NAVIGATE

Search

Calendar

Help Center Manager

1 month ago · Updated

Follow

Where: The Calendar tab is located on the left-hand navigation bar, accessible by clicking the calendar icon.

Who: The Calendar tab provides **staff** and **faculty** with a view of all their scheduled appointments, as well as the ability to sync across multiple calendars.

Conditions: Access to the Calendar tab is available to all users of the platform. The level of detail and actions available within the tab are permission-based.

Table of Contents

- Feature Overview

    - Calendar View
    - List of Calendar Items
    - Settings and Sync

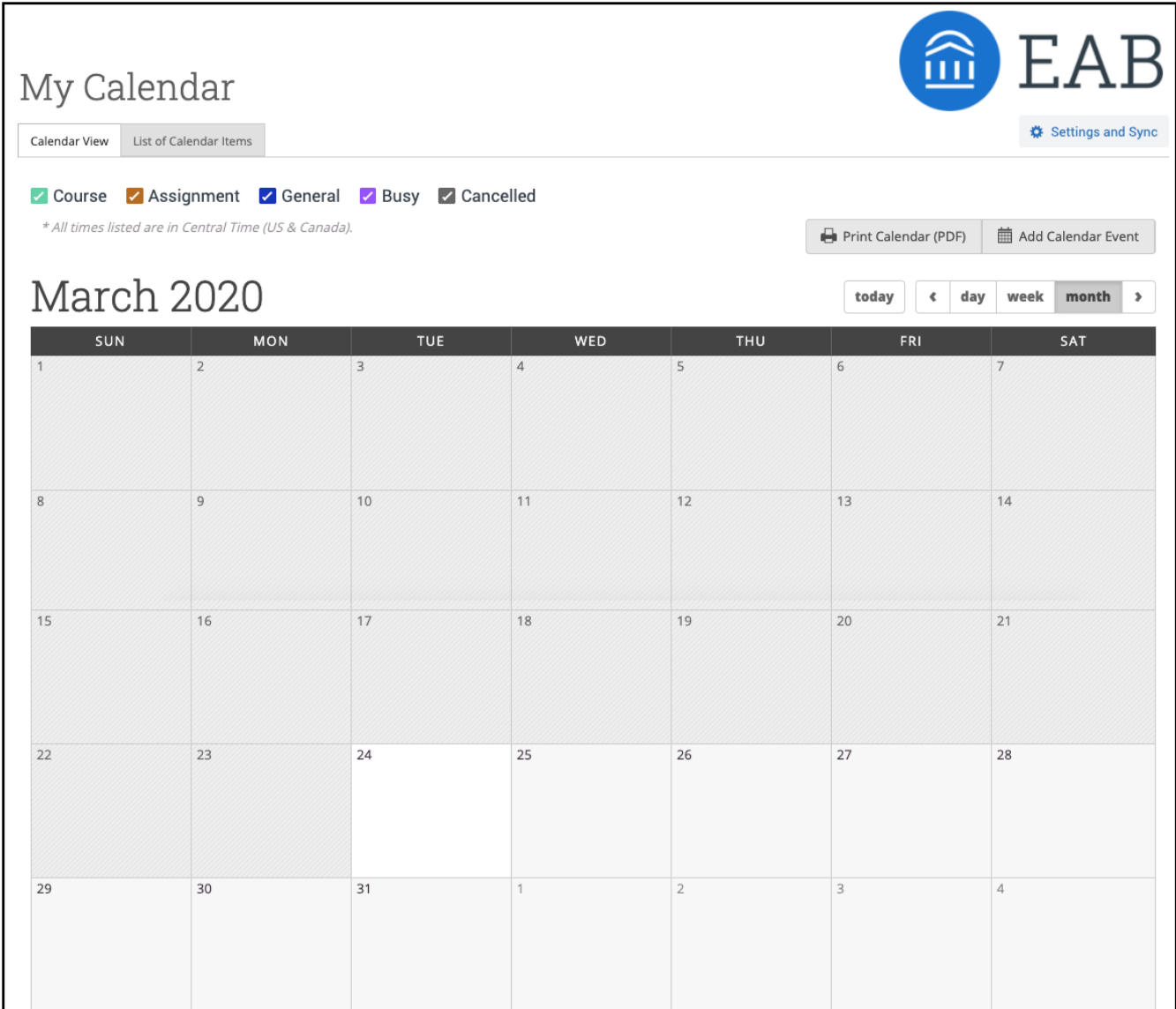- Related Articles

Feature Overview

Your calendar in Navigate is a quick way to view your appointments or events at a glance. The Calendar tab provides a view of your calendar, including all appointments within Navigate, all

courses in which you currently are enrolled or teaching, all general events, and any busy times (only if you sync a personal or professional calendar to the platform – learn how to sync calendars by reading this article). Please note that you will only be able to view appointments for which you are attending.

To access the Calendar tab, click the calendar icon in the left-hand navigation bar. You have access to three views – **Calendar View, List of Calendar Items,** and **Settings and Sync.** Find more information about each of those views below.

Calendar View

You may choose to view the calendar by any day, week, or month time frame by selecting the options on the top right.


Notice the legend just above the calendar grid. Selecting one of the checkboxes enables associated appointments to show on the calendar grid and deselecting the checkbox hides them. All options are automatically selected by default.

Right beneath the legend is the time zone notification. It tells you which time zone your appointments are set in.


You can print or save your calendar grid to a PDF by selecting "Print Calendar (PDF)" in the upper right, next to the printer icon.
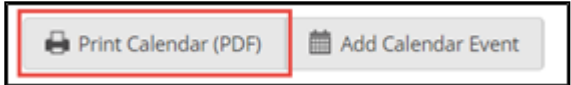
You can add a scheduled appointment or event to your calendar from this screen, by selecting "Add Calendar Event" in the upper right, next to the calendar icon. Clicking that button will bring up your appointment scheduling page. For more information around scheduling an appointment, check out this article.
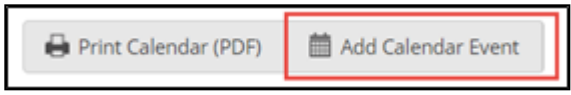
Hover your cursor over any blocked time on the calendar to view a snapshot of details for that block.
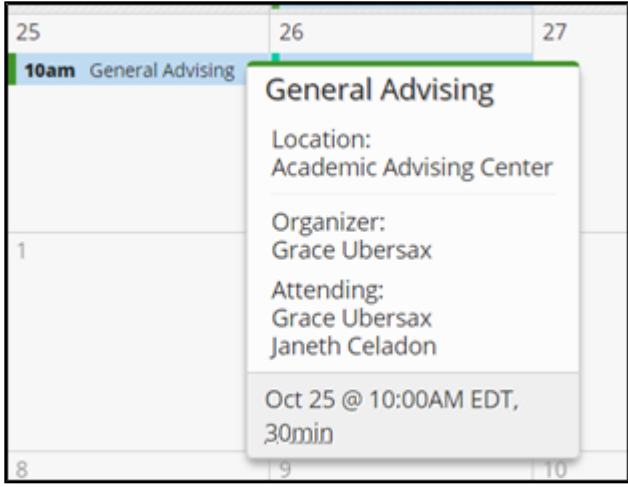
You can click on an appointment in your calendar and see more details. The information provided includes: appointment attendees, appointment organizer, date and time, location, service, course (if applicable), URL/phone number (if applicable), care unit, comments, and type of appointment.

From this screen, you can also take action on the appointments. Depending on your user permissions, you will be able to take action on either all appointments or only the appointments you personally scheduled with the student. Actions available include:

- **Message all or one attendee** – click either "All Attendees" or an individual's name and select "Message" to send them a message about the appointment. You will then be taken to a screen to choose the format of the message (either email or text), customize the message language, and attach files.
- **Cancel one attendee** – click an individual's name and select "Cancel" to cancel their attendance for this appointment. You will then be taken to a screen to select the cancellation reason (required) and add any comments.
- **Cancel appointment** – click "Cancel Appointment" in the bottom left to cancel the appointment for everyone. You will then be taken to a screen to select who to cancel the appointment for, the cancellation reason (required), and add any comments.
- **Delete appointment** – click "Delete Appointment" in the bottom left to delete the appointment from the Navigate platform. *Please note – typically only Administrators have this permission, and we strongly discourage the deleting of appointments. Deleted appointments will be entirely removed from the platform, and data will not be retrievable.*

- **Edit appointment –** click "Edit" in the upper right to change one or more parts of this appointment. You will then be taken to the primary scheduling screen to update any portion of the appointment. Please see this article to learn more about the scheduling appointments.

With the appropriate appointment edit permissions, you may also drag and drop appointments between days on the calendar to update the date of the appointment.

List of Calendar Items

The "List of Calendar Items" tab shows you a list of appointments on your calendar for Today, This Week, and Next Week. You can edit appointments from the list or print the list of appointments for reference.

To reach this list, click the calendar icon on the left-hand navigation bar and then click "List of Calendar Items" on the My Calendar page.

You can print or save your calendar list to a PDF by selecting "Print Calendar" in the upper right, next to the printer icon.
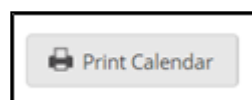
If you have the proper permissions, you may edit each appointment in this view by clicking the date in the "Edit Entry" column to the far right. Doing so will bring up your appointment scheduling page.
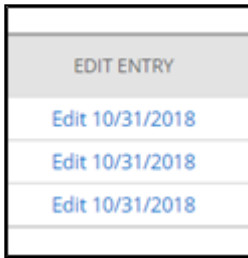
Settings and Sync

The "Settings and Sync" button on the Calendar lets you set up and manage your Calendar Sync. For more detailed information about Calendar Sync, please see this article.

Calendar Sync recommendations:

- We strongly recommend syncing your calendar to the Navigate platform so that appointments can flow between your Navigate calendar and professional calendar, blocking off that time and preventing double booking.
- Only sync your calendar in your live platform, not your training platform, to avoid issues and confusion.
- Only sync one professional calendar to Navigate. Make sure to uncheck any additional calendars in Google Calendar if your professional calendar is on that platform.

Related Articles

- Strategic Care - Student Profile: Calendar Tab
- Smart Guidance - Student Initiated Appointment Scheduling
- Managing My Schedule
- Scheduling Appointments
- Calendar Sync Administration

Was this article helpful?

✓ Yes   ✕ No

0 out of 1 found this helpful

Have more questions? Submit a request

Return to top ⊕

Comments

0 comments

Be the first to write a comment.

Help Center