

Scheduling, Editing, and Canceling Appointments



Professional and Faculty Advisers



University of Wisconsin
Stevens Point

Scheduling Appointments

Purpose: This training guide shows Advisers how to make appointments for their students right in Navigate.


There are four ways a student can have an appointment in Navigate:

- 1) **Advisers making appointments for the student in Navigate (this training guide)**
- 2) Scheduled with the front desk of your office (if applicable)
- 3) Through the Navigate student app
- 4) Someone from another Care Unit making an appointment for you with a student



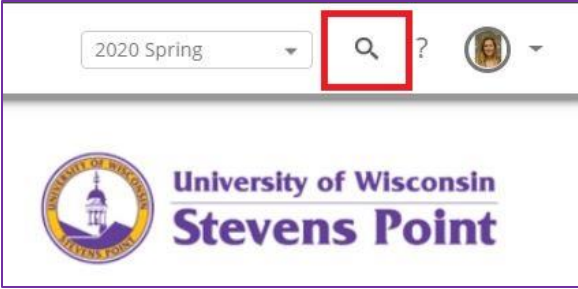
Scheduling Appointments

STEP 1

- To Search for a student, choose the  icon
- You can Search for a student using by:
 - **Student ID**
 - **First and Last name**
 - *Tip: Best to type David Bowie, versus Bowie, David*

OR

From your Staff Home, you can select any of your students in your "My Assigned Students for 2020 Spring" by clicking on their name.



Staff Home

Students Upcoming Appointments My Availability Appointment Queues Appointment Requests

My Assigned Students for 2020 Spring

Actions

<input type="checkbox"/> ALL	STUDENT NAME	ID	WATCH LIST
<input type="checkbox"/> 1	Meredith	115	
<input type="checkbox"/> 2	Nicholas	115	
<input type="checkbox"/> 3	Riley	115	
<input type="checkbox"/> 4	Mike	115	



Scheduling Appointments

STEP 2

- You are now on the Student's Profile Page
- Select "Schedule and Appointment"





Scheduling Appointments



STEP 3



- Select Care Unit
 - e.g., Advising
- Select Location
 - Some Care Unit appointments are available at all three campus locations OR have multiple locations on the same campus (e.g., ALB and DUC)
- Select Service
 - Select the reason why a student is seeking an appointment
 - e.g., Adding or Dropping Courses
 - Note: each Care Unit sets their own Services with the App Admin


Schedule Appointment

Filters

Care Unit
Select a Care unit  

Location
Please Select care unit to select location  

Service
Select a location to select service  

Course
  optional

Comments
 optional

3



Scheduling Appointments

STEP 4

- Select an Organizer
 - Your name in the list of Organizers

People Attending (1)

Karl ← student name appears here

Available Slots Left in Appointment (0)

Select An Organizer

SELECT	ORGANIZER	AVAILABLE TIMES
<input checked="" type="radio"/>	Auer, Shelley	For: Appointments Mon-Fri 9:00a
<input type="radio"/>	Burke, Brianna	For: Appointments Mon-Fri 9:00a
<input type="radio"/>	Franson, Chad	For: Appointments Mon-Fri 8:30a For: Campaigns Mon-Fri 8:00am-5
<input type="radio"/>	Fritsch, Jenna	For: Appointments/Drop-Ins/Ca For: Campaigns Mon-Fri 9:00am-4
<input type="radio"/>	Gaffney, John	For: Appointments Mon-Fri 8:00a For: Campaigns Mon-Fri 8:00am-5



STEP 5

- Offer open days/times to students, indicated by the green box.
- Note: You may need to go into the next week to find an opening. Select a date on the Calendar to find future openings.

Choose A Time To Meet

Length: Leave as is

Availabilities: Show Availabilities for

TIME SLOT	03/08 (SUN)	03/09 (MON)	03/10 (TUE)	03/11 (WED)	03/12 (THU)	03/13 (FRI)
8:00am - 8:30am	BUSY	BUSY	BUSY	BUSY	BUSY	BUSY
8:30am - 9:00am	BUSY	0/1 BUSY	BUSY	0/1 BUSY	0/1 BUSY	BUSY
9:00am - 9:30am		0/1 BUSY	BUSY	BUSY	0/1	0/1
9:30am - 10:00am		0/1 BUSY	BUSY	BUSY	1/1 CONFLICTS	0/1
10:00am - 10:30am		BUSY	BUSY	BUSY	BUSY	BUSY
10:30am - 11:00am		BUSY	1/1 CONFLICTS	BUSY	BUSY	BUSY
11:00am - 11:30am		0/1	1/1 CONFLICTS	0/1 BUSY	0/1	CONFLICTS
11:30am - 12:00pm		0/1	1/1 CONFLICTS	1/1 CONFLICTS	0/1	1/1 CONFLICTS
12:00pm - 12:30pm		BUSY	BUSY	BUSY	BUSY	BUSY



Select a Date

March 2020

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



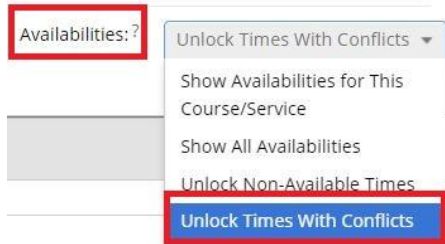
Scheduling Appointments

STEP 6

- Select the date/time chosen by the student

STEP 7

- Select "Save Appointment" at bottom of screen



*Note: Navigate is configured so students cannot schedule appointments during class. To **override this option**, select **Availabilities** and choose **"Unlock Times with Conflicts"***

TIME SLOT	03/08 (SUN)	03/09 (MON)
1:30pm - 2:00pm		CONFLICTS
2:00pm - 2:30pm		BUSY
2:30pm - 3:00pm		BUSY
3:00pm - 3:30pm		<input checked="" type="checkbox"/> 0/1
3:30pm - 4:00pm		<input type="checkbox"/> 0/1
4:00pm - 4:30pm		BUSY
4:30pm - 5:00pm		
5:00pm - 5:30pm		
5:30pm - 6:00pm		
6:00pm - 6:30pm		
6:30pm - 7:00pm		
7:00pm - 7:30pm		

Repeat This Appointment?

Repeat



Scheduling Appointments

What happens next?


- Student receives an appointment confirmation email immediately
- The Organizer (Adviser) will receive notification and the appointment will populate on their Outlook calendar
- Although each Care Unit has set appointment reminders to different times, typically the student will receive:
 - An email reminder 24 hours in advance
 - A text message reminder 2 hours in advance (if they have Navigate app)
 - If they do not have the app installed, the student will receive another email (instead of a text message) 2 hours in advance of the appointment



Editing Appointments

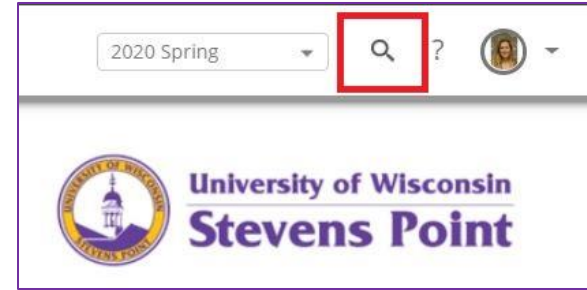
Once logged in, you will be on the Staff Home page.

STEP 1

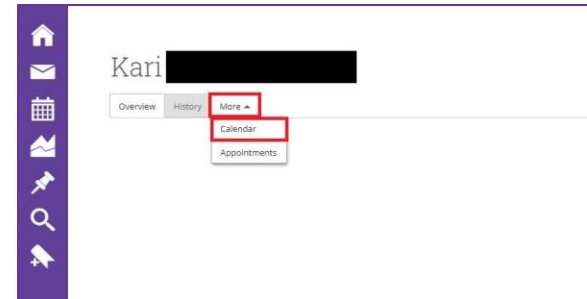
- To Search for a student, choose the  icon
- You can Search for a student using by:
 - **Student ID**
 - **First and Last name**
 - Best to type out: David Bowie vs Bowie, David

STEP 2

- Under the "More" tab on the Student Profile page, choose Calendar



1



2



Editing Appointments

STEP 3

- Find Appointment on Calendar
 - Will have dark green tab next to it
 - Click once on the appointment

STEP 4

- Select [edit]

March 2020

SUN	MON	TUE	WED
1 8am Busy	2 8am Busy 11am Busy 1pm Busy 1:19pm Academic Coaching 2:30pm Busy	3 9am Busy 10:30am Busy 12pm Busy 2:30pm Busy	4 8am Busy 12pm Busy 2pm Busy
8 8am Busy	9 8am Busy 9am Busy 10am Busy 10am Busy	10 8am Busy 12pm Busy	11 8am Busy 11am Busy
15 8am Busy	16 8am Busy 11:15am Academic Coaching	17 8am Busy 8am Busy 12pm Busy 1pm Busy	18 8am Busy

3

MANAGE APPOINTMENT

Academic Coaching

All Attendees

- Megan [redacted]
- Kari [redacted]

Appointment Details

[edit]

When: Mon Mar 16, 2020 11:15 am - 12:00 pm

Care Unit: Tutoring-Learning Center (TLC)

Where: Library - Wausau Campus

Comments: [redacted]

Service: Academic Coaching

Course: N/A

Type: One Time Appointment

Cancel Appointment Delete Appointment Close

4



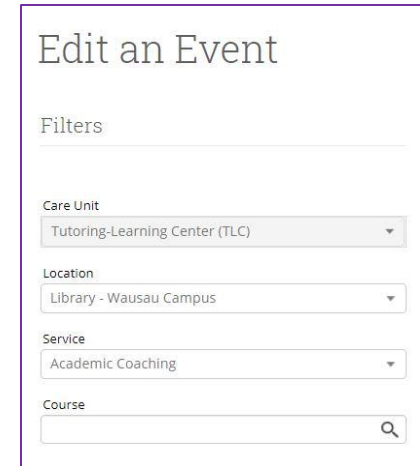
Editing Appointments

STEP 5

- You are taken to the appointment screen where you can edit the following:
 - Location
 - Service
 - Change Organizer
 - Select new date and time

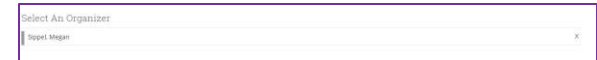
STEP 6

- After making the edits to the appointment, select "Save Appointment" at the bottom of the screen

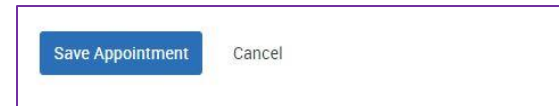


The screenshot shows a form titled "Edit an Event" with a "Filters" section. It contains four dropdown menus: "Care Unit" (selected: Tutoring-Learning Center (TLC)), "Location" (selected: Library - Wausau Campus), "Service" (selected: Academic Coaching), and "Course" (empty search field with a magnifying glass icon).

5



The screenshot shows a dropdown menu titled "Select An Organizer" with "Support Megan" selected and a close button (X) on the right.



The screenshot shows two buttons at the bottom of the screen: a blue "Save Appointment" button and a grey "Cancel" button.

6



Editing Appointments


What happens next?

- Student receives an appointment confirmation email immediately with any edits
- The Organizer (Adviser or other staff who the appointment is with) will receive notification and the changes to their appointment will populate on their Outlook calendar
- All email/text reminders will happen with the new appointment time/date



Canceling Appointments

STEP 1

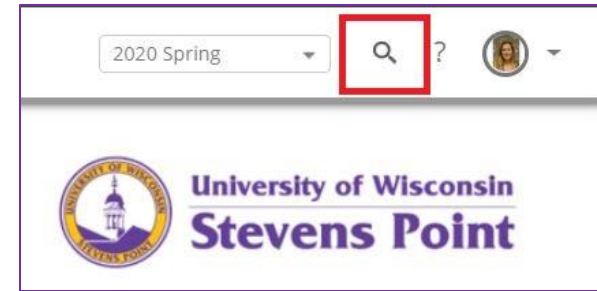
- To Search for a student, choose the  icon
- You can Search for a student using by:
 - **Student ID**
 - **First and Last name**
 - Best to type out: David Bowie vs Bowie, David

STEP 2

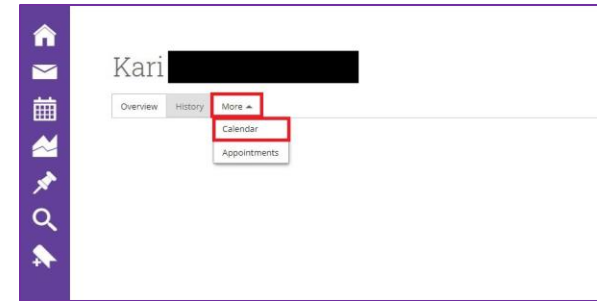
- Under the "More" tab on the Student Profile page, choose Calendar

STEP 3

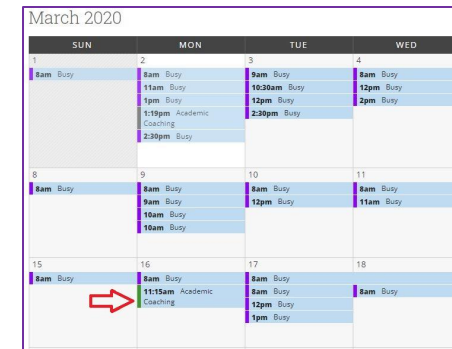
- Find Appointment on Calendar
 - Will have dark green tab next to it
 - Click once on the appointment



1



2



March 2020			
SUN	MON	TUE	WED
1 8am Busy	2 8am Busy 11am Busy 1pm Busy 1:15pm Academic Coaching 2:30pm Busy	3 10:30am Busy 12pm Busy 2:30pm Busy	4 8am Busy 12pm Busy 2pm Busy
8 8am Busy	9 8am Busy 10am Busy 10am Busy	10 8am Busy 12pm Busy	11 8am Busy 11am Busy
15 8am Busy	16 8am Busy 11:15am Academic Coaching	17 8am Busy 12pm Busy 1pm Busy	18 8am Busy

3



Canceling Appointments

STEP 4

- Select "Cancel Appointment"

STEP 5

- Complete the following
 - Cancel Appointment For
 - Select who is canceling appointment (Student or Organizer)
 - Reason
 - Select one of the Reasons in the drop-down menu
 - Comments
 - Add any comments that would be useful
 - Select "Mark as Cancelled"

MANAGE APPOINTMENT

Academic Coaching

All Attendees

- Megan
- Kari

Appointment Details [edit]

When: Mon Mar 16, 2020 11:15 am - 12:00 pm

Care Unit: Tutoring-Learning Center (TLC)

Where: Library - Wausau Campus

Service: Academic Coaching

Course: N/A

Comments

Type: One Time Appointment

Cancel Appointment Delete Appointment Close

4

MANAGE APPOINTMENT

Academic Coaching

All Attendees

- Megan (organizer)
- Kari

Cancel Appointment

Cancel Appointment For: Select Who to Cancel

Reason: Select A Reason

Comments:

Don't Mark Mark as Cancelled

Cancel Appointment Delete Appointment Close

5



Canceling Appointments

What happens next?

- Both the Student and the Organizer receives notification that the appointment has been canceled
- The appointment will be reflected as canceled in the Organizer's Outlook calendar



Having Issues?

Please contact your Navigate Application Administrator at Navigate@uwsp.edu

