Appointment Summary Reports

Appointment Summary Reports allow you to document information pertaining to a specific student in-person 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, Chris Atkins – chris.atkins@marshall.edu if you have questions about your permissions and viewing summary reports.

## 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.

If you have the permission to edit summary reports, you will find the Edit button on the bottom right of the report dialogue.

In addition, the Appointment Summary Report window will expand and take up your entire browser screen. If at any time you wish to minimize the report and return to complete it later you can select the minimize button in the report. You will then be able to access your minimized dialogues from the top left bar on your screen. See the screenshots below.
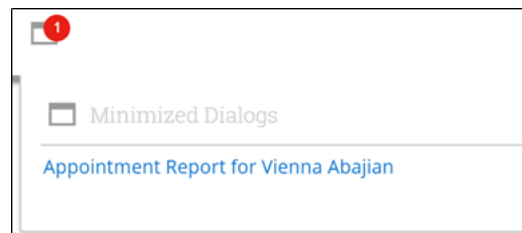

Important Note: Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).
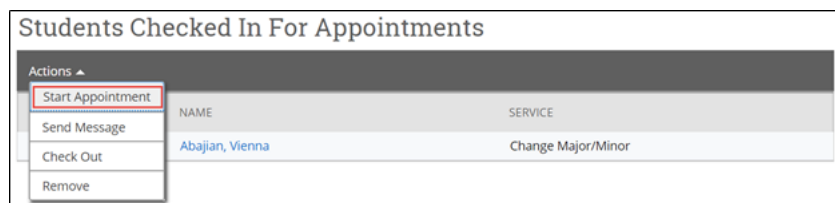
Creating Appointment Summary Reports:

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.
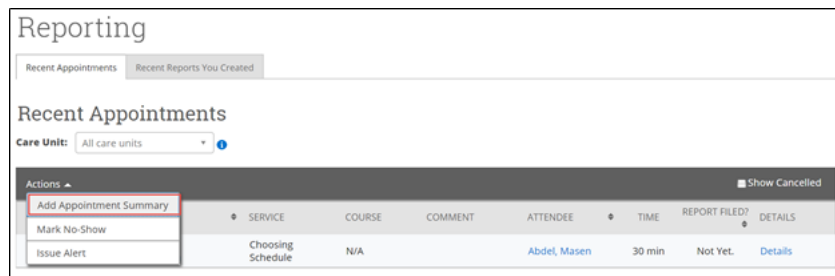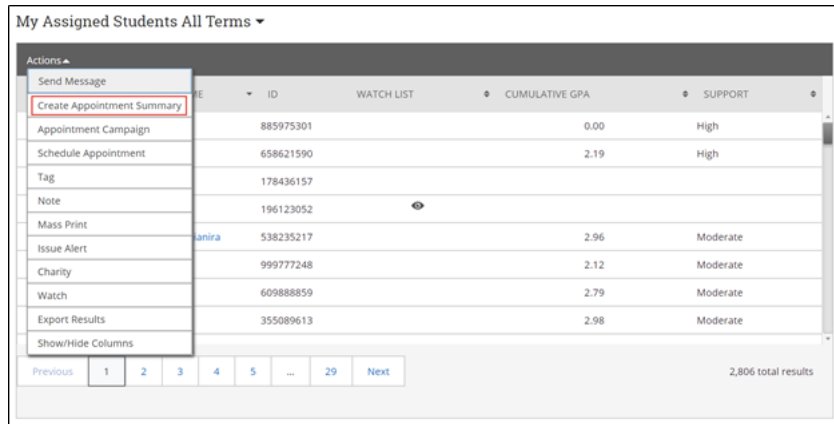

You can also add a summary report to an appointment in progress from the **Appointment Queues** tab of Staff Home. In this tab, the section Students Checked in for Appointments allows you to select a student who has arrived for their scheduled appointment and select **Start Appointment** from the drop-down menu. This will open the summary report dialogue box in your browser window. If you wish to view other information in the platform while the appointment progresses, you can minimize the dialogue box and return later.


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.

You can also add a summary report to a drop in student appointment from the **Appointment Queues** tab of Staff Home. In this tab, the section Students Checked In For Drop-Ins With Me" allows you to select a student who has dropped in to your specific queue and select **Start Appointment** from the drop-down menu. This will open the summary report dialogue box in your browser window. If you wish to view other information in the platform while the appointment progresses, you can minimize the dialogue box and return later.
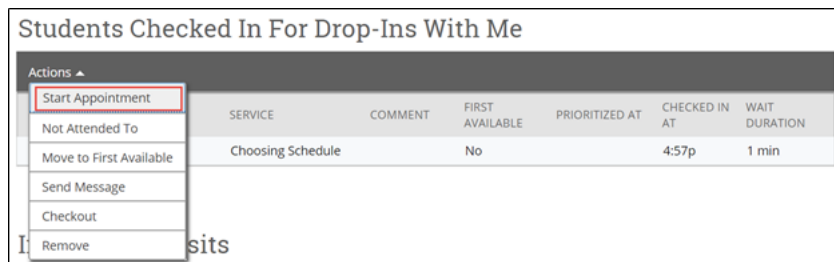

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.
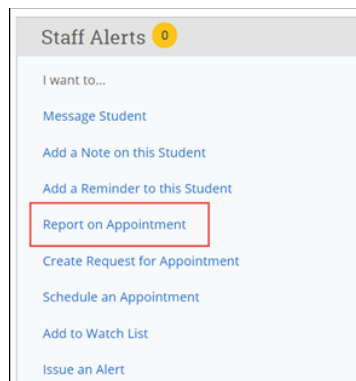
Reminder: When creating an ad-hoc Appointment Summary Report to track walk-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with 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.
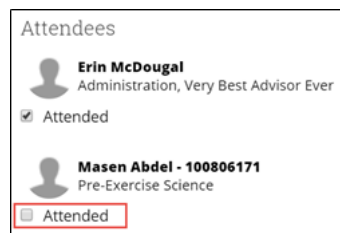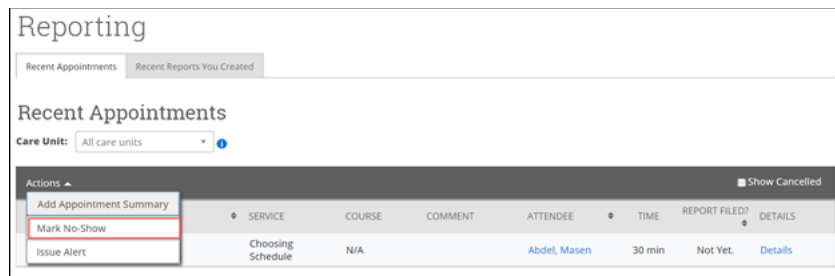
Accessing Appointment Summary Reports:

All Appointment Summary Reports you filed can be found in several areas of the platform – your staff home page, the individual student's profile page under the history tab, or through reporting functionality.