Report on an Appointment

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.

Where are appointment summaries?

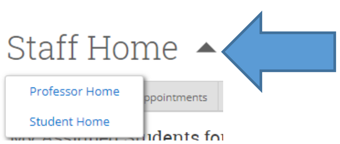
Primarily created and stored in three main sections– your **staff homepage,** a **student's profile** page, and the **Reporting** tab.

Who can create an appointment summary?

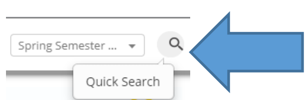
All **staff** and **faculty** through their "Staff Home" role.

Create Appointment Summary through Student Profile

1. Go to your "Staff Home" role

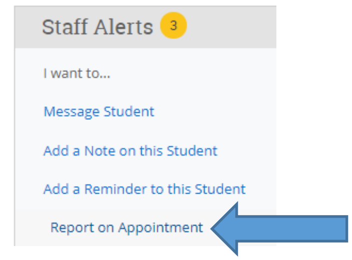


2. Search for the student's profile in the quick search (top right) by their name, student ID number or UA preferred email address. Click on their name. ** You can also click on the student's name if they are in your advisees list.*



Appointment Summary through Student Profile, continued

3. Under "I want to…", click on "Report on Appointment".



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

<u>Information</u>

- **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.

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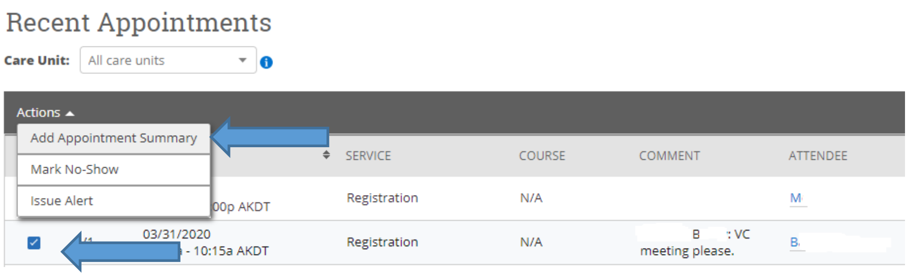
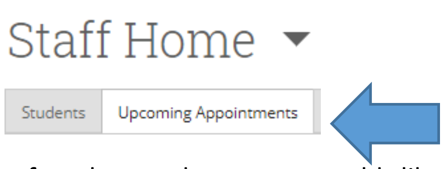
Creating Summaries Through Reporting on Homepage

1. Go to your "Staff Home" role
2. Scroll to towards the bottom of the homepage to "Recent Appointments"
3. Click the check box for the student you would like to create an appointment summary report for.
4. Click "Actions" and then click "Add Appointment Summary"



Creating Summaries Through Upcoming Appointments

1. Go to your "Staff Home" role
2. Click on the "Upcoming Appointments tab



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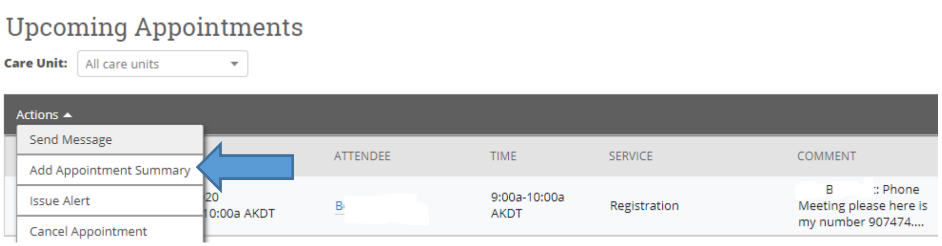
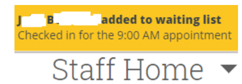
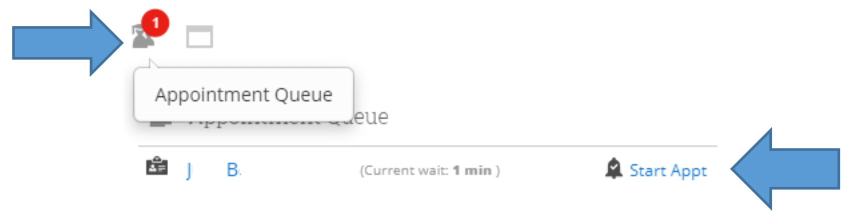


Creating Summaries Through Kiosk Check In

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.

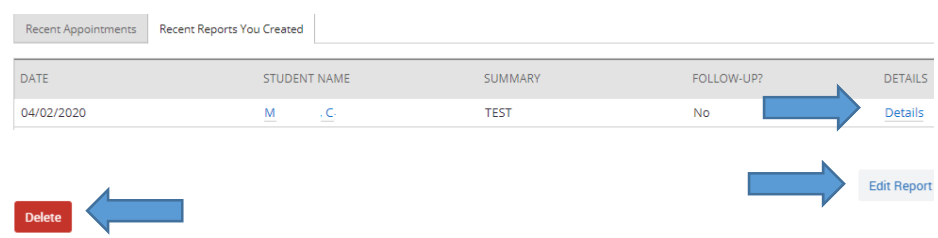


2. Then you will see a notification in your appointment queue.
3. Click on the notification icon and then you can click "Start appt" for the student you wish to create a summary report for.



Edit & Delete Appointment Summaries

1. Go to your "Staff Home" role
2. Scroll to towards the bottom of the homepage to "Recent Reports You Created" or "Recent Appointments"
3. Click the word "Details" on the line of the students you wish to update
4. Click "Edit Report" (bottom right), edit and save the Report
5. Or Click delete



Need assistance? *See more resources at https://uaf.edu/gs/nanooknavigator/ or contact jrskipper@alaska.edu.*

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