

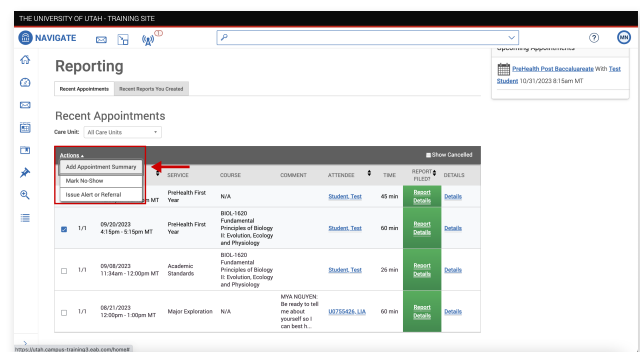
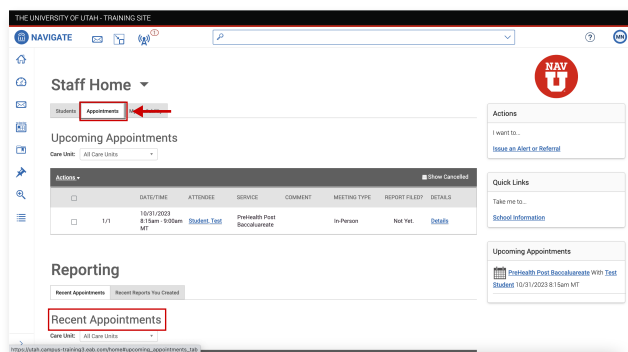
Staff and Faculty Guide
Appointment Summaries

Appointment Summaries

Appointment summaries allow you to keep brief notes with details that correlate to important discussion points during a meeting with a student and next steps discussed. You can also copy and paste the direct discussion from email communication with students as also being appropriate records of communication. The student does not have access to the appointment summary notes.

Adding an Appointment Summary

- 1 From the Staff Home, click on the **Appointments Tab** and scroll down to **Recent Appointments**
- 2 From your list of appointments, select the appointment you want to add a summary to by clicking on the checkbox next to it, and click **Add Appointment Summary** from the **Actions** dropdown



The format of the **Appointment Summary** looks really similar to the form when you're reporting on an appointment, but here, the appointment was made via the Navigate U platform, so details like the Care Unit and meeting date are already filled in.

- 3 Once you've filled in the Summary Details and Appointment Summary to your liking, click **Save this Report**
- 4 A confirmation message will appear indicating you've saved the report. You can access the appointment summary by clicking **Details** under the appointment

