

Navigate: How to Document a Student Interaction

There are many benefits to documenting all student interactions in Navigate, including:

- Creating an electronic student record that is accessible by other staff or faculty on your campus.
- Allowing for enhanced collaboration between those interacting with the student.
- Providing a more holistic view of how that student is navigating their college experience.
- Allowing for robust reporting on all interactions with your students.

Note: Any faculty or staff member can only view documentation in which they have the proper permissions, either by **Care Unit** or **assigned students**.

Methods of Accomplishing this Workflow

There are two primary documentation methods available in Navigate. These are:

1. **Appointment Summary Reports**
2. **Notes**

The type of student interaction dictates the appropriate method for documentation:

- If you are documenting a student appointment (either scheduled, walk-in, or no-show), use **Appointment Summary Reports**.
- If you are uploading a document to a student profile, or leaving a general comment, use **Notes**. Additional information on each type of documentation is included below.

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.

How Do I Create This Documentation?

For Scheduled Appointments:

There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the **Actions** drop-down menu throughout the Navigate platform.

1. The easiest way to access your appointments is from your **Staff Home** page. Under the **Appointments** tab on the **Staff Home** page, scroll down and find your **Recent Appointments**. If necessary, please select the appropriate Care Unit. From this section, you can place a checkmark next to the student's name and select **Add Appointment Summary** from the **Actions** drop-down menu.
2. You can also access the Appointment Summary Report from the **Upcoming Appointments** tab from your **Staff Home** page. From this section, you can place a checkmark next to the student's name for the upcoming appointment for which you intend to complete an Appointment Summary Report. Once selected, click on the **Actions** drop-down and choose **Add Appointment Summary**. This will open a dialogue box with the Appointment Summary Report template pre-filled with the date, time, reason, and location of the appointment. Please Note: additional Services (reasons appointment was made) can be added.

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.

Staff Home ▾

Students
Appointments
My Availability
Appointment Queues
Appointment Requests


Upcoming Appointments 2

Care Unit: All Care Units ①

Actions ▾	DATE/TIME	ATTENDEE	SERVICE	COMMENT	MEETING TYPE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
<input type="checkbox"/>	11/09/2024 9:45am - 10:30am ET	Allen, Ziare	Exam/Test Prep		In Person	Not Yet.	Details	N/A

Training Site

Profile Picture



Recent Appointments

Care Unit: All Care Units ▾

Actions ▾

- All Care Units
- Academic Advising
- Accessibility Services
- Athletics
- Career Services
- Faculty Office Hours
- Financial Aid

Reporting

Recent Appointments
Recent Reports You Created

Recent Appointments 1

Care Unit: All Care Units ▾

Actions ▾

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

Actions ▾	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
<input checked="" type="checkbox"/>	11/09/2024 9:45am - 10:30am ET (45m)	Exam/Test Prep	N/A			Not Yet.	Details	N/A

Show Cancelled

This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention [Created 11/23/2024]

What Information Is Included 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:

- 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

APPOINTMENT REPORT FOR Student Name
— ✕

Appointment Details 1
Exam/Test Prep
11/09/2024 9:45am - 10:30am ET

Care Unit

Location

Service
 ✕
Select Service 2

Course

Meeting Type
 ✕
Select Meeting Type

Date of visit

Meeting Start Time to Meeting End Time 5

Summary Details For Student Name

Topics Discussed

Goals for Next Session

Name of EOP Counselor (If EOP student)

EOP student? 3 Yes No N/A

Appointment Summary

Paragraph B I

1. **Appointment Details** – When the appointment was scheduled.
2. **Services** – Alphabetized list of services (reason for scheduling an appointment) that was reported on the Appointment Summary Report. Can include both student and staff facing Services.
3. Open ended text box questions and any **Yes/No** questions.
4. Overall Appointment Summary open text box.
5. Actual Meeting Start Time and Actual Meeting End Time. For example:
Meeting Start Time: 9:50am
Meeting End Time: 10:40am
6. Click the **Browse** button and attached a file, if you'd like. 4

Attachments

No file selected. 6

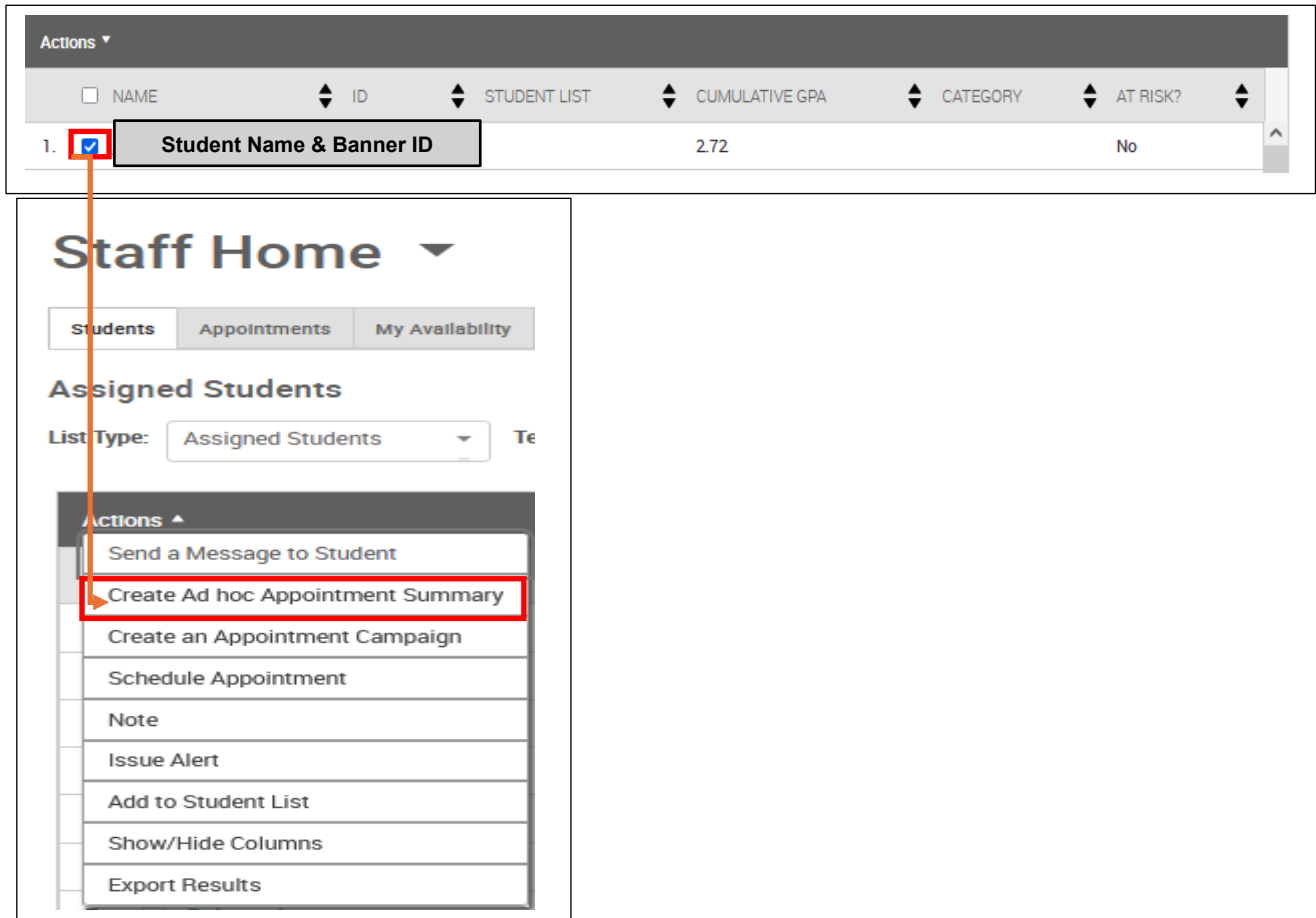
For Drop-in Appointments:

If an Appointment Summary Report is created **ad hoc** then all of this information needs to be added to the Appointment Summary Report. The form offers the ability to choose a meeting type, select a course discussed, and mark if the student attended, was late, or departed earlier than the scheduled time. **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.

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

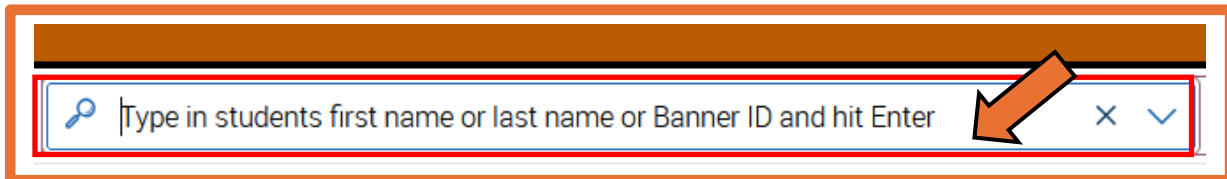
1. On your Staff Home **Students** tab, find the specific student in your **My Assigned Students** table OR select the drop-down menu to find the student on a Saved List. From this section, you choose a student and select **Create Ad hoc Appointment Summary** from the Actions menu. This creates an Appointment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



The screenshot displays the Staff Home interface. At the top, there is a table with columns: NAME, ID, STUDENT LIST, CUMULATIVE GPA, CATEGORY, and AT RISK?. The first row is selected, with a checkbox checked and a red box around the 'Student Name & Banner ID' cell. Below the table, the 'Staff Home' section is visible, with tabs for 'Students', 'Appointments', and 'My Availability'. The 'Students' tab is active, showing 'Assigned Students' as the list type. An 'Actions' menu is open, with 'Create Ad hoc Appointment Summary' highlighted by a red box. An orange arrow points from the checkbox in the table to the highlighted menu item.

You can also create an ad hoc Appointment Summary Report from a **Students Profile** page. Go to that specific student's profile by clicking on their name.

If a student is not listed on your home page, you may use the **Quick Search** feature to search for a Student's Profile. You are able to search by first name, last name, or Banner ID.



A search bar with a magnifying glass icon on the left and a close (X) and dropdown (V) icon on the right. The text inside the bar reads: "Type in students first name or last name or Banner ID and hit Enter". A red rectangular border highlights the search input area, and an orange arrow points from the right side of the bar towards the input field.

Then 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.



An "Options" panel with a title bar and a list of links. The links are: "I want to...", "Message Student", "Add a Note on this Student", "Report on Appointment", "Schedule an Appointment", "Add to Student List", and "Issue an Alert". A red rectangular border highlights the "Report on Appointment" link.

APPOINTMENT REPORT FOR

Student Name

— ×

You must first choose a Care Unit before adding any additional data in this form.

Appointment Details

Care Unit

Location

Service

Course

Meeting Type

Date of visit

Meeting Start Time to Meeting End Time

All times listed are in Eastern Time (US & Canada).

Attendees

Appointment Summary

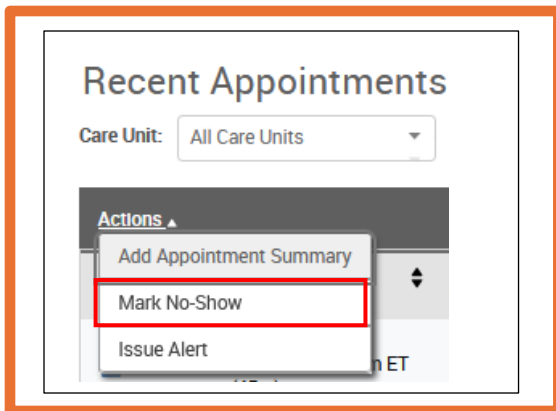
Paragraph B I

i An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

Reminder: When creating an ad hoc Appointment Summary Report to track drop-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 Outlook Calendar to the Navigate platform, this appointment created in the past will also sync to your Outlook Calendar.**

For No-Show Appointments: The primary way to mark a student as a no-show for a scheduled appointment is from your **Staff Home** page. On the **Appointments** tab, scroll down and find your **Recent Appointments**. From this section, you can place a checkmark next to the student's name and select **Mark No-Show** from the **Actions** drop-down menu.

You can also access this section from the **Upcoming Appointments** tab of your **Staff Home** page. 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.**



Note:

- In Navigate terms, neither a **drop-in** or **walk-in** is pre-scheduled in a sense. Students do not book a drop-in but they could **Check-in** for a Drop-in through a Kiosk, mobile app, or by a staff member via the **Appointment Center**. In this case, the staff member could add an Appointment Summary Report through the **Actions** drop-down menu.
- If a student did **not Check in** through the Navigate system in any way and simply walked into a staff member's office, the staff member could then use the ad hoc process "**Report on Appointment**" from a **Student's Profile**.

Note: Any information you enter into Navigate 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 REPORT FOR

Student Name

— ×

Appointment Details

Exam/Test Prep
11/09/2024 9:45am - 10:30am ET

Care Unit

Location






Service

Course


Meeting Type

Date of visit

Appointment Summary

Paragraph **B** *I*     

Attachments


 Attach File

No file selected.

Meeting Start Time: to Meeting End Time:


All times listed are in Eastern Time (US & Canada).

Attendees



Robert Hudson
Staff, Professor, Student, Super User

Attended



Ziare Allen - B00914271
Freshman
Public Relations & Advertising (PRA)

Attended

Checkin: to Checkout:

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.

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date: Time:

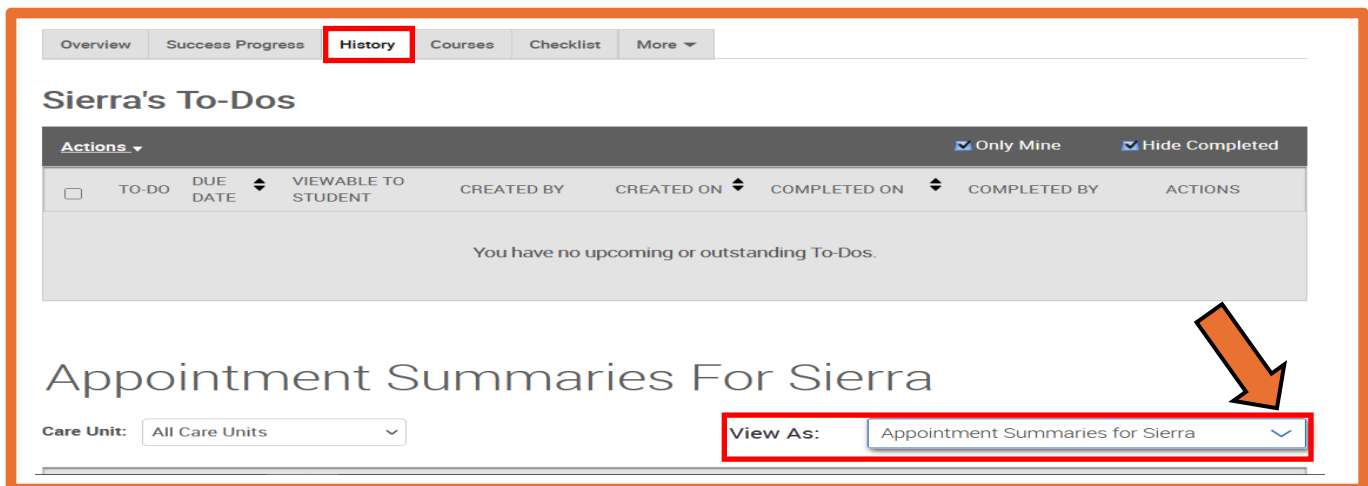
Cancel Save this Report

To View Created Appointment Summary Reports

Once saved, the Appointment Summary Reports will be available on the **Student's Profile** in their **History tab** and on your **Staff Home** page under **Recent Appointments**.

Appointment Summary Reports will be accessible to anyone who has permission to view the particular student. Go to the **History** tab and view Summary Reports.

1. Student's Profile



Overview Success Progress **History** Courses Checklist More ▾

Sierra's To-Dos

Actions ▾ Only Mine Hide Completed

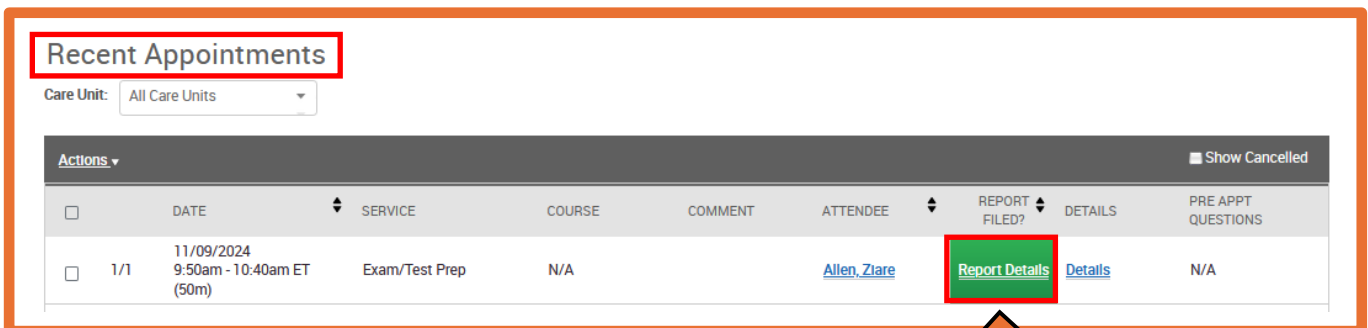
TO-DO	DUE DATE	VIEWABLE TO STUDENT	CREATED BY	CREATED ON	COMPLETED ON	COMPLETED BY	ACTIONS
You have no upcoming or outstanding To-Dos.							

Appointment Summaries For Sierra

Care Unit: All Care Units

View As: Appointment Summaries for Sierra

2. Staff Home Page



Recent Appointments

Care Unit: All Care Units

Actions ▾ Show Cancelled

	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
<input type="checkbox"/>	11/09/2024 9:50am - 10:40am ET (50m)	Exam/Test Prep	N/A		Allen, Ziare	Report Details	Details	N/A

Notes

Notes offer an additional mechanism to jot down information about a student, collaborate across Care Units, and create a record of information provided directly to the student. Unlike Appointment Summary reports, notes are not tied to specific appointments, nor are they formatted specifically for specific Care Units.

What Information Is Included?

Notes should only contain general information related to that student. You can also attach a file to the Note. No information specific to an appointment should be included in a Note. Enter that information into an Appointment Summary Report instead. Within a Note, you can include the following information:

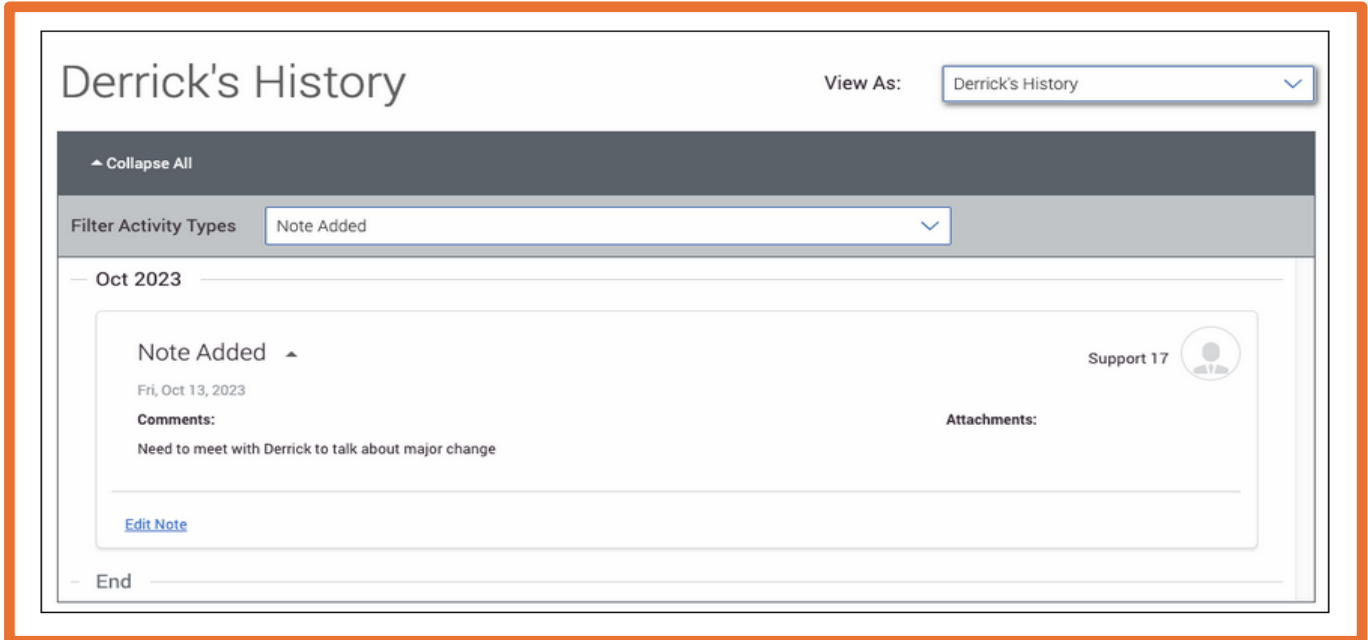
- Note (free text)
- Attachments
- Note Reason
- Note URL
- Visibility (private and/or visible to the student)

Notes can be added to more than one student at the same time. **There is a cap of 100 students for whom notes can be added to at once.** This can be done by selecting students in your queue (e.g. Advanced Search) and opening the **Actions** menu. If they have permission, users can select Note to add a Note to anywhere from 1 to 100 students. If more than one student is selected, the same Note scripting will apply to each student record. If more than 100 students are in your queue and selected, the Note option no longer appears in the Actions menu.

Another Note capability that can be configured for your institution is **Private Notes**. If your institution has Private Notes, only you and other users with the permission to see Private Notes can see Notes marked as private about a student. This capability can be turned on and off, so if your institution disables Private Notes, your old Private Notes remain private; however, you will no longer be able to create Private Notes.

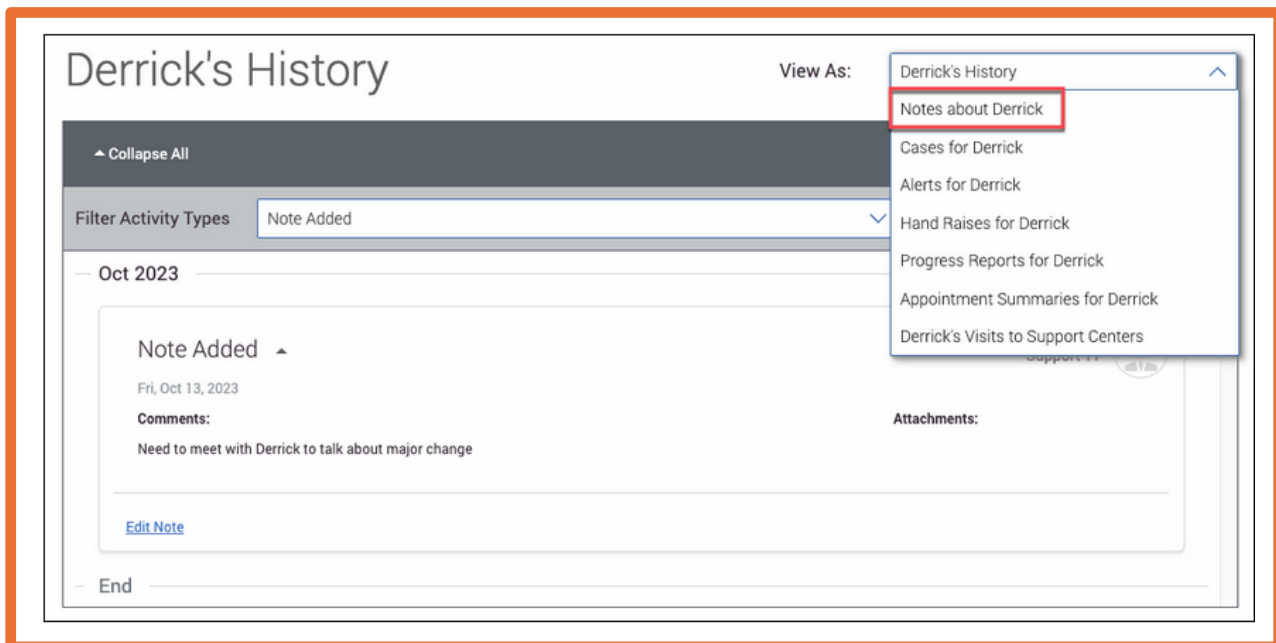
On the **Student Profile**, Notes can be found on the **History** tab along with other documentation, such as Appointment Summaries or Progress Reports. To view only **Notes**, you have two options:

1. Select **Note Added** in the **History** filter, as shown below.



The screenshot shows the 'Derrick's History' interface. At the top right, there is a 'View As:' dropdown menu set to 'Derrick's History'. Below this is a 'Filter Activity Types' dropdown menu with 'Note Added' selected. The main content area shows a list of activity items for 'Oct 2023'. The first item is a 'Note Added' from 'Support 17' on 'Fri, Oct 13, 2023'. The comment reads: 'Need to meet with Derrick to talk about major change'. There is an 'Attachments:' section to the right of the comment and an 'Edit Note' link at the bottom left of the note card. The interface also includes a 'Collapse All' button at the top left and an 'End' button at the bottom left of the list.

2. Click on **(Student Name)'s History** and filter to view only **Notes**. This view is helpful if you have the right permissions, as this is where you are able to delete Notes. To delete a Note, select that Note, open the **Actions** menu and then click **Delete Note**.



This screenshot is similar to the first one, but the 'View As:' dropdown menu is open, showing a list of options. The option 'Notes about Derrick' is highlighted with a red box. Other options in the menu include 'Cases for Derrick', 'Alerts for Derrick', 'Hand Raises for Derrick', 'Progress Reports for Derrick', 'Appointment Summaries for Derrick', and 'Derrick's Visits to Support Centers'. The rest of the page content, including the 'Filter Activity Types' dropdown set to 'Note Added' and the 'Note Added' activity item, remains the same as in the previous screenshot.

Notes About Derrick						View As: Notes about Derrick
Actions ▾						
<input type="checkbox"/>	DATE	CREATED BY	NOTE	NOTE REASONS	ATTACHMENTS	ACTIONS
<input type="checkbox"/>	10/13/2023	Support 17	Need to meet with Derrick to talk about major change	General Note		View Note 10/13/2023

Note visibility is based on configurations and permissions. For example, if you don't mark a Note as Private, users with the permission to view student notes will be able to see your Note, regardless of Care Unit. However, even if you mark a Note as Private, if your administrator gives another user permission to see Private Notes, that user will be able to see a Private Note.

Users with the permission to edit Notes that were created by others can edit your Note. To show a Note to a student, check the box next to their name in the **Visibility** field. If you choose to make a Note Visible to the student, it appears on the **Reports** tab on the **Student Home** desktop site.

ADD A NOTE TO DERRICK AADLAND
— ✕

Note (Required)

B *I* ☰ ☷ 🔗 Paragraph ↶ ↷

Need to meet with Derrick to talk about major change

📎 Attach File
 No file chosen

Note Subject

Derrick Aadland - 29514708
Chemistry

Relations

Note Reason

✕ General Note

Note URL

Visibility

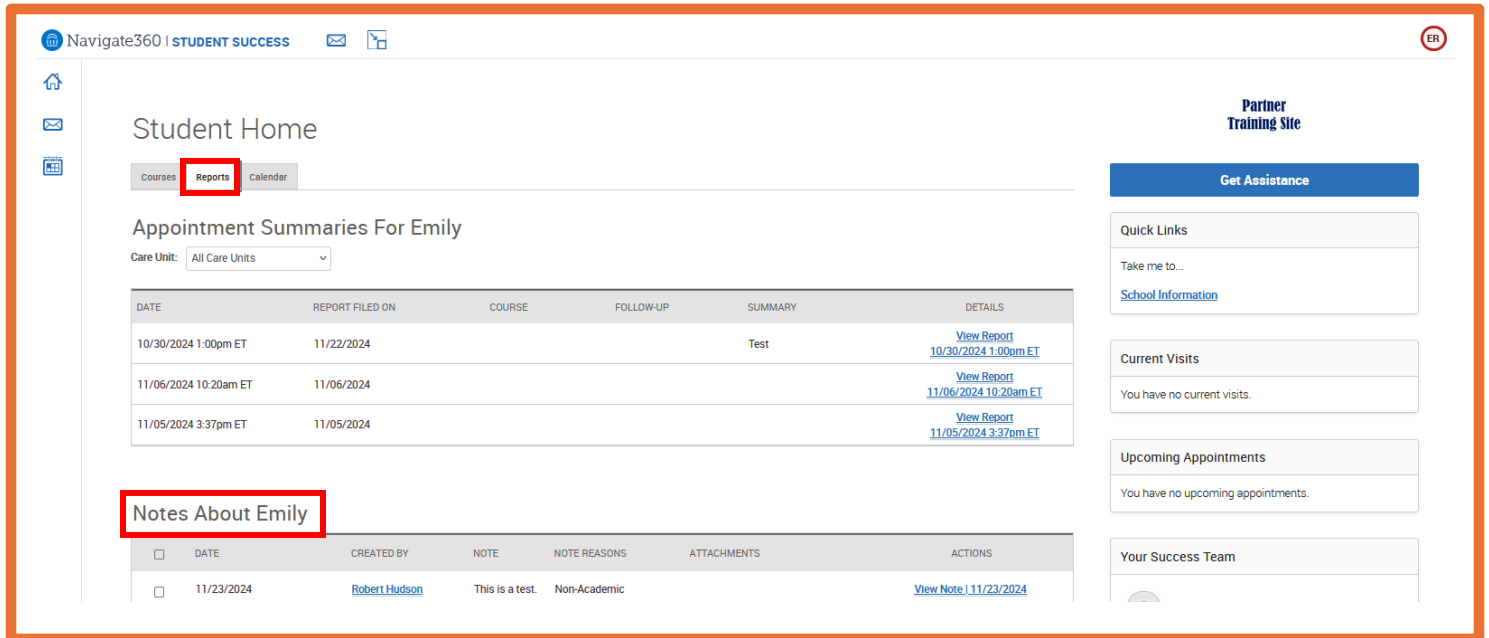
Support 17 Only?

Derrick Aadland?

Cancel

Note: There is a 10MB limit on attachments.

1. Students can view their notes from their **Student Home** page [Reports tab] on their **Navigate Student Desktop Site**.



Student Home

Reports

Appointment Summaries For Emily

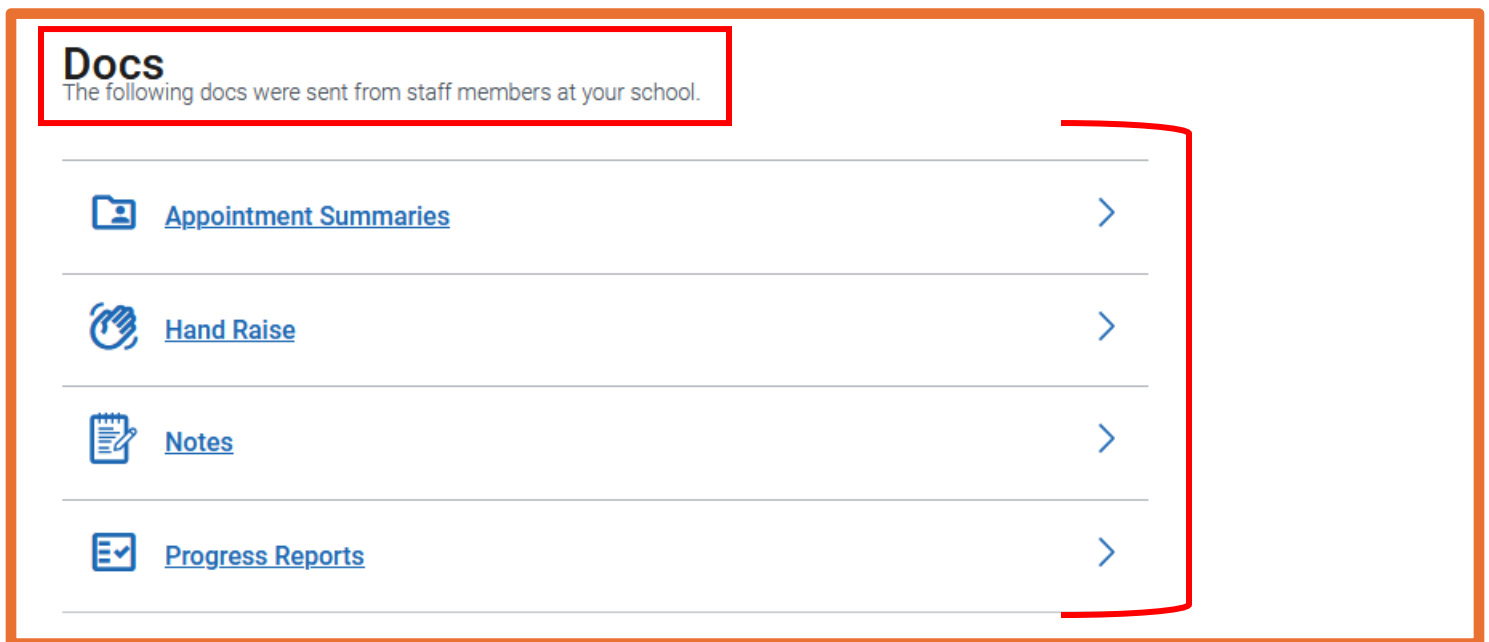
Care Unit: All Care Units

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	SUMMARY	DETAILS
10/30/2024 1:00pm ET	11/22/2024			Test	View Report 10/30/2024 1:00pm ET
11/06/2024 10:20am ET	11/06/2024				View Report 11/06/2024 10:20am ET
11/05/2024 3:37pm ET	11/05/2024				View Report 11/05/2024 3:37pm ET





Notes About Emily

DATE	CREATED BY	NOTE	NOTE REASONS	ATTACHMENTS	ACTIONS
11/23/2024	Robert Hudson	This is a test.	Non-Academic		View Note 11/23/2024

2. Students can also view their Notes and other documents on the student mobile app via their **Docs** page.



Docs
The following docs were sent from staff members at your school.

-  [Appointment Summaries](#)
-  [Hand Raise](#)
-  [Notes](#)
-  [Progress Reports](#)