

Search

Strategic Care - Appointment Center

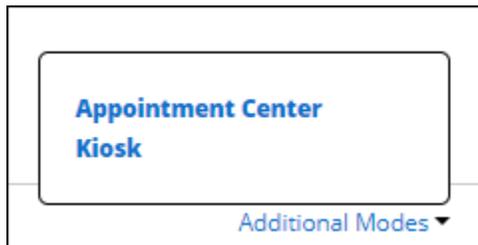


Help Center Manager

20 days ago · Updated

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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.

Choose Appointment Center Location

Available Locations

Newly Added TEST Location

Academic Advising Center - Lecture Hall	Academic Advising Center
Academic Success Coaching	Academic Success Center CL
ASC In-Person Tutoring	Admissions (ECSU)
AStudy Hall	ASC Virtual Tutoring
Athletics Test Location	Athletics Complex
Business Advising Center	Biology Classroom
Campus Recreation Center	CAMD
	Career Services

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.

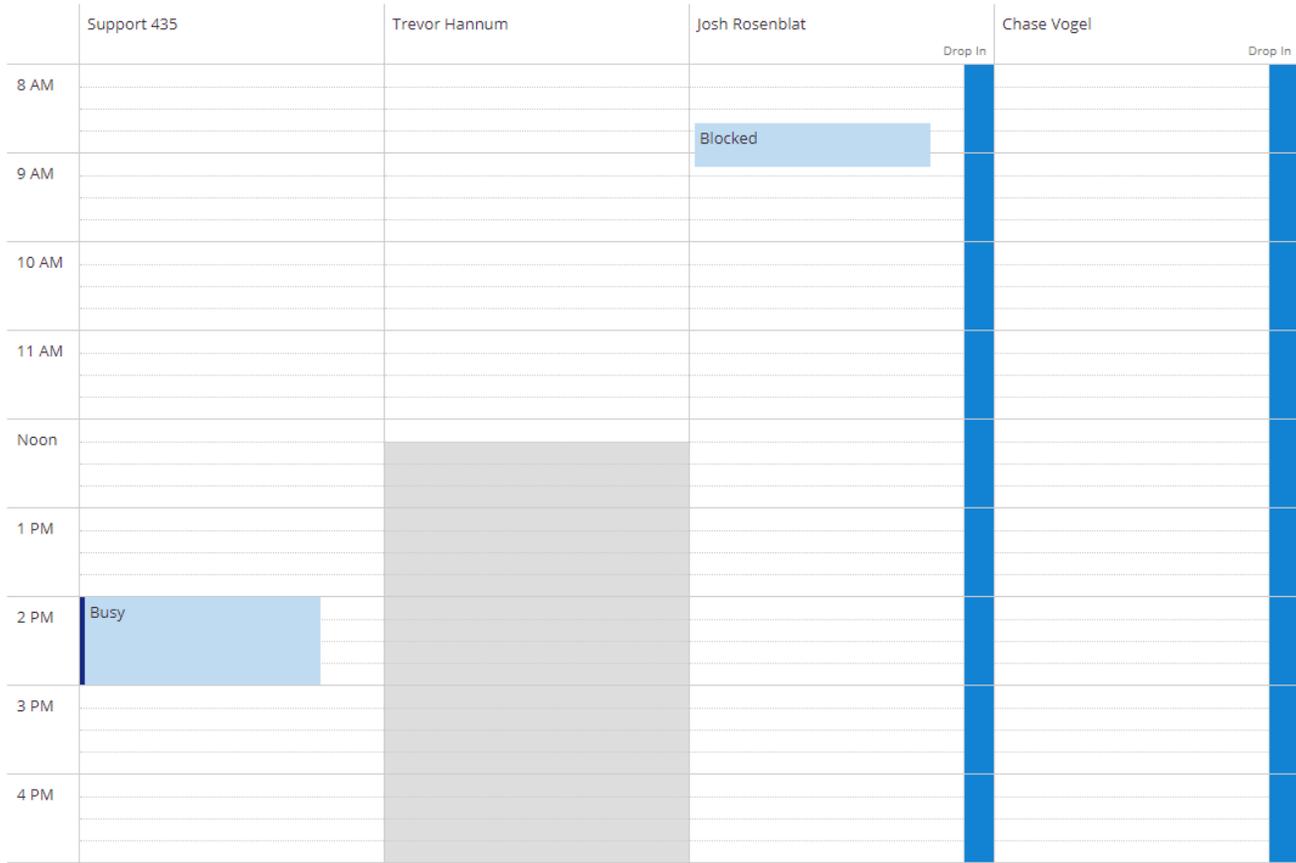
Scheduling Grid ▾

Date: Start Time: End Time: [Refreshed Today 09:34 AM](#)

Care Unit: Service: Staff:

The Appointment Center has a calendar interface where available time for appointments are shown as white blocks and unavailable times as grey blocks.

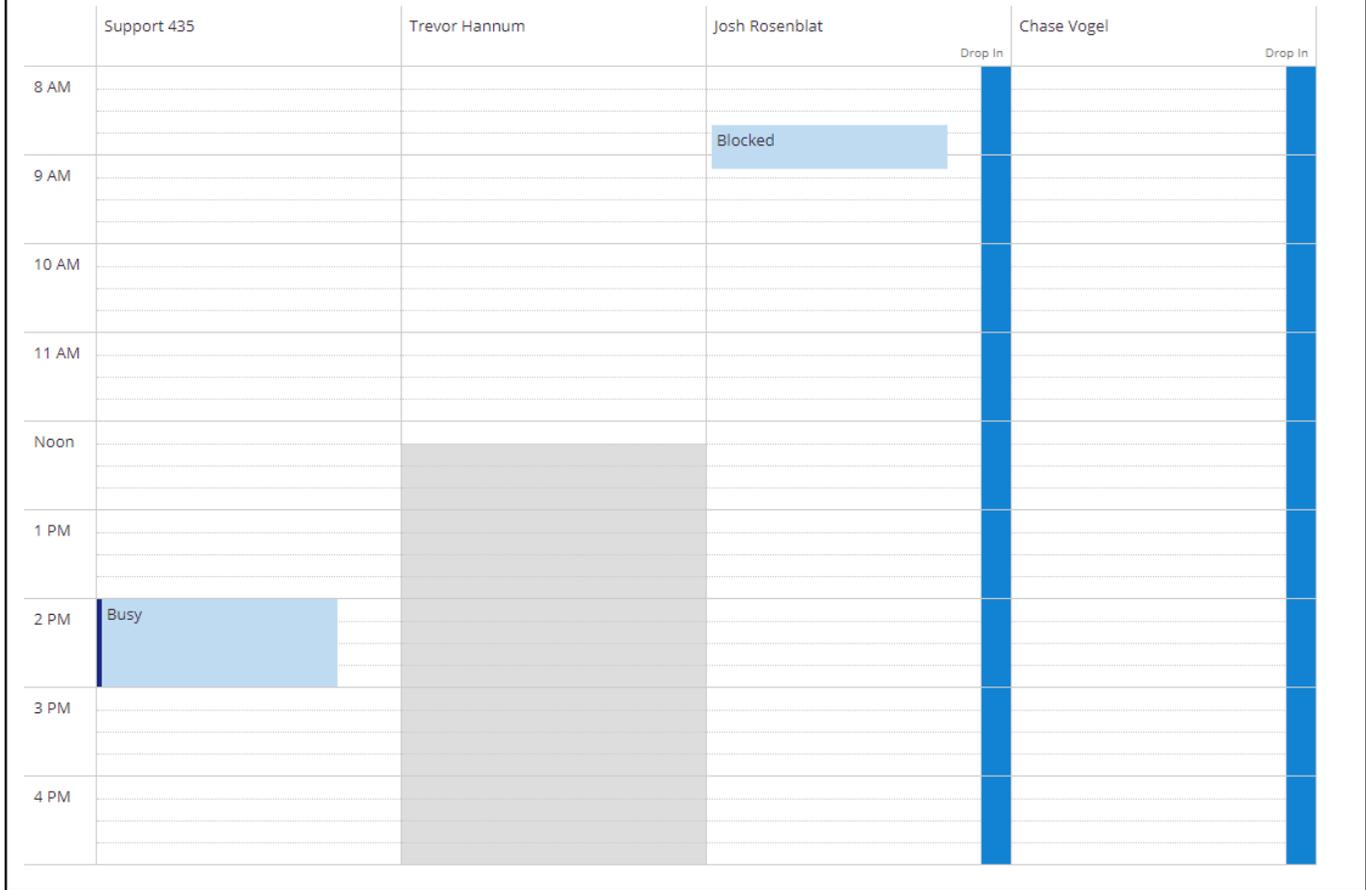
Appointment Schedule For Thursday, January 17, 2019



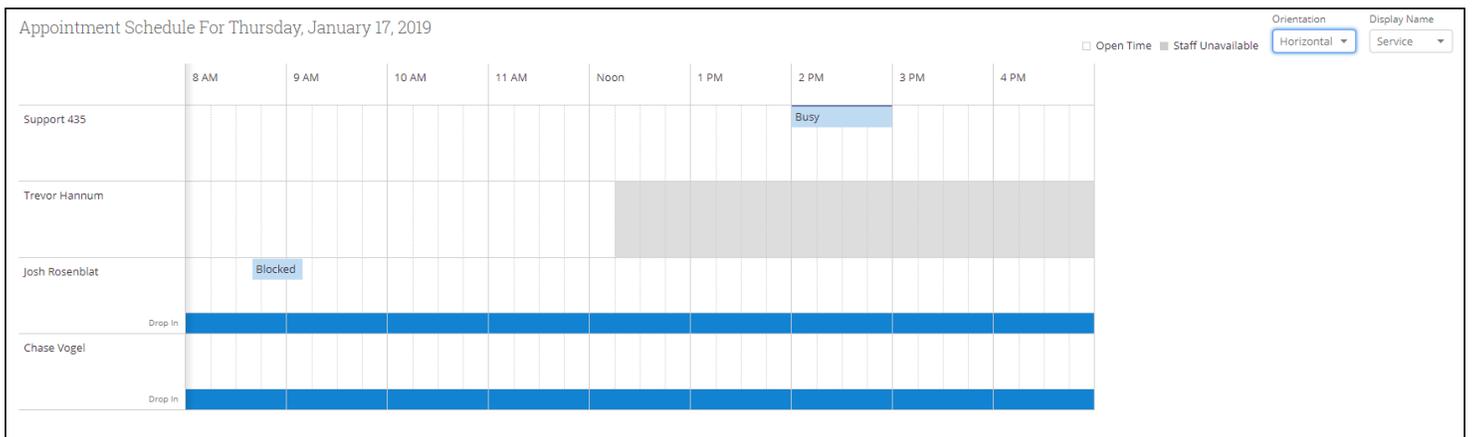
If you click the Vertical Orientation button on the top right of the screen, you will be able to change the orientation of the staff and times if you would prefer one to be the column header over the other.

When vertical orientation is clicked:

Appointment Schedule For Thursday, January 17, 2019



When horizontal 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

	Miami Advisor	Daria Aleksandrova	Krista Busch	Ashlee Demastus	Tyler Dillman
8 AM					
9 AM			Academic Mentoring		
10 AM					
11 AM					

Staff Available for Appointment
Ashlee Demastus(Advisor)
2017-12-15
[Click to create an appointment.](#)

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

CREATE AN APPOINTMENT

Service: [Show All Services for this location](#)

Organizer: Sara Kuzmik

Student: [Create a Student](#)

When:

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.

✕
MANAGE APPOINTMENT

Beach Pledge (CA Promise)

All Attendees

Emilie Abbott (Organizer)

Abdiel Abbott ▾

Appointment Details

When	Fri Mar 13, 2020 09:00 am - 09:30 am	Care Unit	Advising
Where	Beach Academic Resource Center	Comments	None
Service	Beach Pledge (CA Promise)	Type	One Time Appointment
Course	N/A		

<https://eab.zoom.us/j/3060433760>

Cancel My Attendance
Close

Drop-In Appointments Screen

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 drop-down above the filters at the top part of the screen.



Academic Services - Lee Hall

Enter Student Name

Drop-In Appointments ▾

Care Unit

General Advising ▾

Service

All Services ▾

Staff

All Staff

Add to Staff Queue

Students In First Available's Queue

Actions ▾

SELECT

STUDENT NAME

STUDENT ID

SERVICE

COURSE

COMMENT

CHECKED IN (WAIT TIME)

There are no students waiting on this person.

Students Checked In With Staff

Actions ▾

SELECT

STUDENT NAME

STUDENT ID

STAFF MEMBER

SERVICE

COURSE

COMMENT

CHECKED IN (WAIT TIME)

There are no students waiting on this person.

Students Checked In For Track Time

Actions ▾

SELECT

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)

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.

Scheduled Appointments ▾

Care Unit: Service: Staff:

Date:

Upcoming Appointments

Actions ▾								
<input type="checkbox"/>	BEGINNING IN	DATE & TIME	DURATION	SERVICE	COURSE	ATTENDEE NAME: STUDENT ID	ORGANIZER	CHECKED IN
<input type="checkbox"/>	about 1 hour ago	07/17/2018 10:00a	30 minutes	General Advising	N/A	Jennifer Axelrad: 256767396	Sara Kuzmik	No

In Progress Appointments

Actions ▾								
<input type="checkbox"/>	STARTED AT	DATE & TIME	DURATION	SERVICE	COURSE	ATTENDEE NAME: STUDENT ID	ORGANIZER	
No appointments to show for the selected filters								

Recent Appointments

Actions ▾								
<input type="checkbox"/>	RECORDED TIME	DATE & TIME	DURATION	SERVICE	COURSE	ATTENDEE NAME: STUDENT ID	ORGANIZER	
No appointments to show for the selected filters								

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.

Date	Start Time	End Time	 Please Refresh
12/04/2018 	8:00AM ▼	5:00PM ▼	

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.

Orientation
Vertical ▼

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](#)

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No

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

