JOB AID

Academic Advising: Manage Student Appointments (Advisors/Tutors)

08/19/2021
Contents

1. My Appointment Settings (Advisors/Tutors) ...................................................................................................................... 2
   Current Schedule .......................................................................................................................................................... 3
   Unit Level Settings .................................................................................................................................................... 3
   Time Blocks .............................................................................................................................................................. 4

2. My Appointments Advisor-Single (Advisors/Tutors) ..................................................................................................... 6
   A. Bulk Cancel Appointments ...................................................................................................................................... 6
   B. Appointment Settings ................................................................................................................................................. 7
   C. Create Impromptu Appointment ............................................................................................................................. 7
   D. Create New Appointment ......................................................................................................................................... 8
   E. Today’s Appointments .............................................................................................................................................. 10
   F. Future Appointments .............................................................................................................................................. 10
   G. View Appointment History ..................................................................................................................................... 10
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.

The My Appointment Settings allows you to define how an appointment may be conducted, how a student may contact/meet with you during a scheduled appointment, and the times you are available to have appointments scheduled with you (this may be to define time blocks you are unable to meet with all students, time blocks you are only available to meet with certain students and/or time blocks you are available to meet with all students).

<table>
<thead>
<tr>
<th>Appointment Address Line 1</th>
<th>177 Bessey Hall</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Address Line 2</td>
<td>Zoom: <a href="https://msu.zoom/example">https://msu.zoom/example</a></td>
<td>2</td>
</tr>
<tr>
<td>Appointment Phone</td>
<td>517-555-555</td>
<td>3</td>
</tr>
</tbody>
</table>
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.

### 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.

![Current Schedule](image)

### Unit Level Settings

4. **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.

5. **Click Save and Update Settings**.
Now we will begin building the new time block.

Time Blocks

This is where advisors/tutors will set up their appointment or drop-in availability, and their appointment type(s).

6. **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.

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

8. **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.

9. **Allowed Types for this Block**: This is where advisors and tutors indicate how their appointments will be delivered. Each **Type** permits you to enter **Additional Information** that will be visible to the student after the appointment is scheduled.
Types: Select from the drop-down list (not all types are available for all units):

- Email Appointment
- In-Person Appointment
- Phone Appointment
- Zoom Appointment

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

11. Add Type/Delete Type: Click Add Type to add a new appointment type or Delete Type to remove a type from your list of options.

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 reasons 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/Delete Student Group links to manage the list.

14. Click Save and Update Settings.

Now that the time blocks, appointment types, 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 to easily access the settings page. See Section 1 above for details on managing appointment settings.

### C. Create Impromptu Appointment

The impromptu appointments feature permits advisors and tutors to schedule and quickly create and log appointments with students, offering more flexibility. Impromptu appointments can be scheduled regardless of an advisor/tutor's Outlook calendar obligations or their Appointment System time blocks.

1. When you click this button, you will be taken to a search page where you will first need to search for the student by either ID or first/last name. Once the information has been inputted, click the **Search** button.

2. The **New Impromptu Appointment** page will appear, and you will need to enter details related to the appointment, including the reason, duration, additional information, method, and date and time. **Note**: If using an internet browser other than Google Chrome, the clock icon for the time will not appear and you will need to manually type in the time using this format HH:MM:XM.

3. Once all details have been inputted, click **Save Impromptu Appointment** and the appointment will be added to your list of appointments in the Appointment System. **Note**: students and advisors/tutors will not receive a confirmation email as they would in the case of scheduling a regular appointment (see next section). In addition, impromptu appointments do not appear on attendees' Outlook calendars.
D. 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.

![Date selector](image)

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.

![Appointment details](image)
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.

E. 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).

F. 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.

G. View Appointment History

Advisors/tutors can use this hyperlink to view a 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.