

Availability



What: Availability lets staff indicate the days, times, locations, and services they offer when meeting with students. It is a cornerstone of Navigate's workflows and is located on the **Staff Home** page. This article explains how individual staff users create their own availabilities.

Where: Individual users set their availability on the **My Availability** tab of the **Staff Home** page.

Who: Availability is for any **staff or faculty** member who has appointments with students.

Conditions: Your role must have permission to add availabilities. **Locations** and **Services** must be configured to allow appointment scheduling. Students must be able to schedule appointments through Navigate. Personal Availability Links and Target Hours are only available to institutions who have turned on new Student Scheduling.



Availability lets staff indicate the days, times, locations, and services they offer when they meet with students.

There is significant flexibility when you create availabilities. Staff can choose the length of the availability's duration, which can range from a specific set of dates to forever. Availability can be set for appointments, drop-in visits, and/or appointment campaigns. Staff can create course-specific availability such as course-based tutoring. For group appointments, staff can set the maximum number of students for a single appointment slot.

1

Navigate to <https://csus.campus.eab.com/home>



Creating Availabilities for Yourself

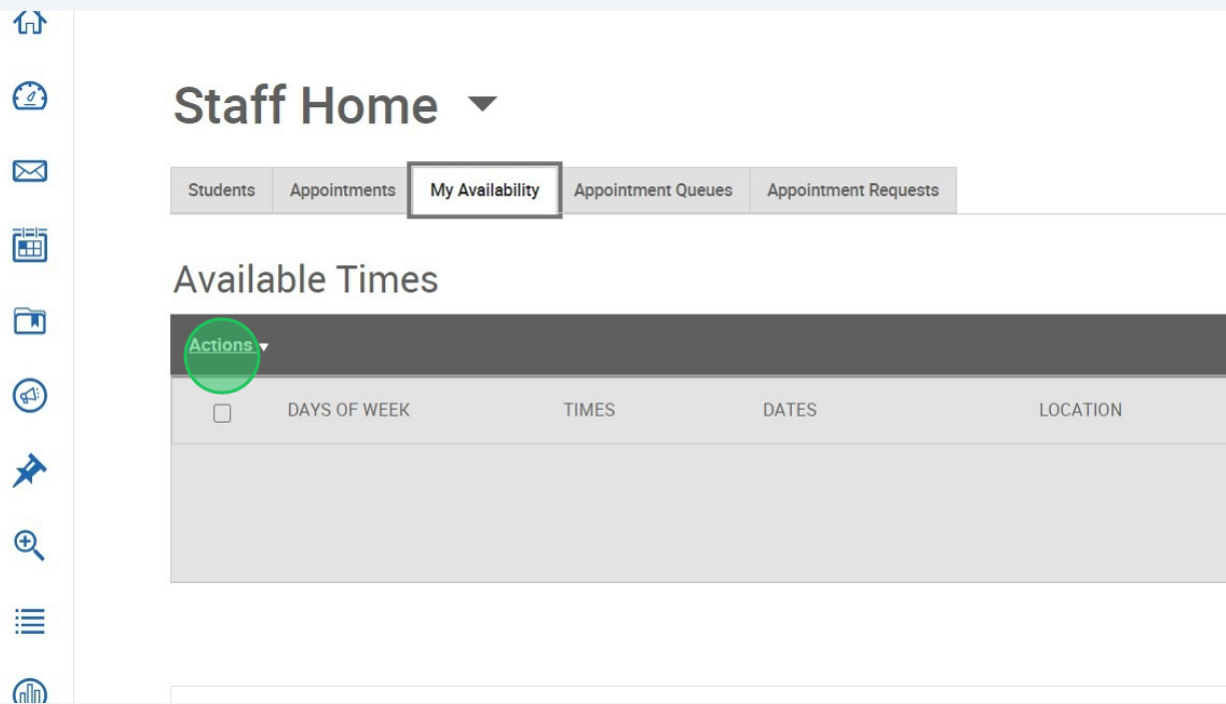
To have the ability to schedule appointments with students in Navigate and have students schedule appointments with you, you must have at least one availability set up.

2

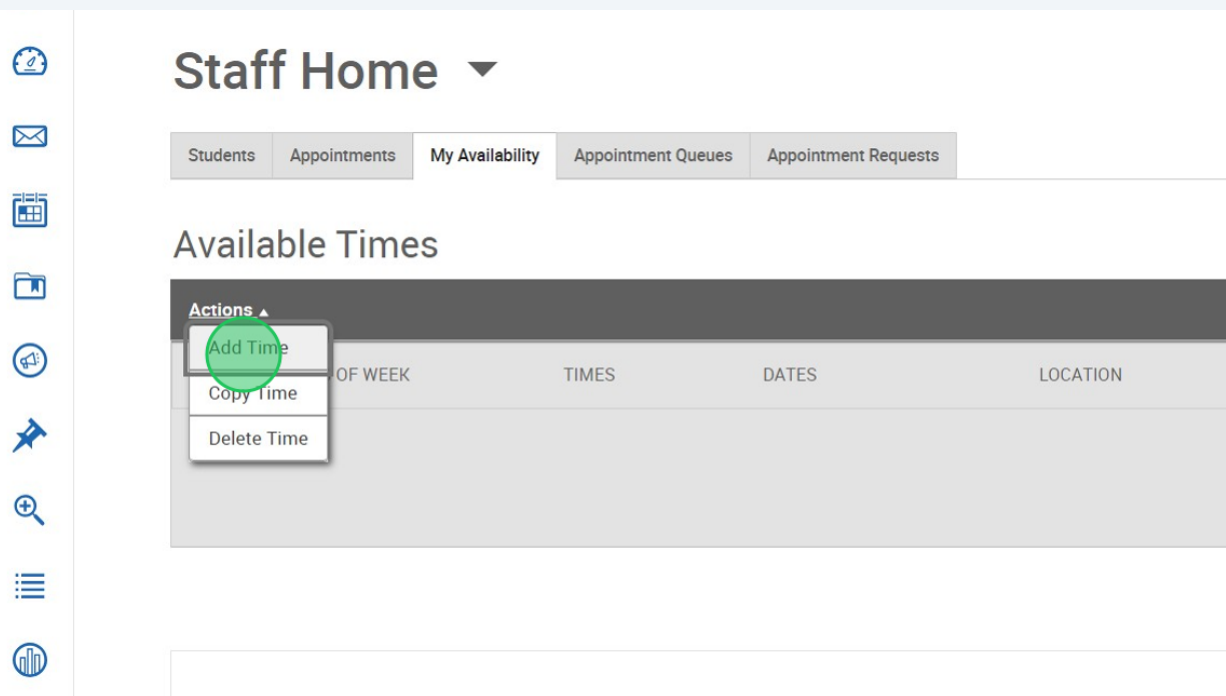
Go to **Staff Home > My Availability**. You should see a table of existing Availabilities, if any, and your **Personal Availability Link**.

The screenshot shows the 'CALIFORNIA STATE UNIVERSITY - SACRAMENTO' header. Below it is the 'NAVIGATE' logo and navigation icons. The main content area is titled 'Staff Home' with a dropdown arrow. A horizontal menu contains tabs for 'Students', 'Appointments', 'My Availability' (highlighted with a green circle), 'Appointment Queues', and 'Appointment Requests'. Below this menu is the 'Assigned Students' section, which includes filters for 'List Type: Assigned Students', 'Term: Fall 2023 (Default Term)', and 'Relationship Type: All Relationship Typ'. At the bottom, there is a table with a header row containing 'Actions', 'NAME', 'ID', 'STUDENT LIST', and 'CUMULATIVE GPA'.

3 Open the **Actions** menu and select **Add Time**.



4 Click "Add Time"



5 The **Add Availability** dialog opens. Choose days of the week for the availability.

Example: Click Mon-Fri

Select the start and end time for the availability in the *From* and *To* fields.

Example: 8:00am -5:00pm

ADD AVAILABILITY X

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From To

8:00am 5:00pm

All times listed are in Pacific Time (US & Canada).

How long is this availability active?

Please select a duration

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

6 Set the length of the availability with the *How Long Is this Availability Active?* field.

Click "Please select a duration"

When are you available to meet?

Mon Tue Wed Thu **Fri** Sat Sun

From 8:00am To 5:00pm

All times listed are in Pacific Time (US & Canada).

How long is this availability active?

Please select a duration

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

Please select Meeting Types

7 Example: Fall 2023 (Default Term)

All times listed are in Pacific Time (US & Canada).

How long is this availability active?

Please select a duration

Availability Ranges

- Forever
- A Range of Dates

Terms

- Fall 2023 (Default Term)**
- Winter Intersession 2024
- Spring 2024

Care Unit

Please select a care unit

Location

Please select a location



Personal Availability Links (PAL) are a useful tool for scheduling. Each PAL is unique to a staff member in Navigate. The link does not change over time.

When you include a PAL in a URL field, website, email, or SMS and students click the link, they are taken to the **New Appointment** page in student scheduling. If your institution uses Navigate Student, the link redirects to the scheduling page in the student's browser and asks if they want to continue in the browser or open Navigate Student app.

8

If you want this availability added to your personal availability link, select *Add This Availability to Your Personal Availability Link?* You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff member's chosen availabilities pre-filled.

The screenshot shows a scheduling interface. On the left, a calendar grid is partially visible with a greyed-out area containing the text "PURPOSE" and "No available times have been... To add a time, click the 'Add Time...". On the right, a form is displayed with the following fields:

- Days: Mon, Tue, Wed, Thu, Fri, Sat, Sun
- From: 8:00am
- To: 5:00pm
- Note: All times listed are in Pacific Time (US & Canada).
- How long is this availability active?: Fall 2023 (Default Term)
- Section: Add to your personal availability link?
- Checkbox: Add this availability to your personal availability link? (This checkbox is circled in green in the original image)
- Section: What type of availability is this?
- Buttons: Appointments, Drop-ins, Campaigns
- Meeting Type: Please select Meeting Types
- Care Unit: Please select a care unit

9

Select your Availability types. You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.

The screenshot shows a form for configuring an availability. On the left, a sidebar is partially visible with the heading 'PURPOSE' and a message: 'No available times have been added. To add a time, click the "Add Time" button.' The main form area includes a dropdown menu for 'Term' set to 'Fall 2023 (Default Term)'. Below this is a section titled 'Add to your personal availability link?' with a checked checkbox. The section 'What type of availability is this?' features three buttons: 'Appointments' (highlighted with a green circle), 'Drop-ins', and 'Campaigns'. Further down are fields for 'Meeting Type' (with a placeholder 'Please select Meeting Types'), 'Care Unit' (with a placeholder 'Please select a care unit'), and 'Location' (with a placeholder 'Please select a location').

10

Select your Meeting Types. You can choose more than one at a time. For example, an availability can be In-Person, Phone, or Virtual.

This screenshot shows the same form as above, but with 'Drop-ins' selected in the 'What type of availability is this?' section (highlighted with a grey border). The 'Meeting Type' field (with a placeholder 'Please select Meeting Types') is now highlighted with a green circle. The 'Services' field (with a placeholder 'Please select services') is visible below the 'Location' field. The 'Term' dropdown remains set to 'Fall 2023 (Default Term)'. The 'Add to your personal availability link?' checkbox is still checked.

11 Select Meeting Type

ADD TO YOUR PERSONAL AVAILABILITY LINK?

Add this availability to your personal availability link?

WHAT TYPE OF AVAILABILITY IS THIS?

Appointments Drop-ins Campaigns

Meeting Type

In-Person Virtual

Location

Please select a location

Services

Please select services

URL / Phone Number

PURPOSE

No available times have been found. To add a time, click the "Add Time" button.

12 For this example, "In-Person Meeting Type & Virtual"

Fall 2023 (Default Term)

ADD TO YOUR PERSONAL AVAILABILITY LINK?

Add this availability to your personal availability link?

WHAT TYPE OF AVAILABILITY IS THIS?

Appointments Drop-ins Campaigns

Meeting Type

x In-Person

Care Unit

Please select a care unit

Location

Please select a location

Services

Please select services

URL / Phone Number

PURPOSE

No available times have been found. To add a time, click the "Add Time" button.

PERSONAL LINK

13 After Selecting the First Meeting Type, you can select another. Select "Virtual"

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?
Appointments Drop-ins Campaigns

Meeting Type
In-Person
Virtual
Please select a care unit

Location
Please select a location

Services
Please select services

URL / Phone Number

14 Select *Care Unit*. This determines which location and services can be added to the availability.

Click "Please select a care unit"

Add this availability to your personal availability link?

What type of availability is this?
Appointments Drop-ins Campaigns

Meeting Type
In-Person Virtual

Care Unit
Please select a care unit

Location
Please select a location

Services
Please select services

URL / Phone Number

Social Instructions for Student

15 Select the Care Unit

PURPOSE

No available times have been found. To add a time, click the "Add Time" button.

PERSONAL LINK

Appointments Drop-ins Campaigns

Meeting Type

In-Person Virtual

Care Unit

Please select a care unit

Advising

ASI

COVID-19 Services

Dean of Students & CARES

Financial Aid

Financial Wellness

Other Services

Student Affairs VP

Cancel Save

16 Select a Location.

PURPOSE

No available times have been found. To add a time, click the "Add Time" button.

PERSONAL LINK

Appointments Drop-ins Campaigns

Meeting Type

In-Person Virtual

Care Unit

Advising

Location

Select Location

Services

Please select services

URL / Phone Number

Special Instructions for Student

Cancel Save

17 Click here. Example: Academic Advising

The screenshot shows a meeting form with the following fields: Meeting Type (In-Person, Virtual), Care Unit (Advising), and Location. The Location dropdown menu is open, showing a search bar and a list of locations. 'Academic Advising Center' is highlighted with a blue bar and a green circle. Other locations in the list include APIDA Center, Art Department - Chair Office, Art Department - Faculty Office, Art Department - Studio, and ASI Hot Spot. A 'Save' button is visible at the bottom right of the form.

18 Select *Services*. You must choose at least one service, but can pick more.

The screenshot shows the same meeting form as in step 17, but with the Services dropdown menu open. The Services field is empty, and a green circle highlights the dropdown arrow. The form also includes fields for URL / Phone Number and Special Instructions for Student. 'Cancel' and 'Save' buttons are at the bottom right.



Important. You must select a **Care Unit**, **Location**, and at least one **Service** for any availability.

19 Click here. Example: Declare Major

The screenshot shows a web form with a dropdown menu open. The dropdown is titled "Services" and lists several options. The "Declare Major" option is highlighted in blue and has a green circle around it. Other options include "Associate Degree for Transfer", "California Promise Advising", "Declaring Expressed Interest/Undeclared Major", "Expressed Interest/Undeclared", and "First-Year Advising". Above the "Services" dropdown, there is a "Location" dropdown set to "Academic Advising Center".

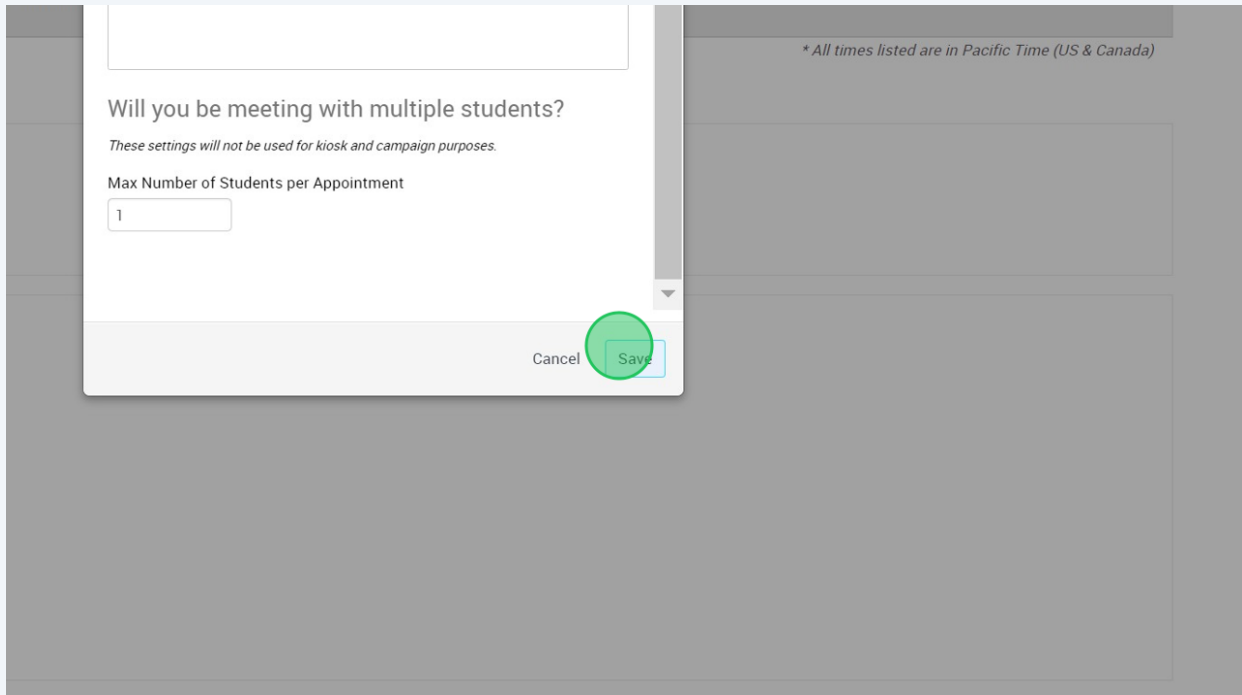


Multiple Services can be selected

20 **Optional.** Enter special instructions for this availability.

Determine how many students can be in one appointment. If you do not select a *Max Number of Students per Appointment*, the maximum number stays 1.

Click **Save** to create the availability. Click "Save" to create your availability



The screenshot shows a web interface with a modal dialog box. The dialog box has a title "Will you be meeting with multiple students?" and a subtitle "These settings will not be used for kiosk and campaign purposes." Below the subtitle is a label "Max Number of Students per Appointment" and a text input field containing the number "1". At the bottom of the dialog are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a green circle. In the background, there is a greyed-out form with a note at the top: "* All times listed are in Pacific Time (US & Canada)".



Note. The special instructions will be included in the initial notification to the student regarding this scheduled appointment. We recommend including general instructions, like your office location or how to check-in for the appointment upon arrival.

Repeat this process any time you want to add another availability. You can have as many availabilities as you want.



Managing Existing Availabilities

When you create availabilities, you can usually edit, copy, or delete availabilities.

To edit an existing availability, click the **Edit** link next to the entry you want to change. Editing an availability is very similar to adding an availability, so refer to the instructions above for information. Please note: editing or deleting an existing availability DOES NOT edit or change already scheduled appointments. In addition, changes made to availability will be immediately reflected in the Student Scheduler.

To copy an existing availability, select the time you would like to copy, open the **Actions** menu and click **Copy Time**. The availabilities are copied and a **Modify Availability** dialog opens, allowing you to make edits or to save your newly created availability.

To delete an availability, simply select the time, open the **Actions** menu and click **Delete Time**.