Appointment Summaries

What: Appointment Summaries let you document information about specific student appointment.

Where: Appointment Summaries are primarily created and stored in three main sections of the platform: **Staff Home,** a **Student Profile** page, and the **Standard Report** page.

Who: Appointment Summary Reports provide **staff** and **faculty** with the ability to record interactions with students pertaining to a specific appointment.

Conditions: The ability to create, edit, and view Appointment Summary Reports is permission-based by user role. The access to student summary reports is also limited by Care Unit permissions.

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). Appointment Summaries and Notes **are** part of the student's official record and are subject to FERPA and other local privacy laws.

Feature Overview

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 if you have questions about your permissions and viewing summary reports..

1   Navigate to **https://csus.campus.eab.com/home**

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Using the Quick Search You can create an ad-hoc Appointment Summary Report from a Student Profile. Open the profile and 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.

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Home ▼
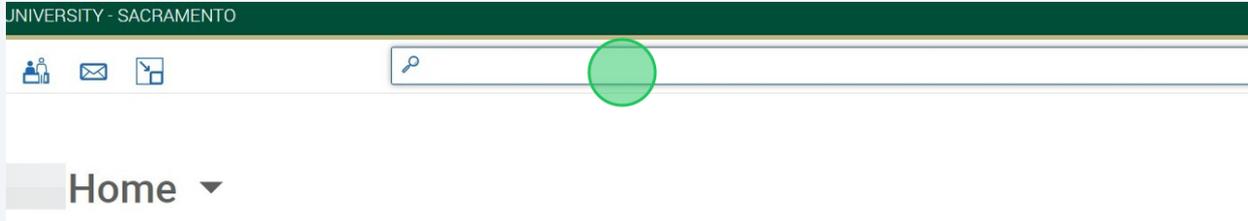
3

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.

Options

I want to...

Message Student

Add a Note on this Student

Add a To-Do to this Student

Report on Appointment

Create Request for Appointment

Schedule an Appointment

Add to Student List

Issue an Alert

Edit User Settings

Upload Profile Picture
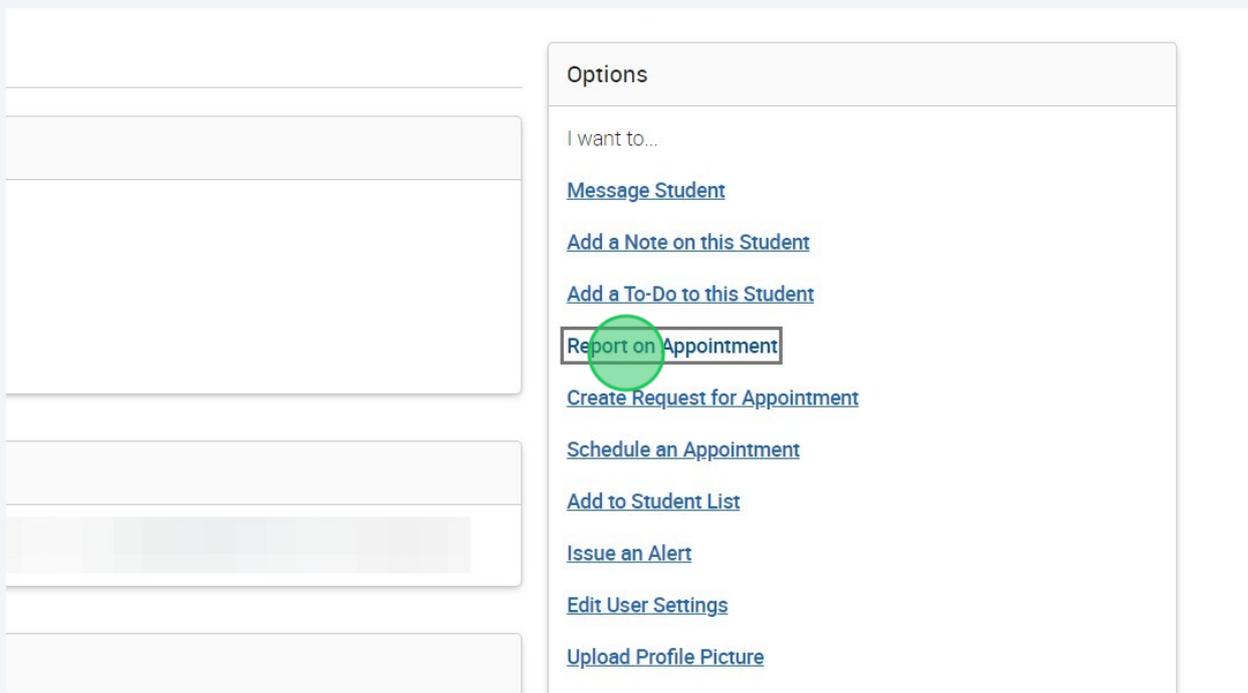
ⓘ **Important.** When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate platform creates the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or drop-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past also syncs to that calendar.

4   Appointment Summary Reports

Appointment Summary Reports allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a drop-in, or the student was a no-show. Most institutions require that all scheduled appointments have a documented Appointment Summary Report filed. However, the policies for drop-in appointments vary institution by institution. Often, policies even vary within Care Units or Locations. If you are unsure if you are expected to file Appointment Summary Reports for all appointments, reach out to your Application Administrator. Appointment Summary Reports are configured and restricted by Care Unit.

What Information Is Included?

Appointment Summary Reports should only include information related to that specific appointment. Within an Appointment Summary Report, you can include the following information:

- Association with an Appointment Campaign

- Care Unit, Location, Service, and Course

- Meeting Type

- Date of Visit, Beginning and End Times

- Attendance

- Suggested Follow up

- Appointment Summary (free text)

- Responses to Care Unit-Specific Questions

- Attachments

ⓘ **How Do I Create This Documentation?**

Scheduled Appointments. The easiest way to add an Appointment Summary Report for a past scheduled appointment is to access your appointments section from your Staff Home page. On your Staff Home **Students** tab, find the **Recent Appointments** section. From this section, choose a student and select **Add Appointment Summary** from the **Actions** menu. You can also access this section from the **Upcoming Appointments** table on Staff Home.

ⓘ **Drop-in Appointments:** There are several different ways to create an ad-hoc Appointment Summary Report for drop-in appointments. There is a **Create Appointment Summary** option in **Actions** menus throughout the platform.

The easiest way to create an ad-hoc Appointment Summary Report for a drop-in appointment is from Staff Home or a Student Profile.

On the Staff Home **Students** tab, find the specific student in your **My Assigned Students** table OR select the dropdown menu to find the student on a Saved List. From this section, you choose a student and select **Create Appointment Summary** from the Actions menu. This creates an Appointment Summary Report and adds the appointment to your calendar in the past.