Setting Your Availability for Appointments

User Guide – May 2024

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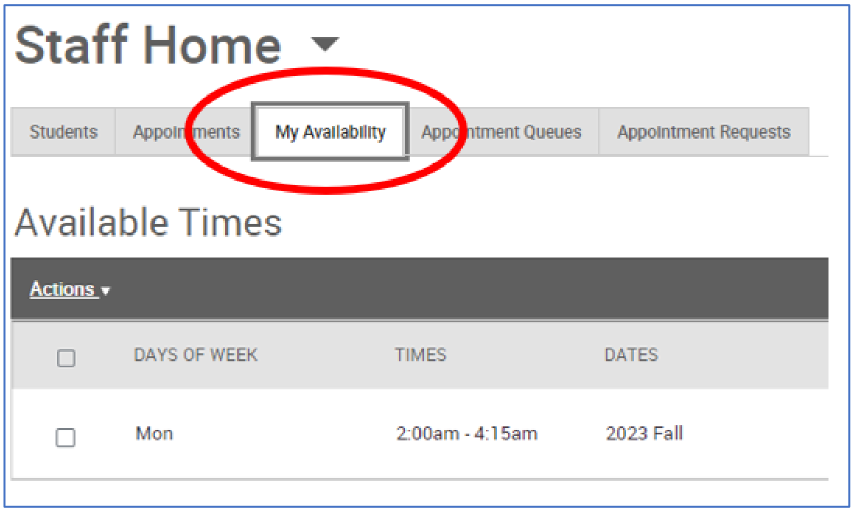
Setting up **availability** is one of the most important functions in RU-N4Success. By specifying your availability, students will be able to make appointments with you, and colleagues will be able to make referrals.

Effective May 23, 2024, 'Meeting Types' will be enabled. This allows advisors to indicate whether time is available for in person and/or virtual appointments, and students will be able to filter on their preference for in person and/or virtual appointments. The 'Virtual Meeting' Location will no longer appear as a separate choice. Each department or office Location can be associated with either Meeting Type (in person or virtual).

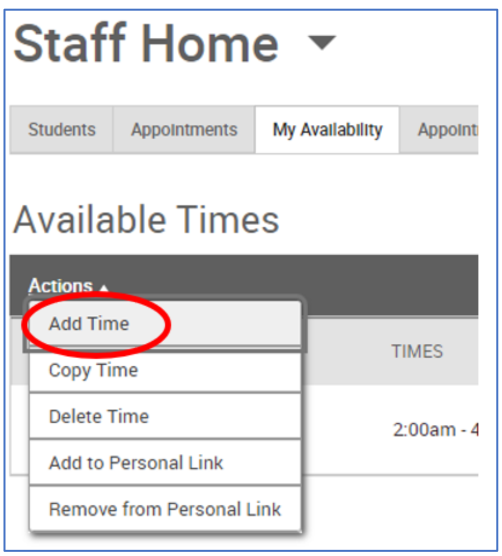
Want to create Appointment Availability that only certain students can see? Use the **Appointments Campaign** feature – see p. 7 for details.

How to set up availability:

1. To set up your availability, you will need to select *My Availability* on the home screen page.



2. Click on the *Actions* dropdown menu in the *Available Times* section and select *Add Time*.



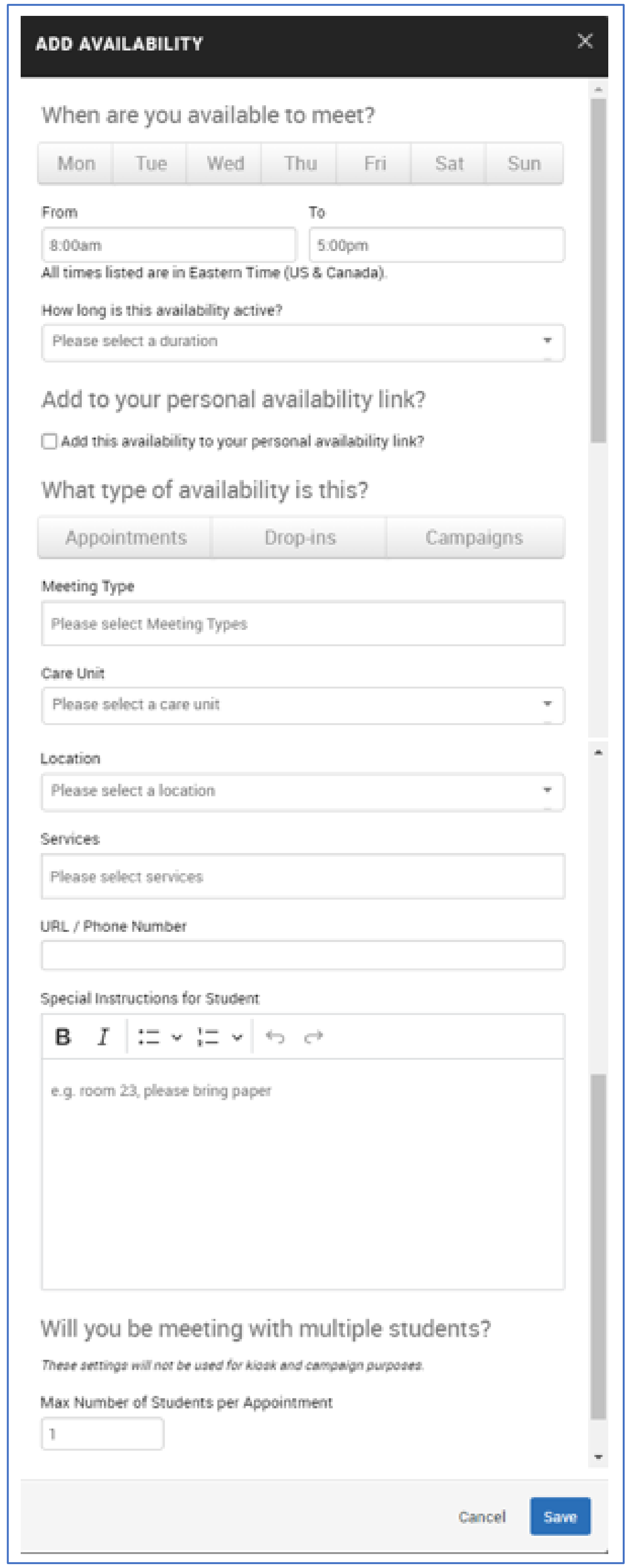
3. The following menu will appear:

   a. You can select multiple days with the same continuous block of time. If you need to set up different times for each day or discontinuous blocks of time in any day, you will need to repeat these steps for each time available on those days.

   b. Select the days of the week and time period.

      i. It is recommended to set broad availability in R4S/Navigate and then block off times for occasional meetings or absences in your Outlook calendar.
      ii. As long as your Outlook calendar is synced to R4S/Navigate, then the system will not allow students to make appointments during times that you are busy on your Outlook calendar. Please refer to the *Synchronizing Outlook and Navigate Calendars* User Guide for information about how to synchronize calendars.

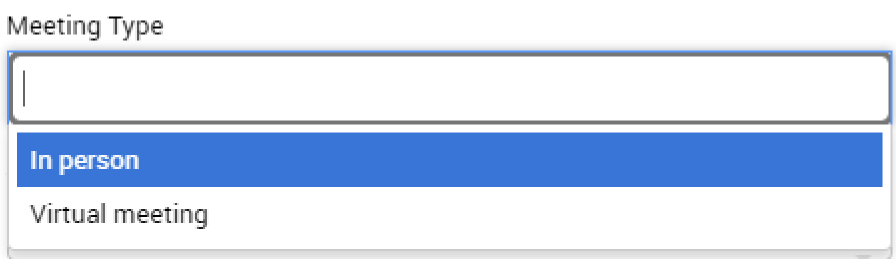
   c. Select how long these times will be effective: all semester, a range of dates, or forever. Forever means until you change it.



d. Choose if you want to add this availability to your **Personal Availability Link (PAL)**. When you include a PAL and students click the link, they are directed to the *Appointment* section in the Navigate Student App. Placing your PAL on your email signature gives students a great shortcut to making appointments.

e. Select **Appointments.** If the availability may also apply for Drop-ins, choose that too. Indicating Campaign availability here will facilitate seeing it when creating an Appointment Campaign, but you can set that later for specific campaigns (see p. 7 for more about Appointment Campaigns).

f. **Choose your preferred Meeting Type: in person or virtual.**



i. **One option is to create separate availabilities for each Meeting Type.** This allows you to customize the 'Special Instructions for Student' according to the Meeting Type – add your building name and room number for in-person appointments, and your Zoom or other URL for virtual appointments.
   1. These times can overlap if you are available for both meeting types at any given time; students then can select which type of appointment they prefer. If you are available to meet either in person or virtually at any given time, set up an availability for each Meeting Type. You can *Copy Time* for existing availability set ups and change the Meeting Type.

ii. **A second option is to choose both Meeting Types for a single availability**, and include information about building name, room number, and video URL in the 'Special Instructions for Student' area. The benefit of this setup is that if a student plans on an in-person appointment but then needs to switch to virtual, they don't have to cancel the appointment and reschedule because they will have the video URL already. Only use this option if you will be available in either modality and have no preference for in-person or virtual.

g. Choose the appropriate Care Unit (*Advising*, *Tutoring*, *Graduate Student Services* or *Student Services*).

h. Select the Location for these appointments. This will be the name of your school, department, or office.

i. Choose the Service(s) for each availability (i.e., coaching, advising, withdrawals, grad check, etc.). You can select multiple Services for each Location and availability slot.

    i. **If you want students to make appointments with you, then you must choose at least one Service.** When writing *Appointment Summaries*, you can choose any service label that is available to accurately represent what a particular meeting was about.

j. You have the option to add one URL (must have https:// included) or one phone number to support a virtual meeting with your students. This will show up in all appointment email/text notifications.

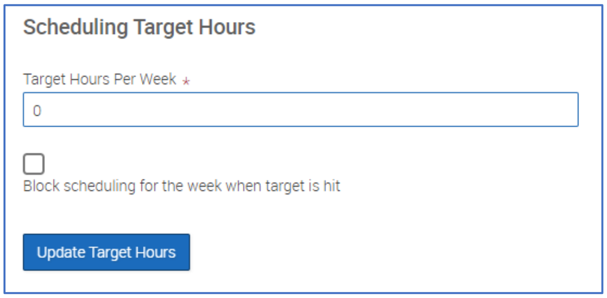
    i. For virtual Meeting Types, include your meeting link URL in the URL/Phone Number slot.

k. You can add any additional notes to this availability in the *Special Instructions for Student* box. They will display as *Additional Details* when a student books an appointment with you. For in person Meeting Types, you can add your building name and room number.

l. Select the maximum number of students that can attend each appointment. The default is 1.

m. Click *Save*.

4. You also have the option to set weekly **Target Hours**. Once these are reached, additional appointments cannot be made until the following week. This may be most pertinent for Tutors who cannot exceed a certain number of hours per week.



Don't have regular appointment times that you want students to see? **Use Appointment Campaigns to send a link to specific students!** This option may work best for staff members who:

- don't have students assigned to them in Navigate, and
- don't want their availability to be visible to all students.

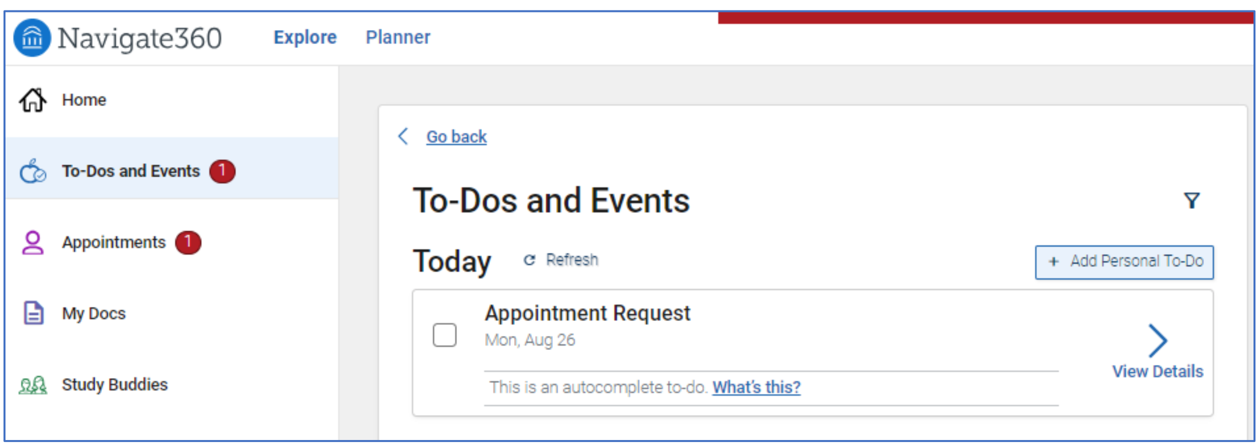
Set up your Campaign Availability by following steps 1-3 in this user guide, being sure to choose 'Campaigns' in step 3e.

Then, set up an Appointment Campaign. See the user guide on the [RU-N Navigate webpage] for step-by-step instructions.

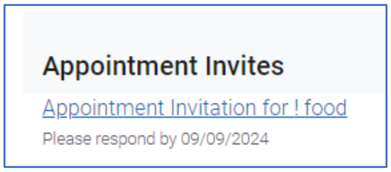
- New! As of August 2024, advisors can create and upload a Content Template within the 'Compose Message' section of the campaign so that messages that get used often can be retrieved and reused quickly and easily. **See the Content Template user guide on the [RU-N Navigate webpage]** for instructions.

What will students see?

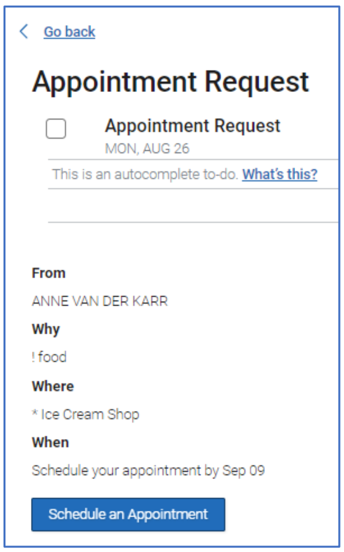
When you start the Appointment Campaign, or whenever you add a student to the campaign, they will see notifications in the Navigate app:



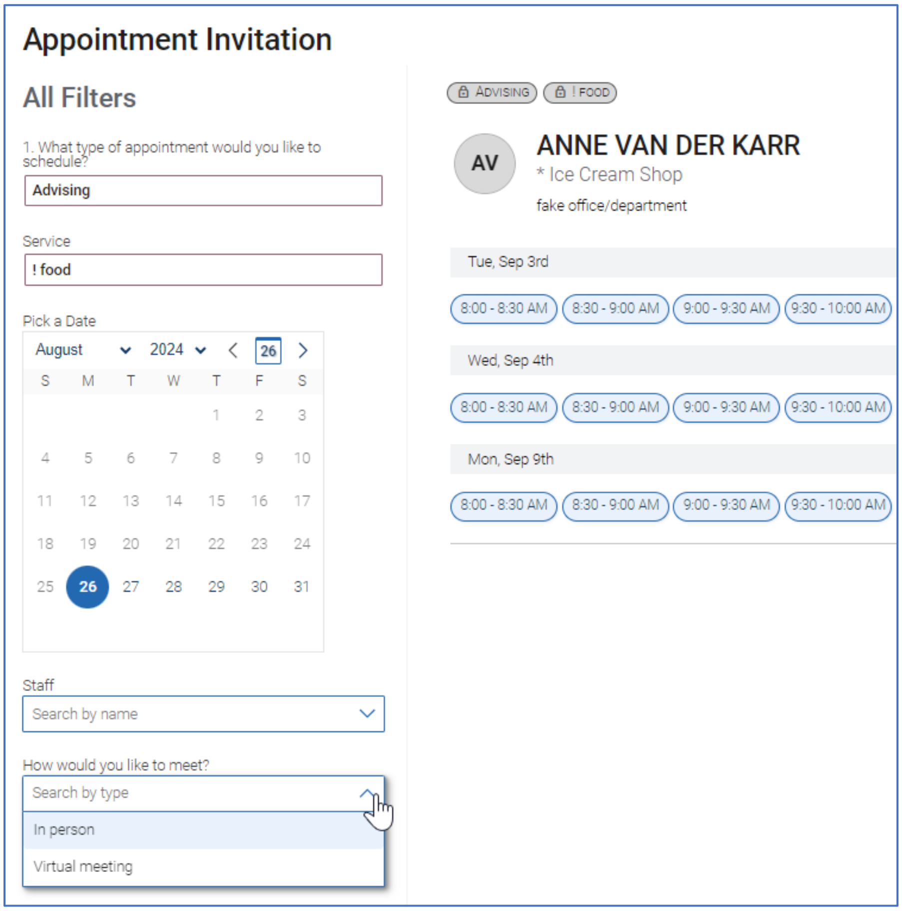
Clicking on Appointments' brings up this invitation:



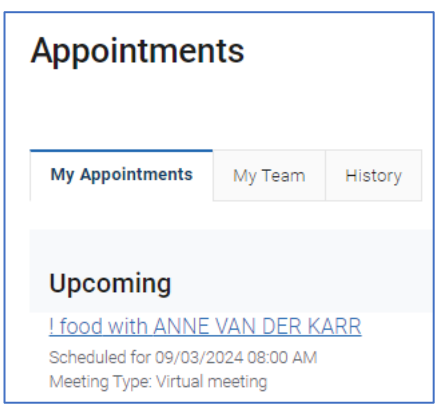
Clicking the 'View Details' or 'Appointment Invitation' takes the student to the 'Schedule an Appointment' button:



Students can choose which appointment type they wish (in-person or virtual) and an available time:



Once they select a meeting type and day/time, students submit the request and receive a confirmation. They also can see their appointments in the app:



Staff members will see the appointment on the Appointments tab in their [Navigate/RU-N4Success]() account: