

Navigate: Syncing Your Google Calendar and Setting Your Availability

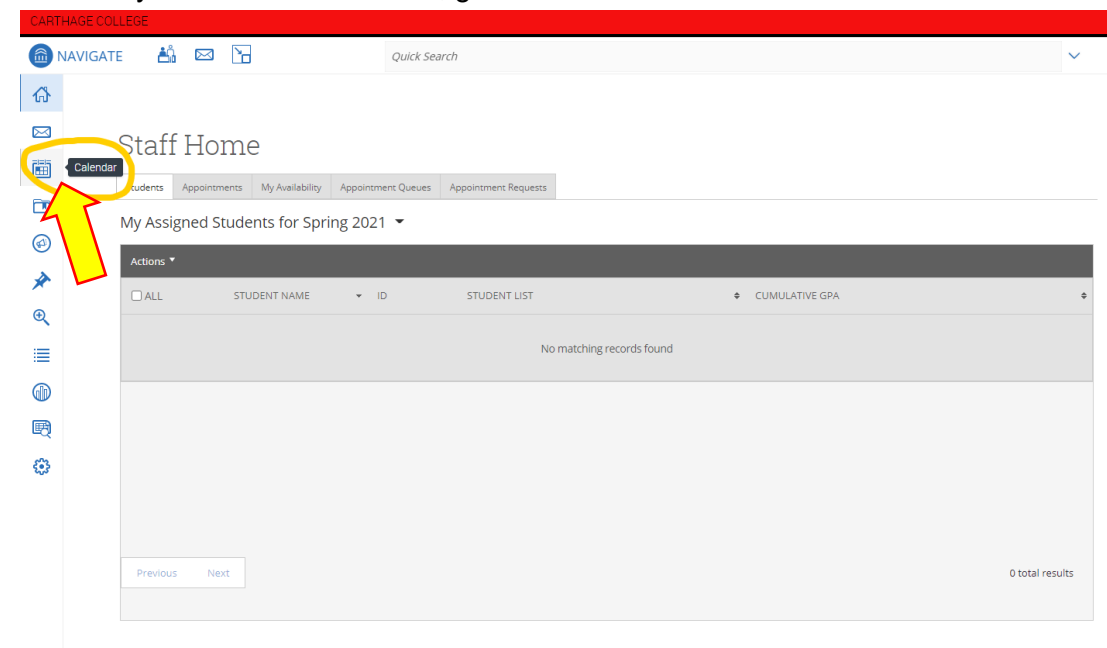
(If utilizing the appointment feature in Navigate, users need to complete both steps.)

Syncing Your Google Calendar

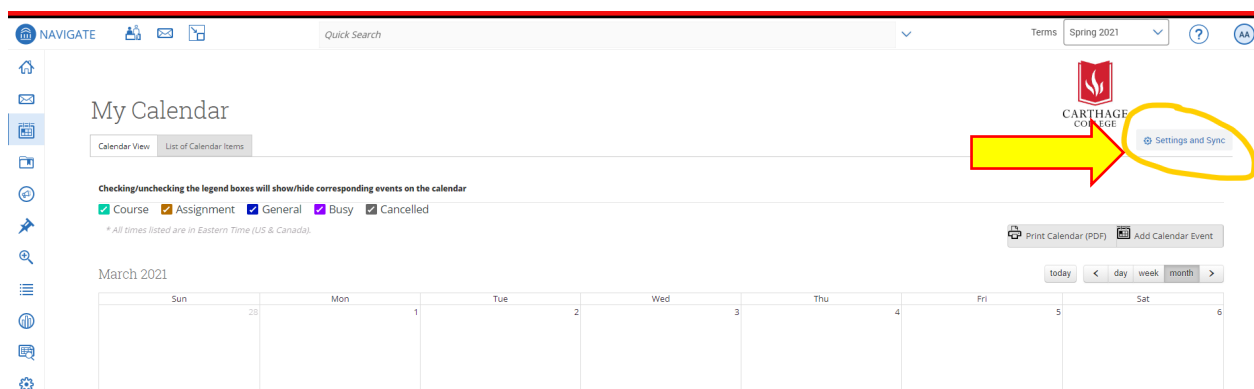
Objective: Calendar sync is a way to make sure Navigate appointments are shown on your professional calendar and constraints on your professional calendar are reflected in the Navigate platform. Syncing your calendar to the Navigate platform allows appointments to flow between your Navigate calendar and professional calendar, blocking off that time and preventing double booking.

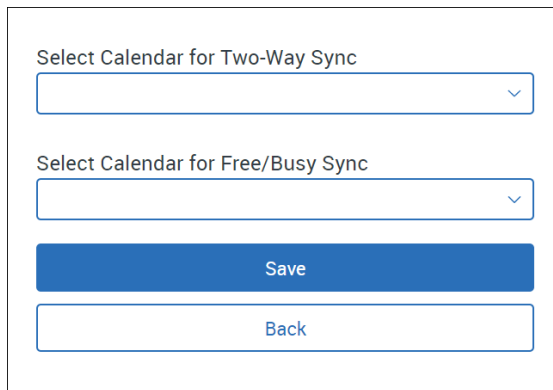
Warning! Only sync your calendar in the live platform and not in your training platform. Sync only one professional calendar with Navigate.

1. From your Staff home screen, go to the Calendar icon on the left hand menu.



2. Click the Settings & Sync button on the far right.
3. Click Setup Sync.
4. Select Google Calendar
5. Select Calendar for Two-Way Sync or Free/Busy Sync





Select Calendar for Two-Way Sync

Select Calendar for Free/Busy Sync

Save

Back

Select Calendar for Two-Way Sync (Highly Recommended Option): All calendar items sync back and forth between your Navigate calendar and your professional calendar (i.e., Navigate calendar ↔ professional calendar). Events from your professional calendar will display as **Busy** in your Navigate calendar. Limited details from Navigate will display in your professional calendar, such as your scheduled appointments in Navigate.

Select Calendar for Free/Busy Sync: Choose this option if you only want events from your professional calendar to display as **Busy** on your Navigate calendar (i.e., professional calendar ↔ Navigate calendar).

3. Click Save. It may take a few minutes to fully sync your calendar.
4. Note: Events synced are limited to 3 months in the past and 6 months in the future. You may notice that the events sync until Google stops them (approximately two years).

Troubleshooting

Calendar Syncing

1. Make sure you have followed the steps to sync your calendar. Visit The Navigate Help Center article, [Syncing Your Google Calendar to Navigate](#)
2. Only sync one calendar at a time.
3. Only sync your calendar with the **live/production** site. Syncing with both the production site and training site may cause errors.
4. Make sure your name or email has not changed
5. Check the type of appointment
 - a. Calendars will only sync Busy times from your professional calendar. Tentative appointments may not show as busy in Navigate. Any calendar appointment that is marked as 'Free' or 'Private' will not sync over.
 - i. If you typically mark your office hours or available appointment times as "busy" on your Google Calendar, those will need to change to "free." If they remain as "busy" when you set your availability to meet with students, Navigate will block those times as unavailable.
 - b. Most all-day events default to "free" in calendars. You will need to mark those busy to avoid having those days appear available to appointments in Navigate. In the opposite case, all-day free appointments with no end day might sync as busy – should that occur, include an end date in your appointments for them to sync as free time in your Navigate platform.
 - c. There are a couple of conditions which may prevent a long-running recurring appointment from fully syncing (whether it has no end date or a distant end date or a distant start date):

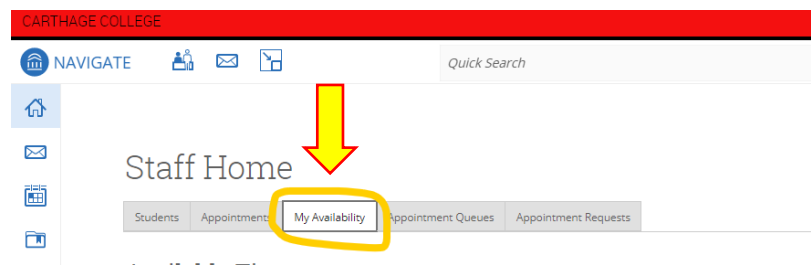
- i. We only sync events up to one year in the future. If a recurring event stretches beyond that, instances that occur after one year won't get synced initially.
 - ii. If a recurring event has more than 750 instances, we may not reliably sync all occurrences of the event. Our normal sync process only examines the first 750 instances in a recurring series. If all 750 instances occur before the sync window (-3 months in the past/+12 months in the future), this would result in no instances getting synced. Depending on exactly when the event was created and how often it occurs, we may see a situation where some instances of the recurring event are synced and others are not (this may happen if the 750th event occurs in the middle of the sync window).
 - iii. There is a catch-up process which regularly syncs Exchange events which were created outside the future 12 month window initially, but have moved within the window as time has advanced. This process is not constrained by the 750 instance limit, which is why the user may be seeing examples of some instances of a recurring event that would seemingly violate the 750 instance limit.
6. **Retry Sync** lets users reconnect to the Navigate servers if calendars are not syncing.
 7. **Disconnect Sync** lets a user disconnect their personal calendar from Navigate. Users might do this if they leave the institution or have changed their email address. Disconnecting your calendar takes about 30 minutes to finish so your user may still see Navigate items on their calendar for a short time.

Related Navigate Help Center Articles (requires logging into Navigate): [Tips for Syncing Your Calendar](#), [My Calendar Isn't Syncing Correctly](#)

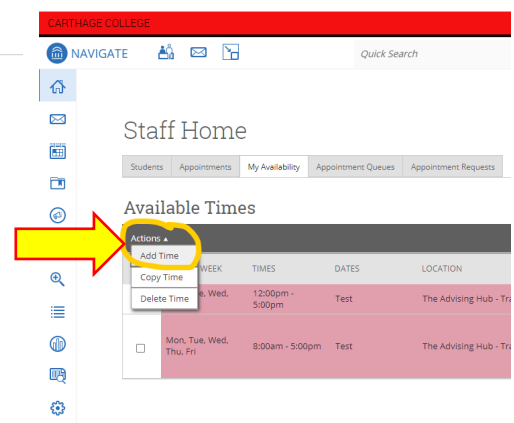
Setting Your Availability

Objective: Setting your availability in Navigate is the feature that allows students to schedule appointments with you. Set your availability in Navigate for specific days of the week and for the different appointment types offered (Appointment, Drop-Ins, and Campaigns).

1. From your home screen, click "My Availability" tab under the Staff Home button

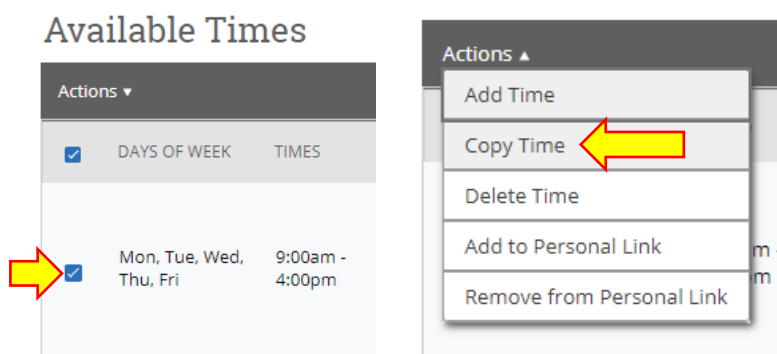


2. Under Available Times, click the Actions button to "Add Time."



3. Choose the days of the week for appointments, time and duration.
 - a. **One thing to be aware of when setting duration** – If you set your duration to be term specific, it is bound to the start and end dates of the term. If you set an availability for Summer Term 20XX and a subsequent availability for Fall Term 20XX, there will be a gap of time from the ending of the Summer Term to the beginning of the Fall Term where you will not have availability set up to meet with students. This can be managed by adding an availability setup to cover that range of dates or changing the duration option completely to a range of dates or forever.
4. Check the box to add to your “Personal Availability Link” or PAL so you can hyperlink in your email signature.
5. Click Appointments, Drop-Ins and Campaigns for type of availability.
6. Select your Meeting Types. You can select more than one at a time. An availability can be In-person, Phone, or Virtual.
7. Select the appropriate Care Unit, Location, Services.
 - a. It is recommended to group as many services together as possible for your availability setup. For example, Mon-Fri, 8:30 a.m. – 4:30 p.m., available for appointments, in-person location, for all services. This will be easier to manage long-term.
 - b. If you plan to offer specific services during selected times, those will need to be configured for each separate grouping of services. For example, if students are only allowed to drop-in for Hold Support Mon-Fri from noon- 4 p.m., it would get set up as its own availability configuration.
 - c. If you have specific instructions for services (meeting reasons), you will need to set those up as individual availabilities and enter the special instructions for the student. For example, if they are required to bring a specific document or fill out a form before the appointment, you would select the one service the instructions pertain to and enter the specific student instructions. See the *TIP below.
8. Add your Zoom and/or Phone number in URL and any special instructions.
9. Choose 1 student per appointment and Save.
10. Your availability will then populate and underneath it you will find your individual PAL link to add to your email signature.

***TIP:** To configure the same availability for another service, click the check box next to the availability you want to copy. Then click the Actions menu and select Copy Time. When the Copy and Add Availability box pops up, change the service and special instructions for the student. Click Save.



Troubleshooting Common Availability Issues

1. I synced my calendar but I did not set up my availability. You must have availability configured in Navigate.
2. Availability is inactive - That usually happens if the availability is set for a time period in the future or past. You can always reactivate an availability by selecting **Edit** in the Actions

menu for the availability on the **My Availability** tab and change the time period to a current time. You can set the active duration to Forever to keep your availability from expiring.

3. I have active availability, but students are still unable to schedule with me. Why?
4. There are a variety of reasons students can't schedule. Common scenarios include the following:
 - a. Student doesn't have permission to schedule appointments.
 - b. The Location and Service combination the student chose doesn't have appointment scheduling.
 - c. You have a calendar conflict during the time slot they chose.
 - d. The student can't schedule because they reached the *No-Show Limit*.
 - e. The student can't schedule because of appointment restrictions based on student category or major.
 - f. Your availability for the time slot is drop-in only. You need appointment availability if you want students to schedule appointments with you.
 - g. If you typically mark your office hours or available appointment times as "busy" on your Google Calendar, those will need to change to "free." If they remain as "busy" when you set your availability to meet with students, Navigate will block those times as unavailable. (Also noted in the Syncing your Google Calendar section)

Related Navigate Help Center Articles (requires logging into Navigate): [My Availability](#)