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Documenting a Student Interaction



Help Center Manager

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Intro: The Navigate platform provides several different ways for faculty and staff to document a student interaction.

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

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

Any faculty or staff member will only be able to view documentation in which they have the proper permissions, either by Care Unit or assigned students.

Remember - Any information you enter into the platform 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).

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Methods of Accomplishing this Workflow

There are two primary documentation methods available in Navigate – Appointment Summary Reports and Notes. The type of student interaction will dictate the appropriate method for documentation. If you are documenting a student appointment (either scheduled, walk-in, or no show), you should use **Appointment Summary Reports**. If you are uploading a document to a student profile, or leaving a general comment, you should use **Notes**. Additional information on each type of documentation is included below.

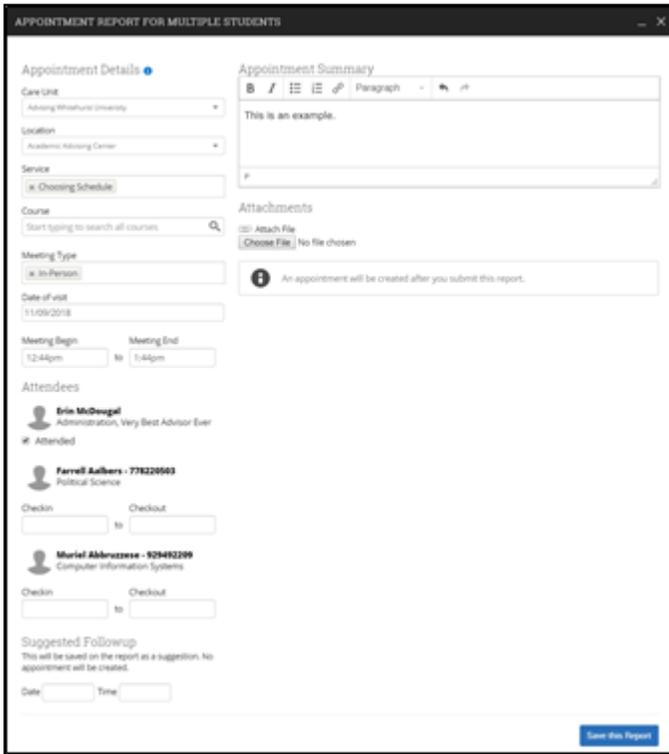
Appointment Summary Reports

Summary reports allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a walk-in, or the student was a no show. Most institutions require that all scheduled appointments have a documented Summary Report filed. However, the policies for walk-in appointments vary institution by institution, and often even vary within Care Units or Locations. If you are unsure if you are expected to file Appointment Summary Reports for all appointments, please reach out to your Application Administrator. Appointment Summary Reports are configured and restricted by Care Unit.

What Information Is Included?

Appointment Summary Reports should only include information related to that specific appointment. Within an Appointment Summary Report, you can include the following information:

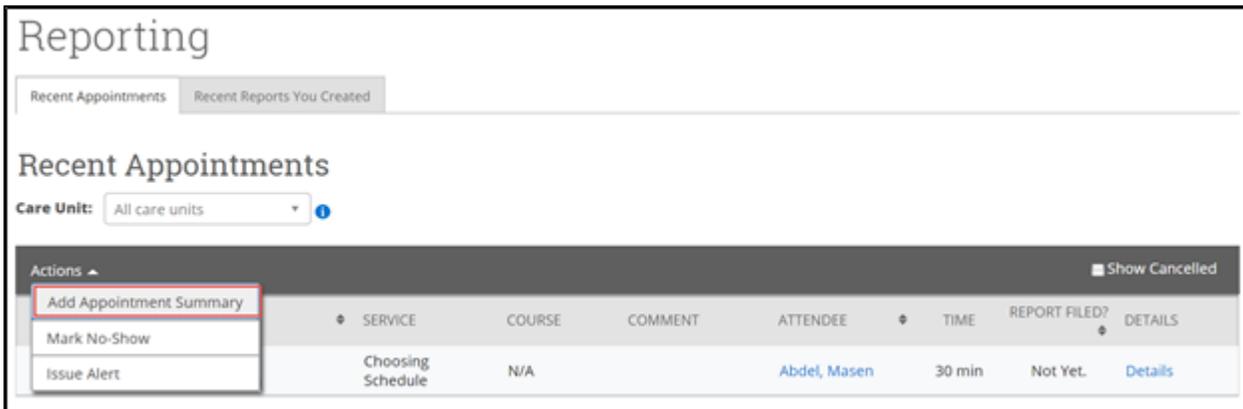
- Association with an Appointment Campaign
- Care Unit, Location, Service, and Course
- Meeting Type
- Date of Visit, Beginning and End Times
- Attendance
- Suggested Follow up
- Appointment Summary (free text)
- Responses to Care Unit-specific Questions
- Attachments



How Do I Create This Documentation?

Scheduled Appointments: The easiest way to add an Appointment Summary for a past scheduled appointment is to access your appointments section from your staff home page. On your Staff homepage, under the “Students” tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select “Add Appointment Summary” from the Actions drop down. You can also access this section from the “Upcoming Appointments” tab of your homepage.

Reminder – 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.



Walk-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments – you will notice that “Create Appointment Summary” is an option in the Actions dropdown bar throughout the platform. The easiest way to create an ad hoc

Appointment Summary Report for a walk-in appointment is from your staff homepage or a student profile. On your Staff homepage, under the “Students” tab, find the specific student in your “My Assigned Students” section, or click the drop down to find the student from one of your saved Lists. From this section, you can click on a student and select “Create Appointment Summary” from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.

My Assigned Students All Terms ▾

Actions ▾

- Send Message
- Create Appointment Summary**
- Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Mass Print
- Issue Alert
- Charity
- Watch
- Export Results
- Show/Hide Columns

NAME	ID	WATCH LIST	CUMULATIVE GPA	SUPPORT
	885975301		0.00	High
	658621590		2.19	High
	178436157			
	196123052	👁		
anira	538235217		2.96	Moderate
	999777248		2.12	Moderate
	609888859		2.79	Moderate
	355089613		2.98	Moderate

Previous 1 2 3 4 5 ... 29 Next

2,806 total results

You can also create an ad-hoc Appointment Summary Report from a student’s profile page. Navigate to that specific student’s profile and click “Report on Appointment” from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

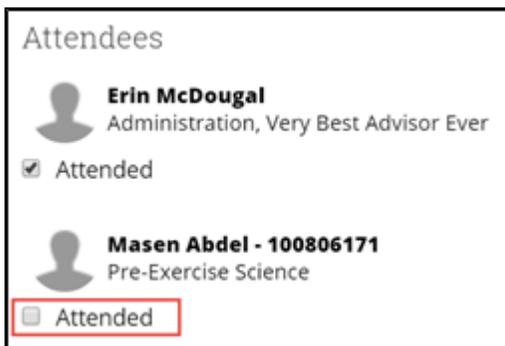
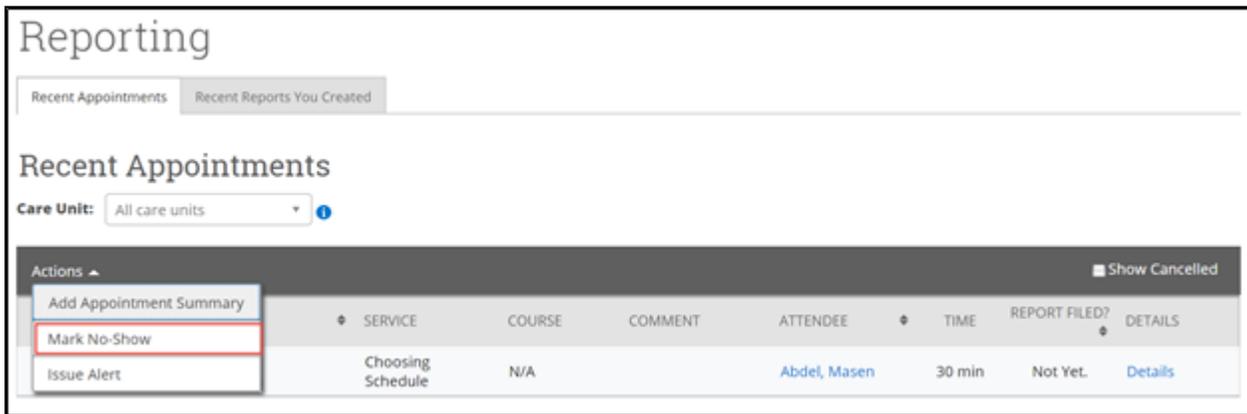
Staff Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment**
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert

Reminder – When creating an ad-hoc Appointment Summary Report to track walk-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 professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

No-Show Appointments: The primary way to mark a student as a no show for a scheduled appointment is from your staff homepage. On your Staff homepage, under the “Students” tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select “Mark No-Show” from the Actions drop down. You can also access this section from the “Upcoming Appointments” tab of your homepage. 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. See the screenshot below.



Where can I access this documentation in the future?

All Appointment Summary Reports you filed can be found in several areas of the platform – your staff home page, the individual student’s profile page, or Reports.

How can I learn more about this feature?

To dive deeper on how this feature works, please read [this article](#).

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. Because of their flexibility, institutions take advantage of notes in a variety of ways. Some institutions view the capability as a “sticky note,” and allow faculty and staff to document any important information that should be visible to anyone working with the student. Other institutions use notes to track very specific information about students, such as their degree plans. In these scenarios, faculty and staff can attach the student’s degree plan directly to the note, make the note visible to the student, and label the note with a searchable Note Reason, such as “Academic Planning” (note reasons vary depending on configurations). Notes are not restricted to specific Care Units, nor tied to student appointments – therefore, they are accessible to any staff or faculty in the platform who have permission to view Notes.

What Information Is Included?

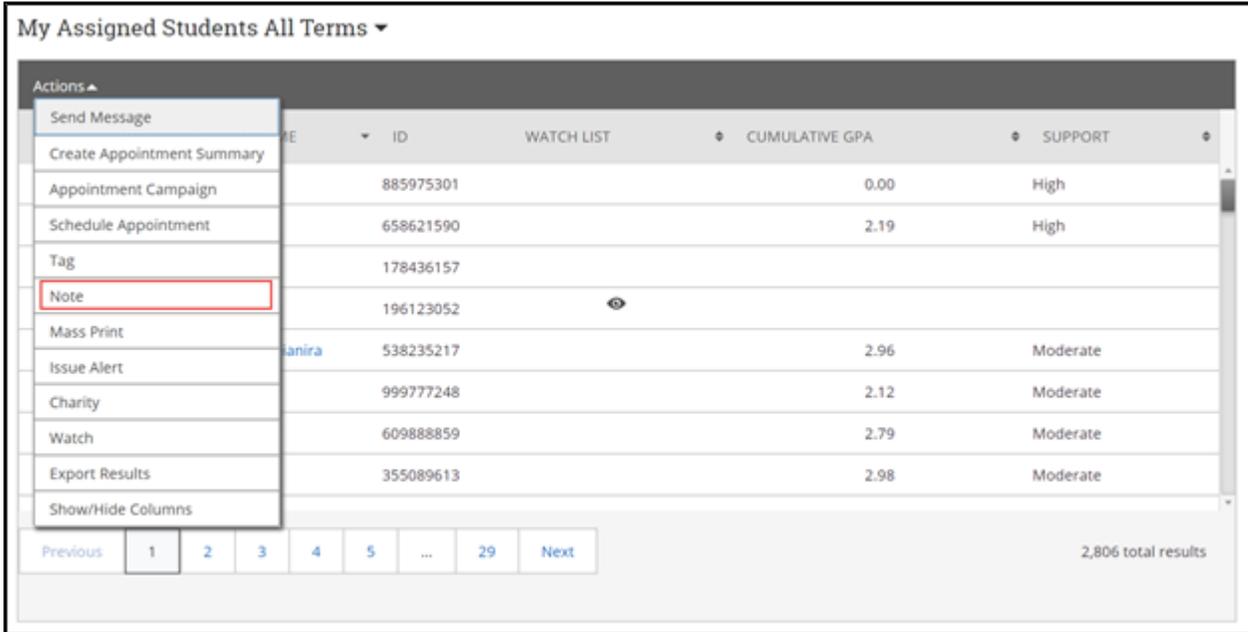
Notes should only contain general information related to that student, possibly documentation. No information specific to an appointment should be included in a Note – please enter that information into an Appointment Summary Report instead. Within a Note, you can include the following information:

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

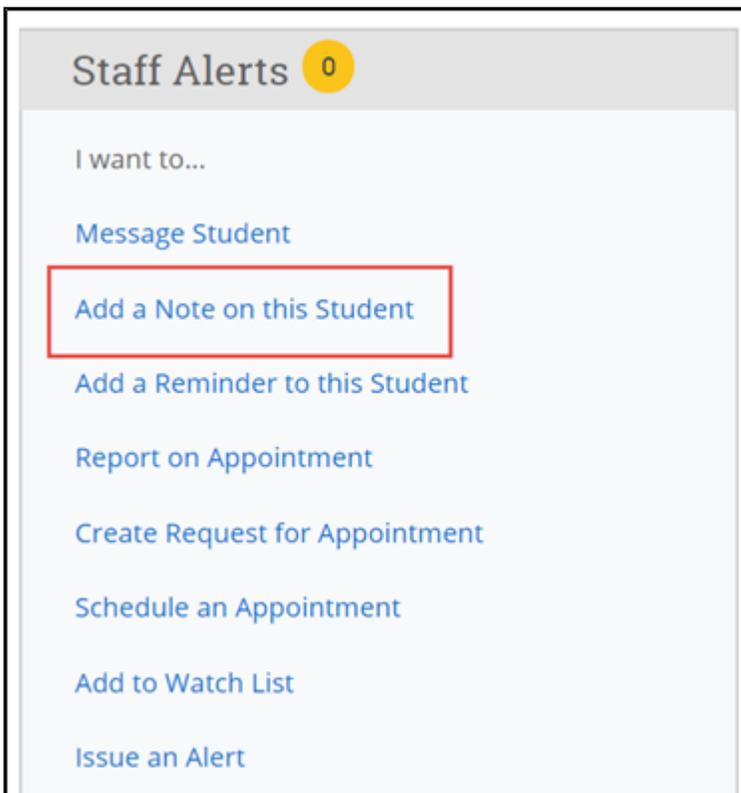
How Do I Create This Documentation?

There are several different ways to create Notes – you will notice that “Note” is an option in the Actions dropdown bar throughout the platform. The easiest way to create a Note is from your staff

homepage or a student profile. On your Staff homepage, under the “Students” tab, find the specific student in your “My Assigned Students” section, or click the drop down to find the student from one of your saved Lists. From this section, you can click on a student and select “Note” from the Actions drop down.



You can also create a Note from a student’s profile page. Navigate to that specific student’s profile and click “Add a Note on this Student” from the Actions menu on the right.



Reminder – Notes are not restricted by Care Unit. Anyone with permission to view Notes and to view the specific student information will be able to view your notes.

Where can I access this documentation in the future?

All Notes you filed can be found in two areas of the platform –the individual student’s profile page or Reports.

How can I learn more about this feature?

To dive deeper on how this feature works, please read [this article](#).

Frequently Asked Questions

What is the difference between adding an appointment summary to an existing appointment and creating an ad-hoc appointment summary?

If an appointment has been scheduled through the Navigate platform, it is important to file the Summary Report from this specific appointment in order to link them together. When you are creating a summary report for a walk-in appointment (i.e., a student appointment that was not scheduled in advance), you will need to create an ad hoc summary report by following the instructions in this article. Creating an ad hoc summary report will create a corresponding appointment on your calendar.

Can I create ad-hoc summary reports for appointments that were scheduled in the platform?

No! 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.

Can I add Notes for myself, to remind me of follow up items?

Yes, this is called a Reminder in the platform. You can add reminders for yourself from a student profile, by clicking “Add a Reminder to this Student” from the Actions menu on the right. For more information about reminders, read this article [here](#).

Are summary reports and notes part of a student’s official record and subject to restrictions under FERPA and local privacy laws?

Yes! Any information you enter into the platform 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). Please consult with your Application Administrator for

institution-specific guidelines about what information to include (and not include) in summary reports and notes.

If I mark a note as private, who can view that note?

A note marked as private is not visible to anyone in the platform other than you. However, it is still part of the student's official educational record and therefore included within any student requests for their records. Please be mindful of the information you include within your private notes.

Related Articles

- [Strategic Care - Appointment Summary Reports](#)
- [Strategic Care - Notes](#)
- [Strategic Care – Staff Home](#)
- [Strategic Care – Student Profile: Reports and Notes](#)
- [Strategic Care - Reporting](#)
- [Strategic Care - Reminders](#)

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✗ No

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