EAB Navigate Guidance: *Making "hidden" appointments*

*Access the Navigate icon in the **AccessUH** portal.*

Normally students make appointments through the student scheduler in the mobile app or the desktop platform. In some cases, offices may want to use the appointment functionality – so that staff Outlook calendars accurately display appointments, and so that Appointment Summaries can be created – but only offer these appointments on a staff-arranged basis. In these cases, appointment services will be available at a location for staff to create the appointment but not visible to students to make their own appointments in the scheduler.

This document provides directions for setting availability for and scheduling these type of "hidden" appointments.

Setting availability

In order for appointments to be made with a staff member, that staff member must have at least some availability for the particular service. However, if this is intended to be a hidden appointment, we don't want the availability to be visible to students.

The suggested work-around is to have staff create availability for the particular service, but use the Date Range option to set it in the past. Even just one-day availability last week means that when somone goes in to manually create the appointment, that staff name will appear as an option to choose. Because it is in the past, this availability will not show in the student scheduler.

Scheduling the appointment

To manually schedule an appointment.

- From the student's profile page, select **Schedule an Appointment**.
- On the left side, select the appropriate Care Unit, Location, Service and Date.
- Under **Select an Organizer**, select an organizer by clicking in the circle in front of their name.
- Scroll down to **Choose a Time to Meet**.
    - "Busy" means this is a block coming over from the Outlook calendar sync.
    - "Conflict" indicates another student appointment in Navigate.
    - If this staff member actually has normal availability for this service, those slots will show in green.
- Click **Availabilities**.
    - Select "Unlock Non-Available Times" to allow scheduling times for which there is no availability set – you will see checkboxes appear in the white areas.
    - Select "Unlock Times with Conflicts" to override all calendar blocks - you will see checkboxes appear in all time slots. Be sure to confirm this override with the organizer.
- Select the checkbox for the desired time.
- Click **Save Appointment**.

Find additional resources here: http://www.uh.edu/ussc/navigate/
Need help? Email navigate@uh.edu