How to Add an Appointment Summary

The Navigate platform provides several different ways for staff to document a student interaction. Appointment summaries are one of the ways staff can document student interactions, specifically pertaining to an appointment, whether the appointment was pre-scheduled, a drop-in, or the student was a no-show.

1. Start by clicking on the **Appointments** index tab of your staff homepage. Scroll down to **Recent Appointments** table. Select the student, then click **Actions** > **Add Appointment Summary.**

2. A form will appear, where you can begin to complete the appointment summary report (see pg. 2)

   a. **Appointment Details** on the lefthand side will display pre-filled information that was selected by the person who scheduled the appointment. This could be the student who attended the appointment or a staff member who scheduled it on their behalf.
      - You can make edits to the **Service** field by selecting additional service types if it applies to the appointment.

   b. **Summary Details for [Student Name]** provides a "short-cut" area for quick notes. The prompts for these fields can vary based on changes to the platform or edits made by the Navigate Leadership admin team.

   c. **Appointment Summary** is the free text box where you can provide the information that pertains to the student appointment. Brief meeting notes added here should help you and other staff members understand the purpose/outcome of the interaction.
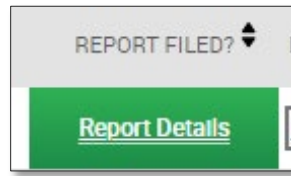
- Appointment summaries should only include information related to that specific appointment.
- Appointment summaries are only available to staff users; students cannot access their appointment summaries.
- All information inputted into Navigate becomes a part of students' records and are open to Open Records laws.

d. **Attachments** up to 10MB in size, such as curriculum sheets and other documents, can be added to the appointment summary.

3. Once your appointment summary notes are completed, click the blue **Save this Report** button. A confirmation message will pop up if your report was successfully saved and you'll automatically be returned to the Appointments page.
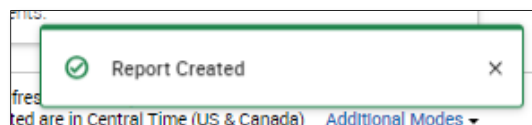
4. To access the appointment summary report again, you have the options to click on the green **Report Details** button next in Recent Appointments OR click on the **Recent Reports You Created** index tab to access all recently submitted summaries. You can also access Appointment Summaries in the **History** tab of a student's profile.

Related Articles

- Appointment Summaries
- Documenting a Student Interaction
- Using Student Profiles to Prepare for Student Interaction

To access the Navigate Help Center articles, you must first go into Navigate > Help > Help Center and keep the Help Center opened in a tab.