Navigate: Filing an Appointment Summary Report

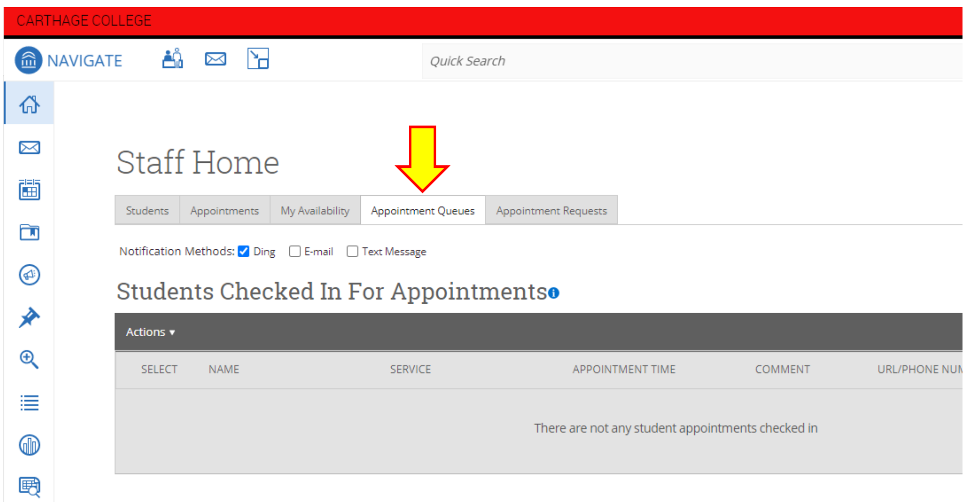
Objective: Appointment Summaries let you document interactions with students pertaining to a specific appointment. Access to Appointment Summaries are limited to your specific Care Unit and are based on your user role permissions.

Important: 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). See the Carthage College Guidelines for Recording Appointment Summaries and Notes in Navigate.

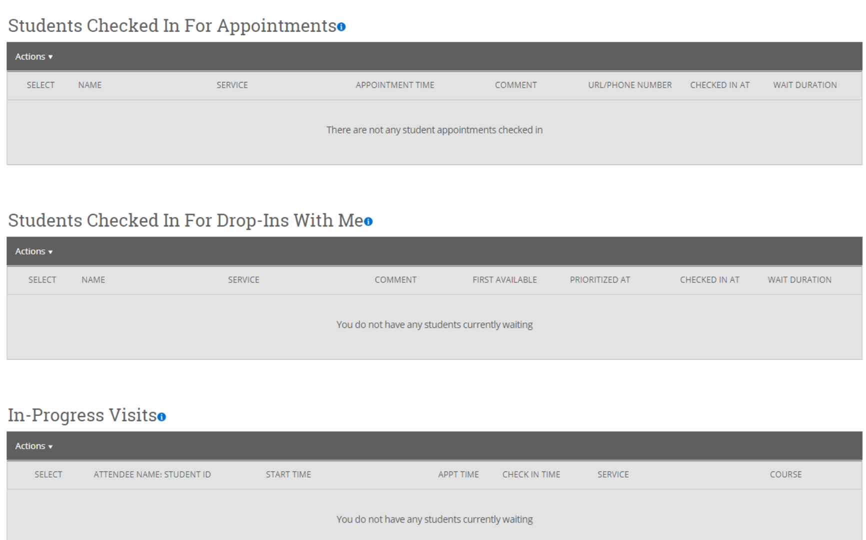
For Scheduled Appointments

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.

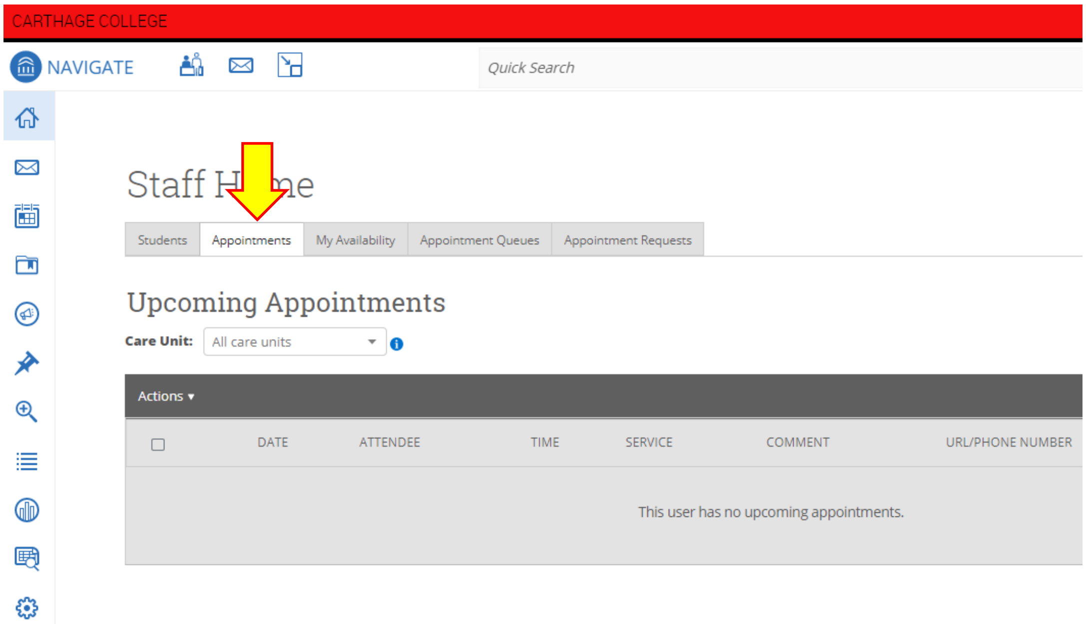
1. For in-progress appointments, from your home page, click Appointment Queues.



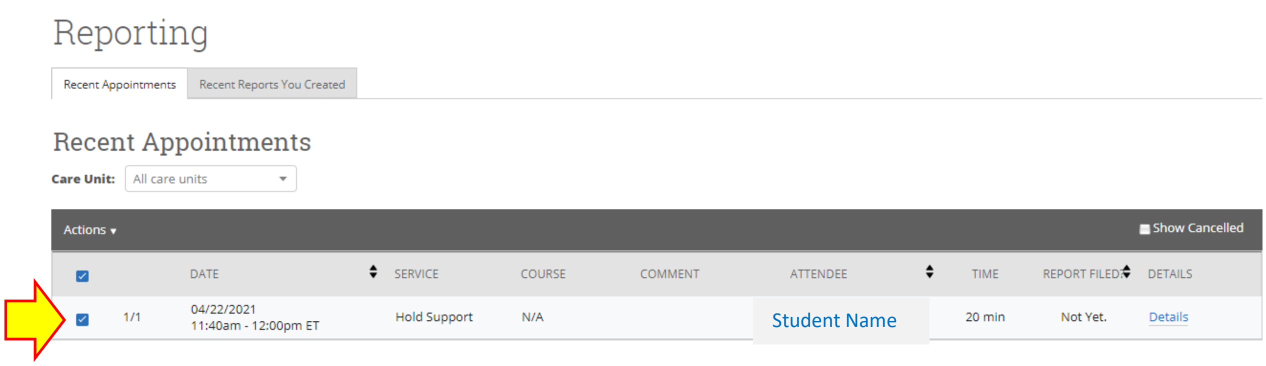
2. If you start an appointment and populate the Appointment Summary, the student will move to the in-progress table. You can minimize the dialog box and return to the Appointment Summary later. When ready to fill out the Summary, continue from step 6.



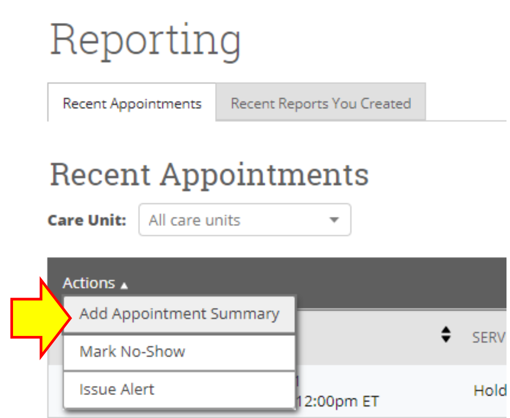
3. For past appointments (that are not in your in-progress table), from your home page click Appointments.



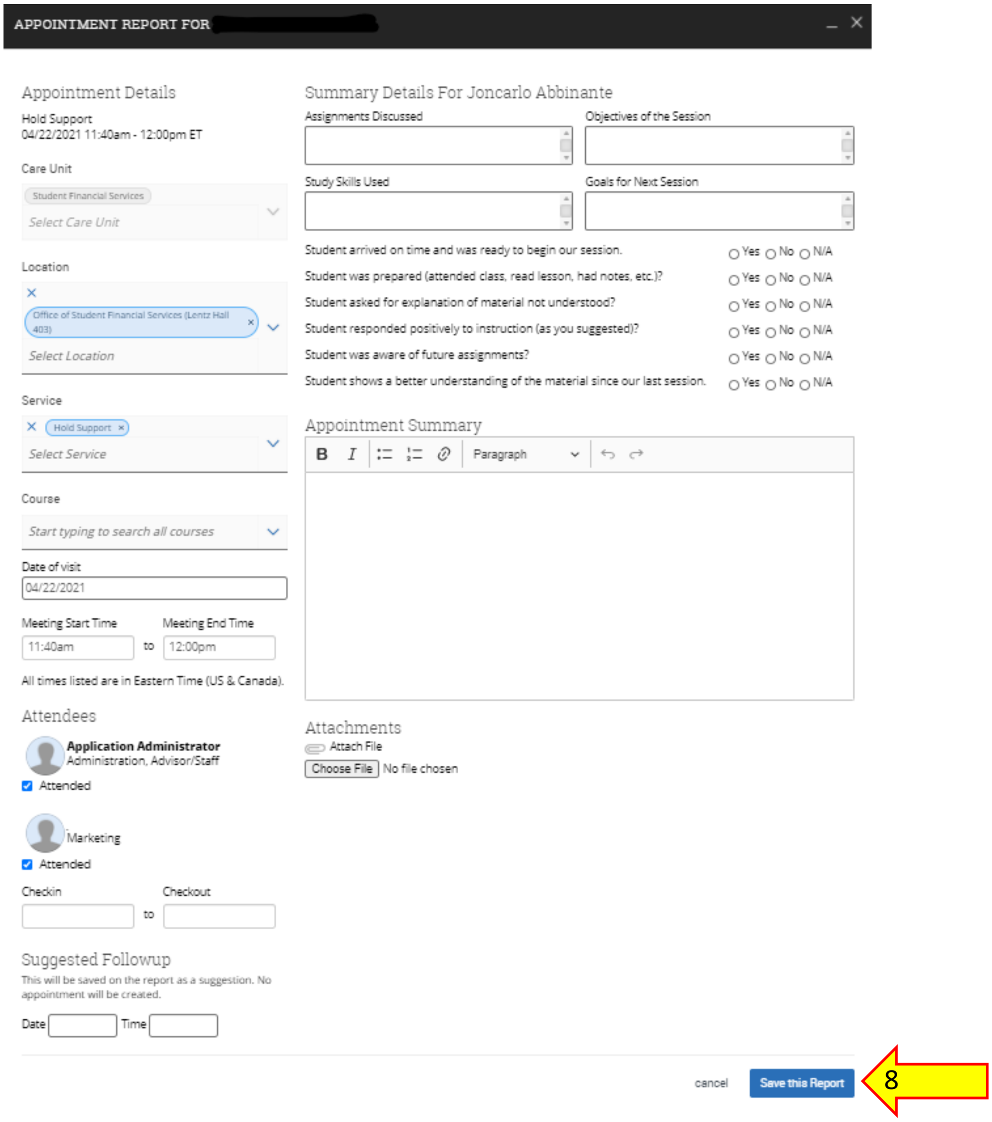
4. Scroll down to 'Reporting' and select the appointment/student you want to fill the report out for by clicking the appropriate checkbox.



5. Then go to 'Actions' at the top of the window and select 'Add Appointment Summary'.



6. Add/modify any details to the report, including time, date, and location.



7. Complete a detailed summary of the events discussed including any relevant details that you will need later. See below for the anatomy of the Appointment Summary.

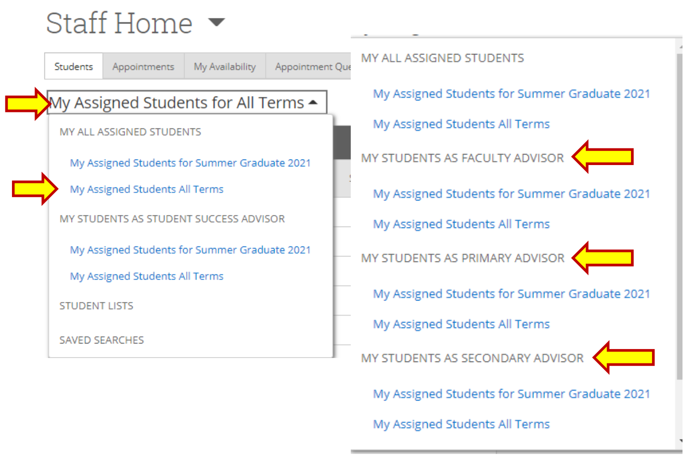
8. When complete, click Save this Report.

For Drop-In Appointments

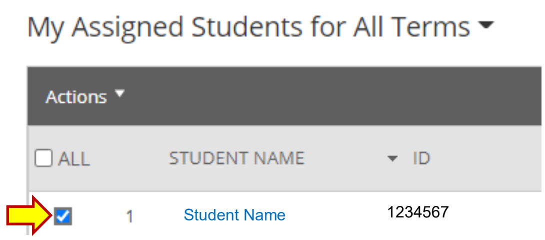
The easiest way to create an ad-hoc Appointment Summary Report for a drop-in appointment is from Staff Home or a student profile.

1. From your Staff Home page, find the specific student in your My Assigned Students table. You may need to click My Assigned Students for *(Current term listed)* to select a different assigned student table.

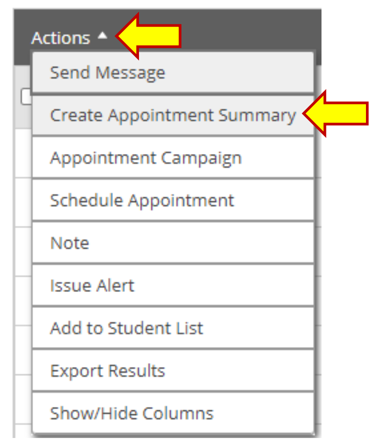
If you are assigned to a students in multiple roles, you will see different options for assigned student tables.



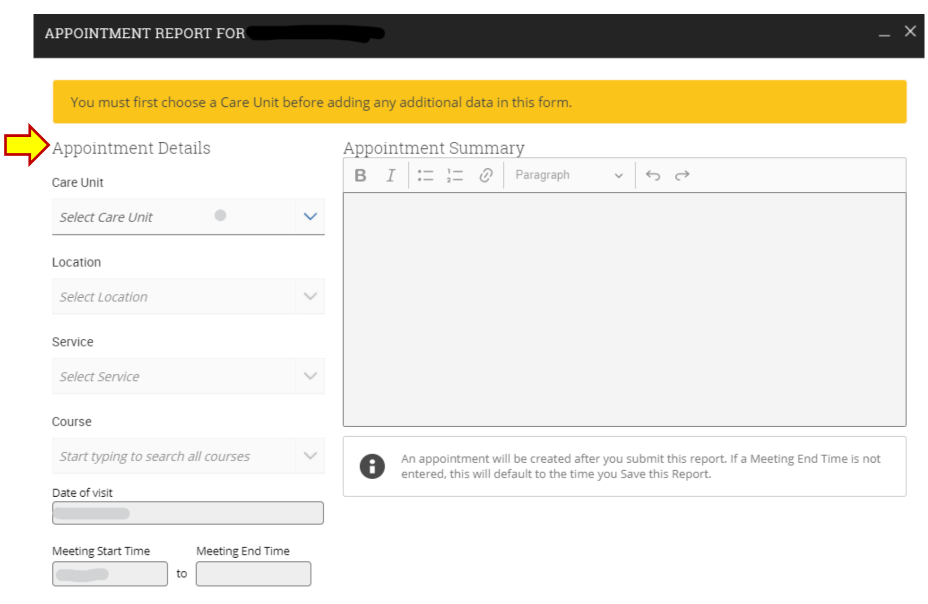
2. Select the student you would like to create an appointment summary for.



3. Click the Actions menu and Create Appointment Summary.



4. As an ad-hoc Appointment Summary, the appointment details will need to be completed. Select the appropriate Care Unit, location of the appointment, type of service(s) discussed during the appointment, course (if applicable), date of visit, and meeting start time and end time. Appointments must be at least 5 minutes long. The meeting start time will default to the time the Summary Report is created and the end time will default to the time the Summary Report is saved.



5. Complete a detailed summary of the events discussed including any relevant details that you will need later. See below for the anatomy of the Appointment Summary.
6. When complete, click Save this Report.

Anatomy of the Appointment Summary:

- Appointment: Gives the date, time, and scheduled service for the appointment.
- Care Unit: Indicates the Care Unit (office of support) associated with the appointment. This field is locked if the appointment was scheduled in advance.
- Location: The location where the appointment occurred. This field is locked if the appointment was scheduled through an appointment campaign.
- Service: Indicates the student service associated with the appointment. Only services associated with the selected location will display as options in this field.
- Course: You can associate the appointment with one specific course. The student's currently enrolled courses display when selecting options from the field. However, you may search for any course regardless of the student's enrollment.
    - Note: The course should populate on the report automatically if the appointment was scheduled for a course or the student dropped in for a specific course.
- Meeting Type: Indicates if the meeting was on the phone, in-person, or virtual. These options are configured by the institution.
- Date of Visit: The date the appointment occurred.
- Meeting Start/Meeting End: For appointments scheduled in advance, the Meeting Start and End times default to the scheduled start and end times for the appointment. For drop-in appointments, the Meeting Start time defaults to the time the summary report is created and End time defaults to the time the summary report is saved. You can edit the fields as needed.
- Check-in/Checkout: These fields 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 remain blank. In cases where the student checked in but did not check out, the check out time defaults to the time the summary report is saved.
    - Note: that check-in/check-out times which are manually added to the summary report will not display in the appointments report, appointment summary report, and check-ins report.
- Attendees: The checkbox indicates attendance for each appointment attendee. Not checking the box indicates a no-show.
- Summary Details: These fields and questions are configured individually for each Care Unit.
- Summary: Use this field to summarize your interaction with the student.
- Attachments: This allows you to attach a file to the summary report, such as a plan or tutoring schedule. Navigate does not allow attachments with certain special characters in the title.
- Suggested Follow-up: These fields are used for informational purposes only. No appointment will be created as a result of filling them out.

Related Navigate Help Center Articles (requires logging into Navigate): Appointment Summaries