UO Navigate Scheduling Updates: Summer 2021

Student Scheduling Updates! Scheduled release: July 30, 2021

Please read below for important updates to Navigate. Because each advising unit has unique workflows, it is recommended that the unit's Navigate lead schedule a time with Erin McKercher, Advising Technology Manager, to explore the best combination of features and settings to best meet the unit's needs.

The Navigate scheduling interface will be updated to provide students with a more streamlined scheduling workflow - **students will able to schedule appointments easier than ever**! The new format has been modeled after Google Flights, with fewer screens and drop-down options for students to have to navigate.

Students will be able select their preferred meeting type for the appointment: **In-Person**, **Zoom/Teams (Virtual)**, **Phone**. Appointment meeting type will depend on the individual advisor's Navigate availability and meeting types available.

Departments will be able to have **descriptive text** (such as office hours, advising info, etc.) that displays to students if they click on the department name when scheduling.

Advisors will be able to share a **scheduling link** (Personal Availability Link) with students so they are taken directly to the scheduling page that shows the staff member's appointment availability, with the department info already filled in.

Departments will have the option to enable **virtual check-in**, where a student virtually checks in using Navigate for their appointment or drop-in.

Contents:

UNIVERSITY OF OREGON | Division of Undergraduate Education and Student Success
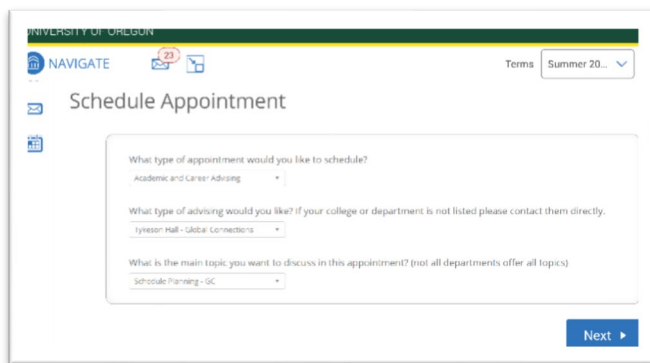
Student Scheduling Interface Updates

The Navigate scheduling interface will be updated on July 30 to provide students with a more streamlined scheduling workflow - students will able to schedule appointments easier than ever! The new format has been modeled after Google Flights, with fewer screens and drop-down options for students to have to navigate. The format is being updated in both the Navigate app and website.
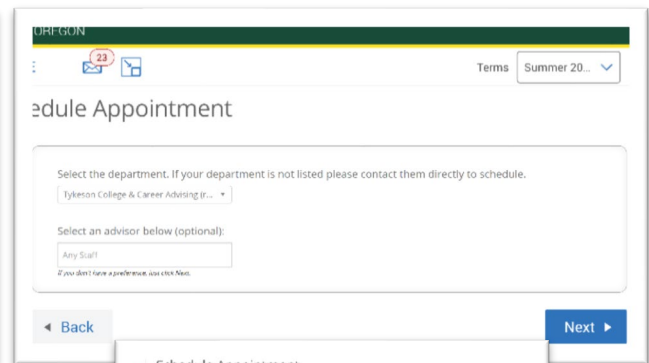
The new scheduler view will be enabled in the UO Navigate site on Friday morning, July 30.

Currently, students walk through several drop-down options and multiple pages/screens before they get to the appointment confirmation page:
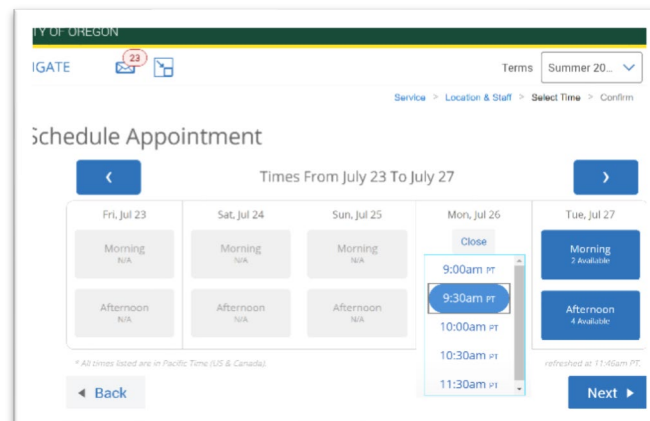
First page:
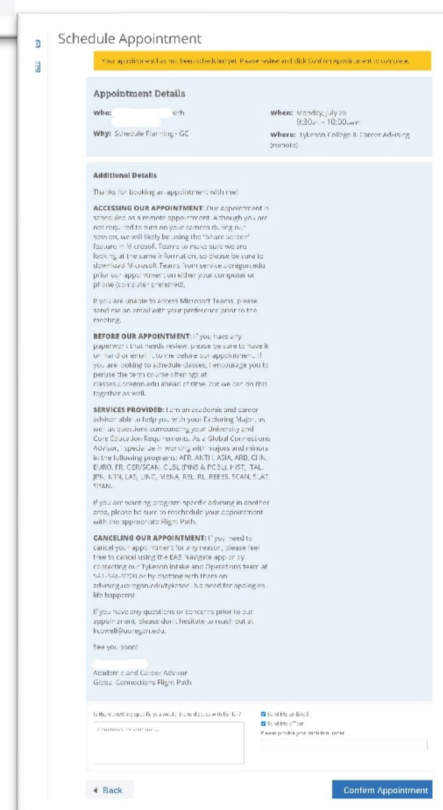
Second page:

Third page:

Confirmation page:

UO Navigate Scheduling Updates: Summer 2021

In the **new student scheduler view**, the department and service have been combined into one drop-down menu called "Service" so students get through scheduling more efficiently:

Same page, Service drop-down:

Students can easily select the date, time, and meeting type:

Confirmation page:

Advisor Scheduling Links – NEW! (optional)

For advisors and other staff who offer appointments through Navigate, a very exciting update with this release is the addition of the Personal Availability Link (PAL). You can also think of this as your **Personal Appointment Link**. Upon clicking the link, students are taken to a scheduling workflow that has your chosen availabilities pre-filled in the Navigate scheduling page.

In each of your availability records (**My Availability** tab) in Navigate, you will see a checkbox to add that availability to your personal availability link.

This link can be located at the bottom of your availability page in Navigate. You can copy and paste in your email signature, an email to a student, on a website, etc. Students can click on the link to be brought directly to your appointment availability. Each advisor's link is unique.

NOTE: Personal Availability Links do NOT include drop-in or campaign availability, even if you check the box. This means when students click on your PAL they will only see your appointment availability.

If you're new to Navigate, remember to sync your Outlook calendar in Navigate before setting up your appointment availability.

Meeting Type Included in Appointment Scheduling

Meeting Types previously existed as an optional field that staff can complete in the appointment summary window. This allowed staff to indicate how they met with students after the appointment (for example, Phone/Teams/Zoom, In-Person).

In the upcoming release, Meeting Types will be updated to allow staff to indicate their availability for various meeting types and the student scheduling workflow will be updated to require students to select their preferred meeting type for that appointment.

The scheduling meeting types will be:

– In-Person

– Zoom/Teams (Virtual)

– Phone

Added an appointment filter within student scheduler that allows students to choose Meeting Types on the Available Times page

For appointment summaries, the existing meeting types will remain (Email Advising, Workshop, etc.), except that Phone/Teams/Zoom will now be two separate meeting types: Phone and Zoom/Teams (Virtual).

UO Navigate Scheduling Updates: Summer 2021

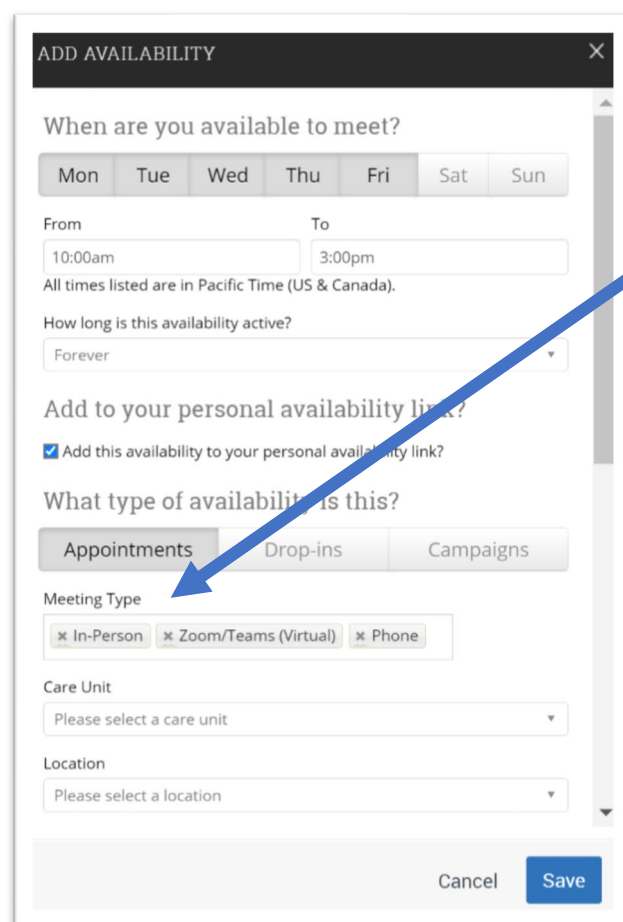## What do I need to do for the new Meeting Types?

If you offer appointments in Navigate, you need to edit each of your availability records to <u>add the appropriate meeting types</u>. Students will NOT see any availability that does not have at least one meeting type.

By default, on July 30, your current availability records will be edited to include **Phone** and **Zoom/Teams (Virtual)** meeting types.

You may wish to add **In-Person**, or create new records with separate Special Instructions for in-person appointments. Some advisors are not yet offering in-person appointments, but plan to at a later date. If this is your situation, just be sure to set up availability records with date ranges, and make sure the In-Person meeting type is set up for future dates.

Steps to add Meeting Types to your Availability:

1. [Navigate home](#) > My Availability > Edit (for your first availability record)
2. In Meeting Type, add In-Person to the same availability records, and put all of the instructions in one Special Instructions box. Or, you can add separate availability for In-Person that has separate instructions.

   You can have multiple meeting types in one availability record. Be sure to include the appropriate instructions for students who choose each meeting type. If you prefer, you can have separate availability records for In-Person versus Phone + Virtual (Teams/Zoom).

3. Remember, check the box to "Add this availability to your personal availability link" if you want this availability included in the scheduling link.

Students can View Department Info when Scheduling (optional)

Students can now view text that a department would like to display when the student is scheduling an appointment or viewing drop-in times in Navigate.

Please email navigate@uoregon.edu if you have text that you would like added for your department.

NOTE – Links (URLs) are not clickable in this text section. For example, if you want your website in the text, you can include the link (for example, http://advising.uoregon.edu) but the student would need to copy and paste the link in a web browser.

Virtual Check-ins – NEW! (optional)

This new, optional feature can be enabled by location (department) in Navigate. If enabled, when students have a scheduled appointment in Navigate, they will see a check-in button in the Navigate app > appointments, or the Navigate website > Upcoming Appointments. When they check in, they will appear in the advisor's appointment queue in Navigate.

UO Navigate Scheduling Updates: Summer 2021

The virtual check-in setting currently applies to both appointments and drop-ins. This means that if your department uses the drop-in queue, and you'd like to enable virtual check-ins for student appointments, it will also enable virtual drop-ins, which will allow students to virtually drop-in and add themselves to the drop-in queue via Navigate.

When students check-in virtually through Navigate, they see a custom message from that department. However, even with the custom message, the software automatically adds the sentence, "Look out for an email, text, or phone call for next steps!" We look forward to a future release that will remove this sentence and only use the custom message.
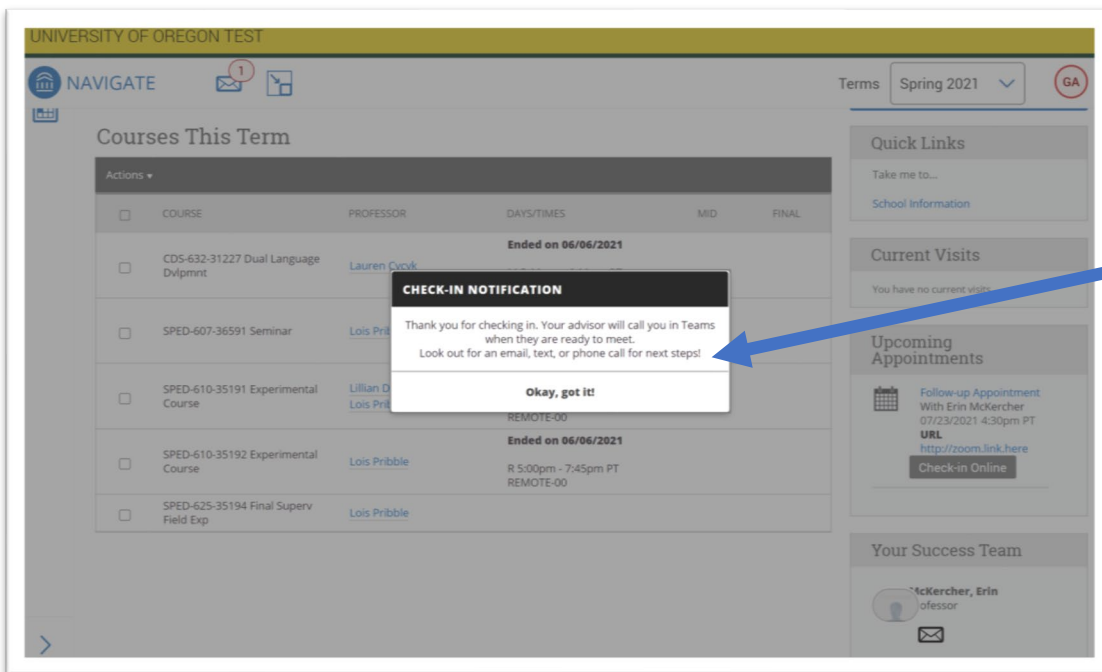
Navigate Support

Please reach out by email to schedule a time to connect and we can review these features and talk about your fall resumption plans!

Erin McKercher
Advising Technology Manager

navigate@uoregon.edu