

# EAB Navigate - Advisor Platform

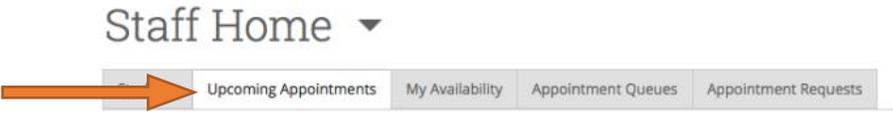
## How to Cancel an Appointment in Navigate

October 2020

Navigate URL: <http://uvm.campus.eab.com>

There are two ways to cancel an appointment that has been scheduled in Navigate. Both of these options work no matter if the Organizer (Advisor) or Non-Organizer (Student) need to cancel.

**OPTION #1:** You may select the “Details” option within any Recent Appointment in the Upcoming Appointments tab off of the Staff Home. (Scroll down within Upcoming Appointments to see Recent Appointments.)



Staff Home ▾

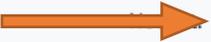
Upcoming Appointments My Availability Appointment Queues Appointment Requests

### Upcoming Appointments

Care Unit: All care units ▾

Actions ▾  Show Cancelled

<input type="checkbox"/>	DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input checked="" type="checkbox"/>	05/28/2020 12:00pm - 12:30pm EDT	<a href="#">Pavek, Ryan</a>	12:00pm - 12:30pm EDT	Academic Success Discussion			<a href="#">Details</a>



**OPTION #2:** You can also view the list of appointments associated with your campaigns by going in to the Campaigns tab (located in the navigation bar). Select “View Details” in the same line as the appointment you wish to cancel once you access the Appointments Made tab.



## Appointment Campaigns > Office Hours [REDACTED]

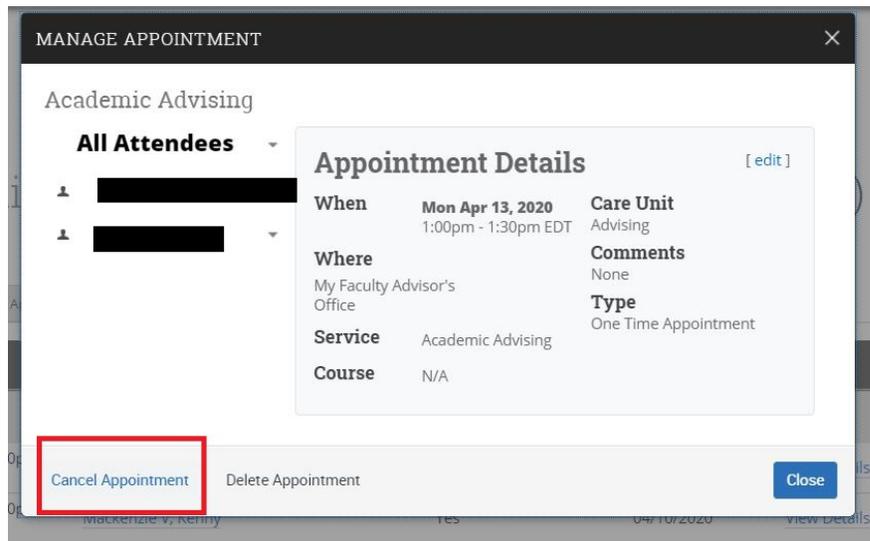
[Expired] 04/09/2020 - 05/22/2020

All Appointments Made Some Appointments Made No Appointments Made Reports Created Eligible Appointments

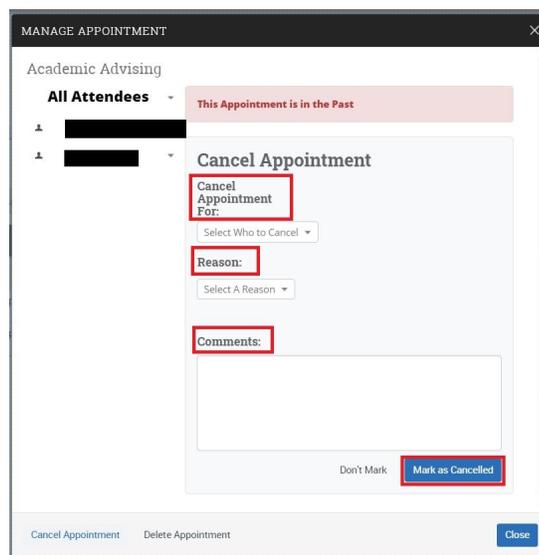
Actions ▾

<input type="checkbox"/>	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	APPT CREATED ON	View Details
<input type="checkbox"/>	1	04/13/2020	1:00pm - 1:30pm EDT	[REDACTED]	No	04/12/2020	<a href="#">View Details</a>
<input type="checkbox"/>	2	04/15/2020	3:00pm - 3:30pm EDT	[REDACTED]	Yes	04/10/2020	<a href="#">View Details</a>

Selecting “View Details” reveals the following screen. Select “Cancel Appointment.”

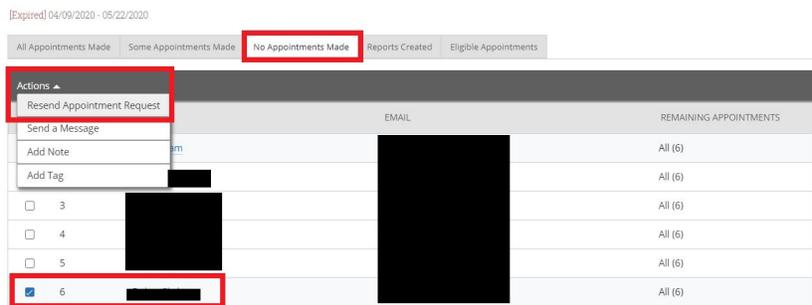


In the cancellation template, select the options most relevant for you. Organizer allows you the option of selecting for whom you want to cancel an appointment; Reasons include options for sickness, a need to reschedule, etc. Select “Mark as Cancelled” to complete the process:



### **Need to re-send a campaign invitation following an appointment cancellation?**

Once you’ve closed Manage Appointment window (see above), select your “No Appointments” or “Some Appointments Made” tab (in the Campaigns tab). Select any student or group of students in your list, then open your “Actions” drop-down menu and select “Resend Appointment Request.”



The template which opens initially populates with the message you originally sent to students; edit this message as needed, but remember to not remove the scheduling link.

RESEND APPOINTMENT REQUEST

Campaign message

**B I** [List Icons] Paragraph Merge Tags [Undo] [Redo]

**Advising appointments**

**Hello** (**{student\_first\_name}**):

Campaign message text  
{schedule\_link}

Available Merge Tags: ?

<b>{student_first_name}</b>	<b>{student_last_name}</b>	<b>{schedule_link}</b>
Inserts the student's first name	Inserts the student's last name	Inserts a link to schedule the appointment

**Add Attachment:**

Select file to attach

[Attachment Icon]

Instructions or Notes for Landing Page

Cancel **Send**