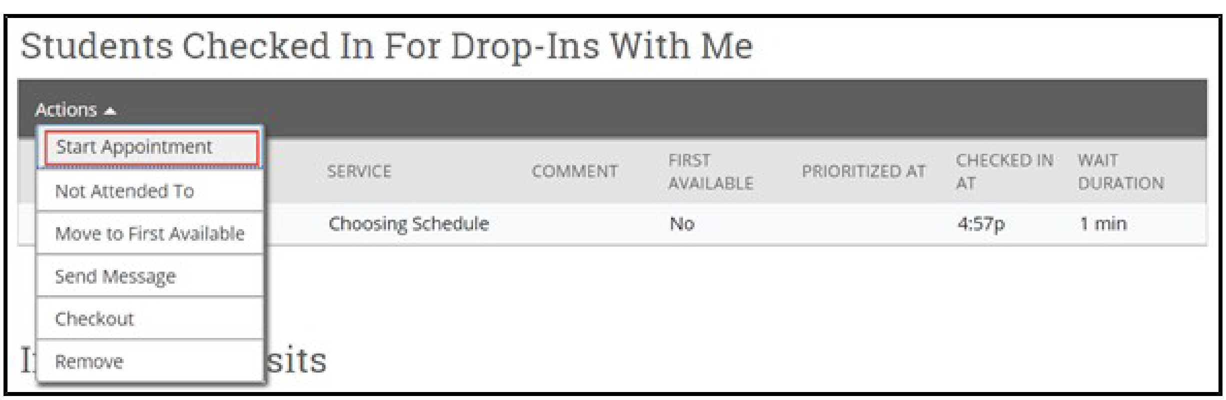
For Drop-In Appointments

There are several different ways to create an ad-hoc Appointment Summary Report for drop-in appointments. **Create Appointment Summary** is an option in the **Actions** menu throughout Navigate. The easiest way to create an ad-hoc Appointment Summary Report for a drop-in appointment is from Staff Home or a student profile. Find the specific student in your **My Assigned Students** table, or open the dropdown menu to find the student from one of your saved lists. From this section, you can select a student and select **Create Appointment Summary** from the **Actions** menu.

This creates an Appointment Summary Report. Add the appointment to your calendar in the past.



You can also add a summary report to a drop-in student appointment from the Staff Home **Appointment Queues** tab. The **Students Checked In For Drop-Ins With Me** table lets you select a student who has dropped in to your specific queue and select **Start Appointment** from the **Actions** menu.

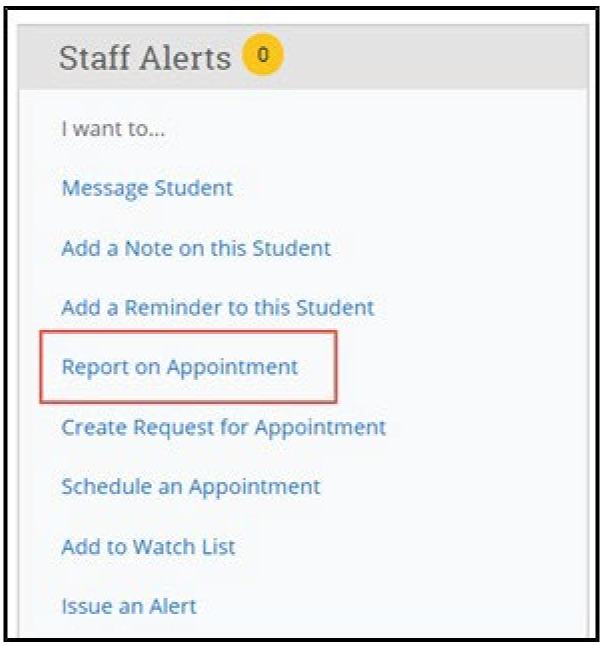


This opens an Appointment Summary Report. If you want to view other information in the platform while the appointment progresses, minimize the dialog and return later.

You can also create an ad-hoc Appointment Summary Report from a Student Profile.

Important. Appointment Summaries must be at least 5 minutes long. Creating an appointment of 0 minutes causes an error in Navigate.

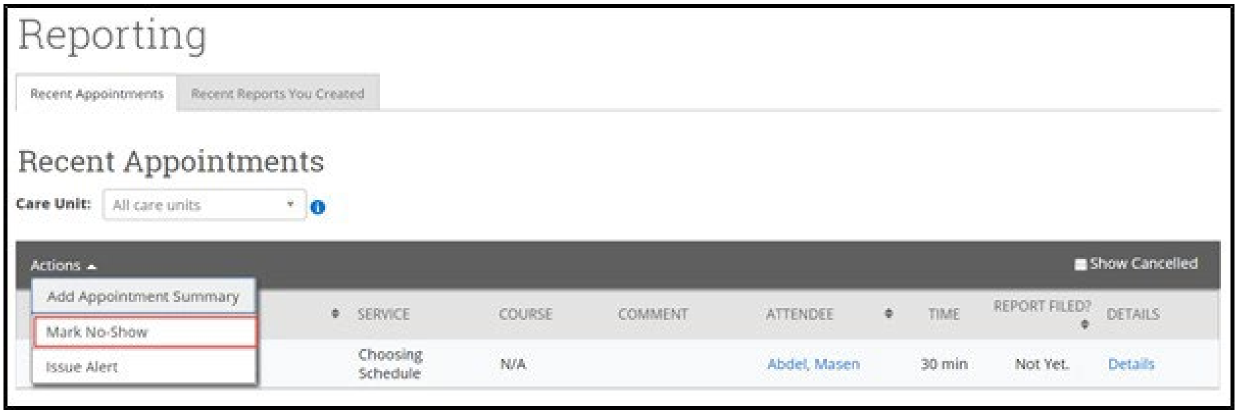
Open the Student Profile. Select **Report on Appointment** from the panel on the right. This creates an Appointment Summary Report and adds that appointment to your calendar in the past. This can be used for unexpected student interactions that are important to other care units utilizing Navigate. Ask yourself: What may other people need to know about my interaction with the student?



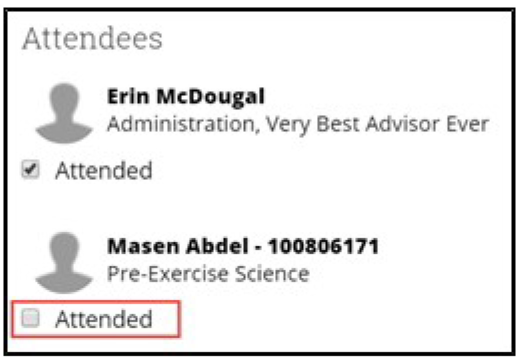
Note. When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate platform created the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or drop-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments

The primary way to mark a student as a no-show for a scheduled appointment is from the Staff Home **Students** tab. Find your Recent Appointments table. Select the student and choose **Mark No-Show** from the **Actions** menu.

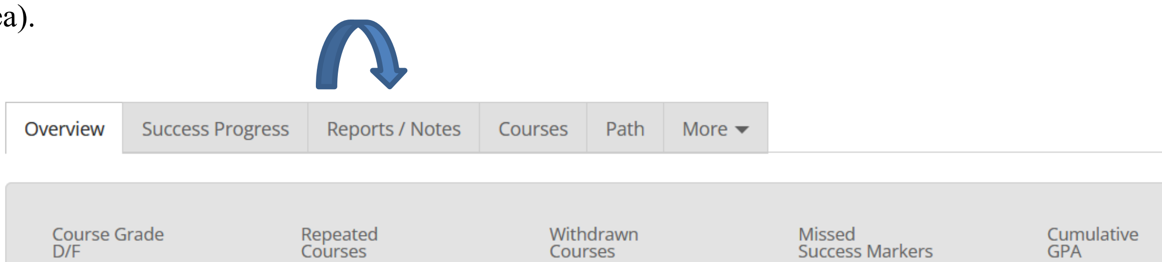


You can also access this section from the Staff Home **Upcoming Appointments** tab. Marking a student as a no-show still adds an Appointment Summary Report. The only difference is that the box next to the student's name called **Attended** is not checked.



Accessing Appointment Summary Reports

Appointment Summary Reports are visible under the student's profile (30 second 'gut-check' area).



Frequently Asked Questions

If the user creates an ad-hoc Summary Report (rather than creating the Summary Report based on an existing Appointment or Visit):

- Meeting Start and Meeting End: the Meeting Start time will default to the time the Summary Report is created and the Meeting End time will default to the time the Summary Report is saved. The user can fill out or edit both fields as needed.
- Check-in and Checkout: These fields will default to blank.

If the user creates a Summary Report for a Drop-in Visit:

- Meeting Start and Meeting End: the Meeting Start time will default to the time the Summary Report is created, and the Meeting End time will default to the time the Summary Report is saved. If the user initiated the appointment from their queue, the Meeting Start time will default to the time the user clicks “Start Appointment” in the queue.
- Check-in and Checkout: These fields will default to the times when the student checked in and checked out via Kiosk or Appointment Center. In cases where the student did not check out, the Checkout time will default to the time the Summary Report is saved.

If the user creates a Summary Report for a Scheduled Appointment:

- Meeting Start and Meeting End: These fields will default to the scheduled appointment times. The user can fill out or edit both fields as needed. The meeting start time will default to scheduled appointment start time even if the appointment is initiated from the queue.
- Check-in and Checkout: These fields will default to the times when the student checked in and checked out via Kiosk or Appointment Center. In cases where the student did not check in or check out for the appointment, the fields will remain blank. In cases where the student checked in but did not check out, the Checkout time will default to the time the Summary Report is saved

What is the difference between adding an appointment summary to an existing appointment and creating an ad-hoc appointment summary?

If an appointment has been scheduled through the Navigate platform, it is important to file the Summary Report from this specific appointment in order to link them together. When you are creating a summary report for a drop-in appointment (i.e., a student appointment that was not scheduled in advance), you will need to create an ad-hoc summary report by following the instructions in this article. Creating an ad-hoc summary report will create a corresponding appointment on your calendar.

Can I create ad-hoc summary reports for appointments that were scheduled in the platform?

No! When you create an ad-hoc summary report, the platform creates a corresponding appointment on your calendar in the past. If you create ad-hoc summary reports for already scheduled appointments, you are essentially **scheduling this appointment twice**. Double-counting appointments will significantly skew the reporting data in the platform and make it more difficult to review your past appointments. If your appointment was scheduled in advance, you should only be adding Summary Reports to that appointment, rather than creating an ad-hoc report.

Are summary reports part of a student's official record and subject to restrictions under FERPA and local privacy laws?

Yes! Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA). Please consult with your Application Administrator for institution-specific guidelines about what information to include (and not include) in summary reports and notes.

Why is my service not showing as an option to select in the summary report?

Only services associated with your selected Location will display as options for your summary reports. If you have questions related to the services you see displaying, please contact your Application Administrator or try selecting a different Location.