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?

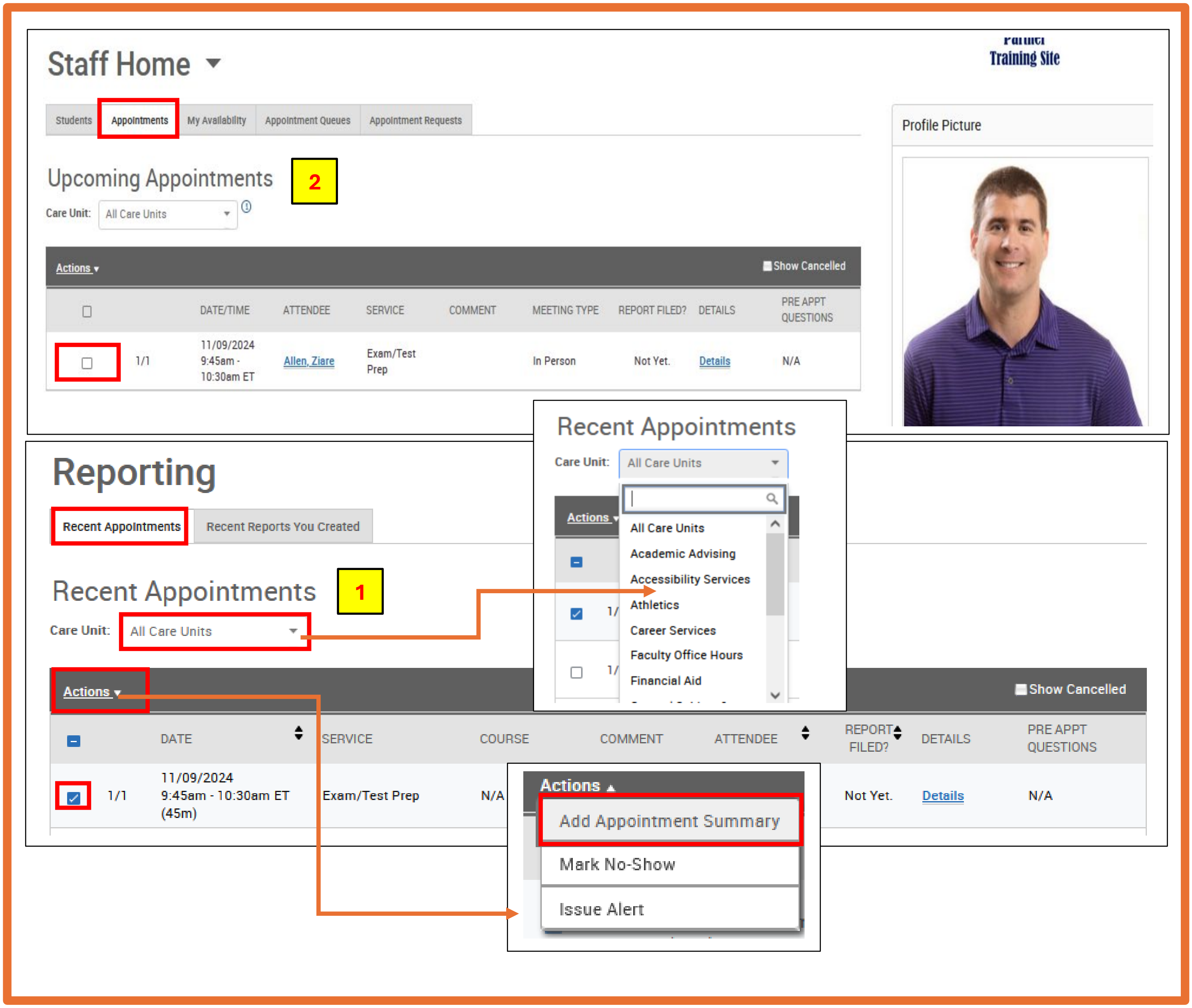
For Scheduled Appointments:

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.

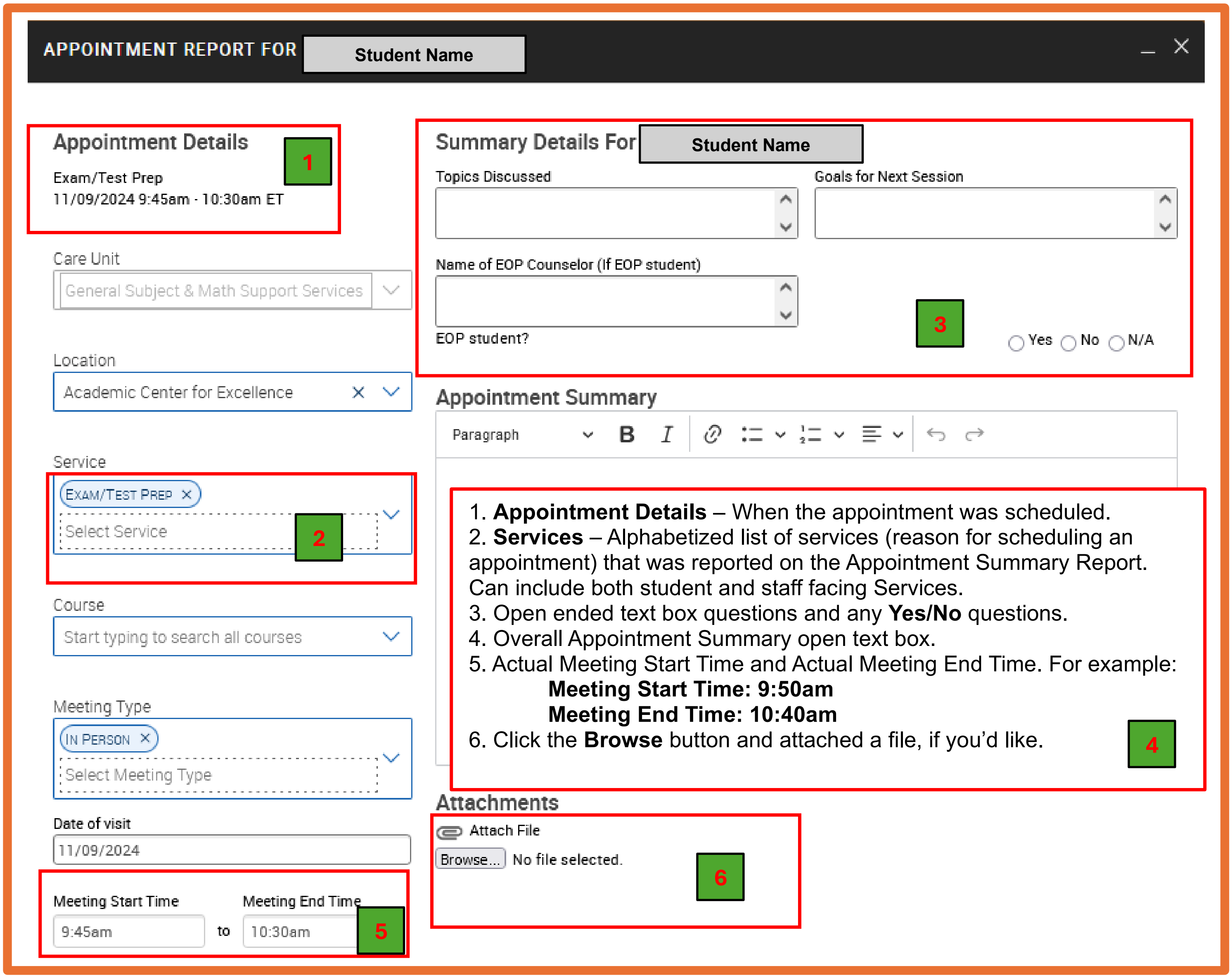
Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad hoc, to ensure the Summary Report is tied to that specific appointment.


Staff Home
Training Site
Students
Appointments
My Availability
Appointment Queues
Appointment Requests
Upcoming Appointments
2
Care Unit: All Care Units
Actions
Show Cancelled
DATE/TIME
ATTENDEE
SERVICE
COMMENT
MEETING TYPE
REPORT FILED?
DETAILS
PRE APPT QUESTIONS
1/1
11/09/2024 9:45am - 10:30am ET
Allen, Ziare
Exam/Test Prep
In Person
Not Yet.
Details
N/A
Profile Picture
Recent Appointments
Care Unit: All Care Units
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
Show Cancelled
DATE
SERVICE
COURSE
COMMENT
ATTENDEE
REPORT FILED?
DETAILS
PRE APPT QUESTIONS
1/1
11/09/2024 9:45am - 10:30am ET (45m)
Exam/Test Prep
N/A
Not Yet.
Details
N/A
Actions
Add Appointment Summary
Mark No-Show
Issue Alert

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

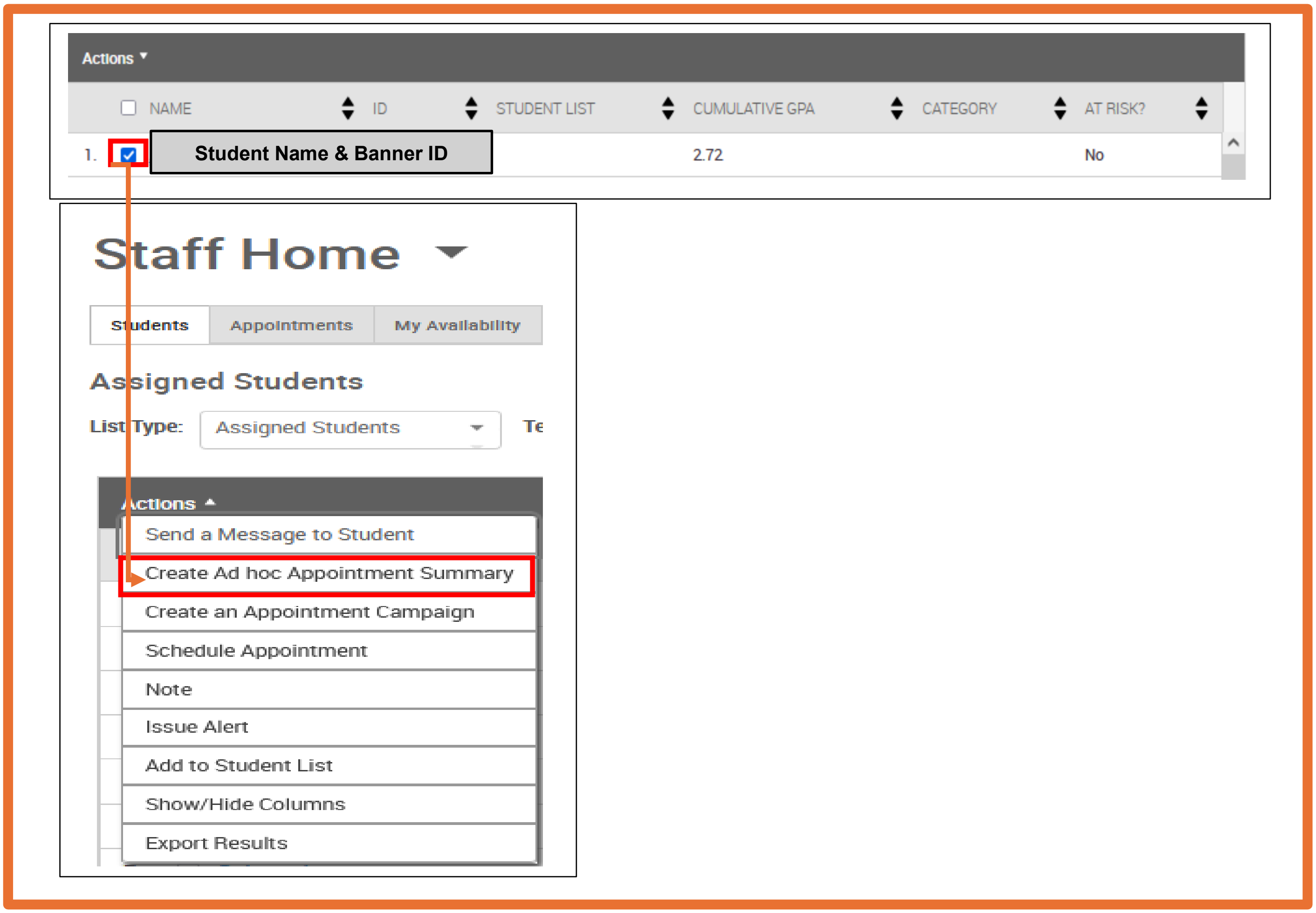


For Drop-in Appointments:

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.

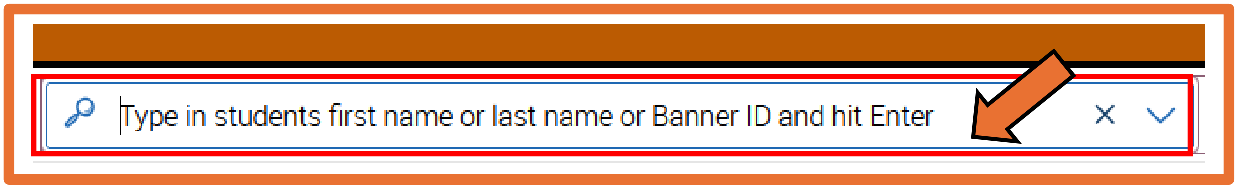
The easiest way to create an ad hoc Appointment Summary Report for a walk-in appointment is from your **Staff Home** page or from a **Student Profile**.

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.



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.



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.

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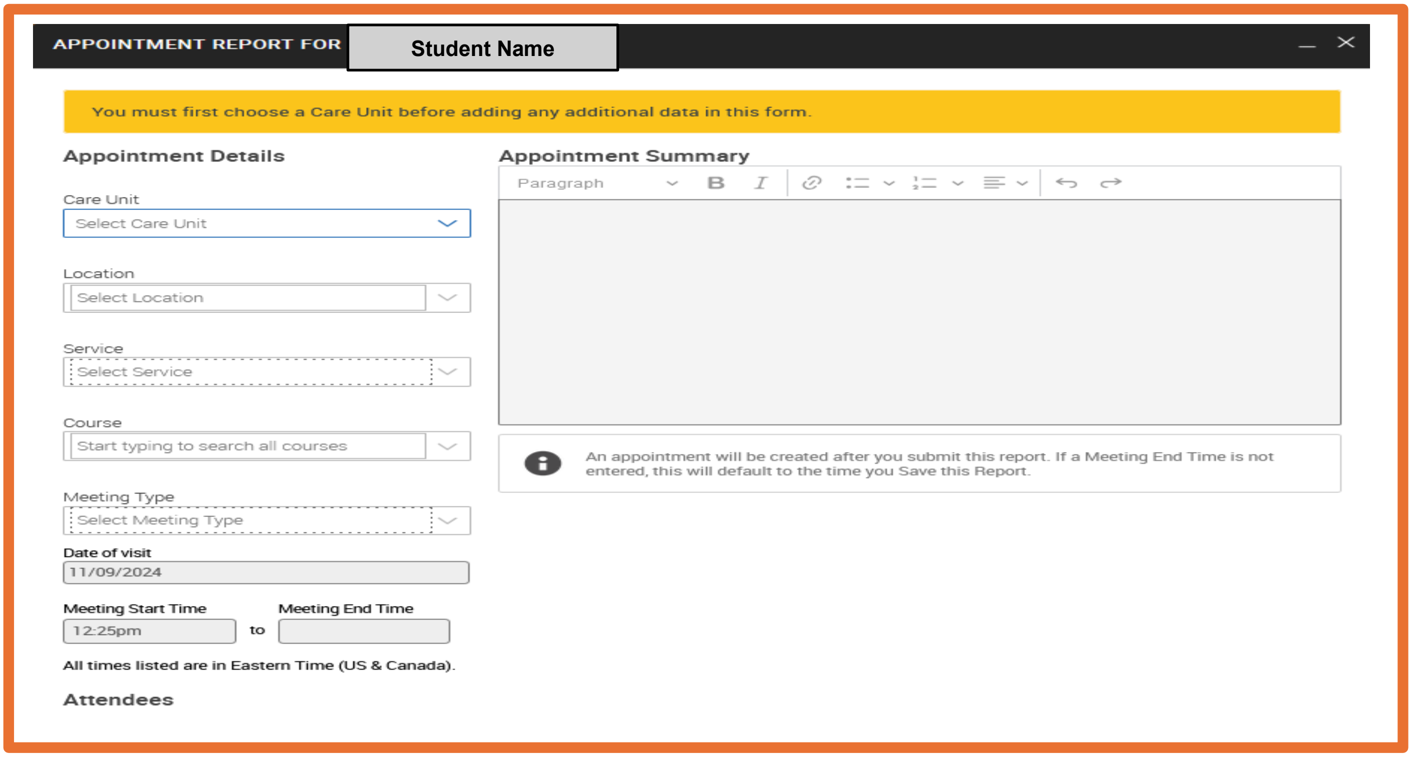
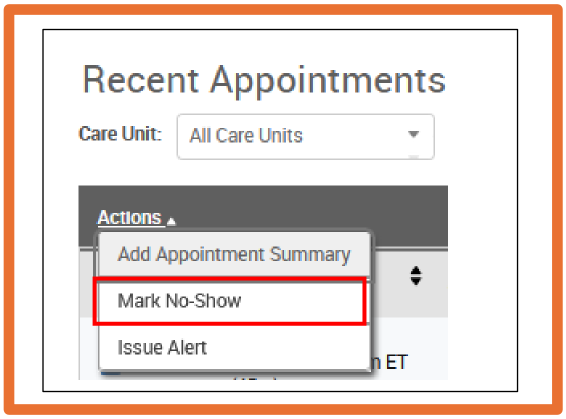


Reminder: When creating an ad hoc Appointment Summary Report to track drop-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with 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.



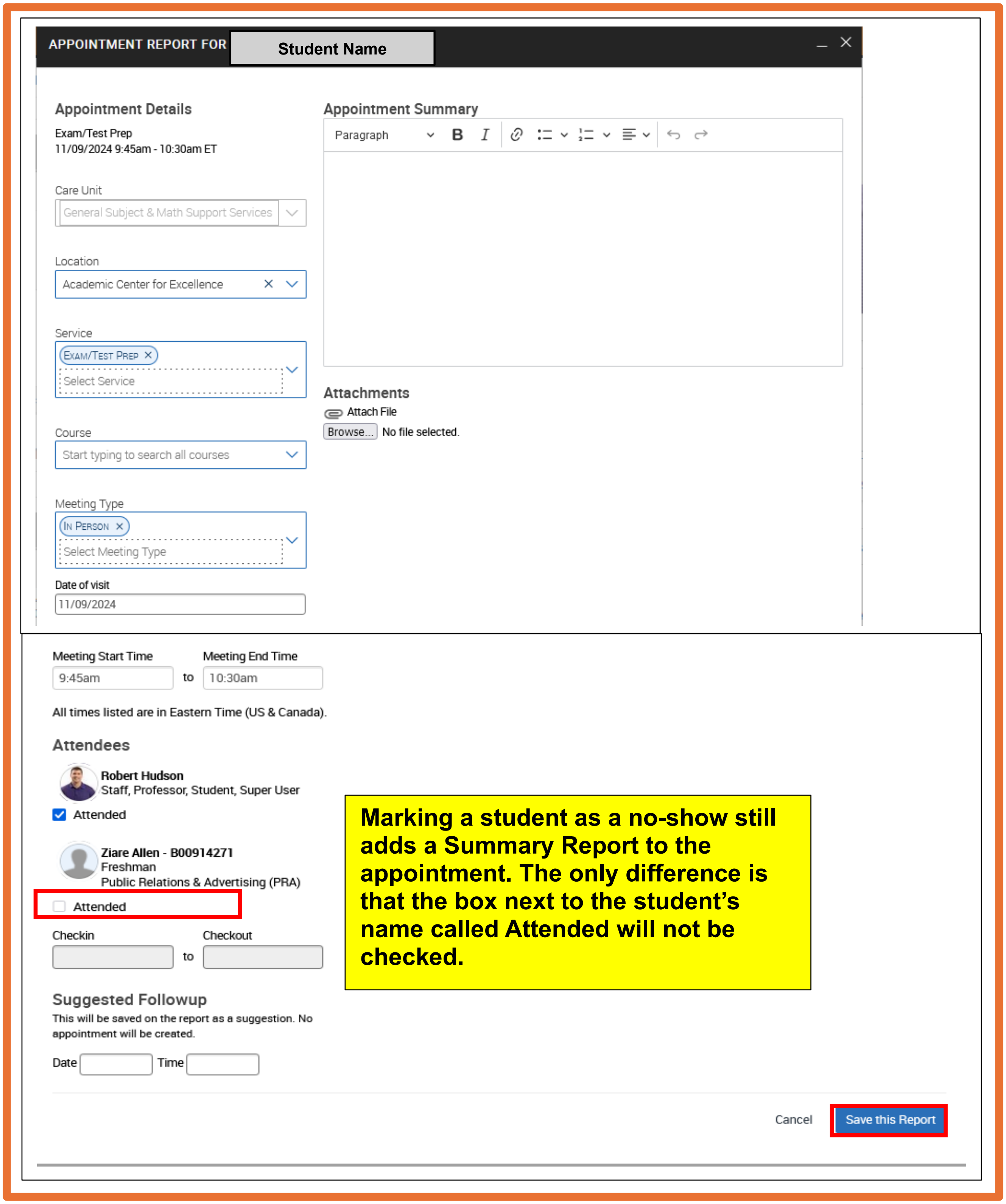
Note:

- 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).

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



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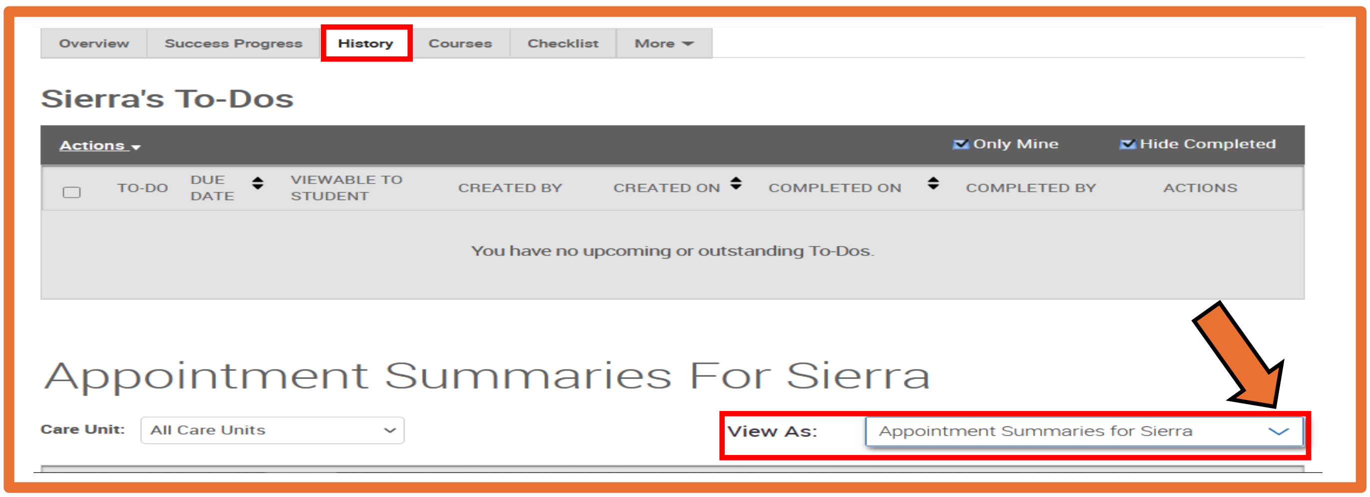
To View Created Appointment Summary Reports

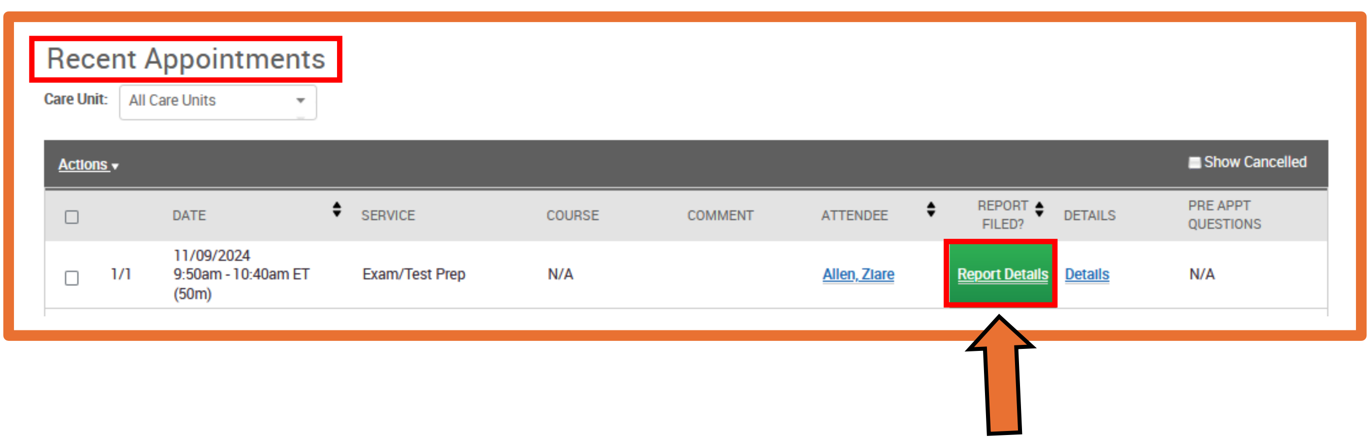
Once saved, the Appointment Summary Reports will be available on the **Student's Profile** in their **History tab** and on your **Staff Home** page under **Recent Appointments**.

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**



2. **Staff Home Page**



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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:

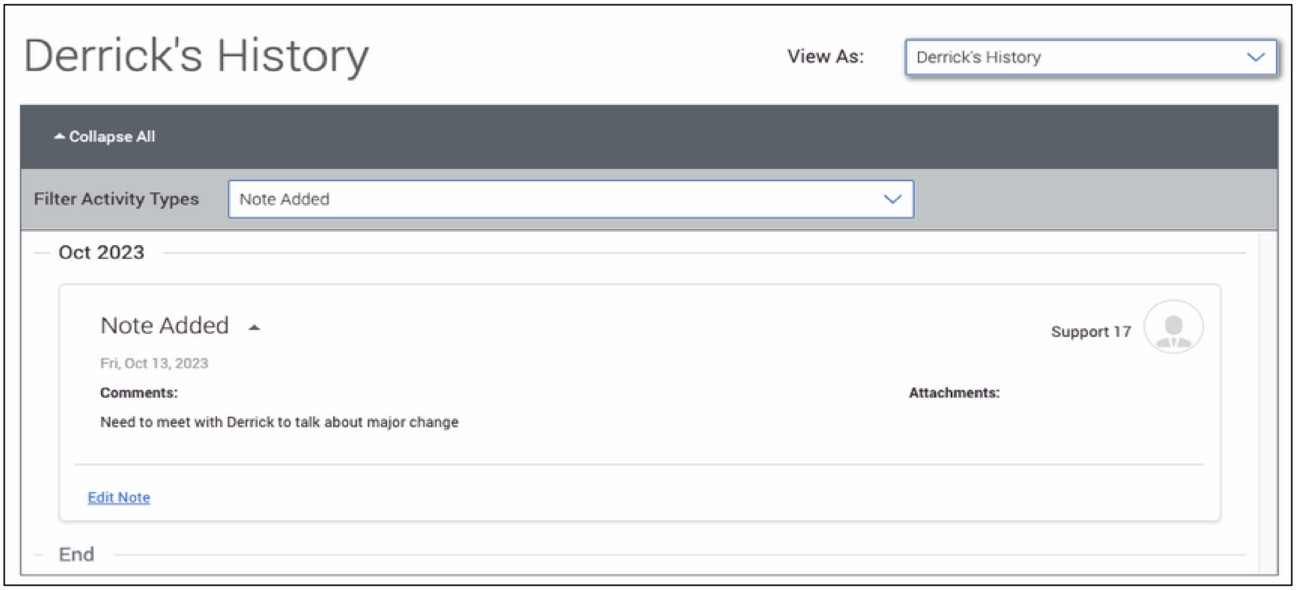
- Note (free text)
- Attachments
- Note Reason
- Note URL
- Visibility (private and/or visible to the student)

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.

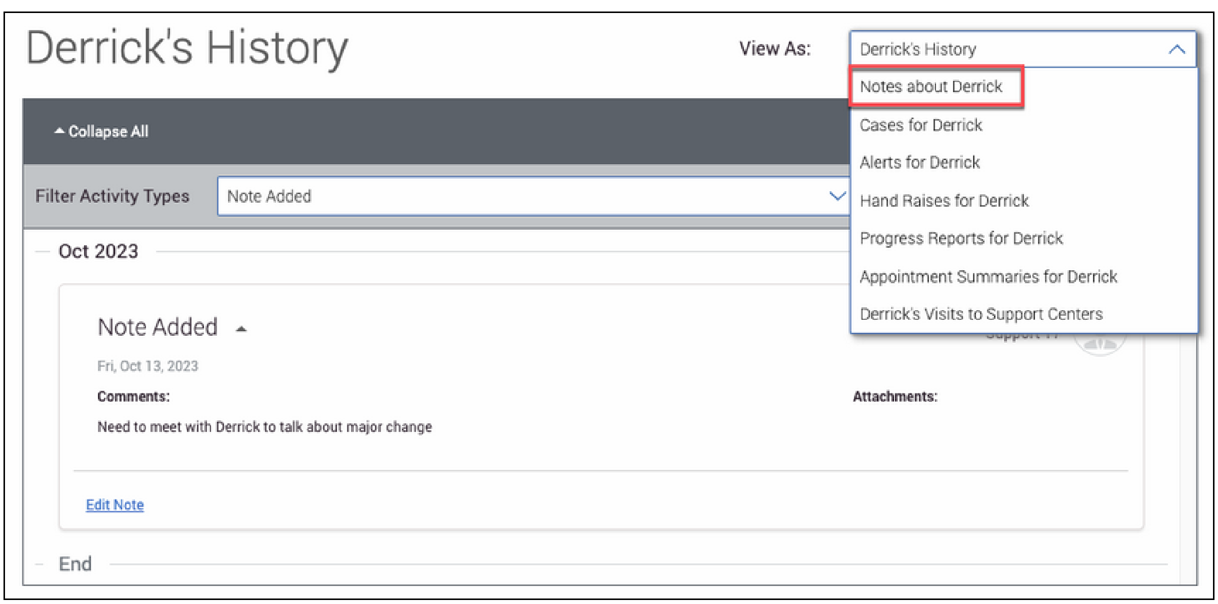
Another Note capability that can be configured for your institution is **Private Notes**. If your institution has Private Notes, only you and other users with the permission to see Private Notes can see Notes marked as private about a student. This capability can be turned on and off, so if your institution 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.

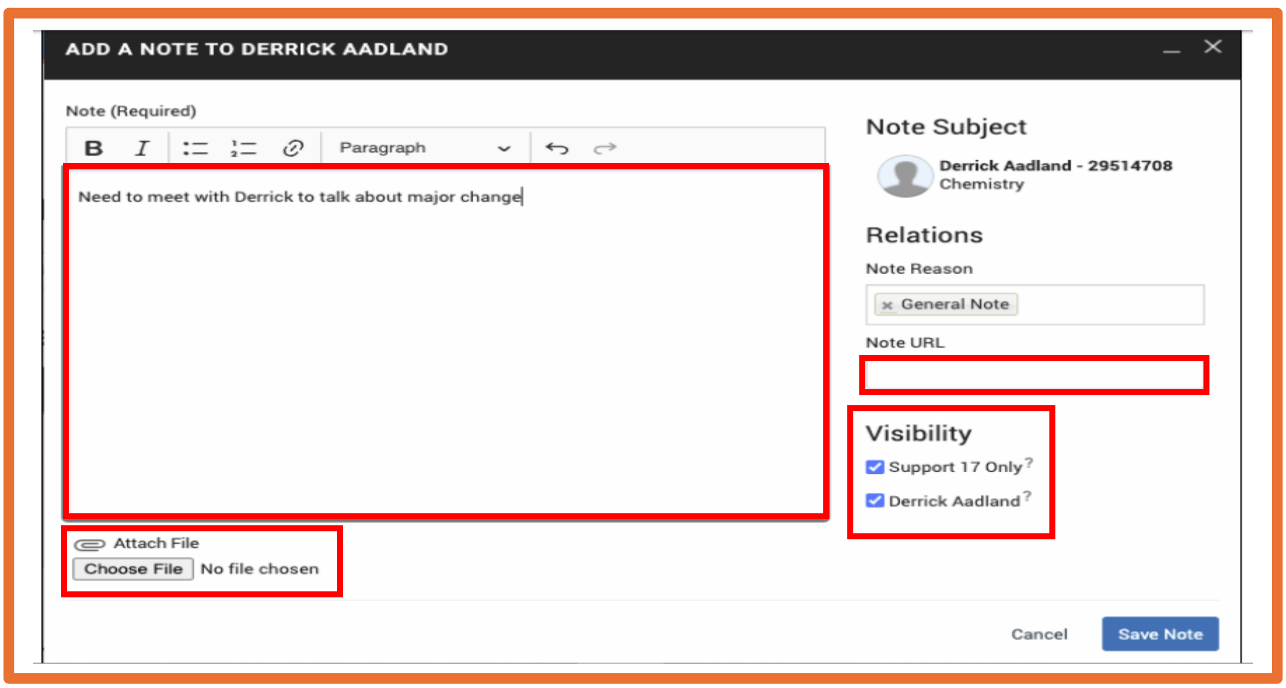


2. Click on **(Student Name)'s History** and filter to view only **Notes**. This view is helpful if you have the right permissions, as this is where you are able to delete Notes. To delete a Note, select that Note, open the **Actions** menu and then click **Delete Note**.



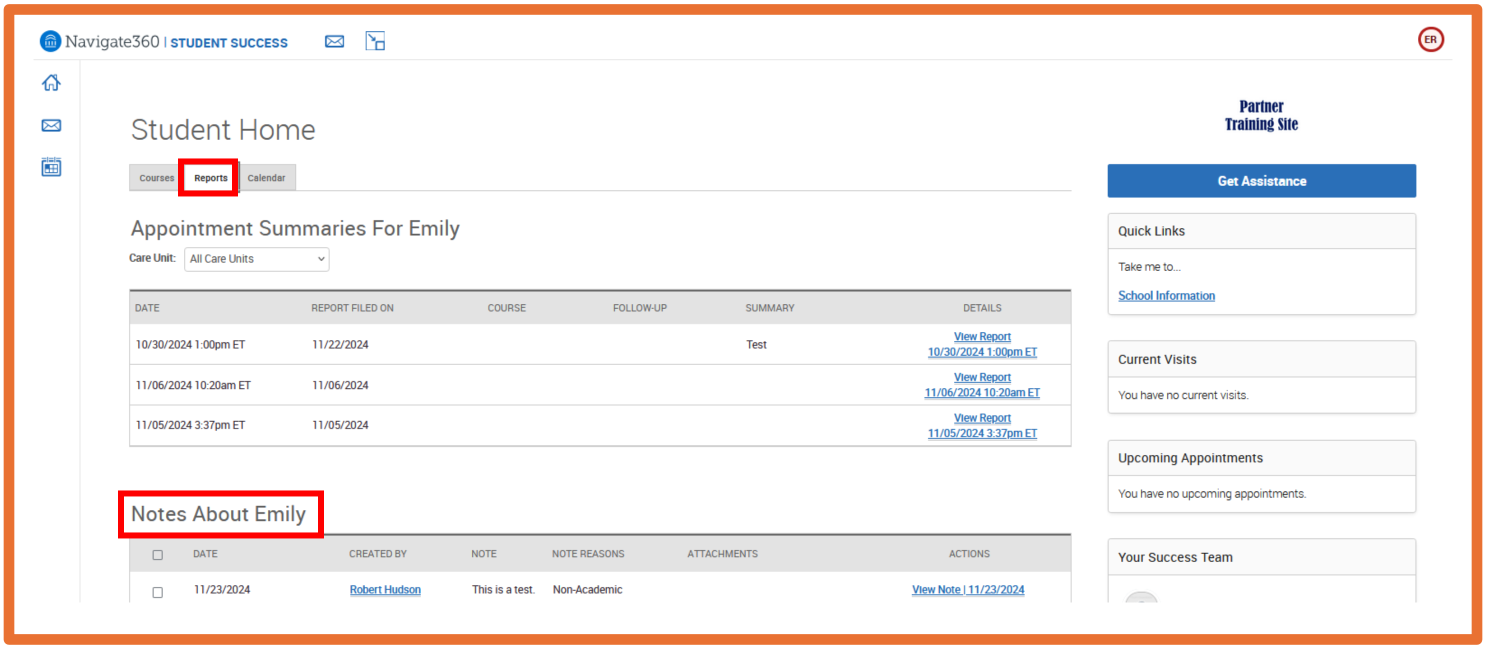
Note visibility is based on configurations and permissions. For example, if you don't mark a Note as Private, users with the permission to view student notes will be able to see your Note, regardless of Care Unit. However, even if you mark a Note as Private, if your administrator gives another user permission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

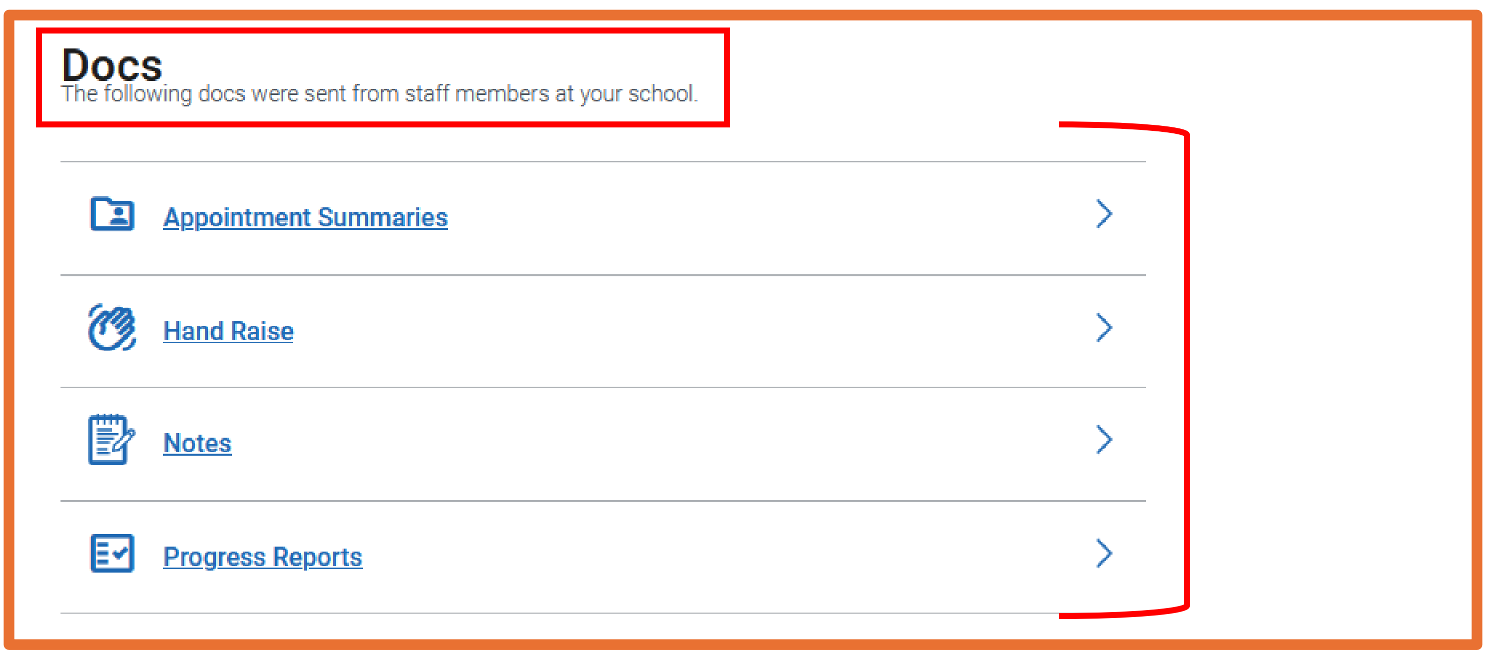


<u>Note:</u> There is a 10MB limit on attachments.

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



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



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