CUNY - NEW YORK CITY COLLEGE OF TECHNOLOGY



Navigate Training Guide #6: Appointment Availability and Summaries

Topics Covered:

- Calendar Sync
- Setting Availability
- Appointment Summaries

1. Calendar Sync

Navigate can be synced with your professional calendar to automatically block off busy times and prevent double booking.

1. Select the Calendar icon on your Staff home page and select the Settings and Sync button.

ଜ ወ	My Calendar	NEW YORK CITY COLLEGE OF TECHNOLOGY
	Calendar View List of Calendar Items	© Settings and Sync
	The calendar view is a graphical representation of the calendar. If you need a fully accessible interface, please use the list of calendar items view here: <u>Calendar Items View</u> . Checking/unchecking the legend boxes will show/hide corresponding events on the calendar	

2. Click Setup Sync.

<u>¢:</u> 5	
Last Sync: N/A	
Setup Sync	

3. Select your calendar application. You may only sync one calendar to Navigate.

Please Choose Your Calendar Application:					
Microsoft Office 365 (Latest Version)					
Google Calendar					
Other Applications					

4. Sign in with your email login information.

Cian in		2
Sign in	•	Email or phone
Email or phone	Sign in	Forgot email?
Can't access your account?	to continue to EAB Navigate	Before using this app, you can review EAB Navigate's privacy policy and terms of service.

5. It may take up to 10 minutes for the sync to complete. Once it does, existing times in your calendar will appear in Navigate as "busy".

2. Setting Availability

Setting your availability will allow students to schedule appointments with you through the Navigate Student app. You can set what types of services you will offer at specific times.

1. Click the My Availability tab on the Staff Home page. Then click Actions and Add Time.

Staff Home 🔻								
Students	Appointments	My Availability	Appointment Queues	Appointment Requests	S			
Availa	able Time	es	_					
Add Tir Copy Ti	ne VEEK	TIMES	DATES LO	CATION	PURPOSE			
Delete	Time			N To a	Io available times have been listed. Idd a time, click the "Add Time" button.			

- 2. You can create multiple availabilities for yourself for the semester. We recommend you start with your office hours and any other times that you know you will be available for advising. Book extra time from Plan Week through the first 2 weeks of registration for the following semester.
- 3. You will usually want to click "Add this availability to your personal availability link?"
- 4. For Availability Type you should select 'Appointments'. You may also select 'Campaigns' for the same availability if your department plans on using that feature.
- 5. Select the Meeting Type In Person, Virtual, or Telephone.

- 6. Make sure you select the correct Care Unit (Student Success), Location (your department), and Services (advising for the degrees you work with).
- 7. Enter your contact information. If you enter a URL for a standing Zoom or Teams meeting, it will show as a clickable link for students. For phone number we recommend ensuring you're able to receive calls from anywhere with your City Tech Jabber phone number or a Google Voice number.
- 8. Include any special instructions you'd like. This can be a request for them to prepare information in advance, such as an academic career planner.
- 9. Copy your Personal Availability Link (PAL) and use it liberally in your email signature, on your course syllabus, and whenever you send out information to students you advise.

ADD AVAILABILITY	× ADD AVAILABILITY ×
When are you available to meet?	Services
Mon Tue Wed Thu Fri Sat Sun	Please select services
From To	URL / Phone Number
8:00am 5:00pm	
All times listed are in Eastern Time (US & Canada).	Special Instructions for Student
How long is this availability active?	B $I := := : \Leftrightarrow \Rightarrow$
Please select a duration 🔻	
Add this availability to your personal availability link? What type of availability is this?	
Appointments Drop-ins Campaigns	
Meeting Type	
Please select Meeting Types	Will you be meeting with multiple students? These settings will not be used for klosk and campaign purposes.
Care Unit	Max Number of Students per Appointment
Please select a care unit	
Location	
Please select a location 🔹	
_	
Cancel Sa	Cancel Save

3. Appointment Summaries

Appointment summaries make it easy to keep high-level notes about your conversations you can refer to later (please see the <u>commenting guidelines</u> for thoughts on what to include and what not to include).

1. To create a summary, go to your Appointments tab, and select the appointment. Then Click Actions and Add Appointment Summary.

R Ca	CCC	ent Al	ppointm re Units	ents							
	Action	<u>s</u> •									📑 Show C
	Add Mar	Appointm k No-Show	ent Summary		\$ SERVICE	COURSE	COMMENT	ATTENDEE	\$	DETAILS	PRE APPT Q
ļ	Issu	e Alert	(30m)	00pm ET	Advisement/Course Selection	N/A			Not Yet.	<u>Details</u>	N/A
	<u>⁄</u>	1/1	09/27/2024 10:30am - 11: (30m)	00am ET	Advisement/Course Selection	N/A			Not Yet.	<u>Details</u>	N/A

2. You may add notes to the Appointment Summary section of the Appointment Report.

APPOINTMENT REPORT	-	Х
Appointment Details	Appointment Summary	
Advisement/Course Selection 09/27/2024 10:30am - 11:00am ET	Paragraph \checkmark B I \mathcal{O} := \checkmark $\frac{1}{2}$ = \checkmark \Leftrightarrow \leftrightarrow	_
Care Unit		
Student Services		
Location		
ASAP/ACE X V		
Service		
ADVISEMENT/COURSE SELECTION X		
Select Service	Attachments	
	C Attach File	
Course	Choose File No file chosen	