Report on an Appointment

Creating & Managing Appointment Summaries Nanook Navigator (EAB Navigate)

What is an appointment summary?

Appointment Summaries provide **staff** and **instructors** with the ability to record interactions with students pertaining to a specific appointment or communication.

Where are appointment summaries?

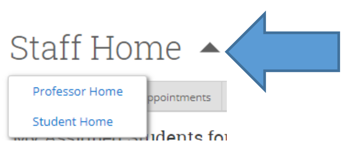
Primarily created and stored in three main sections– your **Staff homepage,** a **student's profile** page, and the **reporting** tab of staff role.

Who can create an appointment summary?

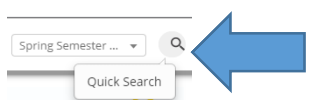
All **staff** and **instructors** through their "Staff Home" or "Professor Home" role.

Create Appointment Summary through Student Profile

1. Go to your "Staff Home" or "Professor Home" role

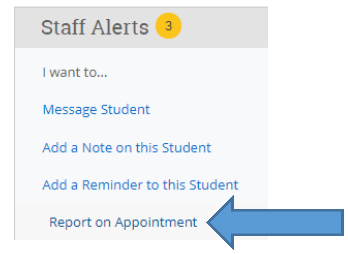


2. Search for the student's profile in the quick search (top right) by their name, student ID number or UA preferred email address. Click on their name. ** You can also click on the student's name if they are in your student list or issued alerts (professor home role), see options on page 2.*



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. *Use the "At-risk Progress report or Alert Intervention Support" service when you meet with a student of concern.
5. Not required but highly encouraged: summary details (quick boxes) and appointment summary text.
6. Click "Save this report" at the bottom right.

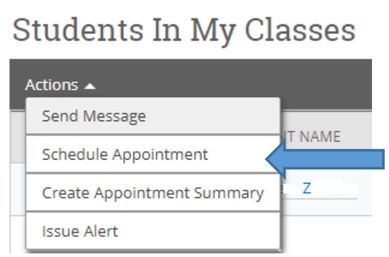
<u>Information</u>

- **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.

Report on an Appointment

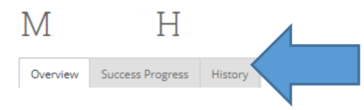
Creating Summaries Through Students In My Classes

1. Go to your “Professor Home” role
2. Scroll to “Students In My Classes”
3. Click the check box for the student you would like to create an appointment summary report for.
4. Click “Actions” and then click “Create Appointment Summary”
5. Follow steps 4-6 from the first page.

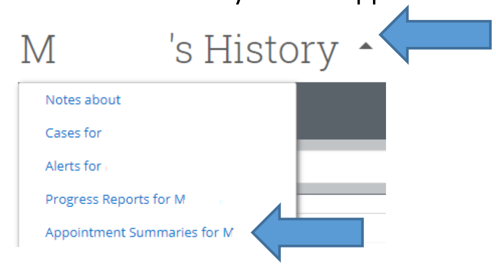


View Your Appointment Summaries on Student Profile

1. Go to your “Professor Home” or “Staff Home” role
2. Access the student profile through quick search (top right of home page- magnifying glass) or the student’s hyperlinked name on advisees list, student list, or my issue alerts list.
3. Click on “History” on the student profile

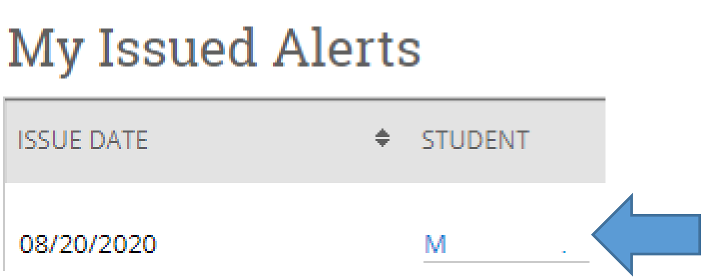


4. Click on the drop down next to history and on appointment summaries



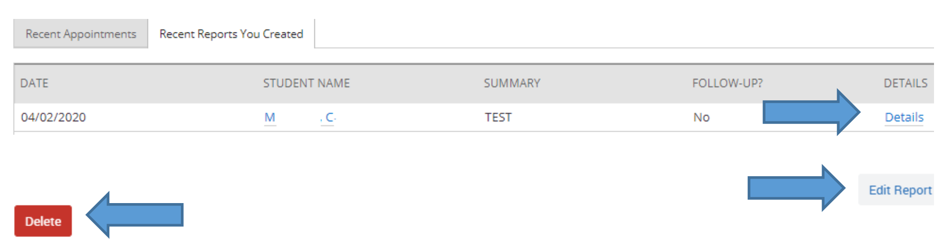
Creating Summaries Through My Issued Alerts

1. Go to your “Professor Home” role
2. Scroll to “My Issued Alerts”
3. Click on the students name in blue, this will open the student’s profile
4. Follow steps 3-6 from the first page.



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. Or go to the student’s profile history when in Professor Home Role
4. Click the word “Details” on the line of the students you wish to update
5. Click “Edit Report” (bottom right), edit, or delete and save the Report



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