Anatomy of an Appointment Summary Report

Appointment Summary Reports should only include information related to that specific appointment. Within an Appointment Summary Report, you can include the following information:

- **Appointment:** Gives the date, time, and scheduled service for the appointment.
- **Appointment Campaign:** If the appointment was scheduled through an Appointment Campaign, then the name of the campaign is selected. If the Location and Service of the appointment corresponds with an Appointment Campaign you are involved with, you may be able to associate this appointment with the campaign by selecting it from this dropdown. This is only true when you are creating an Appointment Summary for one student. For more information about Appointment Campaigns, see this article about Appointment Campaigns.
- **Care Unit:** Indicates the Care Unit 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.

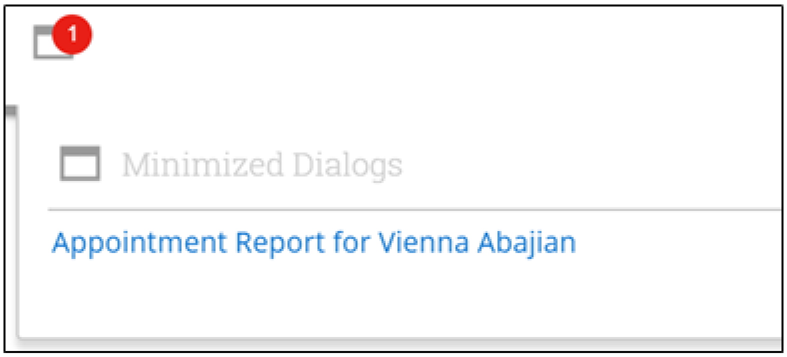
> **Note.** The course should populate on the report automatically if the appointment was scheduled for a course or the student dropped in for a specific course.

- **Meeting Type:** Indicates if the meeting was on the phone, in-person, or virtual. These options are configured by your 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 optional and can be completed to your discretion. These options are configured by your institution.
- **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.

If you have the permission to edit summary reports, you see **Edit** at the bottom right of the report dialog.

In addition, the Appointment Summary Report dialog expands and takes up your entire browser. If at any time you wish to minimize the report and return to complete it later, select the minimize button in the report.

You can access minimized dialog from the top bar in Navigate Staff.



Warning. 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).

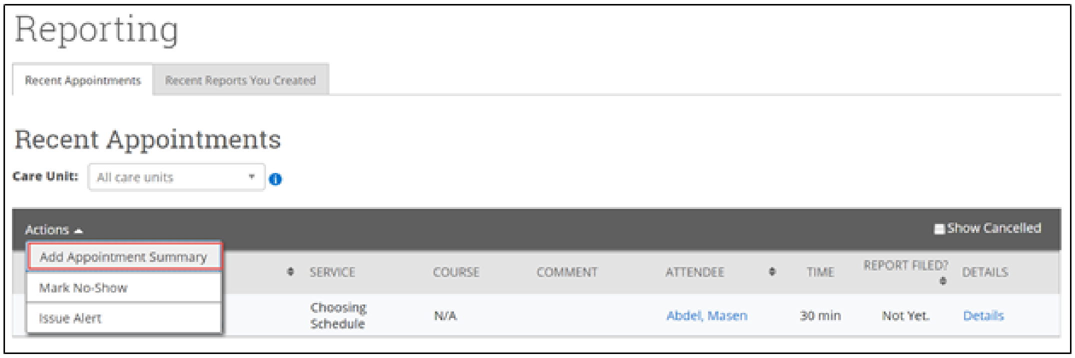
Creating Appointment Summary Reports

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.

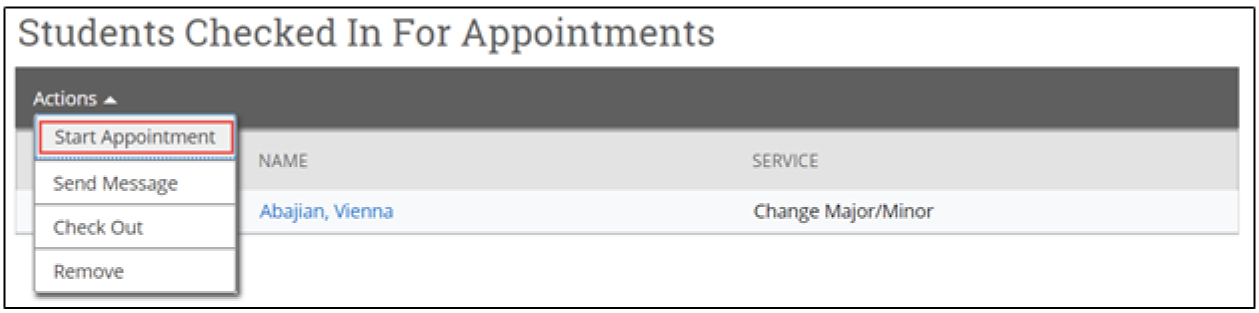
For Scheduled Appointments

To add an Appointment Summary for a past scheduled appointment, open the Staff Home **Students** tab. Find your **Recent Appointments** table. 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.



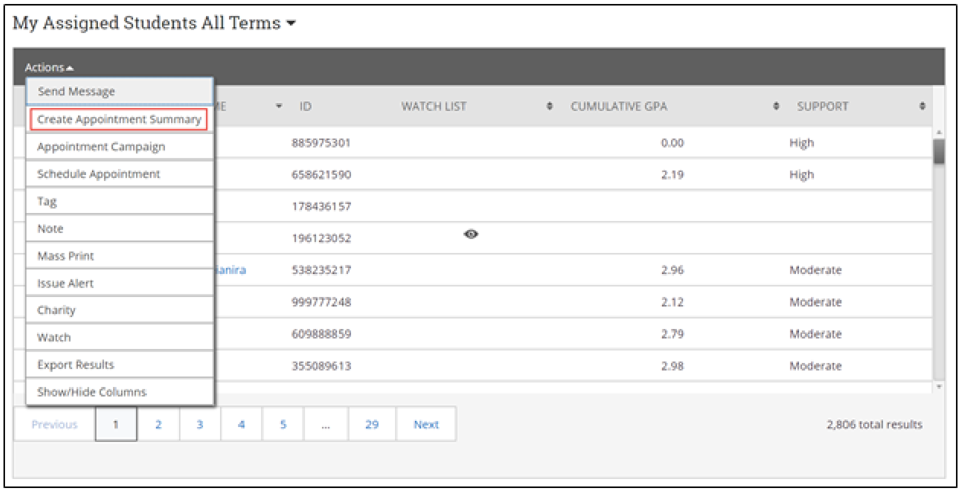
You can add an appointment summary report to an appointment in progress from the [Staff Home](#) **Appointment Queues** tab. The **Students Checked in for Appointments** table lets you select a student who has arrived for their scheduled appointment and choose **Start Appointment** from the **Actions** 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.



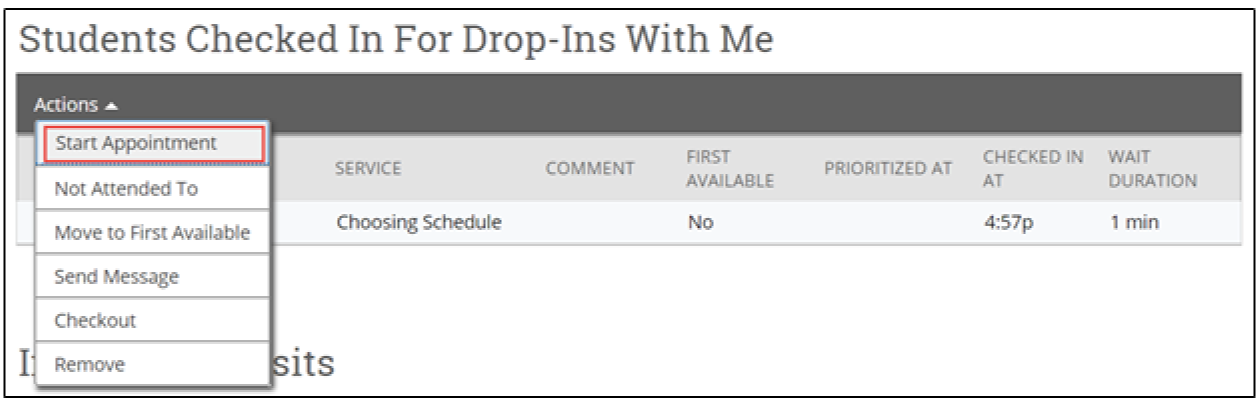
For Drop-In Appointments

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.

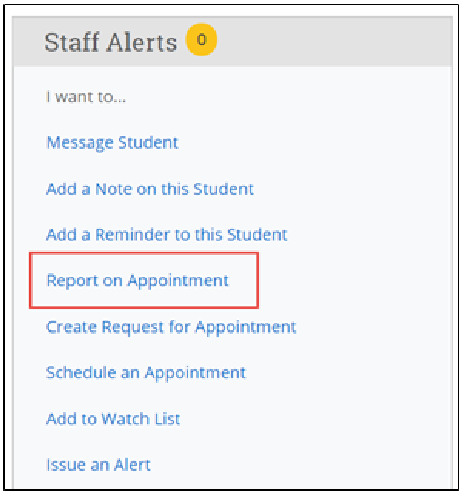


This opens an Appointment Summary Report. If you want to view other information in the platform while the appointment progresses, minimize the dialog and return later.

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.

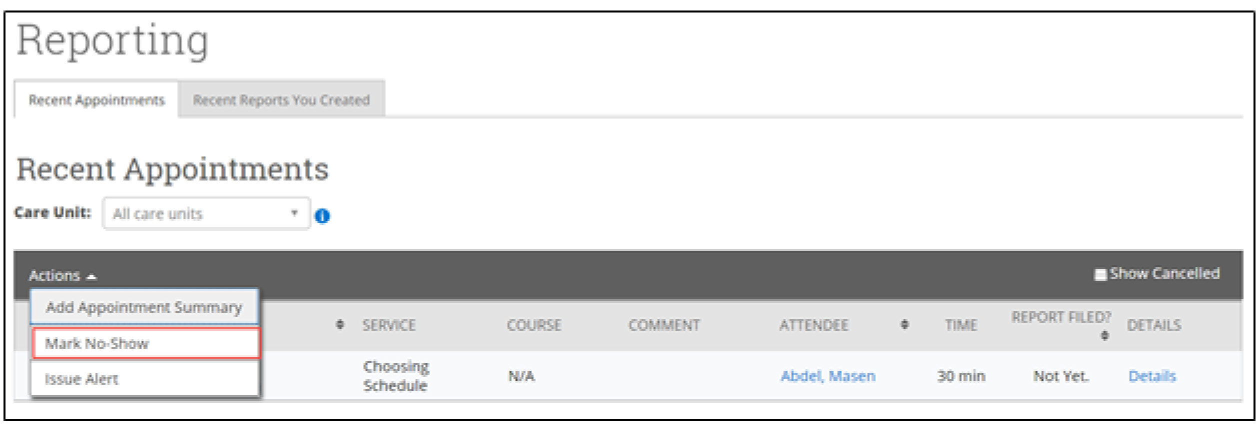
Open the Student Profile. Select **Report on Appointment** from the panel on the right. This creates an Appointment Summary Report and adds that appointment to your calendar in the past.



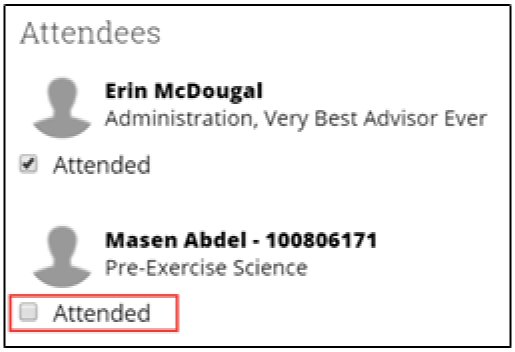
Note. When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate platform created the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, 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 in several areas of the platform. To learn more about each of these sections, look at Staff Home, the Reports/Notes tab of the Student Profile, and the Standard Reports.

Frequently Asked Questions

Can you explain the logic of the different fields marking the start and end of the appointment in the Appointment Summary reports?

We previously used **Arrived** and **Departed** fields for both the organizer and the student in Appointment Summaries. We received feedback that it was confusing to users to have both and was incorrectly populating check-in times in some cases. We have addressed this by replacing these fields with **Meeting Start** and **Meeting End** fields as well as student **Checkin** and **Checkout** fields to the report. This will not only affect filling out Appointment Summary Reports, it will affect all Care Units reports that rely on these fields.

The underlying logic works as follows, depending on how the Summary Report was created.

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?

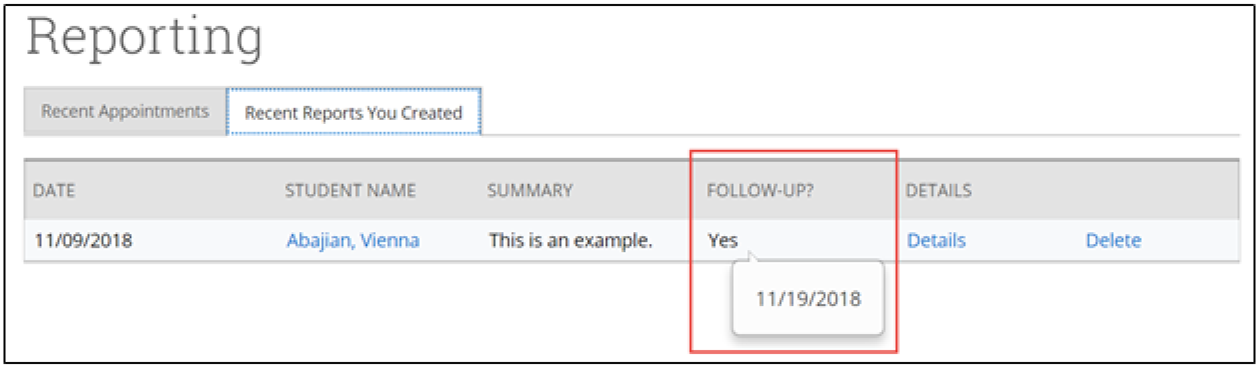
Yes! Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA). Please consult with your Application Administrator for institution-specific 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.

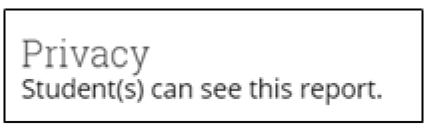
What does the Suggested Follow-up field of the summary report do? Will it actually schedule a follow up appointment for me and the student?

No, the Suggested Follow-up field is informational only and will take no action on your calendar. Use it simply for suggested notes to yourself about when you would like to follow up with the student. You can easily view your suggested follow up dates by navigating to the "Students" tab on your staff homepage, scrolling down, and clicking on the "Recent Reports You Created" tab. This section includes all recent summary reports you filed, with a “Yes” indicated for suggested follow up – hover over the Yes to view the date. Please see the screenshot below.



Can students view their own summary reports?

Your institution may choose to share either all summary reports or no summary reports for each Care Unit with your students. If your institution shares all summary reports, then the student will only be able to view their summary reports when logging into Navigate from their user account. It is not possible to selectively share specific summary reports with students, nor is it possible to email summary reports to students. Your filed summary reports will indicate if a student is able to view them. See the screenshot below.



Can a summary report be marked as private?

No, it will be visible to those with permissions to view the summary report, including those within your Care Unit, and including students if your institution has configured them to be visible to students.

Can I see a record of edits to a summary report?

No, there is no ongoing record of changes to summary reports available. You will always view the most up to date version of the summary report.

Is there a size limit to document attachments?

10 MB is the size limit for document attachments.

Can I create an appointment summary for an inactive student?

Yes.