

## Creating Availability with Meeting Types

### Overview

**What:** Availability lets faculty indicate the days, times, locations, and services they offer when meeting with students. This article explains how individual faculty 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.

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

There is significant flexibility when you create availabilities. Users 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. For group appointments, staff can set the maximum number of students for a single appointment slot.

The screenshot shows a web form titled "ADD AVAILABILITY" with a close button (X) in the top right corner. The form is divided into several sections:

- When are you available to meet?:** Includes a row of buttons for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun). Below this are "From" and "To" time input fields. The "From" field contains "8:00am" and the "To" field contains "5:00pm". A note below states: "All times listed are in Eastern Time (US & Canada)." Below the time fields is a dropdown menu labeled "How long is this availability active?" with the text "Please select a duration".
- Add to your personal availability link?:** A checkbox labeled "Add this availability to your personal availability link?" is currently unchecked.
- What type of availability is this?:** Three buttons labeled "Appointments", "Drop-ins", and "Campaigns".
- Meeting Type:** Two buttons labeled "Phone" and "In-person", both with an 'x' icon.
- Care Unit:** A dropdown menu with the text "Please select a care unit".
- Location:** A dropdown menu with the text "Please select a location".

At the bottom of the form, there are two buttons: "Cancel" and "Save".

## 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. The following instructions for creating availabilities.

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

### Staff Home

Students | Appointments | **My Availability** | Appointment Queues | Appointment Requests

#### Available Times

Actions ▾	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	
<input type="checkbox"/>	Wed, Fri	8:00am - 5:00pm	Forever	Tutor Center (North Campus)	AM101, General Help For: Appointments	Tutoring	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	Tue, Wed, Thu	8:00am - 5:00pm	Forever	Academic Success Center	Registration For: Appointments/Campaigns	Advising	No	<a href="#">Edit</a>
<input type="checkbox"/>	Tue, Thu	8:00am - 5:00pm	Forever	Academic Success Center	Financial Help, Hold Resolution, Mandatory Advising, Registration, Study Abroad For: Appointments	Advising	Yes	<a href="#">Edit</a>
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	8:00am - 5:15pm	Forever	Academic Success Center	Academic Challenges For: Appointments/Drop-Ins	Advising	No	<a href="#">Edit</a>

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

Personal Availability Link

Link: <https://csulb-qa-yellow-mt.gradesfirst.com/pal/l3xVhPwT6B> [Copy](#)

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

### Available Times

Actions ▲

- Add Time
- Copy Time
- Delete Time
- Add to Personal Link
- Remove from Personal Link

3. The **Add Availability** dialog opens.

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From To

8:00am 5:00pm

All times listed are in Eastern 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

Care Unit

Please select a care unit

Location

Please select a location

Services

Please select services

Cancel Save

4. Choose days of the week for the availability.
5. Select the start and end time for the availability in the *From* and *To* fields.
6. Set the length of the availability with the *How Long Is this Availability Active?* field.
7. 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.
8. 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.

1. **NOTE:** If you are creating an availability for use with an appointment campaign, it is best to only choose the “Campaigns” type.
9. Select your Meeting Types. You can choose more than one at a time. For example, an availability can be In-Person, Phone, or Virtual.
10. Select *Care Unit*. Select Faculty
11. Select a *Location*.
12. Select *Services*. You must choose at least one service but can pick more.

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

13. If any service you select is tied to a course, a *Course* field appears. Select the courses for which you are available.
14. Enter a phone number or URL in the *URL / Phone Number* field. A clickable version of this link appears for students who create an appointment during the availability on the **Appointment Confirmation** page.
15. Enter special instructions for this availability.
  1. 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, zoom information or phone meeting instructions. For in-person meetings we also recommend reminding about campus access requirements and procedures.
16. 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.
17. Click **Save** to create the availability.

Repeat this process any time you want to add another availability. You can have as many availabilities as you want. We recommend that you have separate availabilities for meeting types if you are offering multiple meeting types at the same time. This will allow the special instructions to be clearer and more concise.

## 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 similar to adding an availability, so refer to the instructions above for information. Please note that editing an existing availability DOES NOT edit or change already scheduled appointments.

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**.

## Using Personal Availability Links (PAL)

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

### Personal Availability Link

Link:  <https://school.campus.eab.com/pal/I3xVhPwT6B> Copy

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.

The staff user and their Care Units and Support Services are pre-selected. Students then see the available times staff have to meet. The student will only see the Care Unit, Services, and Locations and times the staff user has selected to be part of their PAL. All configurations, limitations, and permissions for the availabilities remain in effect.

**Important.** If the user has more than one service available, the student needs to select one from the Support Services menu first.

To apply an availability to your Personal Availability Link, you need to check the **Add this availability to your personal availability link** box when creating or editing an availability or select existing availabilities and choose **Add to Personal Link** from the **Actions** menu.