RECOMMENDATIONS for SCHEDULING and CONDUCTING
VIRTUAL ACADEMIC ADVISING APPOINTMENTS with NAVIGATE

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There are multiple ways for faculty to *conduct* advising appointments online: Collaborate Ultra, Zoom, Microsoft Teams, phone calls, email, *etc*. Any of these can work. In times like this, you may want to use what is familiar and comfortable to conduct an advising appointment.

What NONE of them do, however, is **minimize the time it takes faculty to *schedule* appointments, nor do they document appointments**. That's why the UARC recommends you set up appointment availability (which you can sync to your Outlook calendar) using **NAVIGATE**, the campus advising management system. **Please read over the benefits to faculty of using Navigate:**

- Students ***sign themselves up for appointments*** via Navigate within available time frames that *you set ahead of time*.
- Students ***can't double-book*** when you are busy, because the Navigate calendar synchs with your teaching and Outlook calendars, and simply won't let them.
- As each appointment is made within Navigate, it will *also* appear on your faculty Outlook calendar.
- Navigate lets you **store notes from the advising appointment, creating a paper trail** that saves time and effort in so many situations. **Your hard work doing advising *lives* on Navigate** if you just:
    - Login to Navigate, type in the ID number, bring up the student's record, and share that screen during your online appointment. From Navigate, you can share and discuss:
        - Enrollment history and grades using the student's Class Info tab
        - The Advisement Report (used to be called the STAR) by clicking on that menu item
        - Memos and alerts from instructors and advisors using the student's Notes/Reports tab
    - Maybe most importantly, in real time OR afterward, you can type up notes of your advising session using the Report on Appointment link; you can even attach documents.
        - This lets you start subsequent advising sessions from where you left off, NOT from scratch.
        - And, students can access the Report on Appointment in Navigate after their appointment, so they don't have to email you to get answers/information you already provided.
- Navigate keeps a record of any advising that's done within it so, **if you *ever* need to document your advising effort**, say for a performance review, Navigate is absolutely the fastest way to do it.

Begin by telling Navigate when you are available for advising.

1. From UWO main webpage, hover over "Titan Services" to bring up the menu and scroll down to select Navigate (SSG/SSC).
    a. Use NetID credentials to complete Navigate login.
2. If you have not yet synced Navigate to your Outlook calendar be sure to do that first; https://docs.google.com/document/d/10xDN1wUZPpgOf8GU98daPOc3AGk5fm1NblsSic1BsjQ/edit
3. Choose tab near top of page to select My Availability.
    a. Click on Actions, get dropdown menu, select Add Time.
    b. Fill out the Modify Availability popup screen as appropriate. Pretty self-explanatory but here are some hacks:
        i. Location: go ahead and select Faculty Office – [your Department], even though it's going be online possibly even from your home. Right now, there's no online option.
        ii. Dates: You can set it for the whole term (e.g. Fall 2020) and forget it till just before the next term but, if your schedule varies week to week, list it for a short date range and just re-do it periodically.
        iii. Special Instructions to Students, the following is recommended boilerplate to cut and paste: All advising is online this term. Appointments are limited to 30 minutes unless otherwise negotiated ahead of time. Please make any cancellations at least 48 hours in advance.
        iv. **Don't list advising availability on a furlough day**. It is considered a form of teaching, so that would violate furlough.
    c. Click Save. It will take a few seconds to register your availability, and a completion bar will run across the top of the screen.

How students make an appointment using Navigate

You may cut, paste, and email these instructions to your advisees.

1. Student logs in to Navigate from UW Oshkosh main webpage, Titan Services menu.
2. Student clicks on Schedule an Appointment.
3. Student is prompted to make choices for type of appointment, including:
    a. Select Care Unit (advising)
    b. Select a Location (Faculty Office – [Department])
    c. Select a Service (advising)
    d. Select faculty advisor's name from the list that appears (only the assigned advisor will be listed)
    e. Choose date & time from that faculty member's My Availability.
    f. Student arrives at confirmation page and can leave a note to faculty advisor about their specific questions/needs, if they choose.
    g. Click Confirm Appointment.
    h. Student will receive an appointment confirmation email immediately and a reminder email 24 hours prior to their appointment, which reduces no shows!
    i. There is a Cancel Appointment button in Navigate, if that needs to occur. The Reschedule button just takes them through the above process again.

How faculty can sign up a student for an appointment using Navigate

1. Login to faculty Navigate page and, using the student's TitanID, do a search for them.
2. When their Navigate page is displayed, click on Schedule an Appointment from the menu at right.
3. Go through the steps listed above as if the student were doing it themselves, except that it's already with you, the faculty advisor, by default.
4. For location, also specify Faculty Office – [Department]
5. When done, click on Confirm Appointment.
6. Student will receive an appointment confirmation email immediately and a reminder email 24 hours prior to their appointment, which reduces no shows!

Conducting student advising appointments

Faculty can use any platform they wish; for Fall 2020, convenience is king. The UARC uses Microsoft Teams exclusively because it's part of Office 365. You open Navigate, start the appointment, consult the calendar, open a Team session, and away you go. You can use Teams to share your screen, show your student various things about their academics in Navigate, or some website or other, whatever you need. You can also type notes into Navigate on the session as you go.