

Creating Availability for Advisors

Overview

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

There is significant flexibility when you create availability. 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.

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 are meant for a staff user 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 ▾							
<input type="checkbox"/>	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 Edit
<input type="checkbox"/>	Tue, Wed, Thu	8:00am - 5:00pm	Forever	Academic Success Center	Registration For: Appointments/Campaigns	Advising	No Edit
<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 Edit
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	8:00am - 5:15pm	Forever	Academic Success Center	Academic Challenges For: Appointments/Drop-Ins	Advising	No Edit

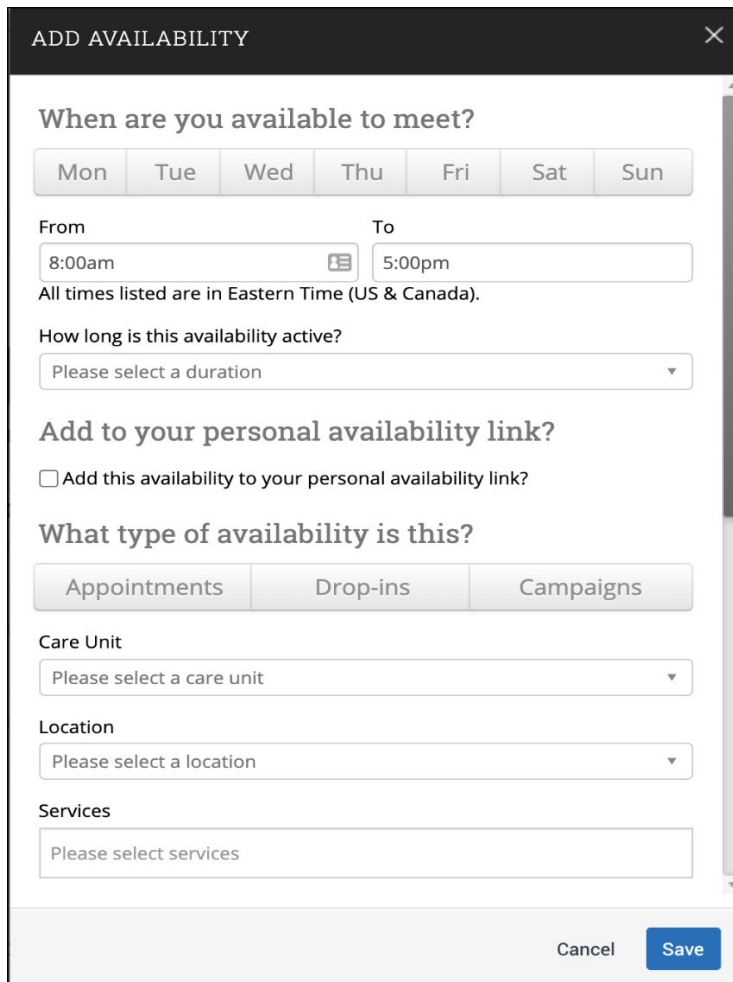
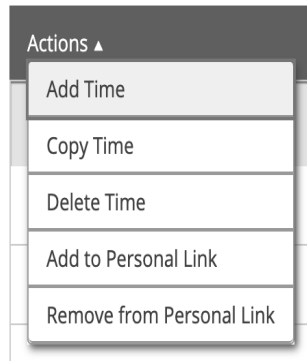
* All times listed are in Eastern Time (US & Canada)

Personal Availability Link

Link: <https://csulb-qa-yellow-mt.gradesfirst.com/pal/13xVhPwT6B> Copy

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

Available Times

A screenshot of a dialog box titled 'ADD AVAILABILITY'. The dialog box contains several sections for configuring availability. The first section, 'When are you available to meet?', includes a row of buttons for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and two input fields for 'From' (8:00am) and 'To' (5:00pm) times. Below these is a note: 'All times listed are in Eastern Time (US & Canada)'. The second section, 'How long is this availability active?', has a dropdown menu with the text 'Please select a duration'. The third section, 'Add to your personal availability link?', has a checkbox that is currently unchecked. The fourth section, 'What type of availability is this?', has three buttons: 'Appointments', 'Drop-ins', and 'Campaigns'. Below this are three more dropdown menus: 'Care Unit' (Please select a care unit), 'Location' (Please select a location), and 'Services' (Please select services). At the bottom right of the dialog box are 'Cancel' and 'Save' buttons.

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*: Available options for academic advisors are:
 1. Academic Advising (Undergraduate)
 2. Graduate Student Advising
11. Select a *Location*: This will be your academic department/program of division advising office.
12. Select *Services*. You must choose at least one service but can pick more.
13. If any service you select is tied to a course, a *Course* field appears. Select the courses you are available for.
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.
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.

Note. The special instructions from step 15 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.

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 for each meeting type 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 very similar to adding an availability, so refer to the instructions above for

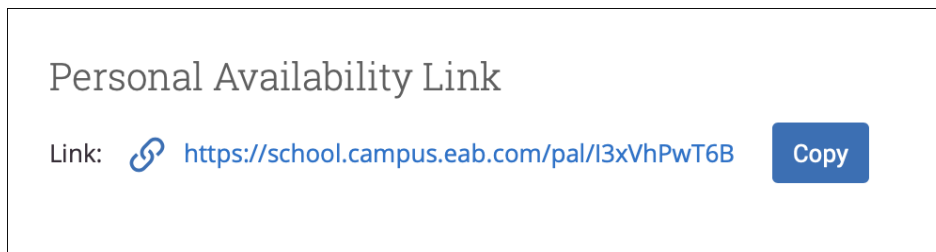
information. Please note that editing an existing availability DOES NOT edit or change already scheduled appointments.

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 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, link redirects to the scheduling page the student's browser and asks if they want to continue in the browser or open Navigate Student app. Students then see the available times staff have to meet without having to go through the full scheduling process.

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.