

Navigate: How to use the Appointment Center

The **Appointment Center** lets staff manage appointments at an individual location. To open the Appointment Center, click the **app switcher** and select Appointment Center. You can also open **Additional Modes** at the bottom right of the screen and select Appointment Center.

This feature is primarily used by staff, especially **front desk workers** or others who help to manage appointment scheduling at a specific location.

Conditions: Staff members will need to set up their **calendar sync** and **availability** to make Appointment Center's features useful. Users need the **View the Appointment Queue Tab on the Home Page** permission to check students out through Appointment Center.

Feature Overview

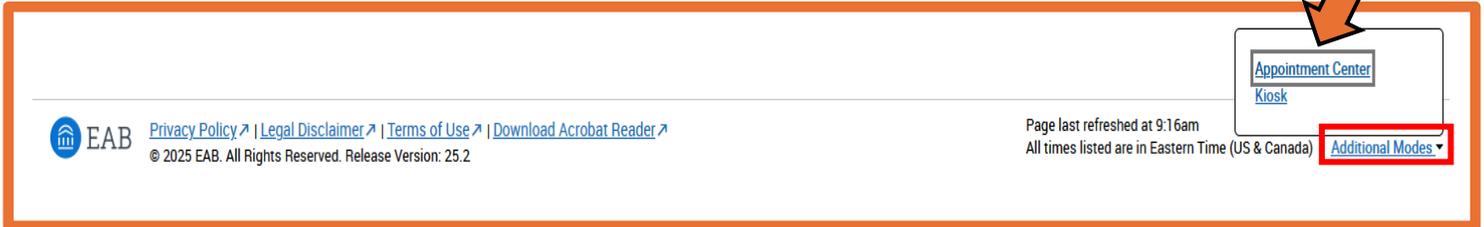
The Appointment Center allows staff at an individual location to manage appointments for that location. For example, a front desk worker can manage appointments for a tutoring center using Appointment Center. Actions possible using the Appointment Center include managing the scheduling grid, scheduling appointments, editing appointment details, and canceling appointments. Staff can also view a list of **drop-in** and **scheduled appointments** for the day or week. More information about the aspects of the Appointment Center are covered below.

To open the Appointment Center via the app switcher

With the appropriate role and permissions, you may access the **Appointment Center** by clicking the **app switcher** and selecting Appointment Center at the top upper right of your Navigate account.

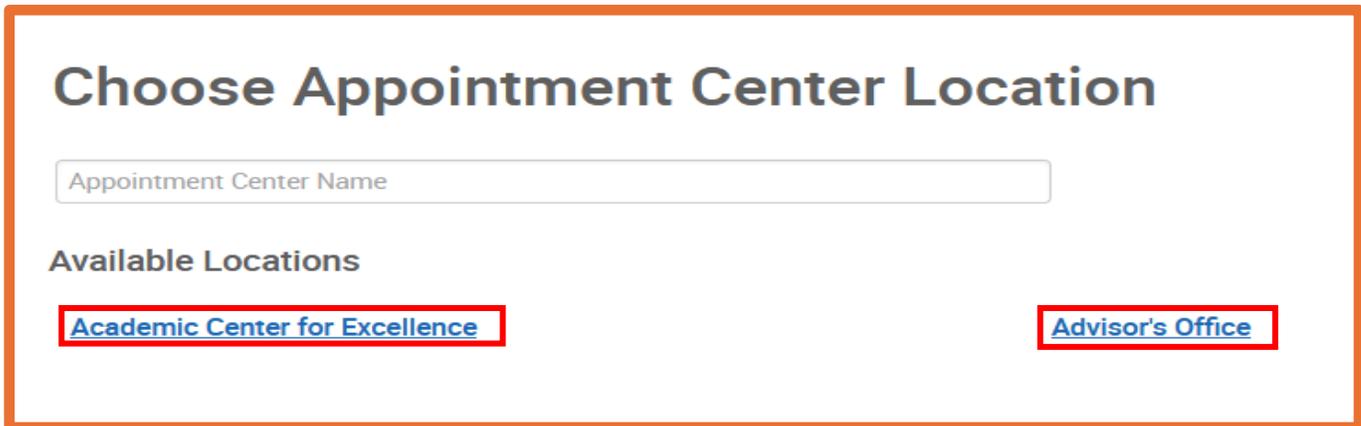


You may also access the Appointment Center in the lower right corner of your Navigate account by clicking on the **Additional Modes** link.



Location List

Once you open Appointment Center, select a location from the list. You will want to choose the location where you specifically work at. The list of Appointment Center Locations below is not an extensive list and is subject to change at any time.



Location Switcher and Scheduling Grid

Choosing a location opens the **Scheduling Grid** for that location. This grid can be narrowed down by **Care Unit, Service, Course, Staff Member, Meeting Type, and Date/Time**. While you cannot change the default hours from 8 am to 5 pm, you can adjust the scheduling grid hours by changing the Start Time and End Time in the filters.

Appointment Center also has a Location Switcher. When users need to change their Appointment Center location, they use the filter at the top of the main page and select a new Location from the drop-down. Once selected, Appointment Center reloads as the new Location.

Academic Center for Excellence

Location

Academic Center for Excellence

Academic Center for Excellence

Advisor's Office

Enter Student Name

Scheduling Grid

Date  01/19/2025  27

Start Time (ET) 8:00AM

End Time (ET) 5:00PM

 Refreshed Today 10:15am ET

Care Unit: General Subject Support Services

Service: All Services

Staff: All Staff

Meeting Types: All Meeting Types

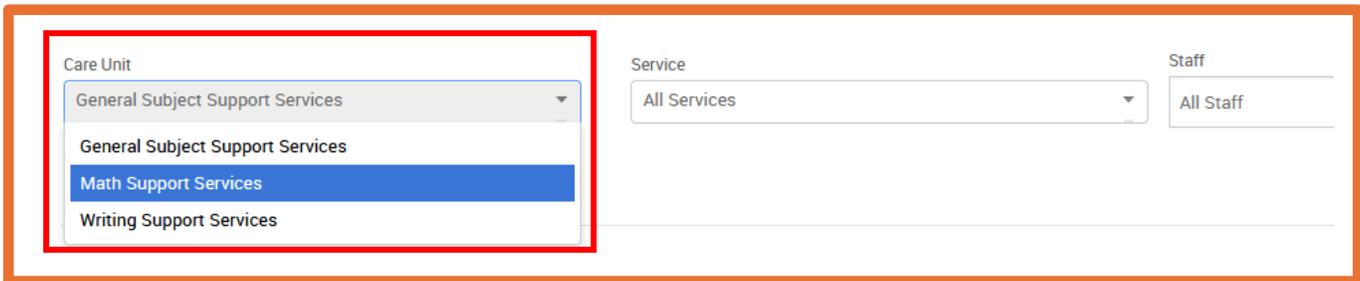
Find First Available?

A user can have two separate Appointment Center locations loaded in two separate tabs and Navigate should work correctly in both. Note that only Locations the user has permission to access are shown in the drop-down.

Staff, Service, and Course filters interact in an intuitive way in Appointment Center. Any time you add or remove a selection in one of these three filters, the options available in the other filters will be narrowed or widened based on that selection.

Choose the Care Unit(s) connected to your specific Appointment Center Location(s).

- Your list of Services may change depending on what Care Unit you choose.
- Your list of staff members may change depending on what Care Unit you choose. For example, a Tutor may work in the **Math Support Services** Care Unit but not work in the Writing Support Services Care Unit.



Care Unit

General Subject Support Services

General Subject Support Services

Math Support Services

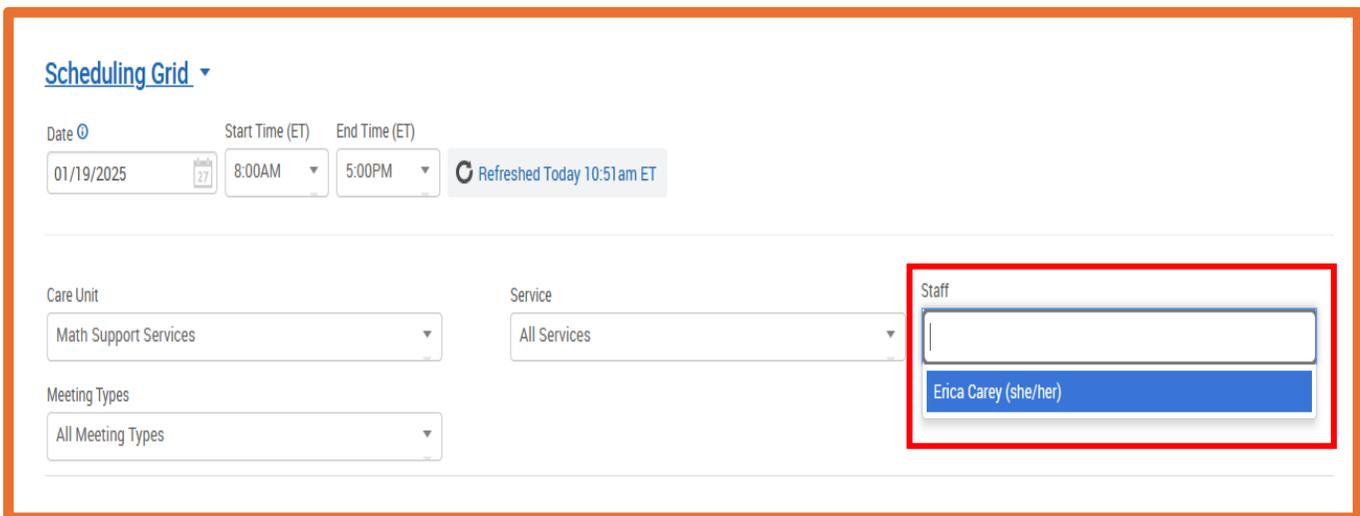
Writing Support Services

Service

All Services

Staff

All Staff



[Scheduling Grid](#) ▾

Date 01/19/2025 Start Time (ET) 8:00AM End Time (ET) 5:00PM Refreshed Today 10:51 am ET

Care Unit

Math Support Services

Service

All Services

Staff

Erica Carey (she/her)

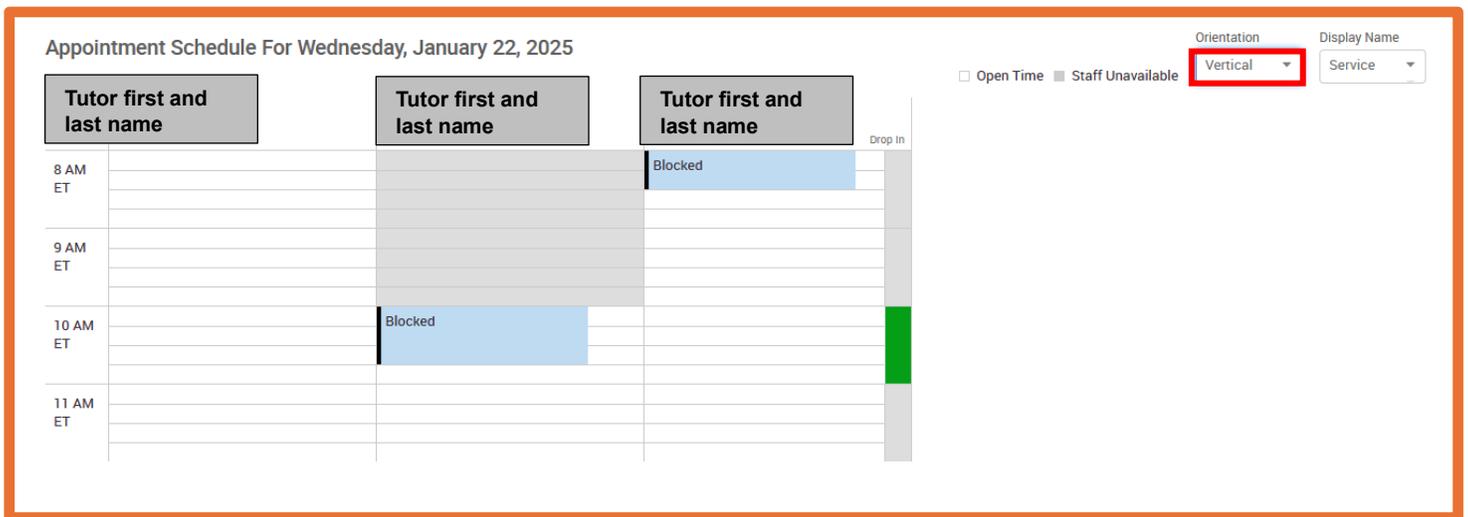
Meeting Types

All Meeting Types

The Appointment Center has a calendar interface where **available time for appointments are shown as white blocks and unavailable times as grey blocks.** Staff members who only have campaign availability do not appear in the Appointment Center.

Vertical Calendar View

If you click the **Vertical Orientation** button on the top right of the screen, you will be able to change the orientation of the staff and times if you would prefer one to be the column header over the other. **When vertical orientation is selected:**



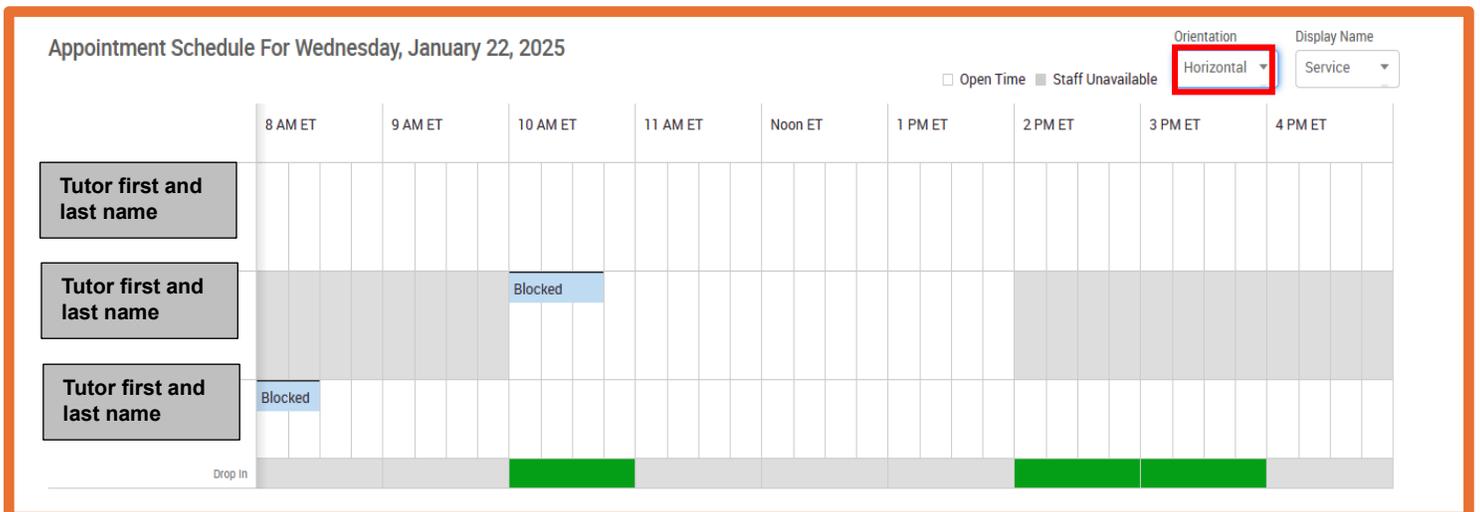
Appointment Schedule For Wednesday, January 22, 2025

Orientation: Vertical | Display Name: Service

| Time | Tutor first and last name | Tutor first and last name | Tutor first and last name | Drop In |
|----------|---------------------------|---------------------------|---------------------------|---------|
| 8 AM ET | | | Blocked | |
| 9 AM ET | | | | |
| 10 AM ET | | Blocked | | |
| 11 AM ET | | | | |

Horizontal Calendar View

When horizontal orientation is selected:



Appointment Schedule For Wednesday, January 22, 2025

Orientation: Horizontal | Display Name: Service

| Staff | 8 AM ET | 9 AM ET | 10 AM ET | 11 AM ET | Noon ET | 1 PM ET | 2 PM ET | 3 PM ET | 4 PM ET |
|---------------------------|---------|---------|----------|----------|---------|---------|---------|---------|---------|
| Tutor first and last name | | | | | | | | | |
| Tutor first and last name | | | Blocked | | | | | | |
| Tutor first and last name | Blocked | | | | | | | | |
| Drop In | | | | | | | | | |

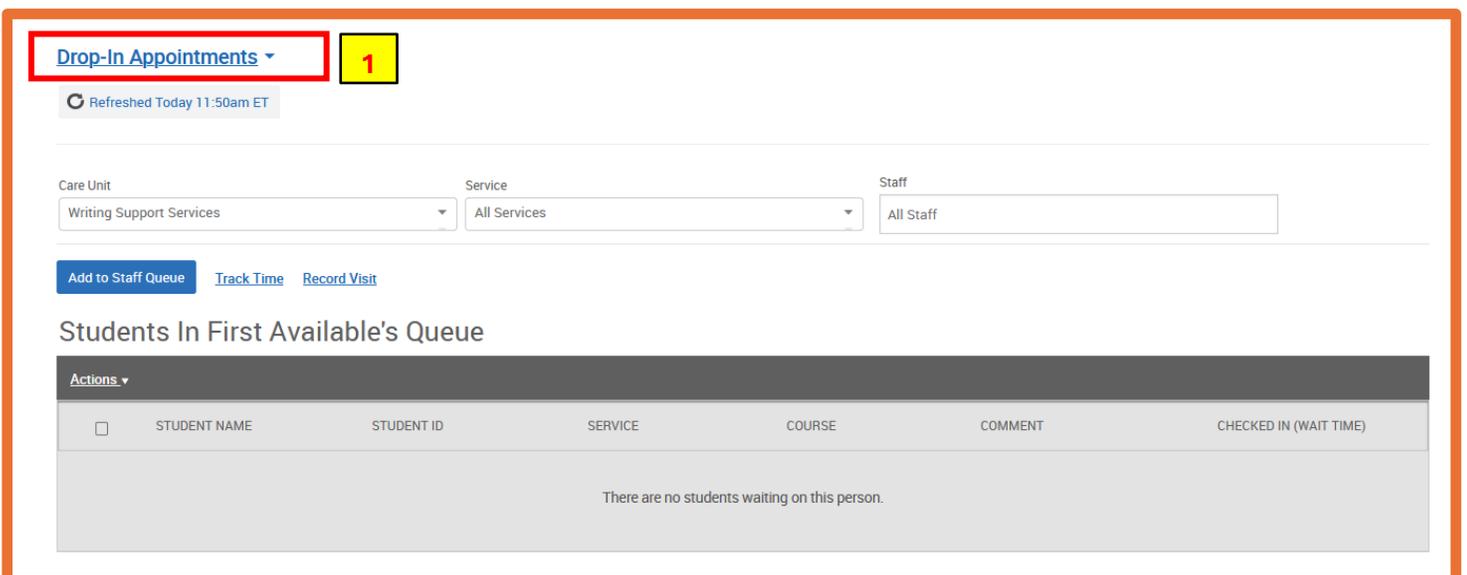
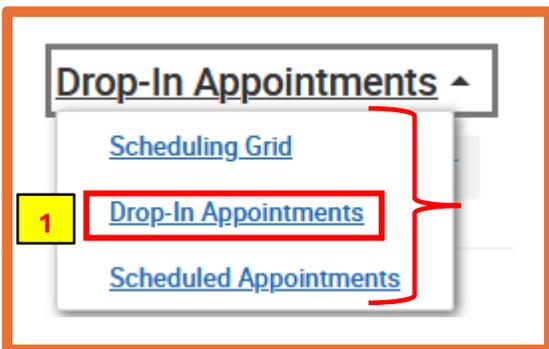
Additionally, by clicking the **Service Name** button, you can choose to see appointments based on attendees or by the service the attendees are scheduled under.

It is also possible to filter who appears on the grid by using the Scheduling Grid drop-down filter, letting you see **drop-in appointments** and **scheduled appointments**.

1. **Viewing Drop-in Appointments via the Appointment Center**

Drop-In Appointments Page

Staff workers often need to view today's appointments. Using the **Drop-In Appointments** page, you can view all of the drop-ins for the current day and take action from the list. Find this screen by clicking the drop-down above the filters at the top part of the main Appointment Center page.



Students Checked In With Staff

| Actions ▾ | | | | | | | |
|--------------------------|--------------|------------|-----------------|---------------|--------|---------|-------------------------|
| <input type="checkbox"/> | STUDENT NAME | STUDENT ID | STAFF MEMBER | SERVICE | COURSE | COMMENT | CHECKED IN (WAIT TIME) |
| <input type="checkbox"/> | | | John Chadderdon | Brainstorming | | | 9:15am ET (2 hr 35 min) |

In-Progress Visits

| Actions ▾ | | | | | | |
|--|---------------------------|------------|-----------|---------------|---------|--------|
| <input type="checkbox"/> | ATTENDEE NAME: STUDENT ID | START TIME | APPT TIME | CHECK IN TIME | SERVICE | COURSE |
| You do not have any students currently waiting | | | | | | |

Students Checked In For Track Time

| Actions ▾ | | | | | |
|---|------|------------|---------|--------|-----------------------|
| <input type="checkbox"/> | NAME | STUDENT ID | SERVICE | COURSE | CHECKED IN (DURATION) |
| There are currently no students check-in with record time | | | | | |

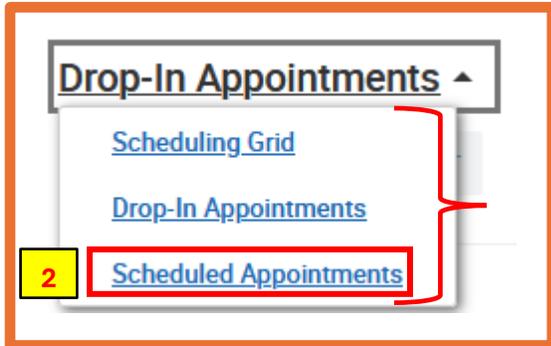
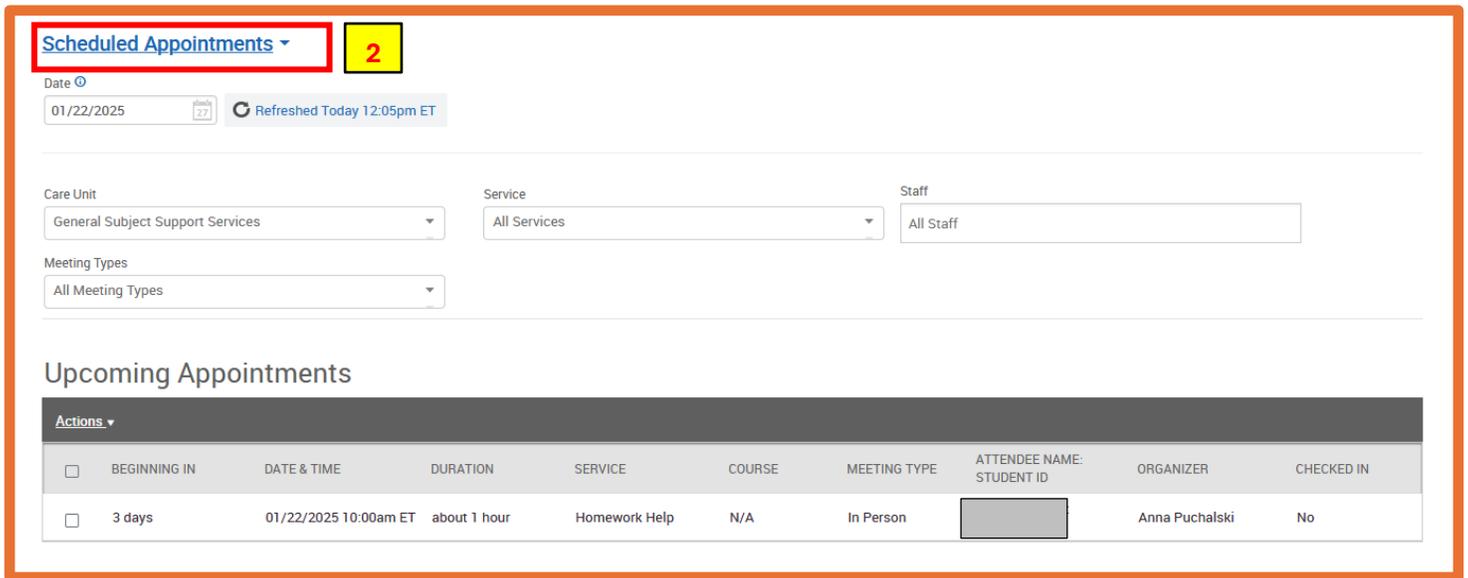
Actions that can be taken from any queue include:

- Send Message to Attendee (Student)
- Move to Top (of queue)
- Remove (from queue)

2. Viewing Scheduled Appointments via the Appointment Center

Scheduled Appointments List Page

The **Scheduled Appointment List** page in Appointment Center lets you view all of the appointments for the current day and take action from the list.

A screenshot of the "Scheduled Appointments" page. At the top left, the page title "Scheduled Appointments" is highlighted with a red box and a yellow callout box containing the number "2". Below the title, there is a "Date" field set to "01/22/2025" and a "Refreshed Today 12:05pm ET" button. The page includes several filter dropdowns: "Care Unit" (General Subject Support Services), "Service" (All Services), "Staff" (All Staff), and "Meeting Types" (All Meeting Types). The main section is titled "Upcoming Appointments" and features a table with a header row and one data row. The header row includes columns for "Actions", "BEGINNING IN", "DATE & TIME", "DURATION", "SERVICE", "COURSE", "MEETING TYPE", "ATTENDEE NAME: STUDENT ID", "ORGANIZER", and "CHECKED IN". The data row shows an appointment starting in "3 days" on "01/22/2025 10:00am ET" for "Homework Help" (N/A course, In Person meeting) organized by "Anna Puchalski". The "ATTENDEE NAME" field is redacted with a grey box, and the "CHECKED IN" status is "No".

| Actions | BEGINNING IN | DATE & TIME | DURATION | SERVICE | COURSE | MEETING TYPE | ATTENDEE NAME: STUDENT ID | ORGANIZER | CHECKED IN |
|--------------------------|--------------|-----------------------|--------------|---------------|--------|--------------|---------------------------|----------------|------------|
| <input type="checkbox"/> | 3 days | 01/22/2025 10:00am ET | about 1 hour | Homework Help | N/A | In Person | [Redacted] | Anna Puchalski | No |

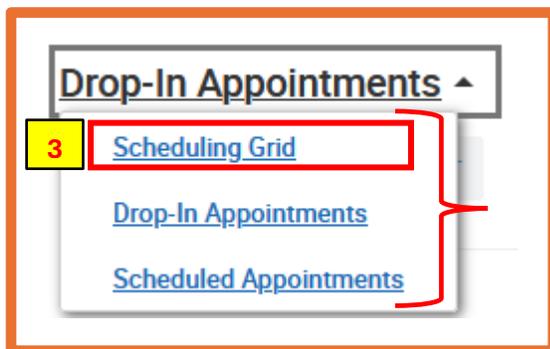
Actions users can take on appointments include:

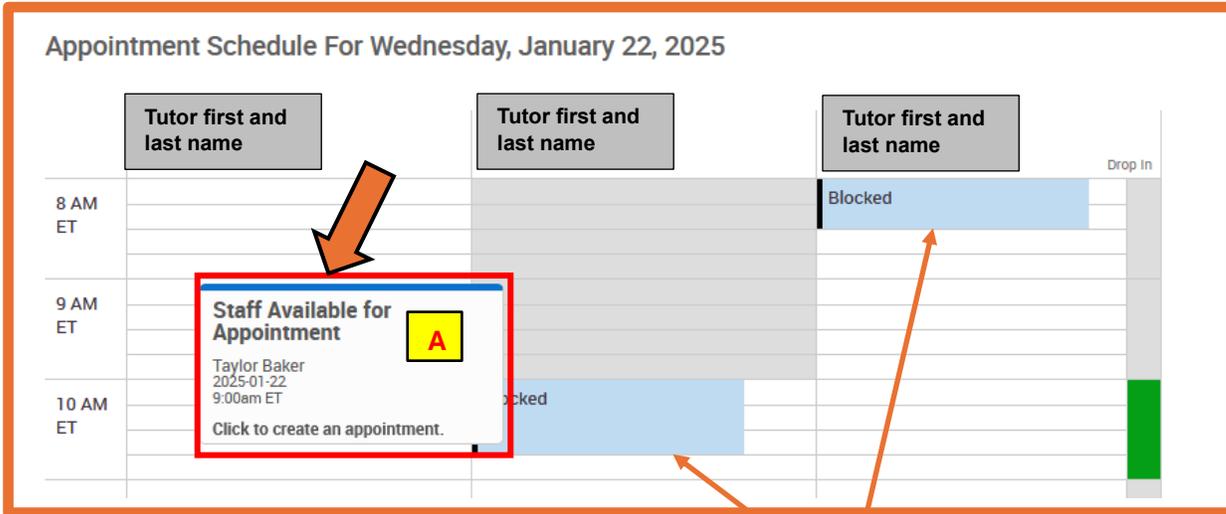
- Send Message to Attendee (Student)
 - Send Message to Organizer(s)
 - View Appointment Details
 - Check In
 - Check Out
 - Mark No-Show
 - Cancel Appointments
- When choosing multiple appointments, actions are limited to sending messages and canceling appointments. This gives you the ability to cancel all appointments for a given day in a particular location.
- You also have the ability to select any date and see appointments on the selected day.

Scheduling Grid

You can also schedule appointments from the **Scheduling Grid** page by clicking on an open slot on the scheduling grid.

[A] Hover over the white area to schedule an appointment for a student by clicking the **Staff Available for Appointment** dialogue box.





You will notice some light blue areas marked as **Blocked**. This means that the Tutors have appointments scheduled during those times. In the example below, the Information will show on the Tutors **Appointments** tab under the **Upcoming Appointments** section.

Tutor first and last name (staff) ▾

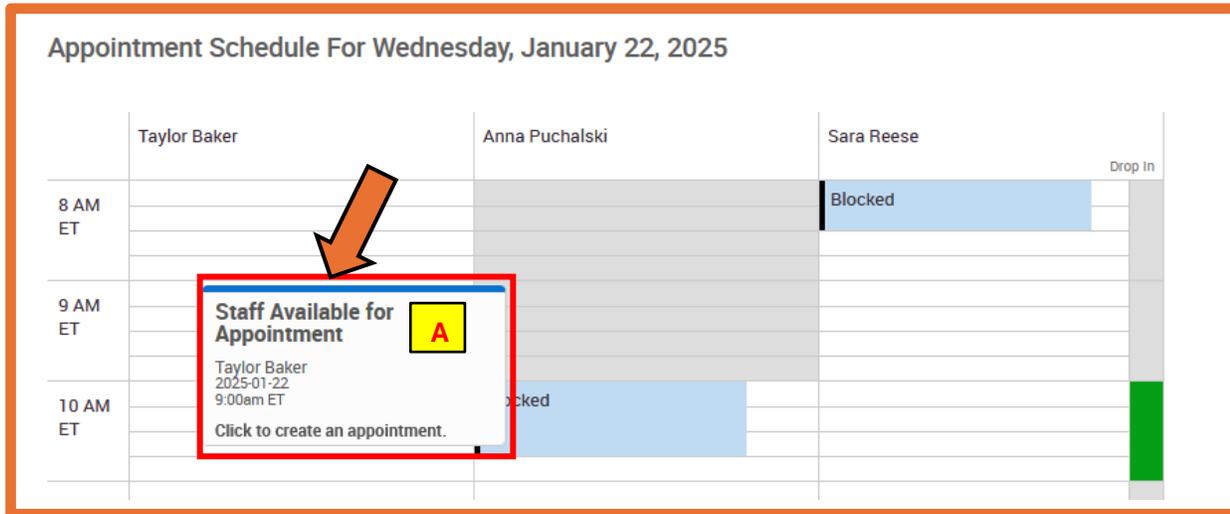
Assigned Students | Availabilities | **Appointments** | Conversations | Calendar

Upcoming Appointments

Care Unit: All Care Units

| Actions | DATE/TIME | ATTENDEE | SERVICE | COMMENT | MEETING TYPE | REPORT FILED? | DETAILS | PRE APPT QUESTIONS |
|--------------------------|------------------------------------|-----------------------------|---------------|-----------------------------------|--------------|---------------|-------------------------|--------------------|
| <input type="checkbox"/> | 01/22/2025 10:00am - 10:45am ET | Student last and first name | Homework Help | I need help with my CRJ homework. | In Person | Not Yet. | Details | N/A |

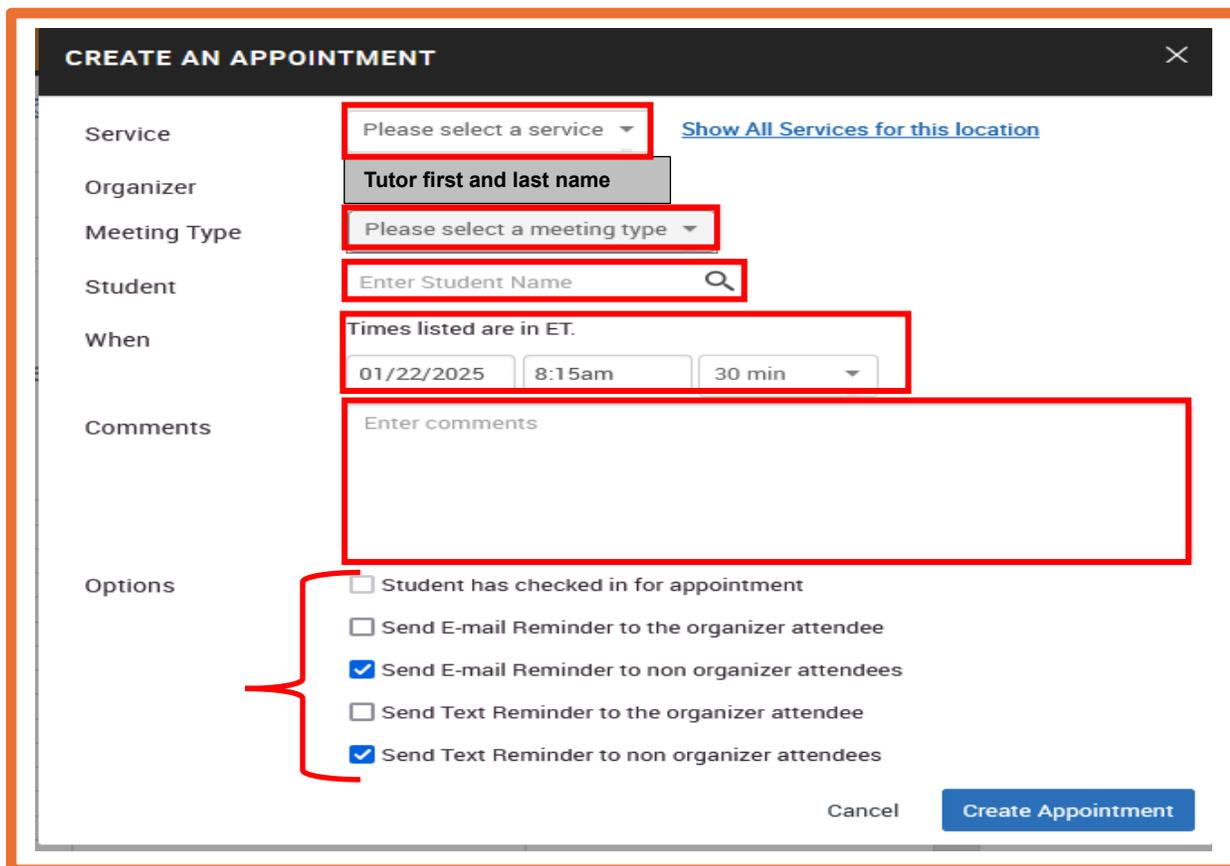
[A] After hovering over the white area, and selecting an open slot to schedule an appointment for a student, click the **Staff Available for Appointment** dialogue box.



Appointment Schedule For Wednesday, January 22, 2025

| Time | Taylor Baker | Anna Puchalski | Sara Reese | Drop In |
|----------|-------------------------------------|----------------|------------|---------|
| 8 AM ET | | | Blocked | |
| 9 AM ET | Staff Available for Appointment (A) | | | |
| 10 AM ET | | Blocked | | |

You will then be prompted to complete the **Create an Appointment** dialogue box.



CREATE AN APPOINTMENT

Service: Please select a service [Show All Services for this location](#)

Organizer: Tutor first and last name

Meeting Type: Please select a meeting type

Student: Enter Student Name

When: Times listed are in ET.
01/22/2025 8:15am 30 min

Comments: Enter comments

Options:

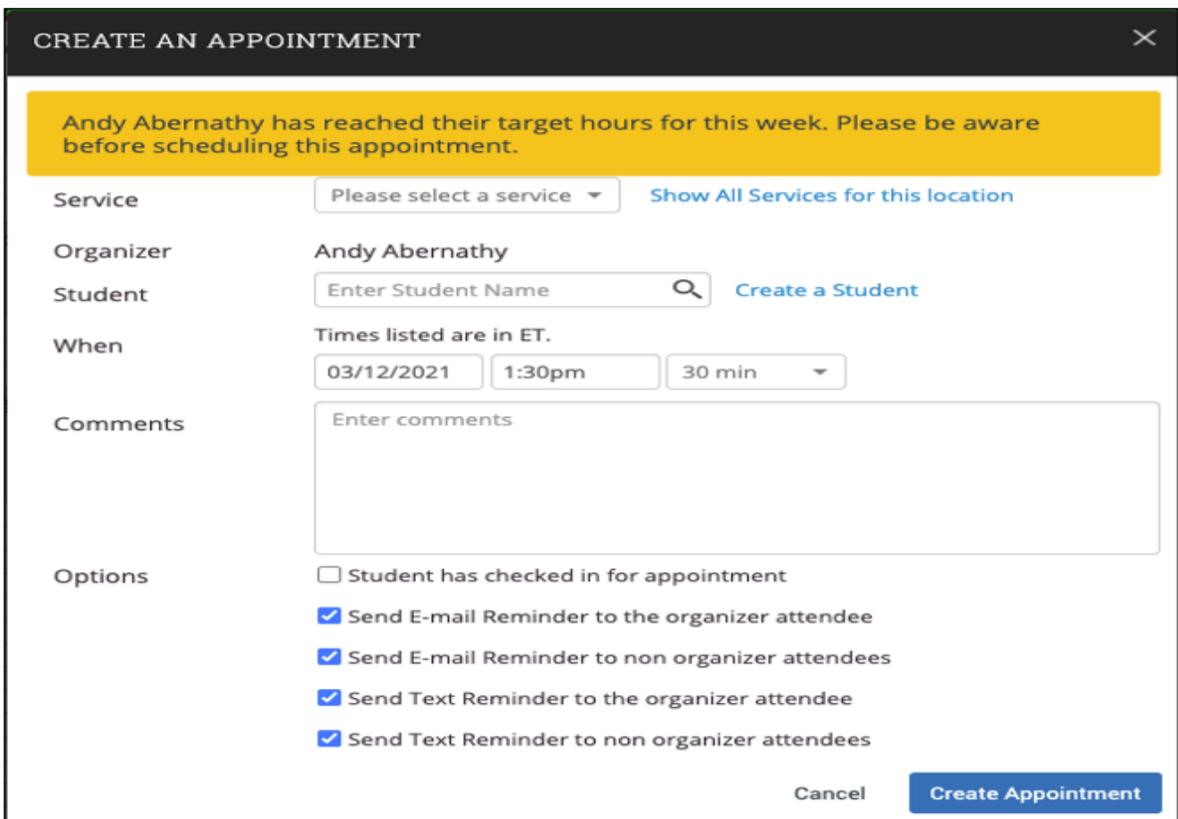
- Student has checked in for appointment
- Send E-mail Reminder to the organizer attendee
- Send E-mail Reminder to non organizer attendees
- Send Text Reminder to the organizer attendee
- Send Text Reminder to non organizer attendees

Cancel **Create Appointment**

Please be sure to include the following appointment details:

- Service
- Student
- Date, time & duration
- Comments
- Then select **Create Appointment**

If a front desk worker selects an open slot for the staff member who has reached their **target hours** but is otherwise free, a warning appears on the **Create an Appointment** dialog.



CREATE AN APPOINTMENT [Close]

Andy Abernathy has reached their target hours for this week. Please be aware before scheduling this appointment.

Service Please select a service [Dropdown] [Show All Services for this location](#)

Organizer Andy Abernathy

Student Enter Student Name [Search] [Create a Student](#)

When Times listed are in ET.
03/12/2021 1:30pm 30 min [Dropdown]

Comments Enter comments [Text Area]

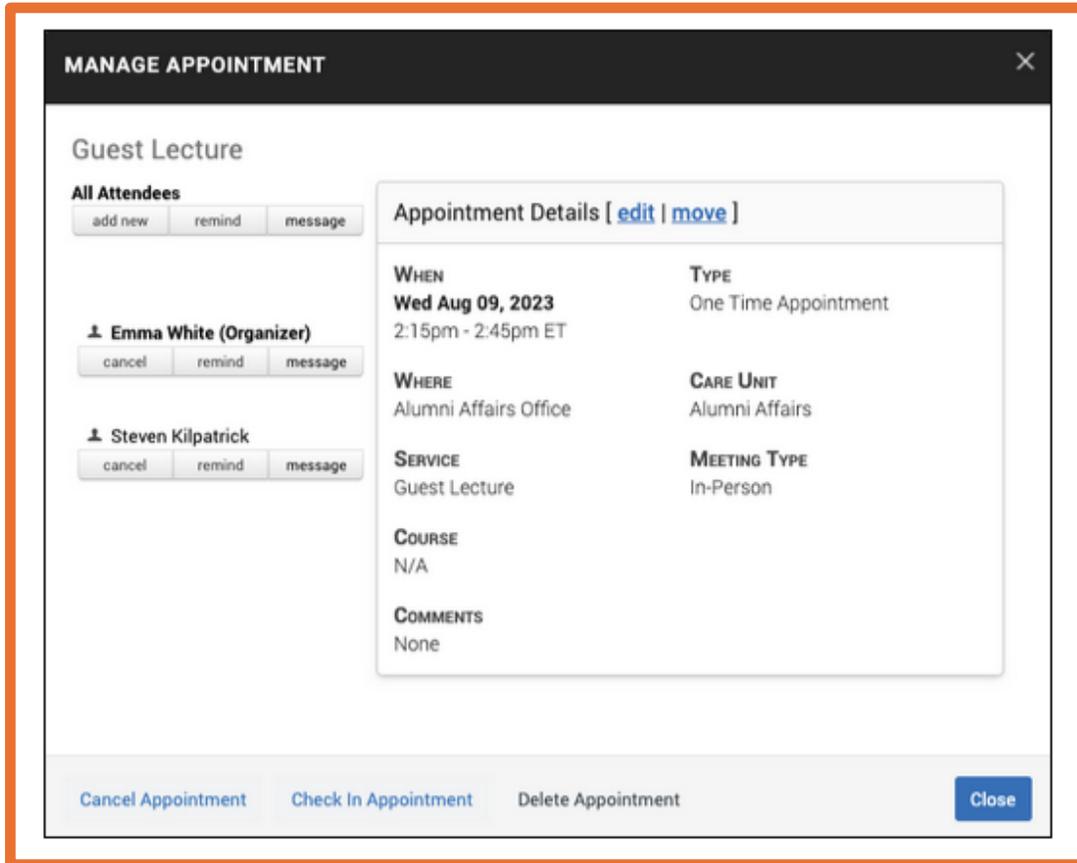
Options

- Student has checked in for appointment
- Send E-mail Reminder to the organizer attendee
- Send E-mail Reminder to non organizer attendees
- Send Text Reminder to the organizer attendee
- Send Text Reminder to non organizer attendees

Cancel **Create Appointment**

Note: Despite the warning, the front desk worker can create the appointment for the staff member, overriding the Target Hours.

You can also click an existing appointment link and see the details of the appointment.



The screenshot shows a 'MANAGE APPOINTMENT' window with a close button (X) in the top right corner. The title of the appointment is 'Guest Lecture'. On the left, under 'All Attendees', there are buttons for 'add new', 'remind', and 'message'. Below this, two attendees are listed: 'Emma White (Organizer)' and 'Steven Kilpatrick', each with 'cancel', 'remind', and 'message' buttons. The main area is titled 'Appointment Details [edit | move]' and contains the following information:

| | |
|---|-------------------------------------|
| WHEN Wed Aug 09, 2023 2:15pm - 2:45pm ET | TYPE One Time Appointment |
| WHERE Alumni Affairs Office | CARE UNIT Alumni Affairs |
| SERVICE Guest Lecture | MEETING TYPE In-Person |
| COURSE N/A | |
| COMMENTS None | |

At the bottom of the window, there are four buttons: 'Cancel Appointment', 'Check In Appointment', 'Delete Appointment', and 'Close'.