

## Appointment Report Overview

Appointment Summary Reports allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a walk-in, or the student was a no show. Access to student summary reports may be limited to your specific Care Unit or based on your user role permissions. Contact your Application Administrator if you have questions about your permissions and viewing summary reports.

The screenshot shows a web form titled "APPOINTMENT REPORT FOR ERIC 'ANGELL'". The form is divided into several sections:

- Appointment Details:** Includes dropdown menus for Care Unit (Advising at Thunderbird University), Location (Advising II), and Service (Advising). It also has a search field for Course, a Meeting Type dropdown, a Meeting Date field (10/25/2018), and Meeting Start/End times (3:00 pm to 3:30 pm).
- Attendees:** Lists John Advisor (Advisor, Attended) and Sally Student (Sophomore Biology, Attended). It includes Checkin and Checkout time fields.
- Suggested Followup:** A note stating "This will be saved on the report as a suggestion. No appointment will be created." with Date and Time input fields.
- Summary Details For Eric 'Angell':** Contains text areas for Assignments Discussed, Objectives of the Session, Study Skills Used, and Goals for Next Session. Below these are five questions with Yes/No/NIA radio button options:
  - Student arrived on time and was ready to begin our session.
  - Student was prepared (attended class, read lesson, had notes, etc.)?
  - Student asked for explanation of material not understood?
  - Student responded positively to instruction (as you suggested)?
  - Student was aware of future assignments?
  - Student shows a better understanding of the material since our last session.
- Appointment Summary:** A rich text editor with formatting options (B, I, bold, italic, link, unlink, list, ul, indent, outdent, undo, redo).
- Attachments:** An "Attach File" button and a "Choose File" button (No file chosen).
- Footer:** A "Save this Report" button and a notification icon with the text "An appointment will be created after you submit this report."

### 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 will be 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. For more information about Appointment Campaigns, see this [article](#).
- **Care Unit:** Indicates the Care Unit associated with the appointment. This field will be locked if scheduled in advance.
- **Location:** The location where the appointment occurred. This field will be locked if 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 your summary report.
- **Course:** You can associate the appointment with one specific course. The student's currently enrolled courses will display when selecting this dropdown, but you may search for any course regardless of the

student's enrollment. Please note - the course should populate on the report automatically if the session 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 will default to the scheduled start and end times for the appointment. For walk-in/drop-in appointments, the Meeting Start time will default to the time the summary report is created and End time will default to the time the summary report is saved. You can edit the fields as needed.
- **Check-in/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.
- **Attendees:** The checkboxes will be checked or not to indicate 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 and some choose not to populate these additional fields.
- **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. The system will 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.

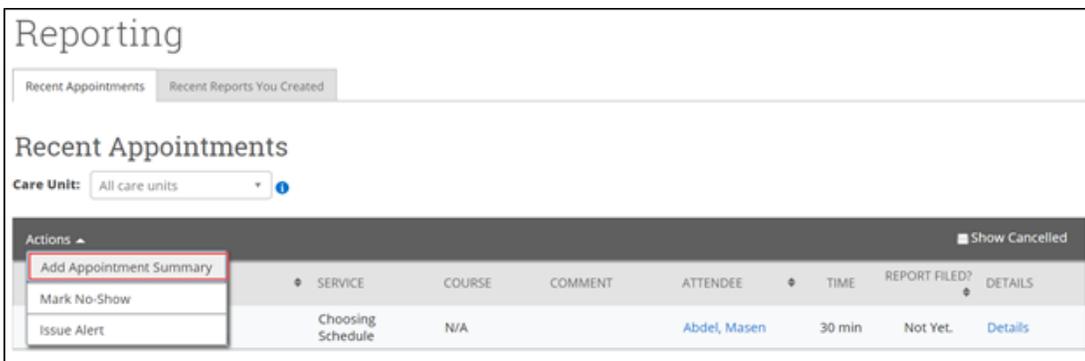
**Important Note:** Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

## Creating Appointment Summary Reports:

Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-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, access your appointments section from your staff home page. On your Staff homepage, under the “Students” tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select “**Add Appointment Summary**” from the Actions drop down. You can also access this section from the “Upcoming Appointments” tab of the Staff Home.

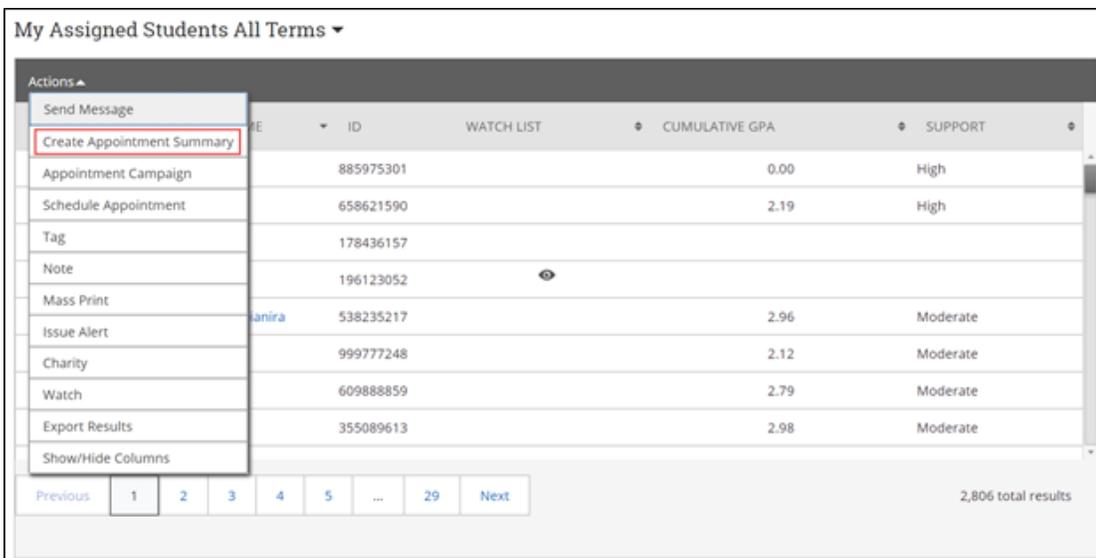
**Note:** It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.



The screenshot shows the 'Reporting' interface with the 'Recent Appointments' tab selected. A dropdown menu for 'Actions' is open, with 'Add Appointment Summary' highlighted. The table below shows a single appointment for 'Abdel, Masen' with a duration of 30 minutes and a status of 'Not Yet'.

ACTIONS	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
Add Appointment Summary	Choosing Schedule	N/A		Abdel, Masen	30 min	Not Yet	Details

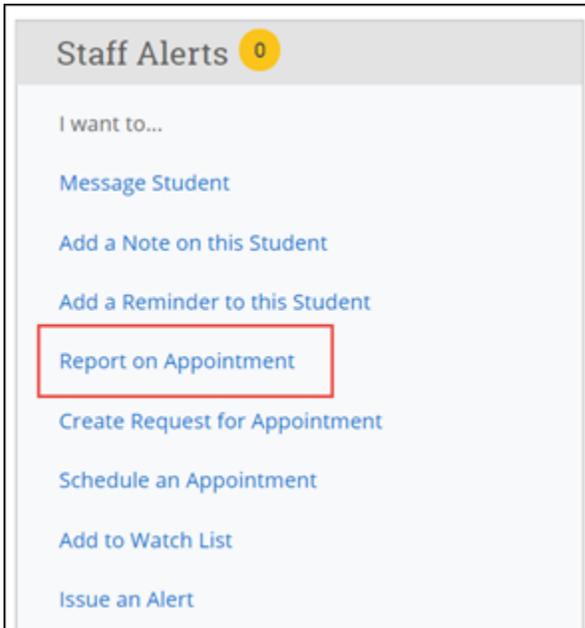
**For Walk-in Appointments:** There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the **Students** tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select **Create Appointment Summary** from the **Actions** drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.



The screenshot shows the 'My Assigned Students All Terms' section. A dropdown menu for 'Actions' is open, with 'Create Appointment Summary' highlighted. The table below lists several students with their IDs, cumulative GPAs, and support levels.

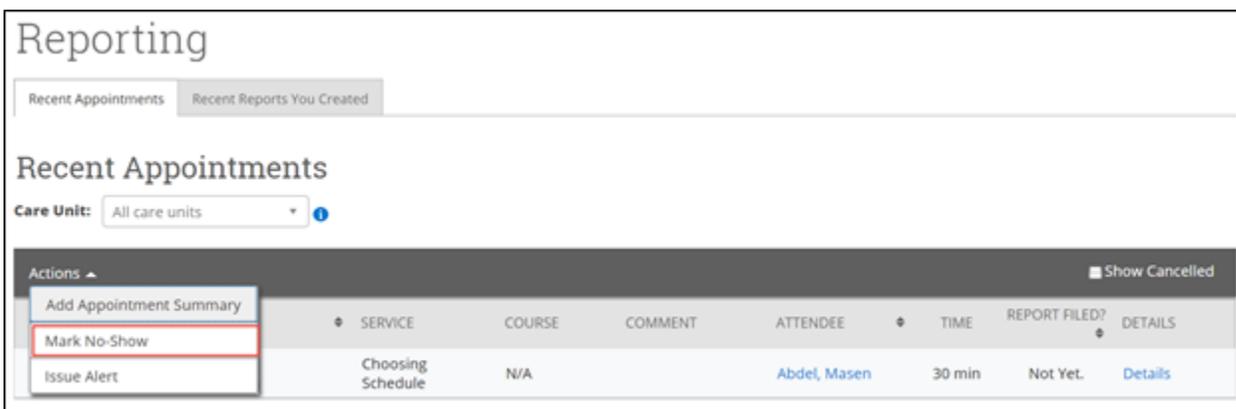
ACTIONS	NAME	ID	WATCH LIST	CUMULATIVE GPA	SUPPORT
Send Message		885975301		0.00	High
Create Appointment Summary		658621590		2.19	High
Appointment Campaign		178436157			
Schedule Appointment		196123052			
Tag		538235217		2.96	Moderate
Note	anira	999777248		2.12	Moderate
Mass Print		609888859		2.79	Moderate
Issue Alert		355089613		2.98	Moderate
Charity					
Watch					
Export Results					
Show/Hide Columns					

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.



**Reminder:** When creating an ad-hoc Appointment Summary Report to track walk-in appointments, the Navigate platform will create 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 walk-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 Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.



## 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 walk-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?*

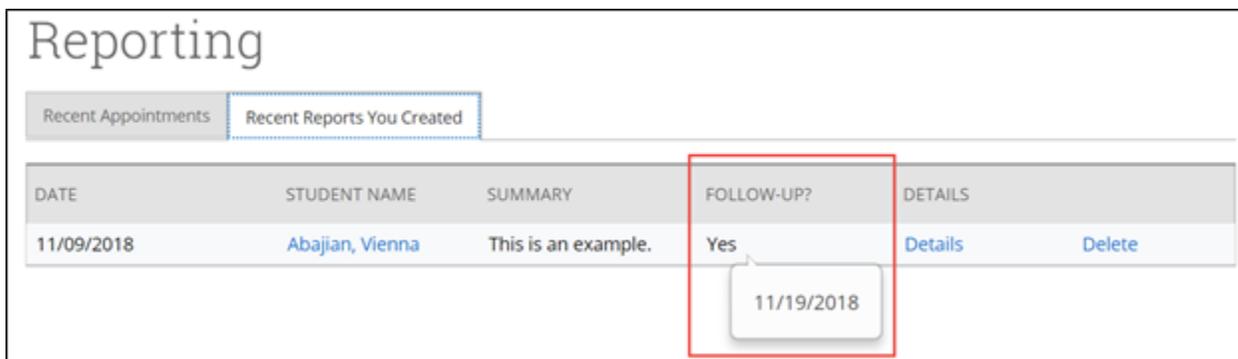
Yes! Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA). Please consult with your Application Administrator for institution-specific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



The screenshot shows a web interface titled "Reporting" with two tabs: "Recent Appointments" and "Recent Reports You Created". Below the tabs is a table with the following data:

DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?	DETAILS
11/09/2018	Abajian, Vienna	This is an example.	Yes	Details

A red box highlights the "FOLLOW-UP?" column, and a tooltip shows the date "11/19/2018" when hovering over the "Yes" value.

*Is there a size limit to document attachments?*

There is no hard size limit for summary report attachments.

*The Appointment Summary Report window takes up the entirety of my browser window, but I would like to view other parts of the platform before finalizing it. How do I hide the window?*

You can minimize any in progress summary report, essentially saving a draft, by selecting the minimize button in the upper right of the dialogue window. You can access these saved drafts at any time from the Minimized Dialogues button in the top navigation bar. Please see the screenshots below. When starting an appointment, we recommend having one internet browser tab for the summary report and another for the student profile, to allow for easy navigation between the two without needing to minimize.

