

## 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.

The screenshot shows the 'Staff Home' page in the Navigate system. The 'Appointment Queues' tab is selected and highlighted with a yellow arrow. Below the tabs, there are notification settings for 'Ding', 'Email', and 'Text Message'. The main content area is titled 'Students Checked In For Appointments' and contains a table with columns: SELECT, NAME, SERVICE, APPOINTMENT TIME, COMMENT, and URL/PHONE NUM. The table is currently empty, displaying the message 'There are not any student appointments checked in'.

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.

#### Students Checked In For Appointments

SELECT	NAME	SERVICE	APPOINTMENT TIME	COMMENT	URL/PHONE NUMBER	CHECKED IN AT	WAIT DURATION
There are not any student appointments checked in							

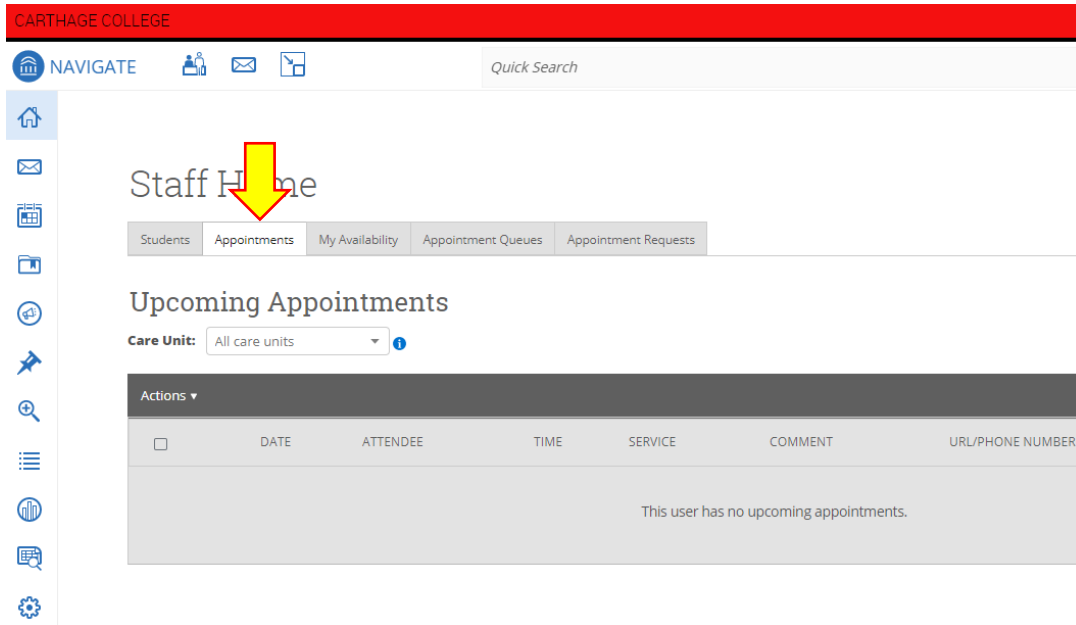
#### Students Checked In For Drop-Ins With Me

SELECT	NAME	SERVICE	COMMENT	FIRST AVAILABLE	PRIORITIZED AT	CHECKED IN AT	WAIT DURATION
You do not have any students currently waiting							

#### In-Progress Visits

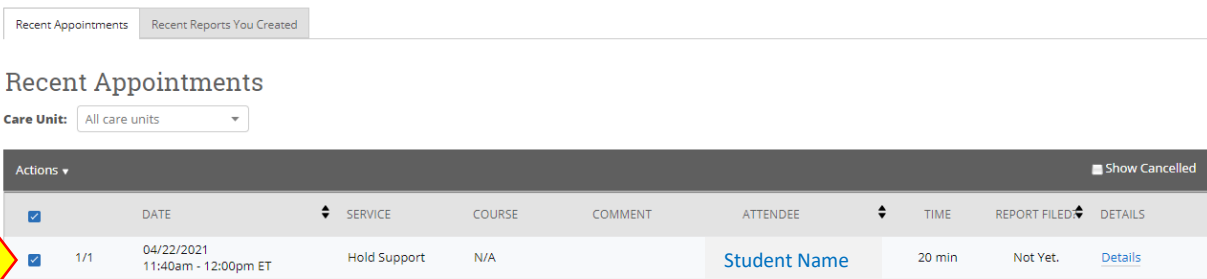
SELECT	ATTENDEE NAME: STUDENT ID	START TIME	APPT TIME	CHECK IN TIME	SERVICE	COURSE
You do not have any students currently waiting						

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

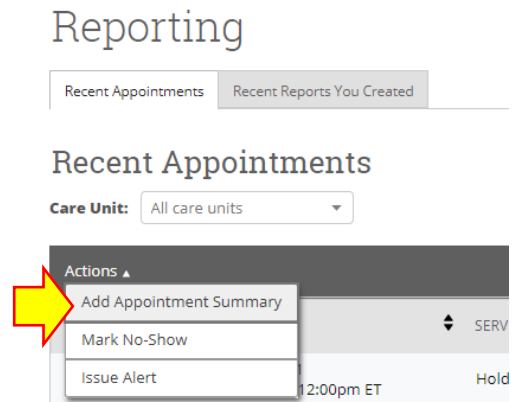


- Scroll down to 'Reporting' and select the appointment/student you want to fill the report out for by clicking the appropriate checkbox.

## Reporting



- 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.

APPOINTMENT REPORT FOR
✖

### Appointment Details

Hold Support  
04/22/2021 11:40am - 12:00pm ET

Care Unit  
Student Financial Services  
[Select Care Unit](#)

Location  
Office of Student Financial Services (Lentz Hall 403)  
[Select Location](#)

Service  
Hold Support  
[Select Service](#)

Course  
[Start typing to search all courses](#)

Date of visit  
04/22/2021

Meeting Start Time: 11:40am to Meeting End Time: 12:00pm

All times listed are in Eastern Time (US & Canada).

Attendees

- Application Administrator  
Administration, Advisor/Staff
- Marketing

Checkin:  to Checkout:

Suggested Followup  
This will be saved on the report as a suggestion. No appointment will be created.

Date:  Time:

### Summary Details For Joncarlo Abbinante

Assignments Discussed:

Objectives of the Session:

Study Skills Used:

Goals for Next Session:

Student arrived on time and was ready to begin our session.  Yes  No  N/A

Student was prepared (attended class, read lesson, had notes, etc.)?  Yes  No  N/A

Student asked for explanation of material not understood?  Yes  No  N/A

Student responded positively to instruction (as you suggested)?  Yes  No  N/A

Student was aware of future assignments?  Yes  No  N/A

Student shows a better understanding of the material since our last session.  Yes  No  N/A

### Appointment Summary

**B** *I* | Paragraph |

Attachments  
[Attach File](#)  
[Choose File](#) No file chosen

cancel Save this Report

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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.

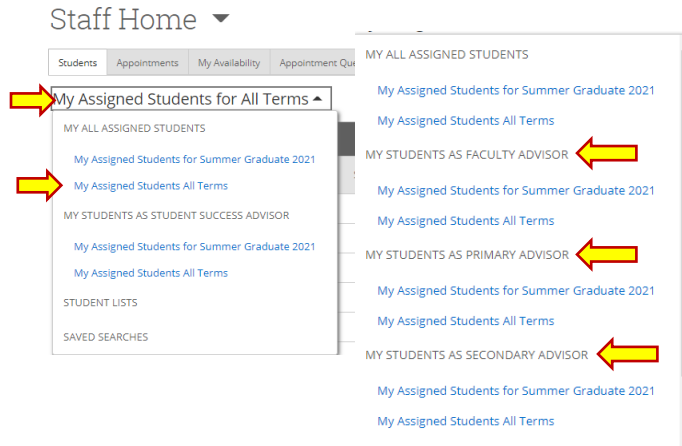
8. When complete, click Save this Report.

### *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.

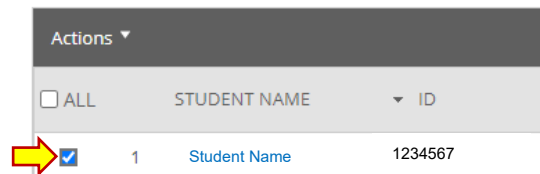
1. From your Staff Home page, find the specific student in your My Assigned Students table. You may need to click My Assigned Students for *(Current term listed)* to select a different assigned student table.

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

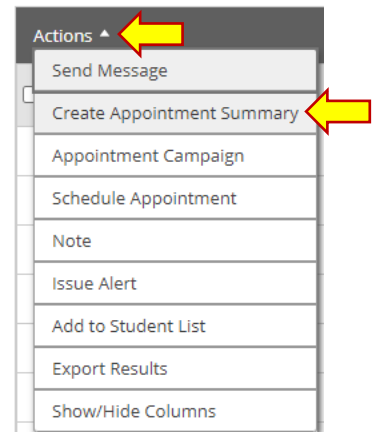


2. Select the student you would like to create an appointment summary for.

My Assigned Students for All Terms ▾



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.

APPOINTMENT REPORT FOR [REDACTED]

You must first choose a Care Unit before adding any additional data in this form.

Appointment Details

Care Unit:

Location:

Service:

Course:

Date of visit:

Meeting Start Time:  to Meeting End Time:

All times listed are in Eastern Time (US & Canada).

Appointment Summary

**B I** | | | | Paragraph | |

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

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](#)*