



Creating Availability in Navigate

To have the ability to schedule appointments with students in Navigate and have students schedule appointments with you, you must have at least one availability set up.

1. Go to **Staff Home > My Availability**. You should see a table of existing Availabilities, if any, and your **Personal Availability Link** (see hyperlink in blue below)

Staff Home



Available Times

Actions ▾							
<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK
<input type="checkbox"/>	Wed, Fri	8:00am - 5:00pm	Forever	Tutor Center (North Campus)	AM101, General Help For: Appointments	Tutoring	Yes Edit
<input type="checkbox"/>	Tue, Wed, Thu	8:00am - 5:00pm	Forever	Academic Success Center	Registration For: Appointments/Campaigns	Advising	No Edit
<input type="checkbox"/>	Tue, Thu	8:00am - 5:00pm	Forever	Academic Success Center	Financial Help, Hold Resolution, Mandatory Advising, Registration, Study Abroad For: Appointments	Advising	Yes Edit
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	8:00am - 5:15pm	Forever	Academic Success Center	Academic Challenges For: Appointments/Drop-Ins	Advising	No Edit

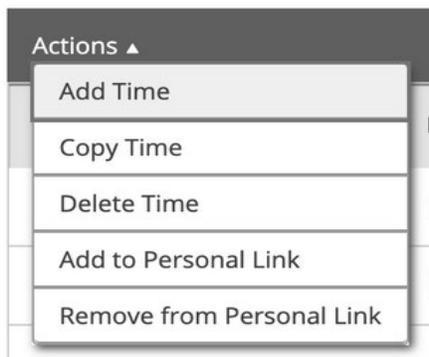
** All times listed are in Eastern Time (US & Canada)*

Personal Availability Link

Link: <https://csulb-qa-yellow-mt.gradesfirst.com/pal/l3xVhPwT6B> [Copy](#)

2. Open the **Actions** menu and select **Add Time**

Available Times



3. The **Add Availability** dialog opens

4. Choose days of the week for the availability (Click on Mon., Tue., Wed., etc. They turn darker when selected.)
5. Select the start and end time for the availability in the *From* and *To* fields.
6. Set the length of the availability with the *How Long Is this Availability Active?* field.
7. If you want this availability added to your personal availability link, select *Add This Availability to Your Personal Availability Link?* You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff member's chosen availabilities pre-filled.
8. Select your Availability types (Appointments, Drop-ins, or Campaigns). You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.
9. Select *Care Unit*. This determines which location and services can be added to the availability.
10. Select a *Location*.
11. Select *Services*. You must choose at least one service, but can pick several.

Important. You must select a **Care Unit**, **Location**, and at least one **Service** for any availability.

12. If any service you select is tied to a course, a *Course* field appears. Select the courses you are available for.
13. Enter a phone number or URL in the *URL / Phone Number* field. A clickable version of this link appears for students who create an appointment during the availability on the **Appointment Confirmation** page.
14. **Optional.** Enter special instructions for this availability. (For example: Appointment is in my office: MAC C 343)
15. Determine how many students can be in one appointment. If you do not select a *Max Number of Students per Appointment*, the maximum number stays 1.
16. Click **Save** to create the availability.

Note. The special instructions will be included in the initial notification to the student regarding this scheduled appointment. We recommend including general instructions, like your office location or how to check-in for the appointment upon arrival.

Repeat this process any time you want to add another availability. You can have as many availabilities as you want.

Managing Availability in Navigate

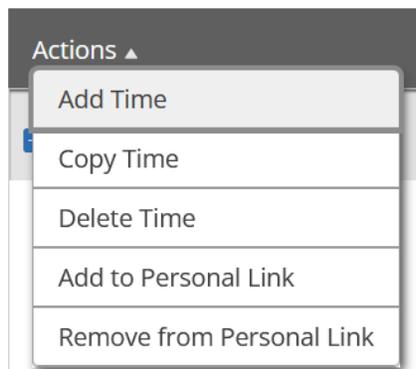
There are two different ways you can manage and adjust your availability. One is when you are making a permanent change. For example, you are a faculty mentor whose office hours changed from Monday from 1 to 3 to Friday from 9 to 11. The other is when you need to make a temporary change: you need to cancel availability one week because you have a department meeting during your usual appointment time.

To edit an existing availability, click the **Edit** link next to the entry you want to change.

To copy an existing availability, select the time you would like to copy, open the **Actions** menu and click **Copy Time**. The availabilities are copied and a **Modify Availability** dialog opens, allowing you to make edits or to save your newly created availability.

To delete an availability, simply select the time, open the **Actions** menu and click **Delete Time**.

Available Times



Changing Availability Permanently

This is a two-step process. First, you will want to edit your existing availability by setting an end date on it. This way you maintain the previous availability in the calendar, which means it won't be removed from your professional calendar or Navigate SSMS.

Change an existing availability so it expires by going to the **My Availability** tab on Staff Home. Find the availability you want to edit and click the **Edit** link on the right of the entry.

The Modify Availability page opens. Change the entry in the **How long is this availability active?** drop-down from **Forever** to **A Range of Dates** so you can select the end date.

MODIFY AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 8:00am To 8:15pm

How long is this availability active?

Forever
Spring Semester 2019
A Range of Dates
Forever

Care Unit

Click **Save** to apply your changes.

Will you be meeting with multiple students?

These settings will not be used for kiosk and campaign purposes.

Max Number of Students per Appointment

1

Cancel Save

One-Time Availability Changes

To modify your availability for a one-time event, you simply need to use your external calendar. If you have set up the platform to sync with your external calendar (i.e. Outlook or Google), then calendar conflicts will prevent students from scheduling during these times, even if it is during an active availability. If your calendar has not synced properly or recently, then calendar conflicts may not be up to date in the platform.

Availability and Scheduling

Once your availability is set up correctly, students are able to schedule appointments with you through Kiosks, Navigate Student, or Student Scheduler. Front-desk workers are able to assign a drop-in student to you from Appointment Center. In addition, you are able to pull students from Appointment Queues or respond to Appointment Requests from Staff Home. This section quickly shows how your schedule works with these features.