Strategic Care - Appointment Center

Help Center Manager 20 days ago · Updated

Where: To open Appointment Center, click 'Additional Modes' at the bottom right of the screen and select 'Appointment Center'.

Who: 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.

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Feature Overview

The Appointment Center allows staff at a location (for example, a front desk worker at a Tutoring Center) to manage appointments for that location. That includes managing the scheduling grid, scheduling appointments,
edit appointment details, and cancel 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.

- **Location List**
- **Scheduling Grid**
- **Drop-In Appointment Screen**
- **Scheduled Appointments**

**Location List**

Once you open Appointment Center using the link, you will be taken to a screen to choose a location to schedule an appointment at.

**Scheduling Grid**

After choosing a location, you will be taken to a Scheduling Grid. This grid can be narrowed down by Care Unit, Service, Staff Member and Date/Time. The Staff, Service and Course filters now interact in a more intuitive way in Appointment Center. These filters are now more interdependent. 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.

The Appointment Center has a calendar interface where available time for appointments are shown as white blocks and unavailable times as grey blocks.
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 clicked:
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 dropdown filter, letting you see drop-in appointments and scheduled appointments.
You can also schedule appointments from the screen by clicking on an open slot on the scheduling grid.

### Appointment Schedule for December 15, 2017

<table>
<thead>
<tr>
<th>Time</th>
<th>Miami Advisor</th>
<th>Darla Aleksandрова</th>
<th>Krista Busch</th>
<th>Ashlee Demastus</th>
<th>Tyler Dillman</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 AM</td>
<td></td>
<td></td>
<td></td>
<td>Academic Mentoring</td>
<td></td>
</tr>
<tr>
<td>10 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once you select a slot, a pop-up window will open letting you set the details of the appointment.

### CREATE AN APPOINTMENT

- **Service**: Please select a service
- **Organizer**: Sara Kuzmik
- **Student**: Enter Student Name
- **When**: 07/17/2018 9:00am 30 min
- **Comments**: Enter comments
- **Options**: Student has checked in for appointment, Send E-mail Reminder, Send Text Reminder

You can also click on an existing appointment and see the details of the appointment.
Staff workers often need to view today's appointments. In the 'Drop-In Appointments' screen, users can view all of the drop-ins for the current day and take action from the list. You can find this screen by clicking the dropdown above the filters at the top part of the screen.
Actions that can be taken from any queue include:

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

**Scheduled Appointments Screen**

With the ‘Scheduled Appointment List’ tab in Appointment Center, users can view all of the appointments for the current day and take action from the list.
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 users the ability to cancel all appointments for a given day in a particular location.

Users also have the ability to select any date and see appointments on the selected day.

**Frequently Asked Questions**

*What is that link in Appointment Details?*

The link in Appointment Details is for virtual or phone appointments. See the [19.2.6.1 release notes](#) for details.
How far into the future do appointments appear in the Appointment Center when you search for a student?

Scheduled appointments for the next six days will display for the student.

Does the 'In Progress Appointments' list that displays in the 'Scheduled Appointments' tab in the Appointment Center display only scheduled appointments, or does it also include drop-in appointments?

It only displays scheduled appointments. To view information about drop-in appointments, you must navigate to the Drop-In Appointments tab.

If appointments are being scheduled by front desk workers, will those individuals be listed as the 'Organizer' of the appointment?

No, the staff member who is leading the appointment will be listed as the 'Organizer.' Think of 'Organizer' more as the appointment facilitator, rather than the individual who originally scheduled the appointment.

Is there any way to schedule an appointment with a student during a time they have class, if that class is cancelled for that specific day?

The only ways a student can override a course conflict is if your institution has enabled the global configuration to allow students to schedule over class times, or if those running appointment campaigns have allowed students to schedule over class times for a given campaign. If neither of those settings are in place, then students will not be permitted to schedule an appointment for themselves during a time in which they have classes scheduled. Staff using the Navigate platform are able to override course conflicts and schedule on students' behalf. Within the Appointment Center, for example, any staff member can click into a time with the staff member on the scheduling grid to schedule the appointment, even if the student has a course conflict.

Is there a way to change the default hours that show in the scheduling grid of Appointment Center?

No, it is not possible to change the default hours from 8am to 5pm. However, an individual user can adjust the scheduling grid hours by selecting drop downs from the menu above, as seen below. These hour changes will default back to 8am to 5pm whenever the user exits and re-launches the Appointment Center.

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/04/2018</td>
<td>8:00AM</td>
<td>5:00PM</td>
</tr>
</tbody>
</table>

Is it possible to change the orientation of the scheduling grid?

Yes! You can shift the orientation of the staff names and times in the scheduling grid between vertical or horizontal. The orientation will switch back to the default (vertical) whenever you exit and re-launch the Appointment Center.
Is there a way to limit the Locations that display when launching the Appointment Center?

Yes, the user role permissions dictate which Locations will display as options when launching the Appointment Center.

Is there a reason why some appointments in the appointment center have a red bar on the left hand side, while others don't or have different colors?

Your Application Administrator can manage the colors being used to visually categorize the different types of appointments in the Appointment Center. These configurations are located in the Administration tab, under the 'Custom Appointment Colors' option.

How can we check-in prospective students into the Appointment Center, since those students cannot be found in the platform?

Please reach out to your Strategic Leader to discuss options should you want to check-in prospective students. While Navigate does support the creation of prospective students, they must be added manually to Navigate and cannot be imported via upload.

Is it possible for the Appointment Center to be set as the platform homepage for our front desk workers?

No, it is not possible for the Appointment Center to be a user's homepage in the platform. However, there are options within the user role management settings to limit the features available on a front desk worker's home page.

When I look at the scheduling grid, I see little white space to the side of advisors’ Busy blocks and when the scheduler pauses over them in Appointment Center, it shows that the advisor is available to make an appointment even though they are busy. Why is that?

That is because that user is “available” at that time. Gray is “no availability”, white is “has availability” - neither change with appointments or busy blocks overlaying. Front desk staff should avoid scheduling where there are overlaying blocks, however.

Why don't I see a staff member in Appointment Center that has availability for today?

Staff members who only have Campaign Availability for a day will not show up in the Appointment Center. Only Staff who have either Appointment or Drop-in Availabilities for today will show in the Appointment Center.

Can I use the Create a Student link to create prospective students in Appointment Center?

Yes, if your institution has enabled Prospective Student functionality, you can create a student this way.

Related Articles

- Strategic Care - Kiosks
- Appointments Administration
- Managing a Location
- Location Administration
Help Center Manager

Updated article with a FAQ to cover the new remote link functionality as well as Appointment Details screenshot