Navigate - Create Availability

Creating availability in Navigate allows staff to indicate the days, times, locations, and services that are offered for student appointments.

1. Create a block of available times for student appointments:
    o Click the *Home* 🏠 icon from the left navigation bar.
    o On the *Staff Home* page, click the *My Availability* tab at the top.
    o Under *Available Times* box, click the dropdown called *Actions*.
    o Choose *Add Time* from the drop-down menu. An *Add Availability* box will appear.
    o Select the days of the week for appointment availability by clicking the boxes.
      NOTE: for variable availability (Ex: differing MWF and TR availabilities), several Availabilities will need to be added. See step 3 below.
    o Select the hours of the day for appointment availability.
      NOTE: Navigate accounts for events made directly in Outlook. When Navigate it synced to the Outlook calendar, any events (ex: lunch) on the Outlook calendar will show as "busy" in Navigate.
    o Select a duration for this availability under the *How long is the availability active?* drop-down menu.
        NOTE: To create availability for a future term, use the *Terms* drop down menu in the top right of the home page to select a future term.
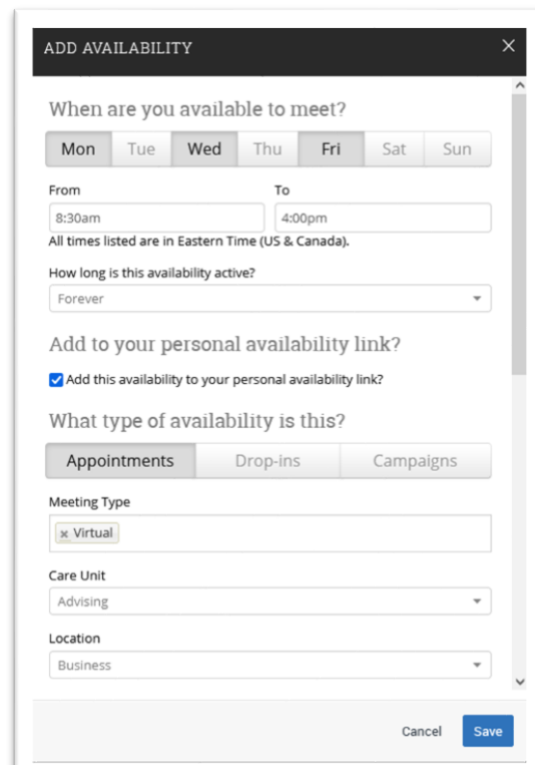   o Make sure to click the checkbox next to *Add this availability to your personal availability link?*
    o Select the availability type under *What type of availability is this?*
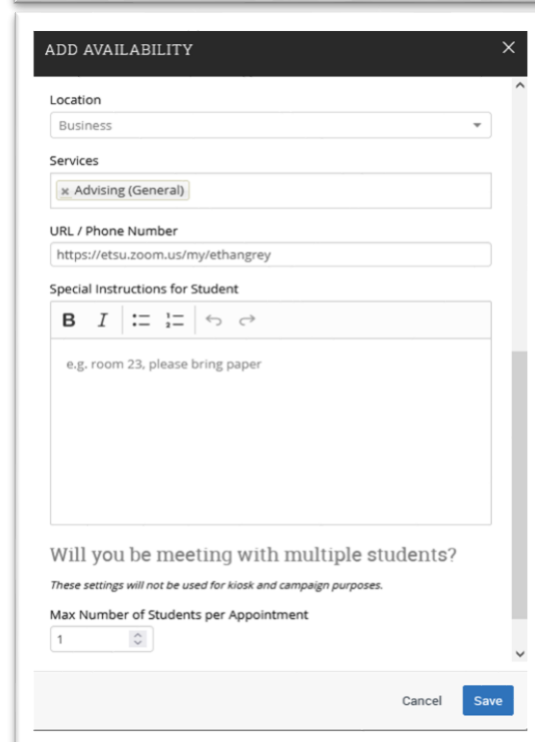   NOTE: Usually *Appointments* will be the best option. *Campaigns* can be used to designate a specific time to meet with students who have been contacted through the *Campaigns* feature. Select *Appointments* and *Campaigns* to allow students who are and are not a part of a Campaign to schedule during this availability. *Drop-ins* allow students to check-in for a meeting at a kiosk or through their mobile app during that time. Do not select *Drop-ins* and *Appointments* or *Campaigns* together. Create separate times for *Drop-ins*.
    o In the box under *Meeting Type*, enter one or more Meeting Types for this availability: *Virtual*, *In Person*, *Phone*, *Email*. This will allow students to indicate preferred meeting type when making their appointment.
    o Choose *Advising* from the drop-down menu under *Care Unit*.
    o Select the major, minor, and/or alpha assignments in the drop-down menu under *Location*.
        NOTE: for variable majors/minors/alpha assignments (Ex: advising for multiple majors), an Availability will need to be added for each of those *Locations*. See step 3 below.
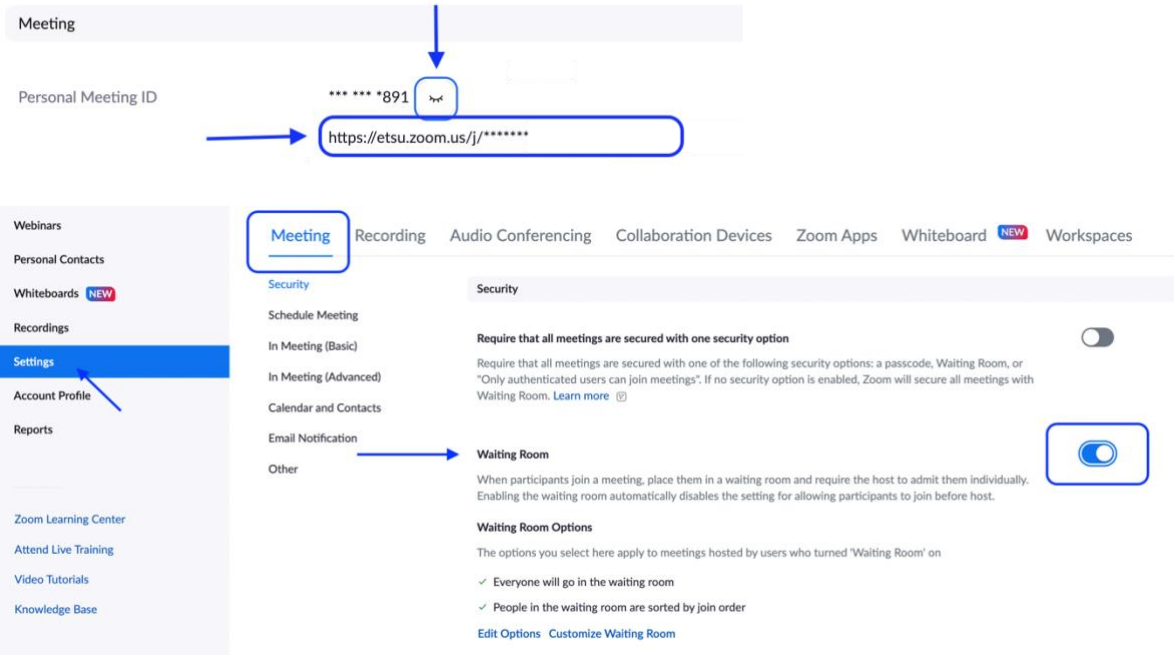
1. CON'T: Create a block of available times for student appointments:
   o Select one or more *Services* from the drop-down menu under *Services*. There is no limit to the number of Services which may be offered during each availability.
   o Type or paste the Personal Meeting ID URL into the *URL / Phone Number* box.
      NOTE: To access your Meeting ID URL, launch your Zoom desktop app and click the *Settings* ⚙ icon. Next, click *Profile* 👤 Profile on the left navigation bar and then Click *Edit My Profile*. Then, scroll down to the *Meeting* settings. Then, click the eye icon to reveal, highlight, and copy your Personal Meeting ID URL. Make sure to also enable your waiting room!

   o Type or paste your <u>Phone Number</u> and <u>Physical Location</u> into the *Special Instructions for Student* text box.
   o Type any other special instructions for the student into the text box under *Special Instructions for Student.*
   o Click *Save* at the bottom of the *Add Availability* box.

2. Use the Personal Availability Link:
   o Once an Availability is set, a *PAL* (*Personal Availability* Link*)* will appear at the bottom of the *Staff Home* page on the *My Availability* tab display.
   o Click *Copy* to copy the link. Once the link is copied it can be pasted into email signatures, on webpages, and any other place a student may go to make an appointment.
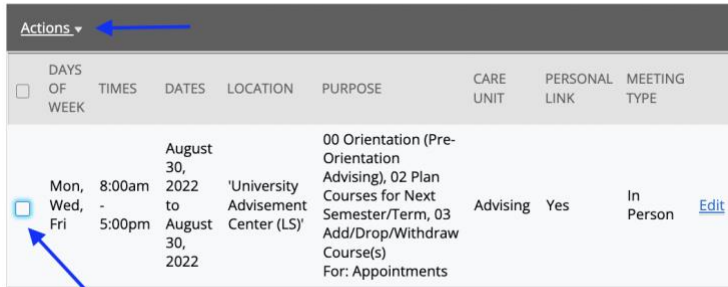
3. Use the Copy Time function to create additional availabilities:
   o Click the check box to the left of an availability.
   o In the *Available Times* box, click *Actions*. Choose *Copy Time* from the drop-down menu. A *Copy and Add Availability* box will appear.
   o Edit the desired information. If editing the *Location*, the *Services* will need to be input again. Examples of additional availabilities: Create Tuesday/Thursday availability. Create availabilities for the final exam period. Create availabilities for specific Campaigns. Create availabilities in which only virtual or phone Meeting Types are available.
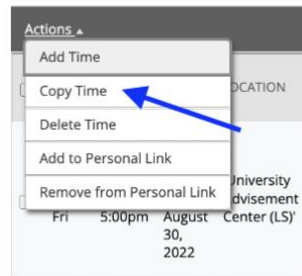

* All times listed are in Eastern Time (US & Canada)