

Advising Appointments

Appointment Scheduling

Users with appropriate permissions can schedule appointments by checking the box beside students' names in various lists throughout the application and by clicking on Schedule Appointment in the Action Menu. These lists are typically found on your home page and in Search areas of the application. The system will then display the Schedule an Appointment page.

Schedule Appointment

Filters

Type:

Reason(s):[?]

Comments:

Location:[?]

Select a Date:

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Reminders

Send an email reminder[?]

Send a text reminder[?]

People Attending (1)

Gonzalez, Laura (Student)

Add an Attendee:

Select An Advisor

SELECT	ADVISOR	AVAILABLE TIMES
<input type="radio"/>	Brown, Tim	mon-tue, thu 11:00am-3:00pm Drop-In Availability: mon-tue, thu 2:00pm-5:00pm
<input type="radio"/>	Eagan, John	mon, wed, fri 12:00pm-5:00pm tue, thu 2:00pm-5:00pm Drop-In Availability: mon, wed, fri 8:30am-12:00pm
<input type="radio"/>	Hamzaee, Maanie	mon-fri 5:00am-9:00pm
<input type="radio"/>	Hoffman, Doug	mon-fri 8:00am-5:00pm
<input type="radio"/>	Irish, Allie	mon-fri 9:00am-4:30pm (September 18, 2015 - February 8, 2016)
<input type="radio"/>	Kilpatrick, Steven	tue, thu 10:45am-4:00pm (Fall 2015) mon, wed, fri 10:15am-5:00pm Drop-In Availability: mon, wed, fri 10:15am-5:00pm (Fall 2015)

Appointment Components

Type is what determines whether the appointment you are creating is an Advising, Tutor, or General appointment. While both Advisor and Tutor appointments are fairly self-explanatory, a General appointment may not be. A General appointment can be considered an obligatory event for the student. Events that can qualify are things like Football practice, Honors Society Dinner etc. The reason adding this type of event to a student's calendar is important is because those events will then show up as "Conflicts" when scheduling future appointments. It is usually a best practice to only worry about those General events when they occur during the regular school day or office hours.

Reasons is where you will select the purpose of the appointment. For example, Career Counseling and Schedule Changes can be valid reasons for advising appointments. For Advising and Tutoring appointments, reasons are configured by your Campus Administrators. For general events, the reasons field is open.

Comments is a section where extra commentary can be entered about the appointment. These comments are seen by both the student(s) and the advisor when they look at their calendar and receive their appointment notification email.

Select a Date really means select a week in which you would like to schedule the appointment. This lets users see the entire week, and not just a single day, to determine what is the best day to schedule the appointment.

Location is where you will meet your students. Select the appropriate location from the drop down list.

Reminders are sent the day of the appointment. The email reminder is sent the morning of the appointment and the text message reminder is set "x" number of minutes before the appointment. "X" number of minutes is

actually defined on the Admin tab by your Campus Administrator. You can mouse over the “?” mark, besides the text reminder, to see what the current value of “X” is.

Add an Attendee lets the advisor add extra users without having to exit the schedule appointment page. Simply type in the user's name, select them, and they will be added to the appointment.

People Attending are the users who will be scheduled for this appointment. The user scheduling the appointment is able to *Remove* or *Add an Attendee* prior to saving the appointment.

Select an Advisor is the list of advisors who have availability at the selected Location. Since you are creating an appointment for yourself, simply check your name.

Length refers to the length of the appointment. While it will default to whatever the advisor had setup in the availability, it can be overridden here.

The Scheduling Grid is where you will actually select what time this appointment will take place. You will notice that a checkbox will appear for any times that are available for scheduling. If something is already scheduled or “Conflicts” with that time, you will see that notated on the grid. For example, Appointments, Free Busy, Conflicts (such as a student’s class), or in some cases Drop in’s for walk in appointment times. A blank means the selected advisor does not have availability for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.

Choose A Time To Meet

Length: 30 min

Availabilities: Show Availabilities for This Course/Reas...

TIME SLOT	10/11 (SUN)	10/12 (MON)	10/13 (TUE)	10/14 (WED)	10/15 (THU)	10/16 (FRI)	10/17 (SAT)
6:00a-6:30a							
6:30a-7:00a							
7:00a-7:30a							
7:30a-8:00a							
8:00a-8:30a	CONFLICTS			CONFLICTS		CONFLICTS	
8:30a-9:00a	CONFLICTS			CONFLICTS		CONFLICTS	
9:00a-9:30a	CONFLICTS			CONFLICTS		CONFLICTS	
9:30a-10:00a	DROP-IN						
10:00a-10:30a	DROP-IN						
10:30a-11:00a	DROP-IN						
11:00a-11:30a	DROP-IN						

Availabilities is where you can override everything and schedule the appointment at any time at any day. Select the option ‘Ignore Availabilities, unlock the calendar’ and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.

Repeat This Appointment? Is where you can make this appointment recurring. While there are many options to choose, the most common and easiest to use is ‘Weekly’. Select Which Days, Every how many weeks and Repeat Until to make this appointment repeat.

To finish, click the **Save Appointment** button. When the appointment is saved, the system will send appointment notification emails to each of the attendees with the details of the appointment. It will also update each attendee’s calendar.

Advising Appointment Queues

The Advising Appointment Queues tab allows advisors to monitor and maintain visits for students in their queue or other advisors' queues. *This will likely only be of use for advisors who have a central place where students check in for an appointment. For individual faculty members where students come directly to your office, this will not typically be used.*

Advisor Home ▾

Students Upcoming Appointments My Availability Advising Appointment Queues

Notification Methods: Ding E-mail Text Message

Students Checked In For Appointments

Actions ▾	
SELECT	NAME
There are not any students checked in for appointments.	

Students Checked in For Appointments

This grid shows any students who have checked in for an appointment and are waiting to see you. In other words, the student is in the waiting room ready to see you. When you are ready to meet with the student, click the circle beside the student and press the Start Appointment button in the Actions Menu. Doing this starts the appointment and brings up an advising report for you to fill out at the conclusion of the appointment.

Students In My Queue

Actions ▾			
SELECT	NAME	REASON	COMMENT
You do not have any students in your queue.			

Students In My Queue

This grid displays students who are waiting to see you, or the first available advisor. The list is sorted by placing the student who checked in first at the top. Along with this grid, you have given several options in the Actions Menu to manage the list of students.

Students In Other Staff Queues

Actions ▾			
SELECT	NAME	ADVISOR	REASON
There are currently no students in other staff queues.			

Students in Other Staff Queues

This grid lists students who are on the waiting list for other advisors. This is perfect for when advisors want to help other advisors meet with their students. They can simply select one of the advisor's students and click the Start Appointment button in the Actions Menu.

Starting an Advising Appointment

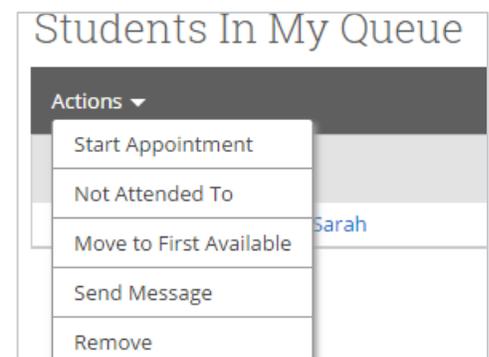
To file a report for a student in your queue and report upon that session simply click the **Start Appointment** button in the Actions Menu. Other options include:

Not Attended To: This option should only be used at the end of your day/shift to signify which students you were not able to meet with

Move to First Available: To move a student to the First Available queue, select the student and then click the button Move to First Available

Send Message: If you would like to send a message via email or text to a student, select the student and click Send Message

Remove: You should use this button when a student leaves without first meeting with an advisor. You should then "Remove" them from the list. This is different than the Not Attended To option in that the Not Attended To option the student actually waited to meet with an advisor but there was not enough time while the Remove option is for when the student leaves, on their own accord, without meeting with an advisor.

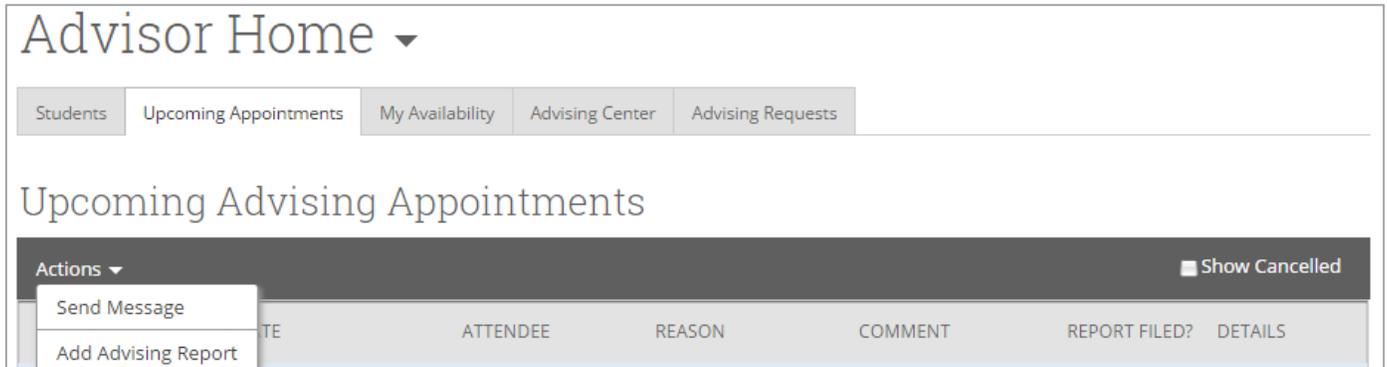


Alternative Method to Starting an Advising Appointment

If your students do not check in, they will not appear in the Advising Center.

If they have a scheduled appointment, you should find them either in the “Upcoming Appointments” tab or in the “Recent Advising Appointments” section if it is past the start time of the appointment.

To start an Advising Appointment, click on the box next to the student’s name. Then click on “Actions” in the dark grey bar. Then select “Add Advising Report”.



Recording a Walk-In Advising Interaction

Students may just show up to your office for assistance and you will want to record this advising interaction. If they have not checked in through a central front desk, you will need to pull up the student’s record. From there, under the options on the right, select “Report on Advising”. Then, select the “Meeting Type” as “Walk-In” and enter your notes as described in the section below on “Adding a Report on Advising”.

Marking a Student “No-Show”

It is just as important to record when students do not show for their scheduled advising appointments. A pattern of this can be an indication of a student having difficulty. To indicate when a student does not show, navigate to the “Advising Reporting” section on your advisor home page. Select the student by checking the box next to the name, then select “Mark No-Show” under “Actions”

This will pull up the Advising Report screen. Having selected “Mark No-Show” you will see that the “Attended” box under the student’s picture is not checked. You can enter any notes (e.g., student did not show but sent a message afterward apologizing) or leave it blank and select “Save this Report.”



See “Advising Reports” for guidance on completing an Advising Report at the conclusion of an advising interaction.