CUNY - NEW YORK CITY COLLEGE OF TECHNOLOGY

NAVIGATE

Navigate Training Guide #6: Appointment Availability and Summaries

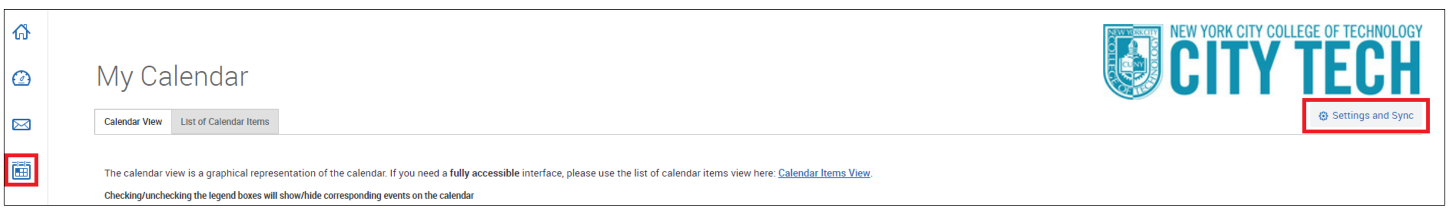
Topics Covered:

- Calendar Sync
- Setting Availability
- Appointment Summaries

1. Calendar Sync

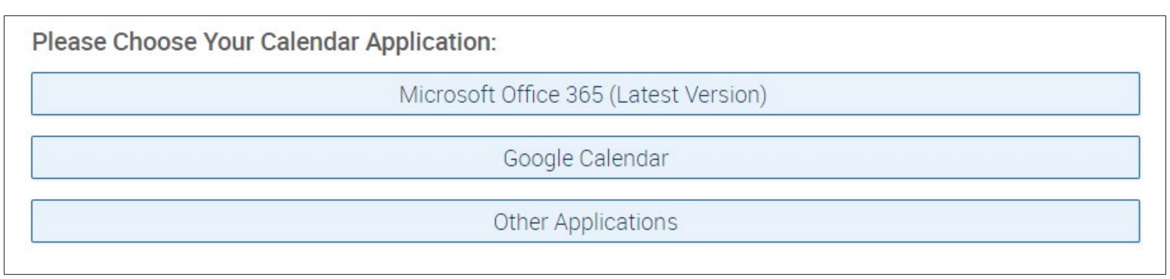
Navigate can be synced with your professional calendar to automatically block off busy times and prevent double booking.

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

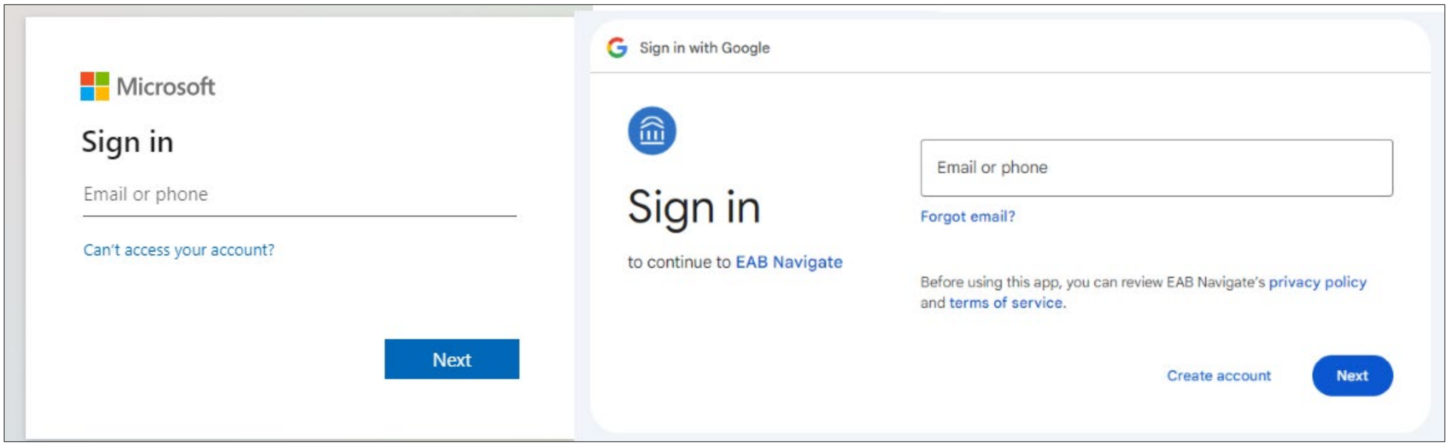


2. Click Setup Sync.

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



4. Sign in with your email login information.

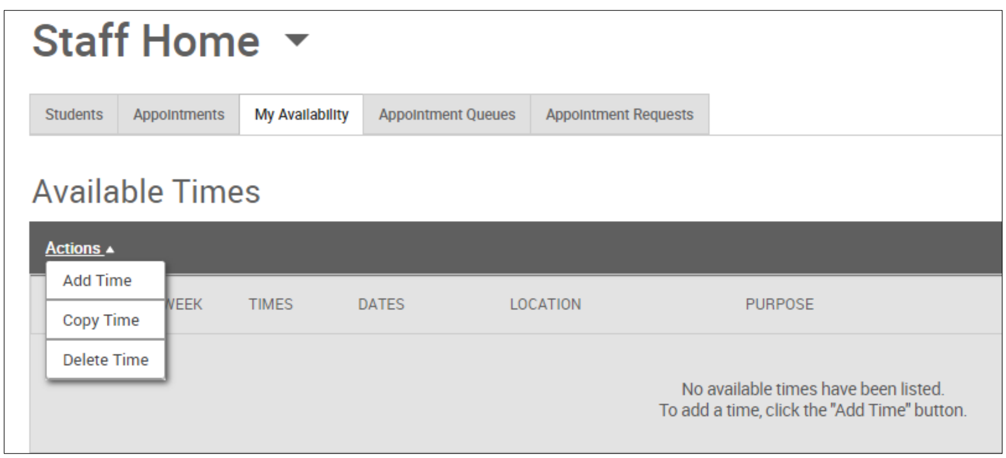


5. It may take up to 10 minutes for the sync to complete. Once it does, existing times in your calendar will appear in Navigate as "busy".

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.



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.

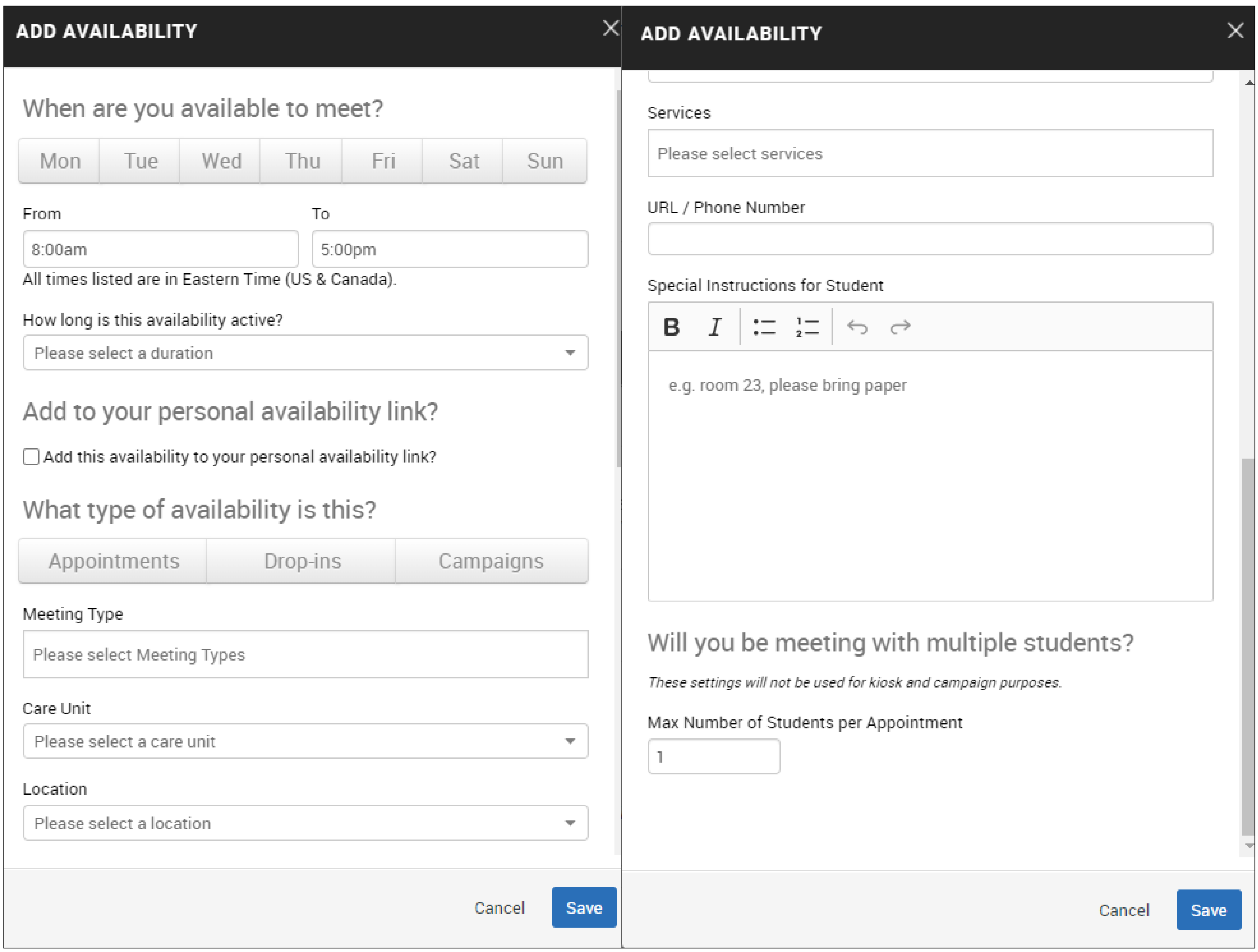
5. Select the Meeting Type – In Person, Virtual, or Telephone.

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.

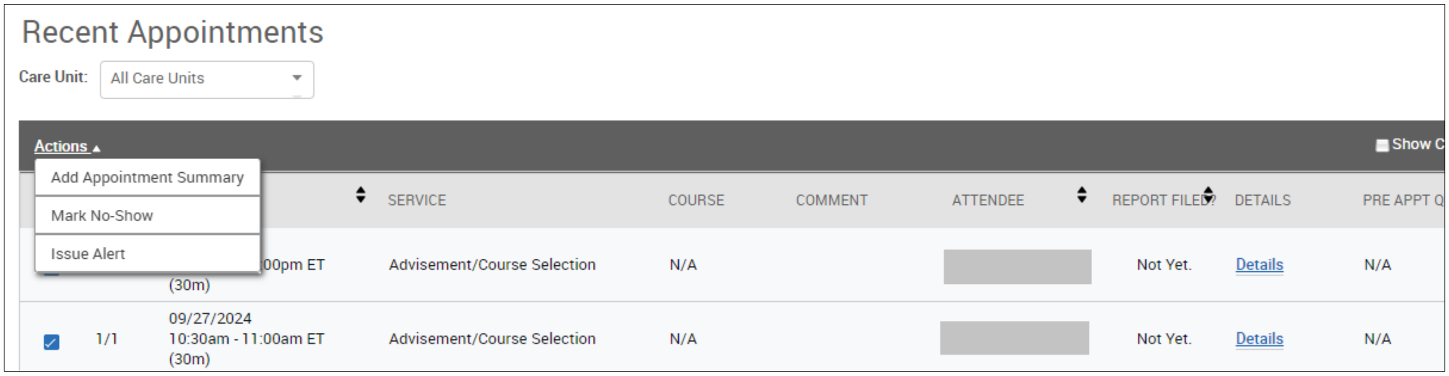
9. Copy your Personal Availability Link (PAL) and use it liberally in your email signature, on your course syllabus, and whenever you send out information to students you advise.



3. Appointment Summaries

Appointment summaries make it easy to keep high-level notes about your conversations you can refer to later (please see the commenting guidelines 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.



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