JOB AID

Academic Advising: Manage Student Appointments
(Advisors/Tutors)

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The Advising/Tutoring Appointments tile on the SIS home page provides advisors, tutors and administrative staff easy access to view and manage student appointments.

When you click the tile, the Advising Appointments page will open with an options menu on the left. The menu items you see will depend on the security role you have been assigned in SIS.

This job aid covers the Advisors/Tutors functions.

1. My Appointment Settings (Advisors/Tutors)

When you click the Advising/Tutoring Appointments tile, the default screen will be the My Appointment Settings page. This is where advisors and tutors define how upcoming appointments may be conducted, how a student may contact/meet with you during a scheduled appointment, and the times you are available.

1. **Appointment Address Line 1**: Enter a physical address.
2. **Appointment Address Line 2**: Enter additional address information or online meeting URL.
3. **Appointment Phone**: Enter telephone number students should use to contact you.

**Appointment Types**

This is where advisors and tutors will indicate how their appointments will be delivered. Each Available Type permits you to enter Additional Information that will be visible to the student.

4. **Available Types**: Select from the drop-down (not all types are available for all units):
   
   a. Email
   b. In-Person
   c. Microsoft Teams
   d. Phone
   e. Zoom

5. **Additional Information**: Click inside the box to add and edit text that will help the student know how to prepare for the appointment they chose.

6. **Add Type/Delete Type**: Click to add a new appointment type from a list of available types or delete to make a type unavailable to students.

**Current Schedule**

This displays the advisor’s/tutor’s current schedule. The default display for this section is **View weeks with custom block date ranges**. Custom blocks allow advisors to change availability for specific date ranges for weeks that deviate from their recurring schedule.
Now we will begin building the new time block.

**Unit Level Settings**

7. Advisors and tutors are affiliated with one college or academic support unit (*Business, Social Science, TRIO, etc.*).

   The unit’s maximum and minimum booking notices are listed here. These are the maximum number of days a student may see your time blocks into the future, and the minimum amount of time in the future the student may book an appointment.

8. Click **Save and Update Settings**.

**Time Blocks**

This is where advisors/tutors will set up their appointment and drop-in availability.
9. **Open (can meet) or Closed (cannot meet) or Drop-In**: Choose one and enter *Start Time/End Time*. If Drop-in is chosen, an Additional Information text box appears. Add details about how a student can reach you during this drop-in time block.

10. **Days this Block applies to**: Choose one or more days of the week to which this block applies.

11. **Apply Date Range**: Click the checkbox to open fields to enter *Start Date/End Date* to specify a date range. If no date range is entered, then the block of time will apply to every day selected in the above step. Advisors and tutors are encouraged to set up different blocks of time that span different dates to accommodate their schedules.

12. **Allowed Reasons for this Block**: This represents the *appointment reasons* the advisor/tutor will provide during the block of time (*Academic Advising, Career Planning, Change of College, Declaring/Changing Major, tutoring, etc.*). Leave empty to allow all services for your college or academic support unit use the **Add Reason/Delete Reason** links to manage the list of reasons for this block.

13. **Student Groups for this Block**: This represents specific student groups for which the advisor will provide services during the block of time. Leave empty to allow all student groups or use the **Add Reason/Delete Reason** links to manage the list.
14. Click **Save and Update Settings**.

Now that the time blocks and appointment reasons have been set, students will be able to schedule appointments and advisors/tutors will be able to view, create and edit appointments.

2. **My Appointments Advisor-Single (Advisors/Tutors)**

   When you click the My Appointments-Advisor-Single item on the left menu, the **My Appointments** page will open, and it contains several action items for current, past and future appointments.

   **A. Bulk Cancel Appointments**
   1. Click the **Bulk Cancel Appointments** hyperlink.

      For each date, you have an option to **Select All Appointments** for a given date or use the **Yes/No** button to manually select appointments to cancel.
2. **Cancellation Message to Students**: Enter the message students will receive in the cancellation email.

3. Click the **Cancel Appointments** button.

**B. Appointment Settings**

Use this hyperlink for easy access to the settings page. See Section 1 above for details on managing appointment settings.

**C. Create New Appointment**

When you click the **Create New Appointment** button, a New Appointment page will open.
1. **Student ID**: Enter ID or click the look-up button to search.
   
   **Note**: Within Campus Solutions, the ‘A’ in student IDs (APID) has been replaced with a ‘1.’ The look-up process takes time. Consider having the student’s APID already copied from ESAF, so you can paste it here and alter the ‘A’ with a ‘1’.

   **Example**: A123456789 (Legacy SIS ID) = 1123456789 (Campus Solutions ID)

2. **Advisor**: If you are scheduling an appointment for another advisor/tutor, enter their ID or click the look-up button to search.

3. **College or Academic Support Unit**: Click the drop-down and make a selection.

4. **Reason**: Click the look-up button and make a selection from the list.

5. **Duration**: Will default to the unit’s default duration. Choose an appointment duration from the drop-down. After selecting **Duration**, additional fields will appear.

6. **Additional Information**: Enter information to help the advisor or tutor prepare for the appointment.

7. **Method**: Click the drop-down and select from the meeting methods available.

   After selecting a **Method**, click the **Select Time** button, and the available dates established by the advisor/tutor will appear with an option to **Choose Time** for the desired date.

8. **Choose Time**: Click the drop-down and select a time from the list.

   Once you have selected a time, the **Select Time** button will activate.

9. **Select Time**: Click to confirm the selected time.

   The appointment’s **Date**, **Begin** and **End** times, and **Additional Information** will display for your review before officially booking the appointment.
10. Click **Book It!** to confirm or click **Select a different Date/Time** to go back to the list of available times to make a new selection.

You will receive a confirmation that the appointment was successfully created, and the appointment will appear in the advisor/tutor’s appointment list, as well as on their Outlook calendar and the Outlook calendar of the student.

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**D. Today’s Appointments**

Any appointment(s) an advisor/tutor may have for the current day will appear in the Today’s Appointments section at the top of the page, along with pertinent details. NOTE: the **Status** field will indicate the appointment’s current status (Scheduled, Cancelled, No Show, Checked-In).

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**E. Future Appointments**

The bottom portion of the page contains a listing of upcoming appointments. Use the **Select Appointment** button to view or update appointment details.

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**F. View Appointment History**

Advisors/tutors can use this hyperlink to view an historical list of their appointments.

1. Click **View Appointment History**

The History of Appointments page will display, including the following:
a. **Search From Date/Search To Date**: You can scroll through the list of historical appointments, or enter a specific date range to narrow the results.

b. **Refresh History**: Click this button to update the display based on the date range entered.

c. **Appt ID**: The same appointment ID will appear in the advisor/tutor’s meeting event within their Outlook calendar.

d. **Status**: Scheduled, Cancelled, Checked-In or No-Show.

e. **Select Appointment**: Click to view the Existing Appointment screen containing detailed information about the past appointment.