

## Appointment Summaries

Appointment Summaries are the primary mechanism to record information about an interaction with a student, collaborate across campus, and create a record of information provided directly to the student. Appointment Summaries are associated with student appointments and should be used whenever you meet with a student. Summaries are visible to and accessible to any staff or faculty in the platform who have the appropriate permissions.

### How Do I Create an Appointment Summary?

Create Appointment Summary Reports during or after meeting with students. You can also create a summary report for a drop-in appointment or mark a student as a no-show.

- **For Scheduled Appointments:** To add an Appointment Summary for a past scheduled appointment, open the Staff Home Appointments tab. Find your Recent Appointments table. Select a student and choose Add Appointment Summary from the Actions menu.
  - 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.

The screenshot shows the 'Reporting' section of the CCNY Navigate system. It features two tabs: 'Recent Appointments' and 'Recent Reports You Created'. The 'Recent Appointments' tab is active, displaying a table with columns for SERVICE, COURSE, COMMENT, ATTENDEE, TIME, REPORT FILED?, and DETAILS. A dropdown menu is open over the table, showing three actions: 'Add Appointment Summary' (highlighted with a red box), 'Mark No-Show', and 'Issue Alert'. The table contains one row with the following data: SERVICE: Choosing Schedule, COURSE: N/A, ATTENDEE: Abdel, Masen, TIME: 30 min, REPORT FILED?: Not Yet, and DETAILS: Details.

- **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. 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.

My Assigned Students All Terms ▾

Actions ▾

- Send Message
- Create Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Mass Print
- Issue Alert
- Charity
- Watch
- Export Results
- Show/Hide Columns

NAME	ID	WATCH LIST	CUMULATIVE GPA	SUPPORT
	885975301		0.00	High
	658621590		2.19	High
	178436157			
	196123052			
anira	538235217		2.96	Moderate
	999777248		2.12	Moderate
	609888859		2.79	Moderate
	355089613		2.98	Moderate

Previous 1 2 3 4 5 ... 29 Next

2,806 total results

You can also create an ad-hoc Appointment Summary Report from a Student Profile. 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.

Staff Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert

### 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.

# Reporting

Recent Appointments   Recent Reports You Created

## Recent Appointments

Care Unit: All care units

Actions

- Add Appointment Summary
- Mark No-Show
- Issue Alert

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

## What Information Is Included?

APPOINTMENT REPORT FOR ERIC 'ANGELL'

### Appointment Details

Care Unit: Advising A Thunderbird University

Location: Advising II

Service: Advising

Course: [Search]

Meeting Type: Select Meeting Type

Meeting Date: 10/25/2018

Meeting Start: 3:00 pm to Meeting End: 3:30 pm

Attendees:

- John Advisor, Advisor (Attended)
- Sally Student, Sophomore Biology (Attended)

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 Eric 'Angell'

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

[Rich Text Editor]

### Attachments

Attach File: [Choose File] No file chosen

An appointment will be created after you submit this report.

Save this 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 at your discretion. These options are configured by your institution.
- **Summary:** Use this field to summarize your interaction with the student. It is suggested that you use common keywords in your summaries.
- **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 because of filling them out.

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.