

How to Create Appointment Summaries

An Appointment Summary is used to document a meeting that you had with a student.

For appointments scheduled in the platform, you can complete the associated Appointment Summary.

And Ad-hoc Appointment Summaries can be created to document a meeting that you had with a student that was not scheduled in the platform.

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Parts of an Appointment Summary

Appointment Details

SSH Academic Success Appointment
11/04/2024 10:30am - 11:00am ET

Care Unit
Student S

Location
Student S

Service
SSH Acad
Select Se

Course
Start typing to search all courses

Meeting Type
IN-PERSON X
Select Meeting Type

Date of visit
11/04/2024

Meeting Start Time
10:30am

Meeting End Time
11:00am

All times listed are in Eastern Time (US & Canada).

Attendees

Michael Brubaker
Administration, Advisor, Professor, Student,
Study Hall Monitor, Tutor

☒ Attended

Student Name
Advisor, Student

☒ Attended

Checkin
to

Checkout

Summary Details For Student Name

Assignments Discussed

is ready to begin our session. ☐ Yes ☐ No ☐ N/A

and class, read lesson, had notes, etc.)? ☐ Yes ☐ No ☐ N/A

of material not understood? ☐ Yes ☐ No ☐ N/A

o instruction (as you suggested)? ☐ Yes ☐ No ☐ N/A

assignments? ☐ Yes ☐ No ☐ N/A

standing of the material since our last session. ☐ Yes ☐ No ☐ N/A

Appointment Summary

Paragraph

Attachments

Attach File

Choose File No file chosen

Appointment Details – This section will be pre-populated for all scheduled appointments.

For Ad hoc Appointment Summaries you will need to complete this section prior to saving the summary. If you have set your Default Care Unit and Location in your *User Settings*, then they will be pre-populated.

Summary Details – This section and the yes/no questions are not required to be completed to save the summary. Follow guidance for your department requirements.

Appointment Summary Text Box – This is the most important section of the summary and best practice is to always include a response here.

You can write free text or copy and paste from a template you use.

Start and End Time – This is pre-populated but can be adjusted to reflect the actual time duration you met with a student.

Attachments – Attachments can be added in addition to the written appointment summary above.

If you are uploading an attachment in place of a written summary, best practice is to note above that “Appointment summary is included as an attachment.”

Checkin and Checkout – This section will be pre-populated for centers that use a front desk/kiosk. This is not required to be updated to save the appointment summary.

If an appointment summary is started from the Kiosk, it should be completed at that time to correctly reflect the Checkout time. Otherwise, this section should be updated to correctly reflect when the student checked out.

Parts of an Appointment Summary

The screenshot shows the 'Appointment Report for Pitt Student' form in the University of Pittsburgh Navigate360 system. The form is divided into several sections, each highlighted with a yellow box:

- Appointment Details:** Includes fields for Care Unit (Student Services), Location (Student Success Hub), Service (Get Answer/Success Appointment), Course (Start typing to search all courses), Meeting Type (Select Meeting Type), Date of visit (12/09/2028), Meeting Start Time (12:00), and Meeting End Time (12:00).
- Summary Details For Pitt Student:** Includes fields for Assignments discussed, Objectives of the session, Study skills used, and Goals for next session. It also contains a series of yes/no questions about the student's preparation and understanding.
- Appointment Summary:** A large text box for writing the appointment summary.
- Attachments:** Includes fields for Attach File and Choose File.
- Checkin and Checkout:** Includes fields for Checkin and Checkout.

Appointment Details – This section will be pre-populated for all scheduled appointments.

For Ad hoc Appointment Summaries you will need to complete this section prior to saving the summary. If you have set your Default Care Unit and Location in your *User Settings*, then they will be pre-populated.

Summary Details – This section and the yes/no questions are not required to be completed to save the summary. Follow guidance from your department requirements.

Appointment Summary Text Box – This is the most important section of the summary and best practice is to always include a response here.

You can write free text or copy and paste from a template you use.

Start and End Time – This is pre-populated but can be adjusted to reflect the actual time duration you met with a student.

Attachments – Attachments can be added in addition to the written appointment summary above.

If you are uploading an attachment in place of a written summary, best practice is to note in the text box that *“Appointment summary is included as an attachment.”*

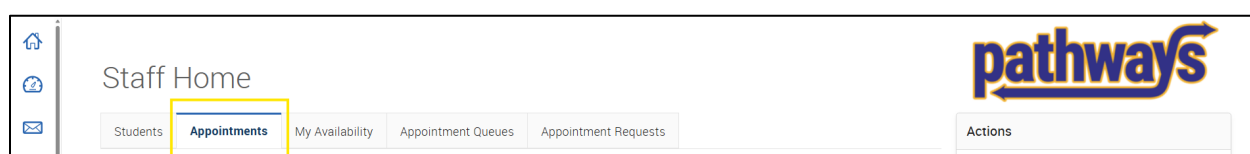
Checkin and Checkout – This section will be pre-populated for centers that use a front desk/kiosk. This is not required to be updated to save the appointment summary.

If an appointment summary is started from the Kiosk, it should be completed at that time to correctly reflect the Checkout time. Otherwise, this section should be updated to correctly reflect when the student checked out.

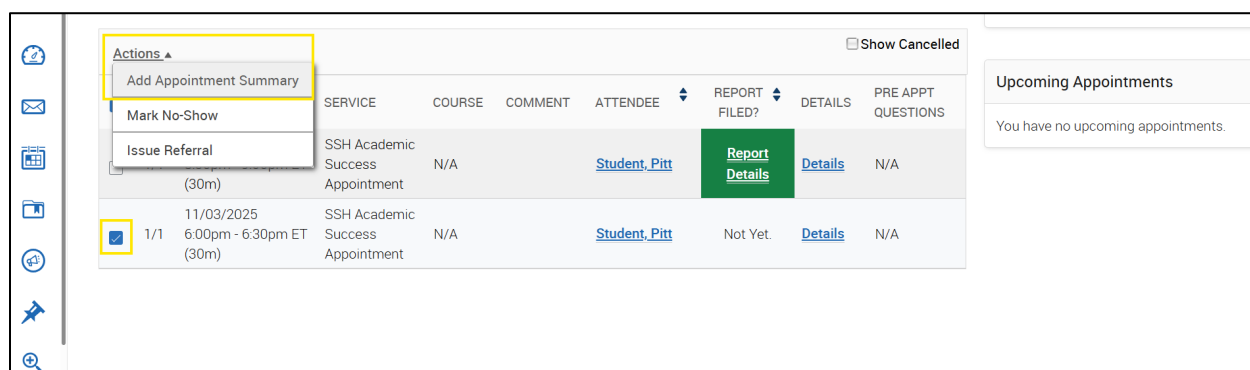
Completing an Appointment Summary from the Appointments Tab

(for an Appointment that was Scheduled in Pathways)

Select the **Appointments** Tab from your Staff Home page.



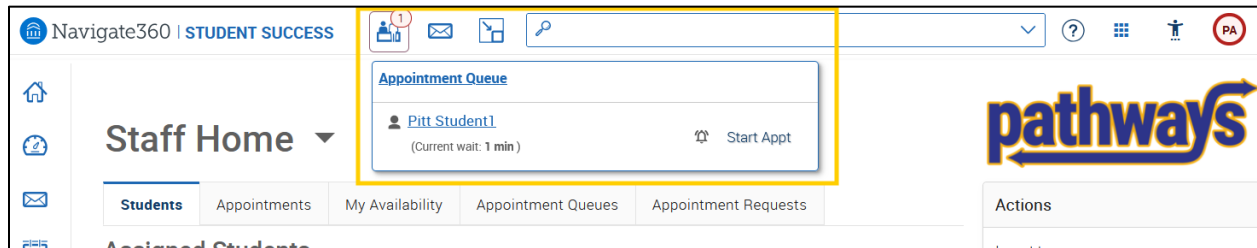
Scroll down to the **Recent Appointments** section. Select the checkbox beside the student appointment you would like to create the summary for. Using the **Actions** drop down button, select **Add Appointment Summary**.



Complete the **Appointment Summary** following your department guidelines. See the [Parts of an Appointment Summary](#) section for more details.

Completing an Appointment Summary from Front Desk Check In (for Drop in Appointments and Locations that Use a Kiosk or Virtual Check In)

When your student checks in for their appointment, you will be notified at the top of your screen. Click this notification to see the student who has checked in and to start the appointment.



You will receive a notification at the bottom of the screen that the student has left the waitlist, and the associated Appointment Summary popup will be available to complete the appointment summary.

The student will be checked when you complete and save the report.

A screenshot of the Appointment Summary form for Pitt Student1. The form is divided into several sections: Visit Details, Summary Details, Appointment Summary, and Attachments. The Visit Details section includes fields for Care Unit (Student Services), Location (Student Success Hub), Service (Academic Coaching (Virtual)), Course (Start typing to search all courses), Meeting Type (Select Meeting Type), Date of visit (01/09/2026), Meeting Start Time (1:46pm), and Meeting End Time. The Summary Details section includes fields for Assignments Discussed, Objectives of the Session, Study Skills Used, and Goals for Next Session. The Appointment Summary section includes a text area for the summary and a rich text editor. The Attachments section includes a file upload button. A confirmation message at the bottom right states: "Pitt Student1 left waiting list Removed by Pitt Advisor".

If you need to edit the Checkout Time, select the green Report Details link to Edit the report.

	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
☐	12/02/2025 11:00am - 11:30am ET (30m)	SSH Academic Success Appointment	N/A		Student, Pitt	Report Details	Details	N/A

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date Time

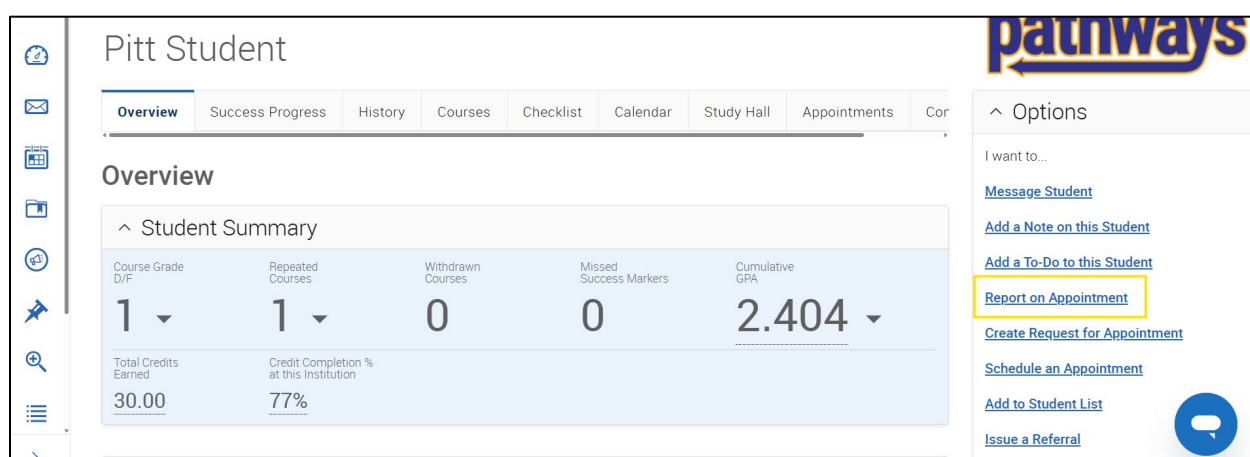
Complete the **Appointment Summary** following your department guidelines. See *the [Parts of an Appointment Summary](#) section for more details.*

Creating an Ad hoc Appointment Summary (For a Student Meeting Not Scheduled in Pathways)

When an Ad hoc Summary is created, an associated Appointment is also created and added to both you and your student's schedule. The student does not receive any notification about this appointment or that a summary was created, but they will be able to see the appointment on their calendar if they look.

FROM THE STUDENT'S PAGE

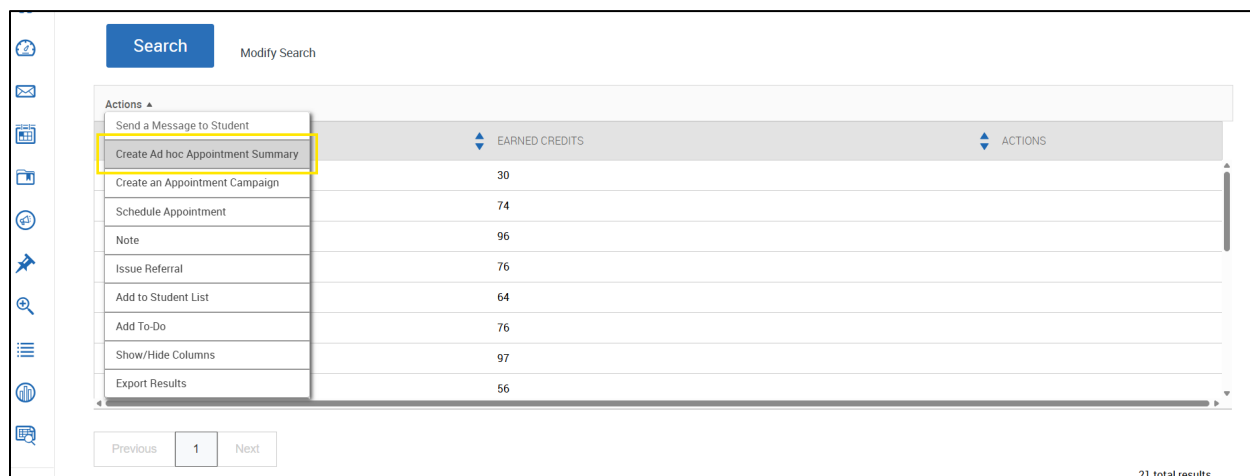
From the student's page, select the **Report on Appointment** link from the Options container.



The screenshot shows the 'Pitt Student' overview page. The 'Options' menu on the right contains the following links: Message Student, Add a Note on this Student, Add a To-Do to this Student, **Report on Appointment** (highlighted), Create Request for Appointment, Schedule an Appointment, Add to Student List, and Issue a Referral. The main content area shows student statistics: Course Grade D/F: 1, Repeated Courses: 1, Withdrawn Courses: 0, Missed Success Markers: 0, Cumulative GPA: 2.404, Total Credits Earned: 30.00, and Credit Completion % at this Institution: 77%.

FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT

Select the student you would like to create an appointment summary for and using the Actions drop down menu, select the **Create Ad hoc Appointment Summary** option.



The screenshot shows a table with columns for 'EARNED CREDITS' and 'ACTIONS'. The 'Actions' dropdown menu is open for the first student, showing the following options: Send a Message to Student, **Create Ad hoc Appointment Summary** (highlighted), Create an Appointment Campaign, Schedule Appointment, Note, Issue Referral, Add to Student List, Add To-Do, Show/Hide Columns, and Export Results. The table has 21 total results.

	EARNED CREDITS	ACTIONS
Create Ad hoc Appointment Summary	30	
Create an Appointment Campaign	74	
Schedule Appointment	96	
Note	76	
Issue Referral	64	
Add to Student List	76	
Add To-Do	97	
Show/Hide Columns	56	
Export Results		

Report Results

Search in Results

☐	≡	STUDENT NAME	STUDENT IS ACTIVE	DATE SUBMITTED	TIME SUBMITTED	COURSE NAME
☐	≡	Student11.Pitt	Yes	01/28/2025	01:32 PM ET	SENSATION AND PERCEPT...
☐	≡	Student12.Pitt	Yes	02/05/2025	08:22 PM ET	GENERAL CHEMISTRY 2
☐	≡			01/29/2025	09:22 PM ET	ORGANIC LABORATORY
☐	≡			01/29/2025	09:31 PM ET	PHARM & THERAPEUTICS ...
☐	≡			01/29/2025	09:31 PM ET	PHARM & THERAPEUTICS ...
☐	≡	Student14.Pitt	Yes	02/05/2025	08:21 PM ET	NUR MGT ACUT/CHRONIC H...

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Because ad hoc appointment summaries also create an associated appointment, be sure to adjust the **Date**, **Start Time** and **End Time** to accurately reflect the approximate details of the meeting.

Meeting Type

By Person x

Select Meeting Type

Date of visit
11/18/2025

Meeting Start Time Meeting End Time
4:00pm to 4:30pm

All times listed are in Eastern Time (US & Canada).

Attendees

Pitt Advisor
Advisor
Attended

Pitt Student-
Undeclared, Undeclared
Attended

Checkin to Checkout

Attachments

Attach File
Choose File No file chosen

Privacy

This report is hidden from student view.

Report Information

Created By: Pitt Advisor on 12/05/2025 4:18pm ET

Appointment Campaigns

To-Dos

Check out degree finder bef...
Pitt Student
03/14/2025
[View More](#)

Upcoming Appointments

You have no upcoming appointments.

PRE APPT
QUESTIONS

N/A

N/A

Complete the **Appointment Summary** following your department guidelines. See [the Parts of an Appointment Summary](#) section for more details.