Report on an Appointment (Appointment Campaign)

Creating & Managing Appointment Summaries Nanook Navigator (EAB Navigate)
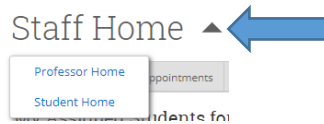
What is an appointment summary?

Appointment Summaries provide **staff** and **faculty** with the ability to record interactions with students pertaining to a specific appointment or communication.
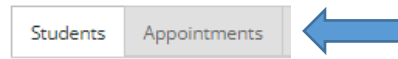
These instructions are for students who created appointments through an appointment campaign. To reduce errors in data and duplication of appointments please use one of the following methods for creating an appointment summary.

Creating Summaries Through Reporting Appointments

1. Go to your "Staff Home" role

2. Click on the appointment tab and scroll to "Recent Appointments"

3. Click the check box for the student
4. Click "Actions" and click "Add Appointment Summary"

Creating Summaries Through Appointments, *continued*

5. Required to be able to save: Care Unit, Location, at least one service provided, date of Visit and start time.
6. Not required but highly encouraged: summary details (quick boxes) and appointment summary text.
7. Click "Save this report" at the bottom right.
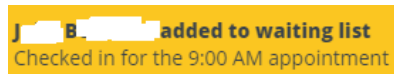
Information

- **Course:** You can associate the appointment with one specific course. You may search for any course.
- **Meeting Start/Meeting End:** For appointments scheduled in advance, the Meeting Start and End times will default to the scheduled start and end times for the appointment. For walk-in/drop-in appointments, the Meeting Start time will default to the time the summary report is created and End time will default to the time the summary report is saved. You can edit the fields as needed.
- **Attendees:** checkboxes will be checked or not to indicate attendance for each appointment attendee. Not checking the box indicates a no show.
- **Attachments:** attach a file to the summary report, such as a plan or tutoring schedule.
- **Suggested Follow-up:** These fields are used for informational purposes only. No appointment will be created as a result of filling them out.

See more details on appointment summaries in the Report on an Appointment handout.

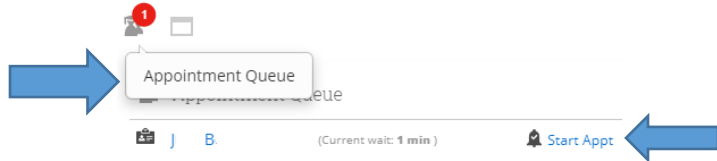# Report on an Appointment (Appointment Campaign)

Creating Summaries Through Kiosk Check In

1. If your office is using the Kiosk feature at the office front desk, then students can be checked in at the time of their appointment. When a student has been checked in the advisor receives a message on their staff home page.
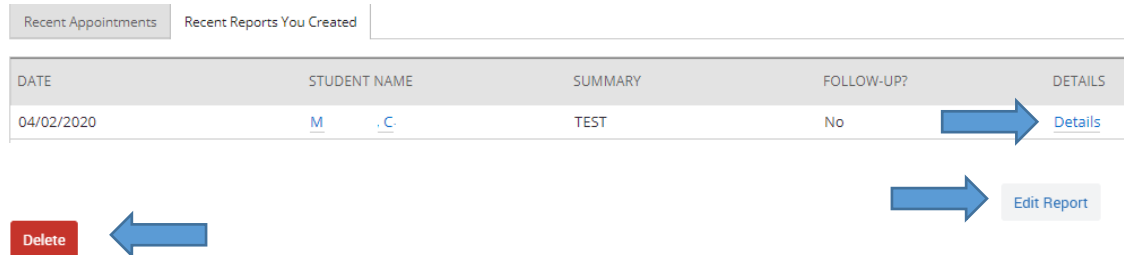
> **J___ B.___ added to waiting list**
> Checked in for the 9:00 AM appointment
>
> Staff Home ▼

2. Then you will see a notification in your appointment queue.
3. Click on the notification icon and then you can click "Start appt" for the student you wish to create a summary report for.

Edit & Delete Appointment Summaries

1. Go to your "Staff Home" role
2. Click on appointments tab
3. Scroll to towards the bottom to "Recent Reports You Created" or "Recent Appointments"
4. Click the word "Details"
5. Click "Edit Report" (bottom right), edit and save the Report
6. Or Click delete

Recent Appointments	Recent Reports You Created			

DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?	DETAILS
04/02/2020	M . C-	TEST	No	Details

Edit Report

Delete