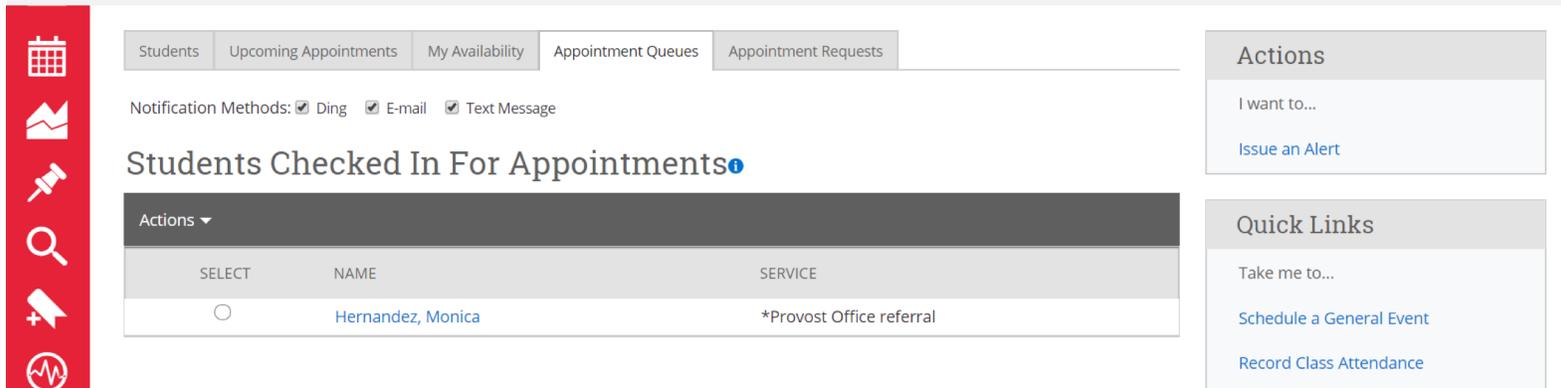




UH Quick Start Guide: Appointment Management

Appointment Tabs on Advisor Home Page



Students Upcoming Appointments My Availability Appointment Queues Appointment Requests

Notification Methods: Ding E-mail Text Message

Students Checked In For Appointments

Actions ▾

SELECT	NAME	SERVICE
<input type="radio"/>	Hernandez, Monica	*Provost Office referral

Actions

I want to...

[Issue an Alert](#)

Quick Links

Take me to...

[Schedule a General Event](#)

[Record Class Attendance](#)

Students with appointments that are scheduled are listed under the “**Upcoming Appointments**” tab.

The **Appointment Queues** tab displays students checked in for both appointments and drop-ins so that you know exactly who is waiting and what type of appointment they have

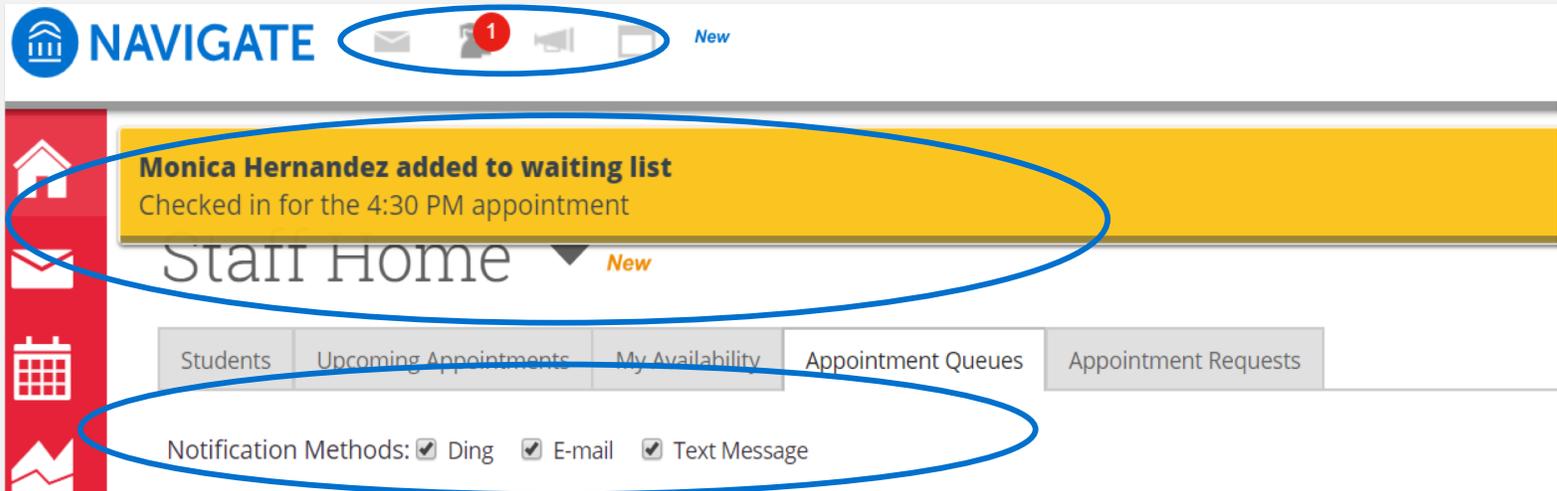
Appointment lengths have been set globally to 30 minutes, although some locations may differ. If a student attempts to check in or create an appointment with an advisor when they have less than 30 minutes of availability for that day, the student will not be able to find time for that day with that advisor. The office can still choose to have the student see an advisor and be checked in when the advisor creates an Appointment Report.

If a student is early or late for an existing appointment, Navigate will recognize that the student has arrived for a previously scheduled appointment.

A Note About Advisor Availability

Please note that, just as with the regular appointment scheduling, the appointment center and kiosk modules rely on the availability advisors have set for drop-ins and appointments. Please ensure that you have set up accurate and comprehensive available times using the “My Availability” tab.

Appointment Notifications on Advisor Home Page



The screenshot displays the EAB Navigator interface. At the top left, the 'NAVIGATE' logo is visible. To its right, a notification icon (envelope) is circled in blue, with a red circle containing the number '1' next to it. Below the navigation bar, a yellow banner contains the text: 'Monica Hernandez added to waiting list' and 'Checked in for the 4:30 PM appointment'. Below the banner, the text 'Staff Home' is displayed with a dropdown arrow and the word 'New' in orange. A horizontal menu contains several tabs: 'Students', 'Upcoming Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. Below the menu, the 'Notification Methods' section is circled in blue, showing three checked options: 'Ding', 'E-mail', and 'Text Message'. A red sidebar on the left contains icons for home, mail, calendar, and a line graph.

You will see a red notification and yellow banner appear at the top of the screen to let you know when a student has been:

- Added to a waitlist for a drop-in appointment
- Checked into an existing appointment
- Checked out of a completed appointment

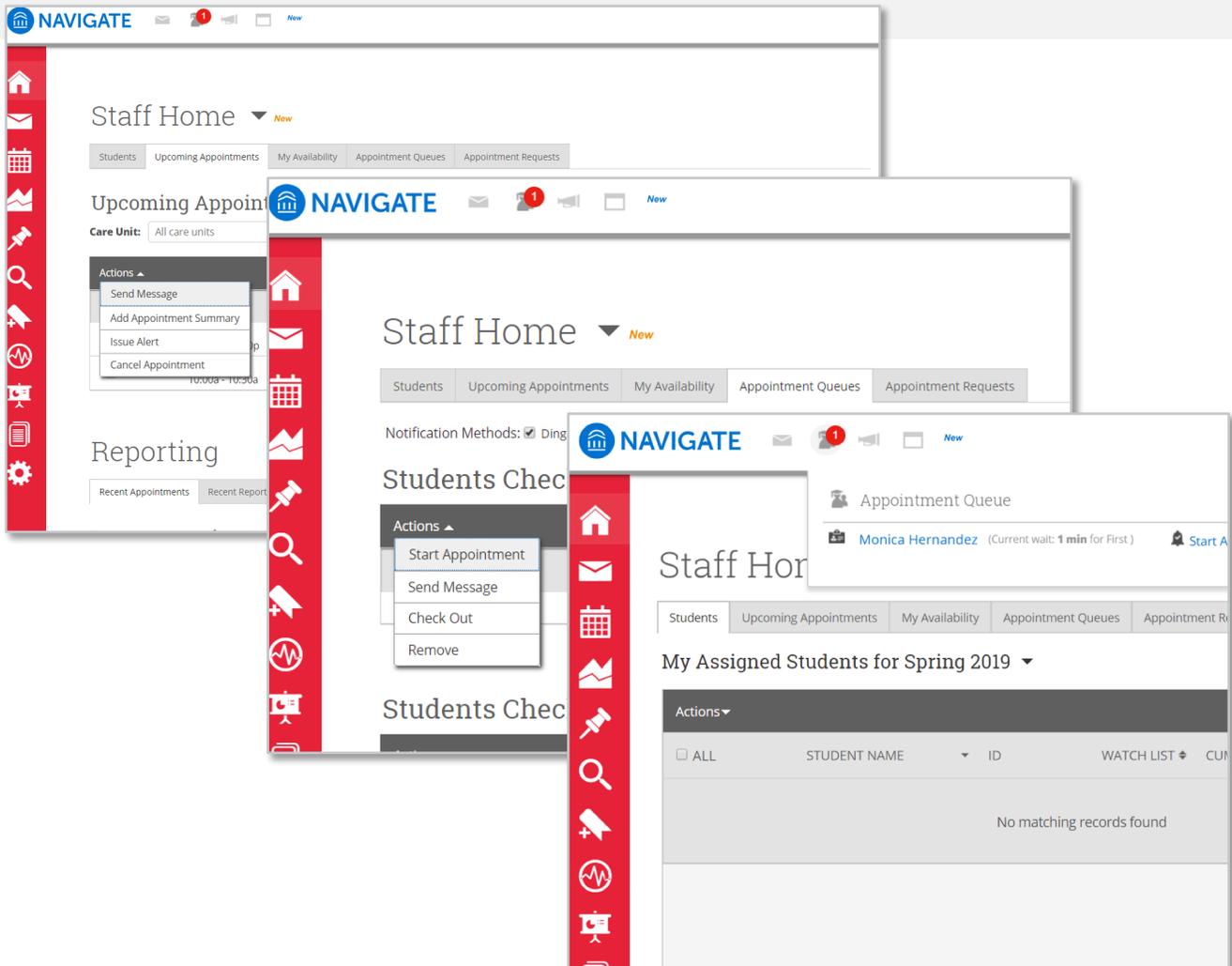
You can choose to be notified by hearing an audio “ding” and/or receiving text/email messages when students are waiting for an appointment.

“Starting” an Appointment with Appointment Reports

Three ways to start an Appointment

1. Use the “Actions” tab under **Upcoming Appointments** to “Add Appointment Summary.” (Best if students have not been checked in at front desk); or
2. Use the “Actions” tab under **Appointment Queue** to “Start Appointment.”
3. Click the red notification at the top of the screen.

Note: The queue and notification options will populate the Appointment Report/Summary with the times the student was checked in and out.



The image displays three overlapping screenshots of the NAVIGATE staff home interface, illustrating different ways to start an appointment:

- Top Screenshot:** Shows the "Upcoming Appointments" tab. The "Actions" menu is open, highlighting "Add Appointment Summary".
- Middle Screenshot:** Shows the "Appointment Queue" tab. The "Actions" menu is open, highlighting "Start Appointment".
- Bottom Screenshot:** Shows the "Appointment Queue" tab with a notification for "Monica Hernandez" (Current wait: 1 min for First). The "Start Appointment" button is visible next to the notification.