

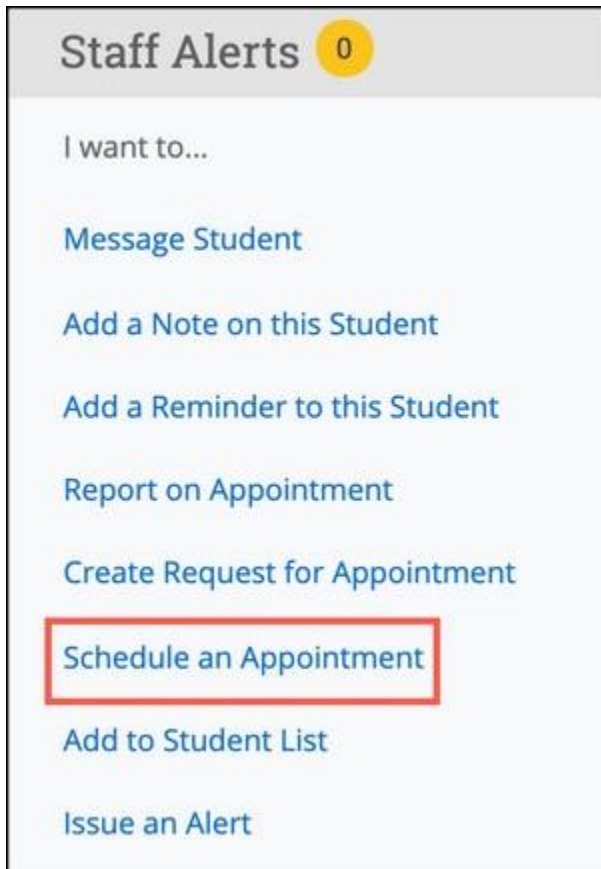


Scheduling Appointments for Staff or Faculty

Intro: Scheduling appointments is a critical Navigate functionality. This guide explains how to schedule an appointment for individual students if you are a staff or faculty member. It also explains how to create a General Event in Navigate.

This section explains how to create an appointment with an individual student.

1. Open a student profile.
2. Select **Schedule an Appointment** from the sidebar.



3. The **Schedule Appointment** page opens.

Schedule Appointment

Filters

Care Unit
Select a Care unit ▾

Location
Please Select care unit to select location ▾

Service
Select a location to select service ▾

Course
 🔍

Meeting Type
Select meeting type ▾

Comments

Select a Date
August 2021

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14

People Attending (1)
Alderink, Orenda (Student) X
Available Slots Left in Appointment (0)

Choose A Time To Meet

Length: ▾

Repeat This Appointment?

Repeat
Does not repeat ▾

- Select the Care Unit, Location, and Service from the filter panel. If the service requires a course or your appointment is course-related, select the Course as well. After that, select Meeting Type from the filter.

Filters

Care Unit
Advising Athletes ▾

Location
Student Support Center ▾

Service
Eligibility Questions ▾

Course
 🔍

Meeting Type
Virtual ▾

Comments

- Select the organizer for the appointment. This is most likely you, but if you have the ability to schedule for others, you see other potential organizers. After selecting an organizer, a grid showing available dates and times appears. The grid will show all possible appointments based on the availabilities for the Service in the week that corresponds to the date selected in the **Select a Date** calendar in the filters section.

Choose A Time To Meet

Length: 30 min ▾

Availabilities: ? Show All Availabilities ▾

TIME SLOT	05/02 (SUN)	05/03 (MON)	05/04 (TUE)	05/05 (WED)	05/06 (THU)	05/07 (FRI)	05/08 (SAT)
8:00am - 8:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
8:30am - 9:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
9:00am - 9:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
9:30am - 10:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
10:00am - 10:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
10:30am - 11:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
11:00am - 11:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
11:30am - 12:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
12:00pm - 12:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
12:30pm - 1:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
1:00pm - 1:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
1:30pm - 2:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
2:00pm - 2:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	

If you do not choose an appointment length, it will default to 30 minutes. You can also adjust the availabilities shown on the grid by choosing a different option from the **Availabilities** drop-down menu. Note that if you unlock non-available or conflicted times, this may cause schedule conflicts for you.

Availabilities: ?

Show All Availabilities ▾

Show Availabilities for This Course/Service

Show All Availabilities

Unlock Non-Available Times

Unlock Times With Conflicts

05/06 (THU)	0	(
DROP-IN	DR	
DROP-IN	DR	
DROP-IN	DR	

- If the appointment needs to repeat, choose the frequency of repetition from the **Repeat** menu.

Repeat This Appointment?

Repeat

Weekly (Tue & Thu) ▼

Every

2 weeks ▼

Repeat Until

7. Select what reminders need to be sent to who from the Reminders section of the filters. You can send either email or text reminders to the organizer of the appointment, the non-organizers (the attendees and any student support staff who is informed when the student has an appointment, e.g. a coach or main advisor), both, or neither.

Reminders

Send E-mail Reminder to the organizer attendee?

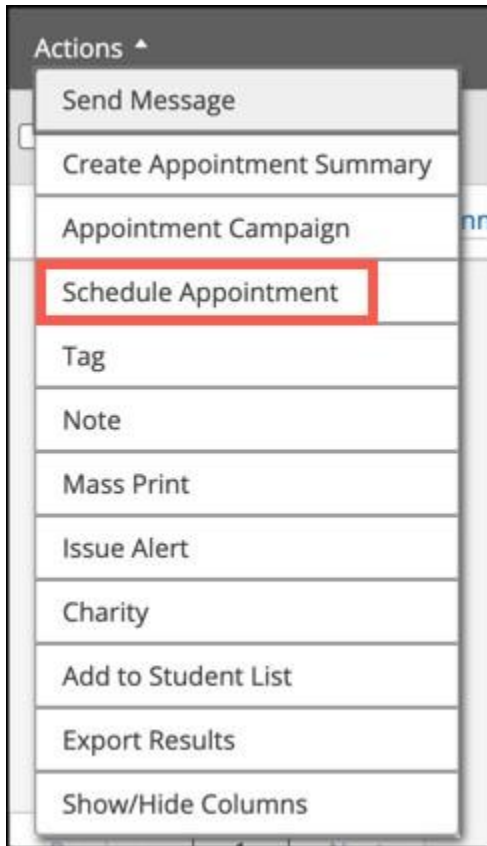
Send E-mail Reminder to non organizer attendees?

Send a text reminder to the organizer attendee?

Send a text reminder to non organizer attendees?

8. Once you have set the appointment details, click **Save Appointment** to create the appointment. It is added to the organizer's calendar and a notice is sent to the student's email from Navigate.

You can also access the **Schedule Appointment** page from other locations in Navigate Staff. It is available from Staff Home in the Actions Menu for your assigned students.



Schedule Appointment also appears in the Actions Menu for Student Lists, Advanced Search, Professor Home, the Calendar (as **Add Calendar Event**) and some Navigate Reports. Selecting it takes you to the Schedule Appointment page. Follow the procedure at the top of this section to create an appointment.