Meeting Types Configuration Guide for Application Admins

Purpose of the Document:

This document is intended to assist Application Administrators in updating existing configuration after enabling Meeting Types Phase 1. It will provide a framework on common configuration scenarios and how to update Navigate - Strategic Care configurations to best use Meeting Types within the application.

Current Configuration Scenarios:

Temporarily Updated Names of Locations to Indicate a Single Appointment Modality

In preparation for previous/temporary mass campus closures, many/most of your location names were updated to communicate a modality in which your location operated.

Example Locations:

- Career Center → Career Center (In Person Only)
- Academic Center → Academic Center (Virtual Only)
- Transfer Center → Transfer Center (Phone Only)

Goal:

Revert to pre-pandemic location naming conventions that remove modality reference from location names.

Consideration:

Changing location names will update any historical data tied to that location (reports, availabilities, etc.). For future reporting, these changes should be documented *prior* to reverting location names.

Recommendation:

Enable Meeting Types and update location names to reflect pre-pandemic location naming conventions. Enabling one or multiple Meeting Types to support your future scheduling workflows.

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Audit Locations

Export Care Unit Configuration or Go to Administration Page → Site Configurations → Location

Are these temporary location naming conventions still needed/used?

Determine which location names to revert to their pre-pandemic naming convention

Step 3: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to the Administration Page, select Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 4: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific location

Edit the availabilities to add appropriate Meeting Type for that availability

Duplicated Locations to Indicate Different Appointment Modality

Each location continued to offer the same service(s) and modality was communicated to students by location naming convention

Example Locations:

- Advising Center → Advising Center (In-Person) & Advising Center (Virtual)
- Tutoring Center → Tutoring Center (In-Person) & Tutoring Center (Virtual)
- Library → Library (In-Person) & Library (Online)

Goal:

Simplify the student/staff experience with Meeting Types instead of locations dictating modality of the appointment

Considerations:

Changing location names will update any historical data tied to that location (reports, availabilities, etc.).

Inactive locations are not immediately removed from staff availability screen. However, availability is removed from the student scheduling workflow.

Inactive locations cannot be used to filter reports. However, appointments with inactive locations DO return in report results.

Recommendations:

(Option 1) Inactivate duplicated locations and create a new location to support future workflows

(Option 2) Inactivate one location and revert one location to pre-pandemic naming conventions

(Option 3) Continue using duplicated locations that indicate appointment modality

(Option 1) - Inactivate duplicated locations and create a new location to support future workflows

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Audit Locations

Export Care Unit Configuration or Go to Administration Page → Site Configurations → Location

Deactivate duplicated locations with different modalities

Create a new location

Configure the newly created location to enable the desired student workflow and limitations

Step 3: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 4: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities

Edit the availabilities to reflect the newly created location

Edit the availabilities to add appropriate Meeting Type for the availabilities

(Option 2) - Inactivate one location and revert one location to pre-pandemic naming conventions

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Audit Locations

Export Care Unit Configuration or Go to Administration Page → Site Configurations → Location

Inactivate one of the duplicated locations

Revert one location to the pre-pandemic naming convention

Step 3: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 4: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific location

Edit the availabilities to add appropriate Meeting Type for that availability

(Option 3) - Continue using duplicated locations that indicate appointment modality

Step 1: No major configuration changes are needed in this option. If you want to begin utilizing Meeting Types functionality with this option, Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle.

Step 2: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 3: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific location

Edit the availabilities to add appropriate Meeting Type for that availability

Duplicated Services to Indicate Different Appointment Modality

One location offers multiple services and modality was communicated to students by service naming convention

Example Locations:

- General Advising → General Advising (In-Person) & General Advising (Virtual)
- Math Lab → Math Lab (In-Person) & Math Lab (Virtual)
- Change a Major → Change a Major (In-Person) & Change a Major (Virtual)

Goal:

Simplify the student/staff experience with Meeting Types instead of services dictating modality of the appointment

Considerations:

Changing service names will update any historical data tied to that location (reports, availabilities, etc.).

Inactive services are not immediately removed from staff availability screen. However, availability is removed from the student scheduling workflow.

Inactive services cannot be used to filtering reports.

Appointments with inactive service DO return in report results.

Recommendations:

(Option 1) Inactive duplicated services and create a new service to support future workflows

(Option 2) Inactivate one service and revert one service to pre-pandemic naming conventions

(Option 3) Continue using duplicated services that indicate appointment modality

(Option 1) Inactive duplicated services and create a new service to support future workflows

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Audit Care Unit Services

Export Care Unit Configuration or Go to Administration Page → Care Units → Services

Inactivate duplicated services with different modalities

Create a new service

Go to the location configuration page to add newly created service to that location.

Configure the newly created service to enable the desired student workflow and limitations

![EAB logo]

Step 3: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 4: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities

Edit the availabilities to reflect the newly created service

Edit the availabilities to add appropriate Meeting Type for the availabilities

(Option 2) Inactivate one service and revert one service to pre-pandemic naming conventions

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Audit Services

Export Care Unit Configuration or Go to Administration Page → Care Unites → Services

Inactivate one of the duplicated services

Revert one service to the pre-pandemic naming convention

Step 3: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 4: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific service

Edit the availabilities to add appropriate Meeting Type for that availability

(Option 3) Continue using duplicated services that indicate appointment modality

Step 1: No major configuration changes are needed in this option. If you want to begin utilizing Meeting Types functionality with this option, Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle.

Step 2: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 3: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific service

Edit the availabilities to add appropriate Meeting Type for that availability

These instructions are for Application Admins to manage availabilities en masse. Please refrence the Configuration Guide for Staff if you'd like your Staff to update their own availability after these configuration changes are made.

No Duplicated Locations and Services to Communicate Modality

You have a streamlined list of services and locations for student scheduling, which are typically not designated out by modality. Staff and faculty largely communicate modality through the Phone/URL or "Special Instructions for Student" section of their availability

Example Locations:

- Academic Advising Center
- Tutoring Center
- Transfer Center

Goal:

Enhance current student scheduling workflow to introduce Meeting Types for supporting multiple modalities of appointments.

Considerations:

Since your staff and faculty use the Phone/URL link and/or Special Instructions to communicate modality, your institution may choose to opt out of leveraging Meeting Types in the student workflow

Enabling Meeting Types will require at-least one Meeting Type to be added to all availabilities for staff to show as available in the student scheduler.

Recommendation:

Enable Meeting Types functionality to support multimodal appointment model.

Step 1: Enable Meeting Types Phase 1

Contact NavigateTechSupport@eab.com or Strategic Leader to enable the Phase 1 Meeting Type feature toggle

Step 2: Create/Update Desired Meeting Types to be used in scheduling workflow

Go to Administration → Appointments → Meeting Types

Enable configuration for "Include this Meeting Type in Availabilities and Scheduling"

Step 3: Review and Update Availabilities*

Go to Reporting Page → Availabilities Report

Search for availabilities for a specific location

Edit the availabilities to add appropriate Meeting Type for that availability

Additional Resources

[Application Admin Office Hours to introduce Meeting Types](#)

Application Admin Office Hours to Demo Meeting Types

[Community Post: Meeting Types](#)

[Help Center Article: Meeting Types](#)

Release Notes

Meeting Types FAQ