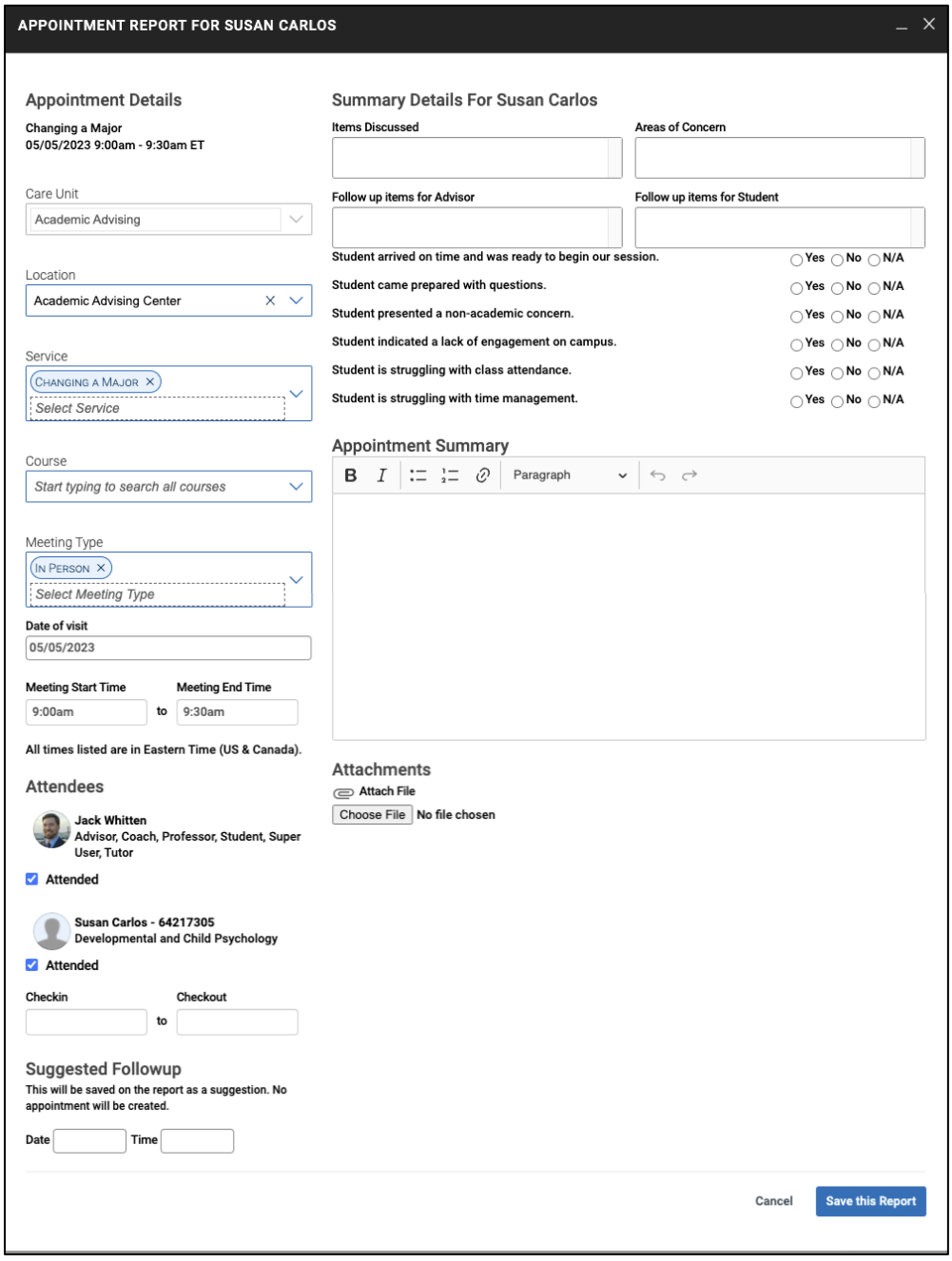
Appointment Summaries

Appointment Summaries let you document information about a specific student appointment, whether the appointment was scheduled, a drop-in, or the student was a no-show. You can create an appointment summary for active OR inactive students. Access to Appointment Summaries can be limited to your specific Care Unit and are based on your user role permissions. Contact your Application Administrator at tclaw@tsu.edu if you have questions about your permissions and viewing summary reports.



In addition, you can add an Appointment Summary on behalf of another user by going to the **Appointment** tab of their profile, selecting the appointment, and choosing **Add Summary** from the **Actions** menu.

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. Navigate360 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.

Note:

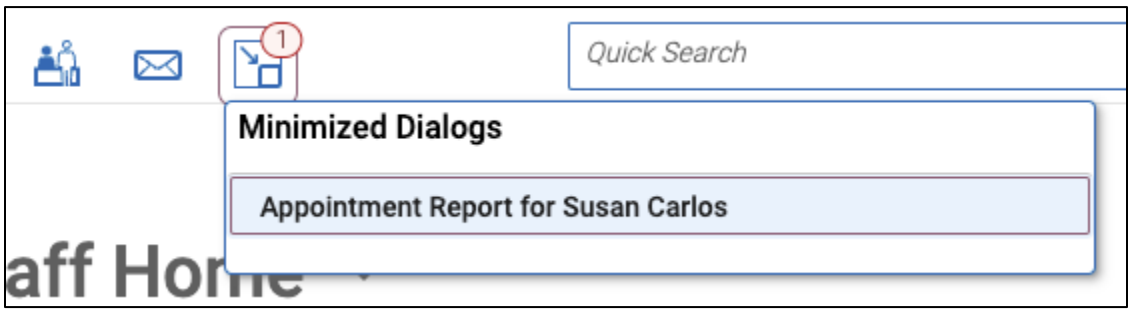
- Maximum Attachment size is 10 MB
- Accepted File Types: .pdf, .doc, .docx, .txt, .xls, .xlsx, .csv, .jpeg, .jpg, .png, .gif, .ppt, .pptx, .vfb, .msg, .odt, .rtf, .svg

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 Navigate360 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).

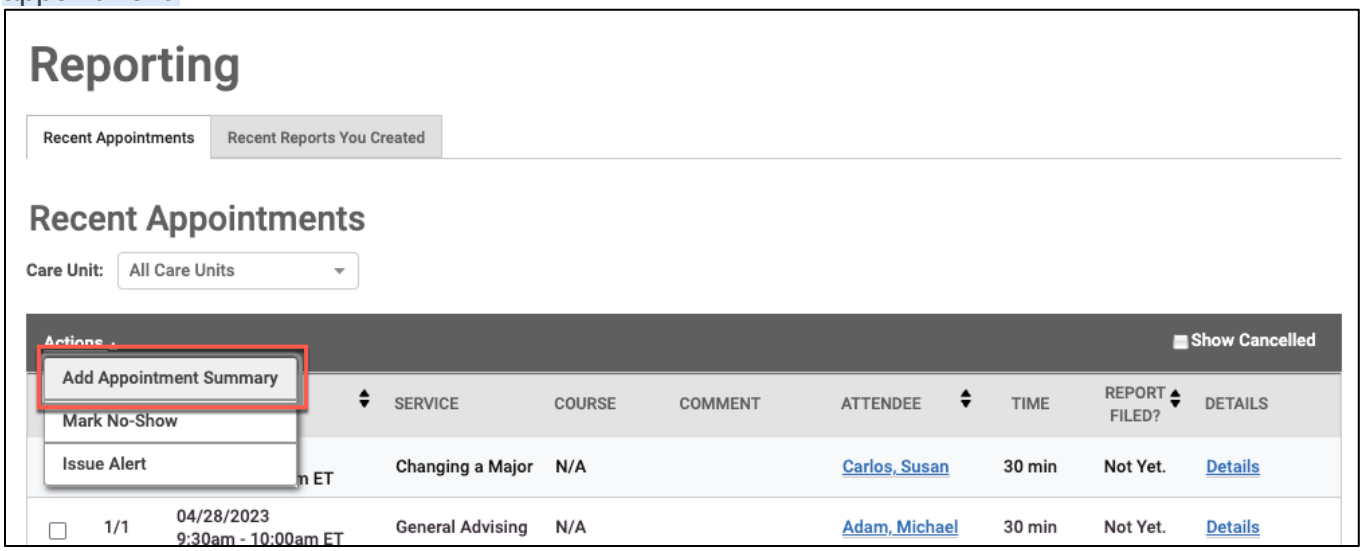
Creating Appointment Summary Reports

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.

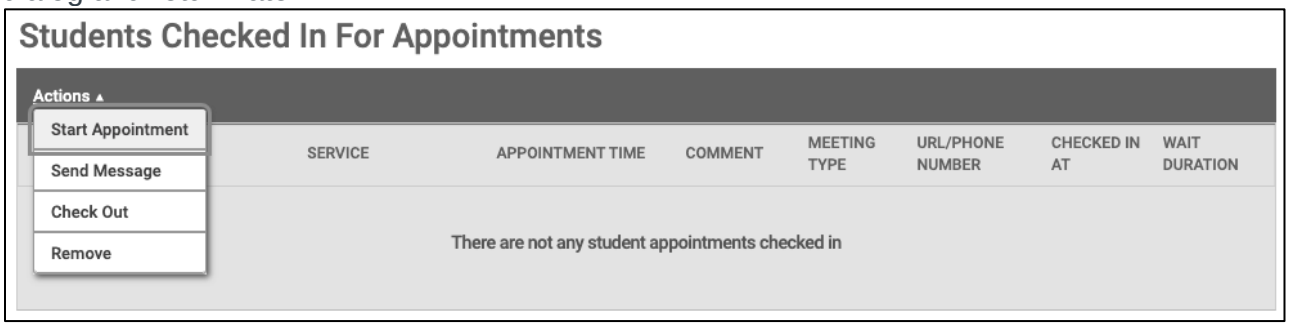
For Scheduled Appointments

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.



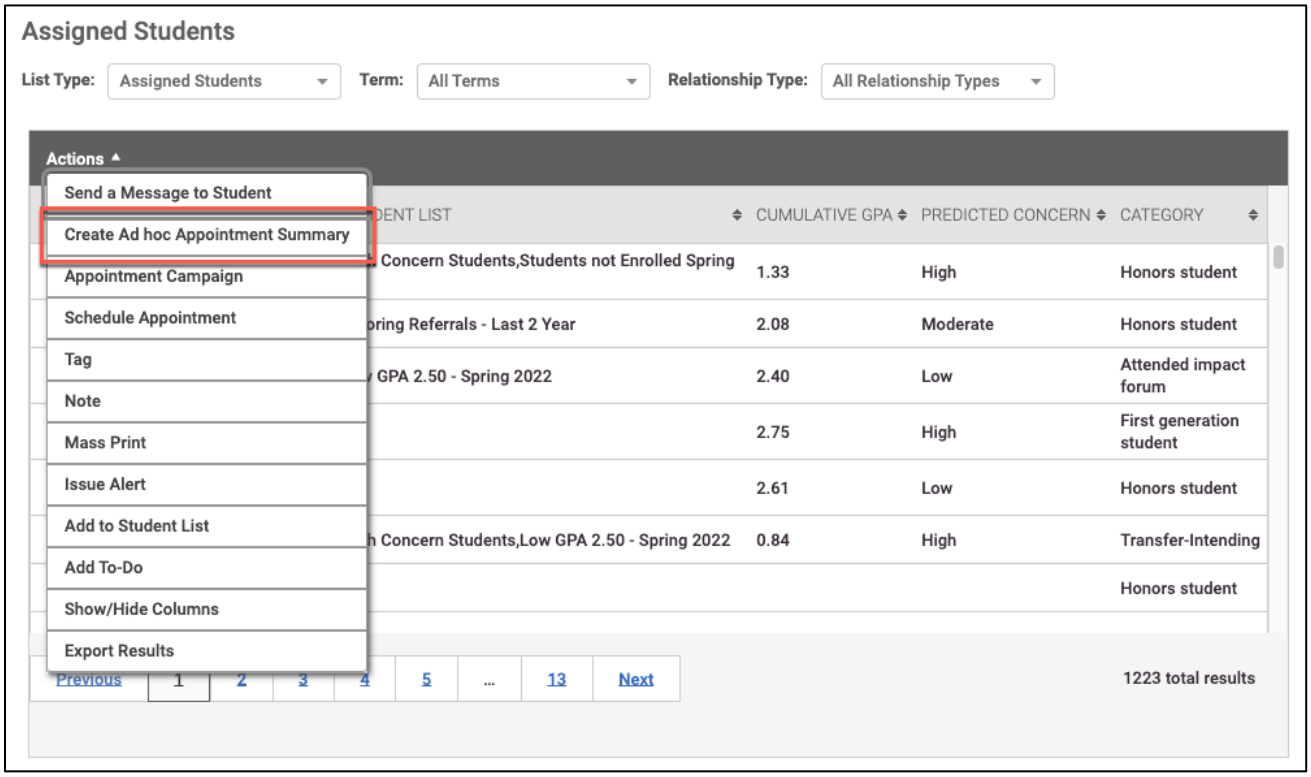
You can add an appointment summary report to an appointment in progress from the Staff Home **Appointment Queues** tab. The **Students Checked in for Appointments** table lets you select a student who has arrived for their scheduled appointment and choose **Start Appointment** from the **Actions** menu.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



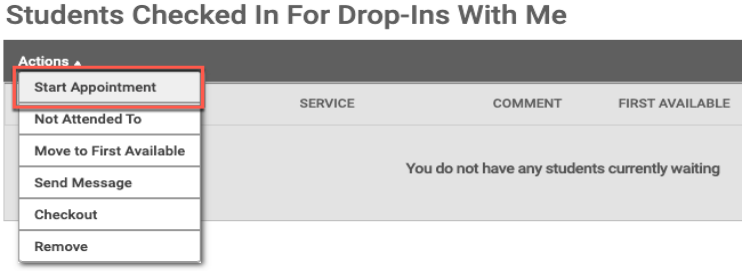
For Drop-In Appointments

There are several different ways to create an ad-hoc Appointment Summary Report for drop-in appointments. **Create Ad hoc Appointment Summary** is an option in the **Actions** menu throughout Navigate360. 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 **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 Ad hoc 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.

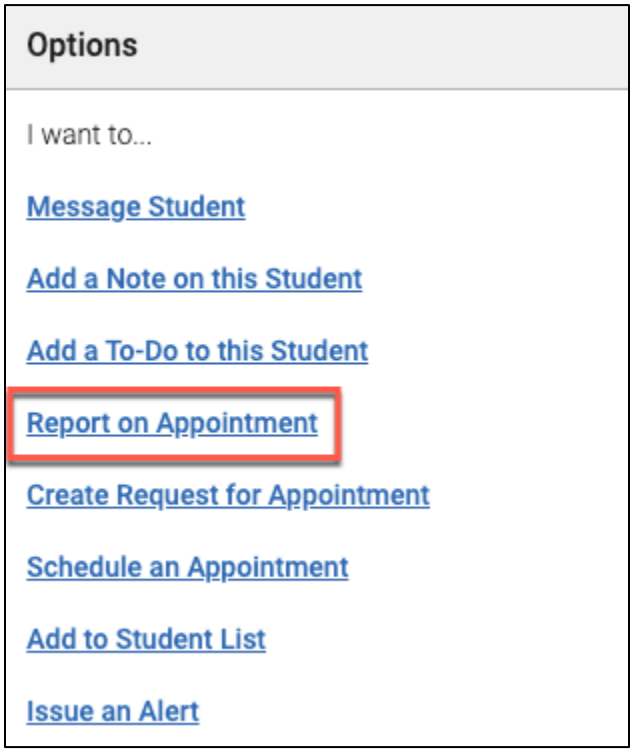


This opens an Appointment Summary Report. If you want to view other information in the platform while the appointment progresses, minimize the dialog and return later.

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 Navigate360.

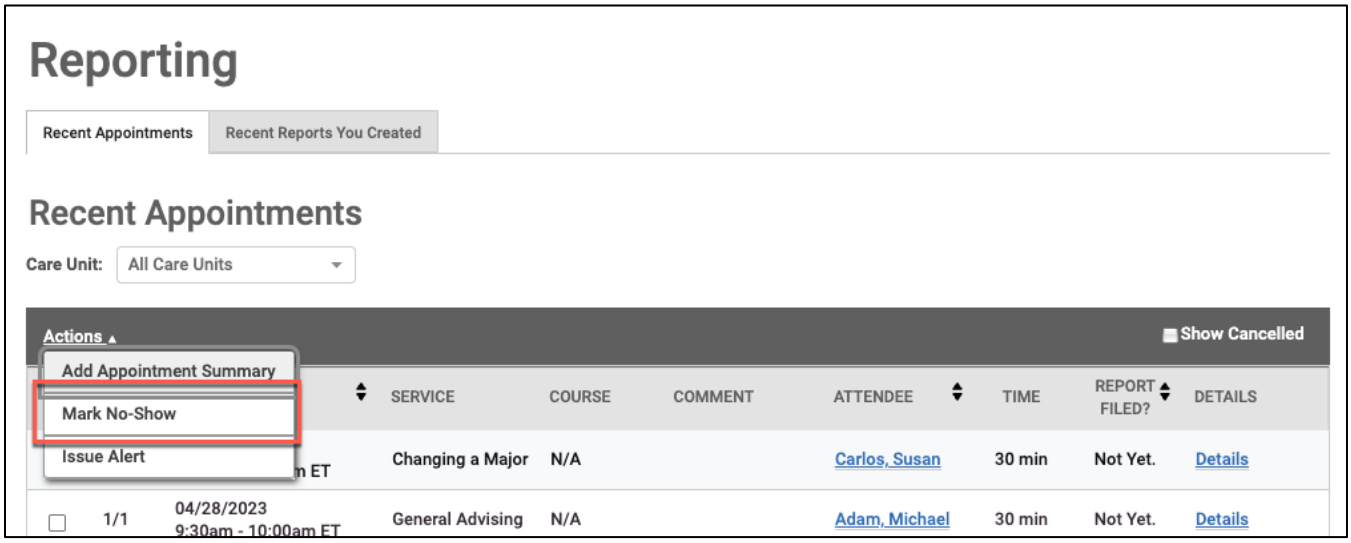
Open the Student Profile. Select **Report on Appointment** from the panel on the right. This creates an Appointment Summary Report and adds that appointment to your calendar in the past.



Note. When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate360 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 Navigate360 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.