



## Scheduling Appointments for Students

Advising appointments can be scheduled two ways:

1. Using the Appointment Center mode, which shows a full calendar of availability for all advisors who work at a specific location. Appointments scheduled by front line staff will be scheduled through the Appointment Center.
2. Directly from a student’s Navigate profile by the advisor or staff member who is planning to meet with the student.

## Starting the Appointment Center

The Appointment Center pulls together all of the availability that advisors set in Navigate and displays it for frontline staff who are scheduling future appointments. Assuming that the advisor has synced their calendar to Navigate, the availability shown in the Appointment Center will reflect when the person is truly available. It will show times that **1)** the advisor told Navigate they are typically free for advising appointments *and* **2)** have been confirmed as free in outlook.

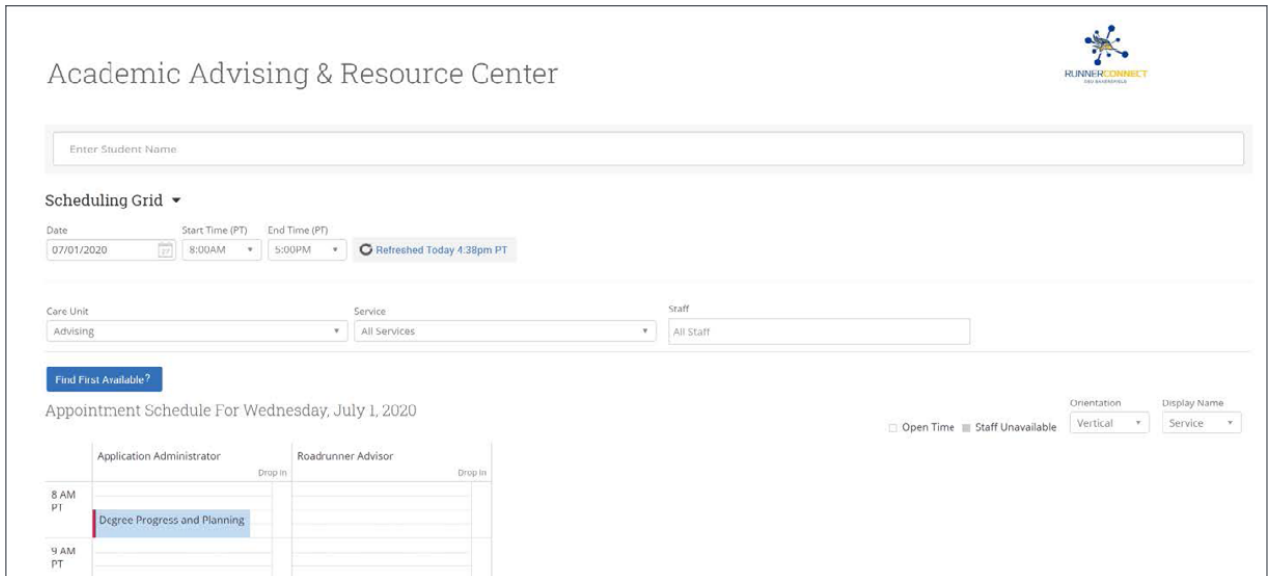
### 1 Log into Navigate

### 2 Start the Appointment Center *(located on the far bottom right of home screen)*

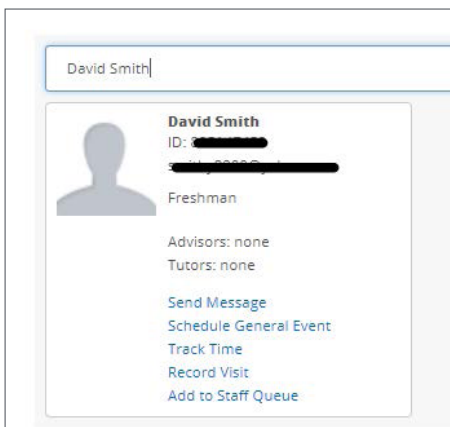
### 3 Select your location

# Using the Appointment Center to Schedule Appointments

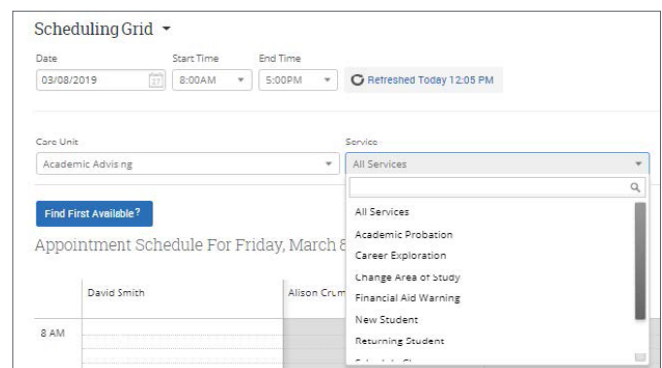
## 1 Access the Academic Advising & Resource Center



## 2 Search for and select the student



## 3 Filter for the type of appointment the student is looking for (Career Exploration, etc.) to view available advisors. You can also search for a specific staff member or date



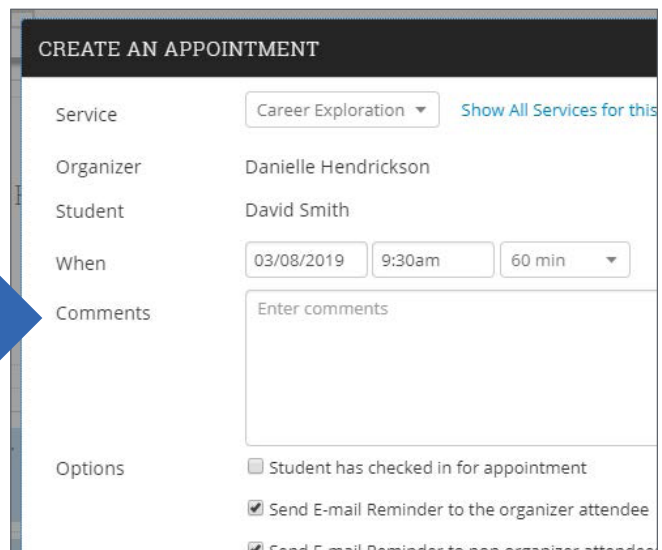
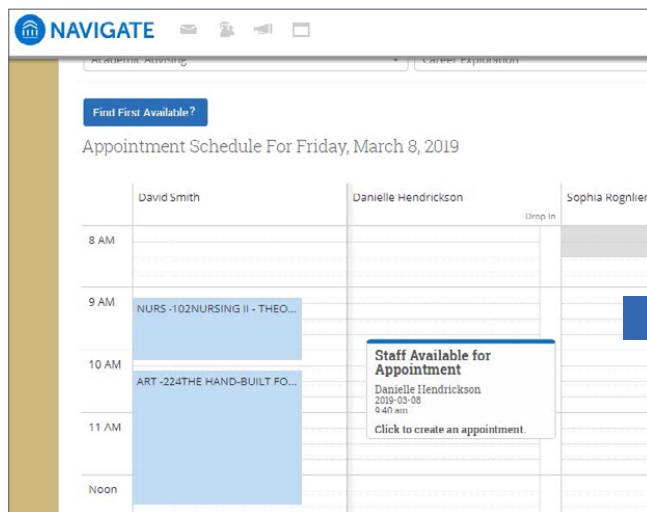
# Using the Appointment Center to Schedule Appointments

After filtering for specific dates, services (appointment reasons), or staff members, you will see a list of all the available advisors and their calendars shown next to the student's. If a staff member's calendar is gray, that are unavailable for scheduled appointments but may be available for walk ins.

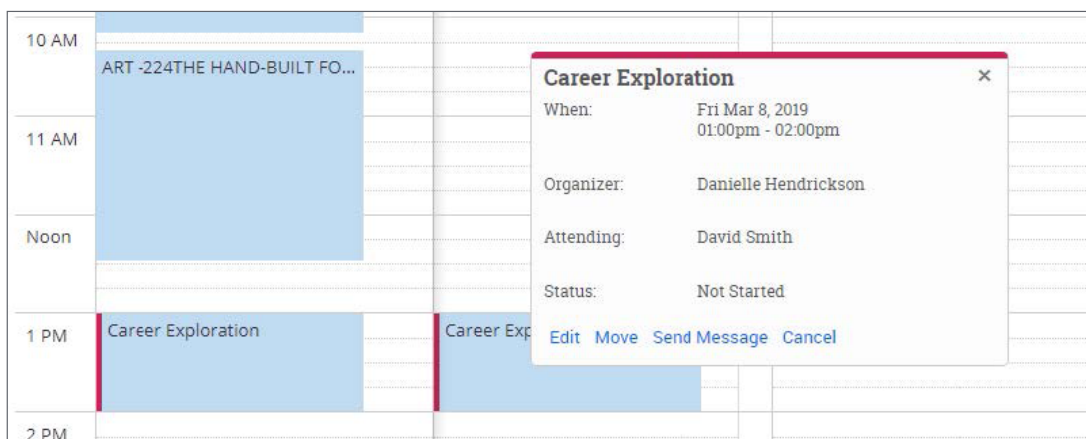
**1** Hover over a time on an advisor's calendar to confirm it is available

**2** Click on an open time and schedule the appointment

*Note: Comments are student and advisor facing*



**3** The appointment will now appear on both attendee's calendars and is available for editing



# Checking Students in for an Existing Appointment

When a student comes to the front desk to check in for a scheduled appointment, you can check them in using the **Appointment Center**. This sends an alert through Navigate informing the advisor that their student has arrived. This step is optional and may not be needed for smaller locations.

- 1 Once in your location's Appointment Center, switch to the Scheduled Appointments view to see a list of all upcoming, in progress, and recent appointments

1. General - Student Services Building

Enter Student Name

Scheduled Appointments ▾

Date  
03/08/2019  Refreshed Today 3:00PM

Care Unit: Academic Advising Service: All Services Staff: All Staff

Upcoming Appointments

Actions ▾	BEGINNING IN	DATE & TIME	DURATION	SERVICE	COURSE
<input type="checkbox"/>	29 minutes	03/08/2019 01:00p	about 1 hour	Career Exploration	N/A
<input type="checkbox"/>	29 minutes	03/08/2019 01:00p	30 minutes	Schedule Change	N/A

- 2 Select the student you wish to check in and then check in under the Actions button. The advisor will be notified in Navigate and by email and text if they have opted into additional notifications.

Upcoming Appointments

Actions ▾	DATE & TIME
Send Message to Attendee	03/08/2019 01:00p
Send Message to Organizer	03/08/2019 01:00p
View Appointment Details	03/08/2019 01:00p
Check In	03/08/2019 01:00p
Mark No-Show	03/08/2019 02:00p
Cancel	03/08/2019 02:00p

What the advisor will see when a student is checked in:

NAVIGATE

Appointment Queue

David Smith (Current wait: 0 min) Start Appt

## Reports and Mass Management of Appointments

Canceling multiple appointments and messaging multiple students about appointments through the **Appointment Center**. If the college is unexpectedly closed or an advisor is out sick, you can quickly cancel or message all appointments at your location using the **Upcoming Appointments** section of the **Appointment Center**.

**Upcoming Appointments**

Actions ▾

- Send Message to Attendee
- Send Message to Organizer
- View Appointment Details
- Check In
- Mark No-Show
- Cancel

	DATE & TIME	DURATION	SERVICE	
	03/08/2019 01:00p	about 1 hour	Career Exploration	
	03/08/2019 01:00p	30 minutes	Schedule Change	
<input checked="" type="checkbox"/>	about 1 hour	03/08/2019 02:00p	about 1 hour	Career Exploration

**NAVIGATE**

**Reports**

- Appointments
  - Appointments
  - Daily Appointments
  - Students with/without an Appointment
- Cancellation Summaries
- Appointment Stats
- No-Shows
- Availabilities
- Appointment Activity
- Cancellation Summary Stats
- Service Totals
- Check-ins

Using the **Reporting** tab you can quickly pull lists of appointments, students who have no showed, etc. and filter for specific date ranges, services, locations, and types of students. From here, you can export results to Excel or message students.

**Daily Appointments**

Send a Message  Check-In

<input checked="" type="checkbox"/>	Student	Care Unit	Appointment Be...
<input checked="" type="checkbox"/>	1	Academic Advis...	03/04/2019 08:...
<input checked="" type="checkbox"/>	2	Academic Advis...	03/04/2019 12:...
<input checked="" type="checkbox"/>	3	Academic Advis...	03/05/2019 09:...
<input checked="" type="checkbox"/>	4	Academic Advis...	03/08/2019 01:...
<input checked="" type="checkbox"/>	5	Academic Advis...	03/08/2019 01:...
<input checked="" type="checkbox"/>	6	Academic Advis...	03/08/2019 02:...