JOB AID

Academic Advising: Manage Student Appointments (Advisors/Tutors)

11/14/2022

Contents

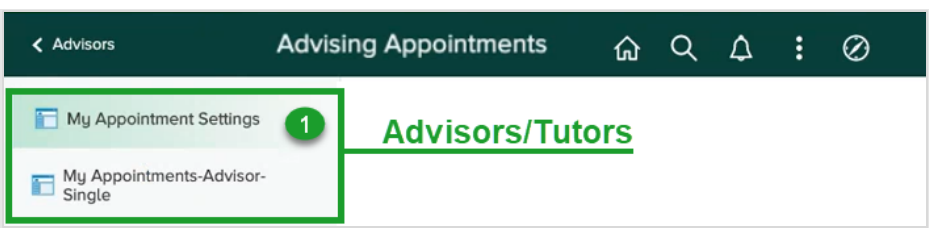
Academic Advising: Manage Student Appointments (Advisor/Tutor)

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

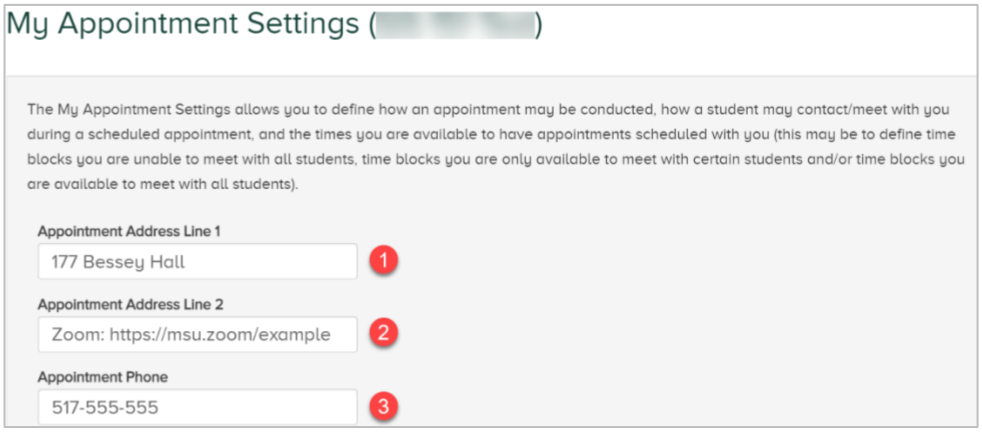
When you click the above tile, the **Advising Appointments** page will open with an options menu on the left. The menu items you see will depend on the security role you have been assigned in SIS.

This job aid covers the Advisors/Tutors functions.

1. My Appointment Settings (Advisors/Tutors)



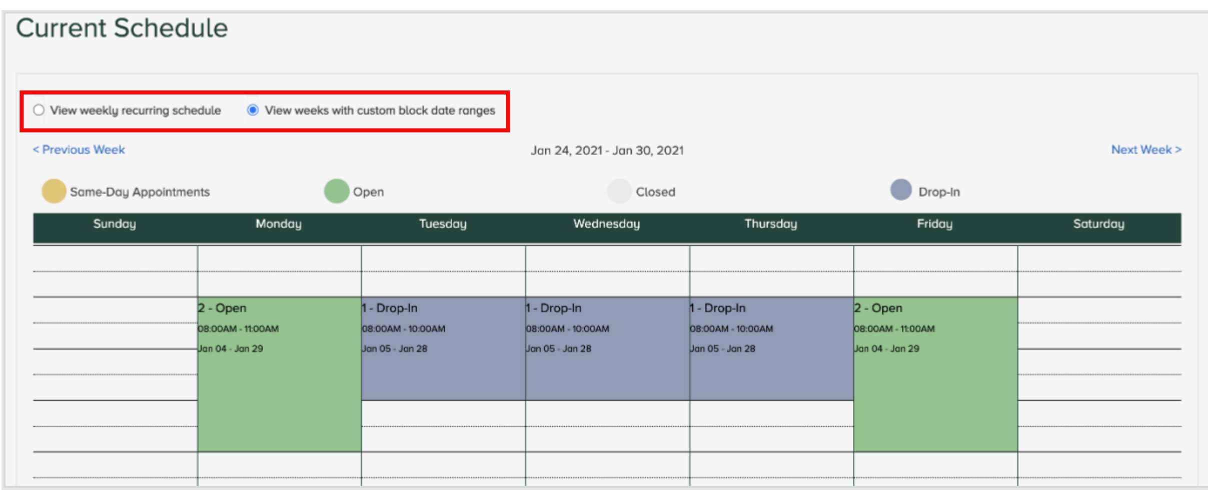
When you click the Advising/Tutoring Appointments tile, the default screen will be the **My Appointment Settings** page. This is where advisors and tutors define how upcoming appointments may be conducted, how a student may contact/meet with you during a scheduled appointment, how many students may meet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



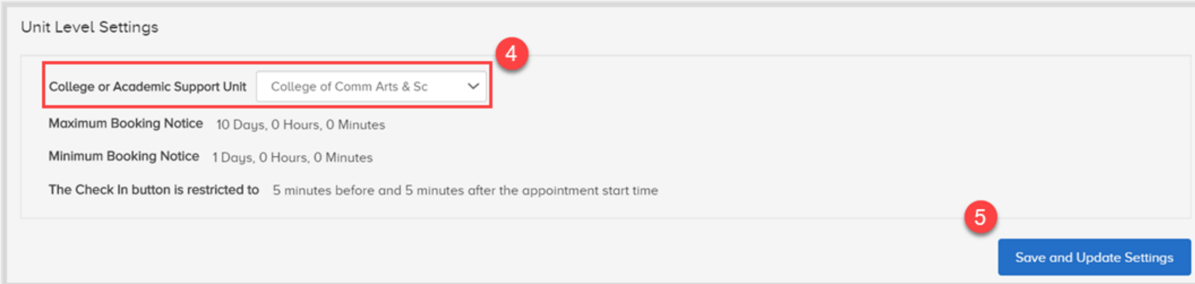
1. **Appointment Address Line 1**: A free-form text field. You may enter a physical address or other text that students will see when booking an appointment.
2. **Appointment Address Line 2**: You may enter additional address information or supplement Address Line 1 information (with an online meeting URL, for example).
3. **Appointment Phone**: Enter an area code and telephone number students should use to contact you.

Current Schedule

This displays the current schedule of the advisor/tutor. The default display for this section is **View weeks with custom block date ranges**. Advisors and tutors can change availability for specific ranges of dates, for periods that deviate from a recurring schedule.



Unit Level Settings



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

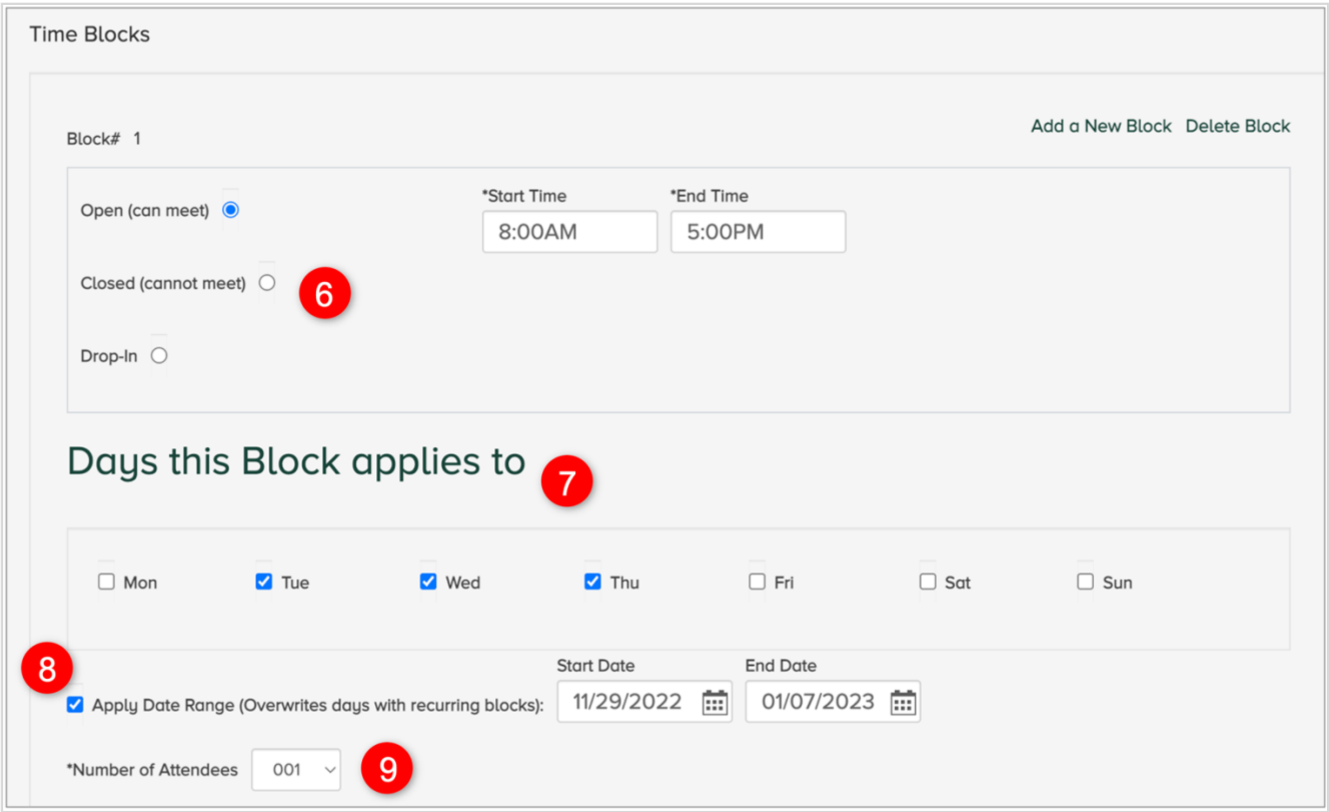
   The unit's maximum and minimum booking notices are also listed here. These are the *maximum* number of days a student may see your time blocks into the future, and the *minimum* amount of time in the future the student may book an appointment.

5. Click **Save and Update Settings**.

Now we will begin building a time block.

Time Blocks

This is where advisors/tutors set up their appointment or drop-in availability.

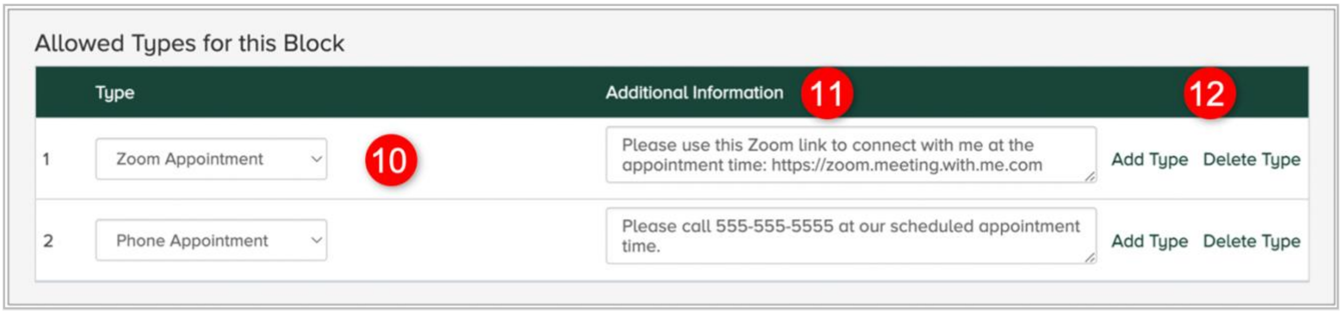


6. **Open (can meet)** or **Drop-In**: Choose one and enter *Start Time*/*End Time*. If **Drop-in** is chosen, an **Additional Information** text box appears where you may add details about how/where a student can reach you during this drop-in time block. *Note:* **Closed (cannot meet) is not used, thanks to a direct calendar integration with Office365.**

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 permitting you to enter a *Start Date/End Date* for a specific date range. If the checkbox is left unchecked, 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. If Open (can meet) is selected, a required selection box will appear for **Number of Attendees**. This option defaults to 1 attendee but can be changed to permit up to 50 attendees at one appointment (for group advising situations).



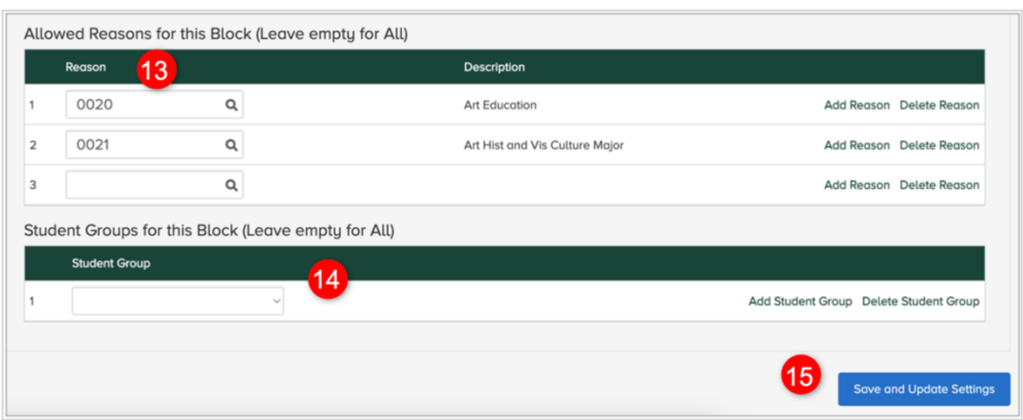
10. This is where advisors and tutors indicate how their appointments will be delivered. Each **Type** permits you to enter **Additional Information** that will be visible to the student after the appointment is scheduled.

Types: Select from the drop-down list (not all types are available for all units):

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

11. **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, based on the appointment type.

12. **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. You may add multiple appointment types.



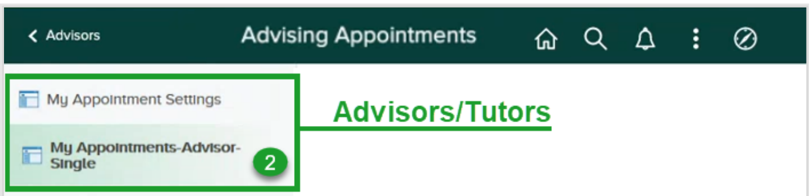
13. **Allowed Reasons for this Block**: This represents the *appointment reasons* the advisor/tutor will provide during the block of time. Click the magnifying glass to see a list of available reasons for your unit. Leave empty to allow <u>all</u> reasons for your college or academic support unit (not recommended). Use the **Add Reason/Delete Reason** links to manage the list of reasons for this block. You may add multiple allowed reasons for a given block.

14. **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. You may add multiple student groups.

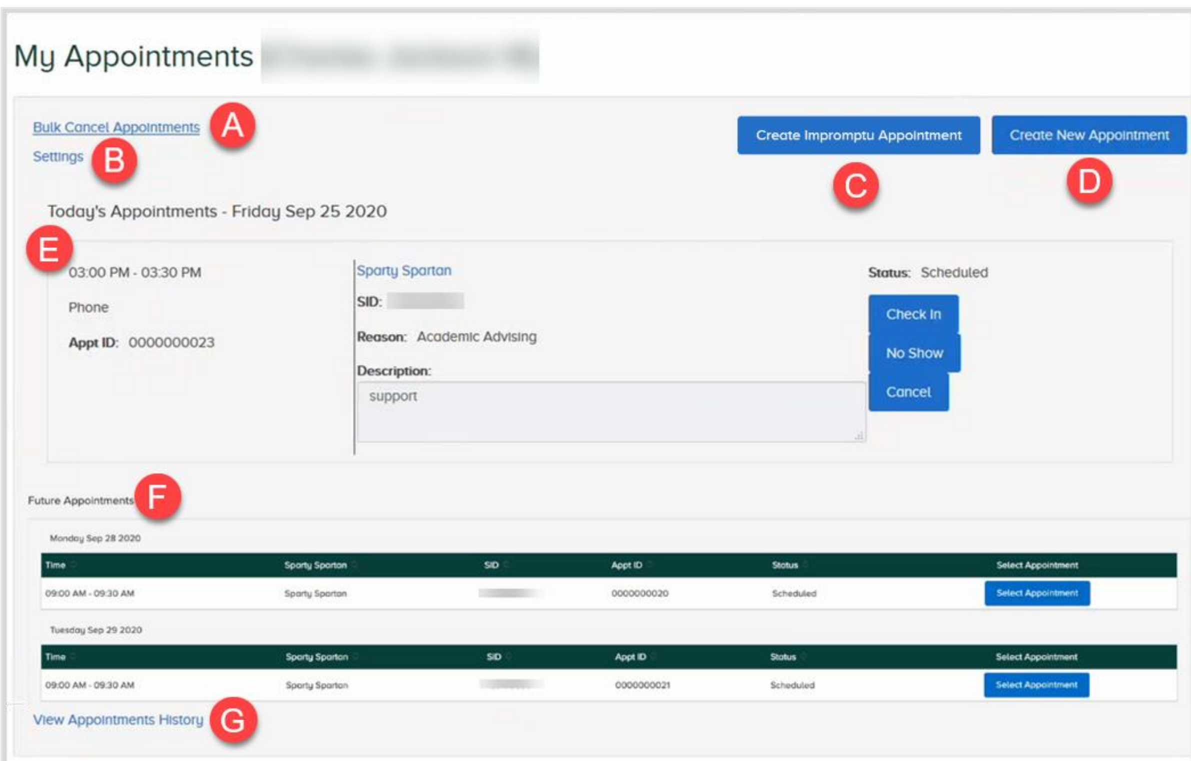
15. Click **Save and Update Settings**.

Now that the time blocks, appointment types, number of attendees, 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)



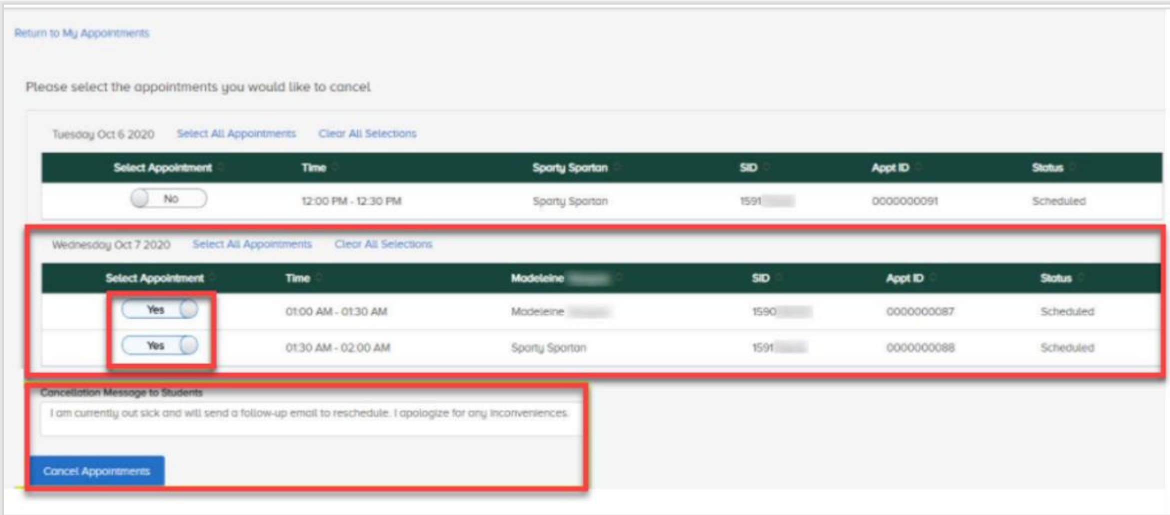
When you click the My Appointments-Advisor-Single item on the left menu, the **My Appointments** page will open, and it contains several action items for current, past and future appointments.



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.

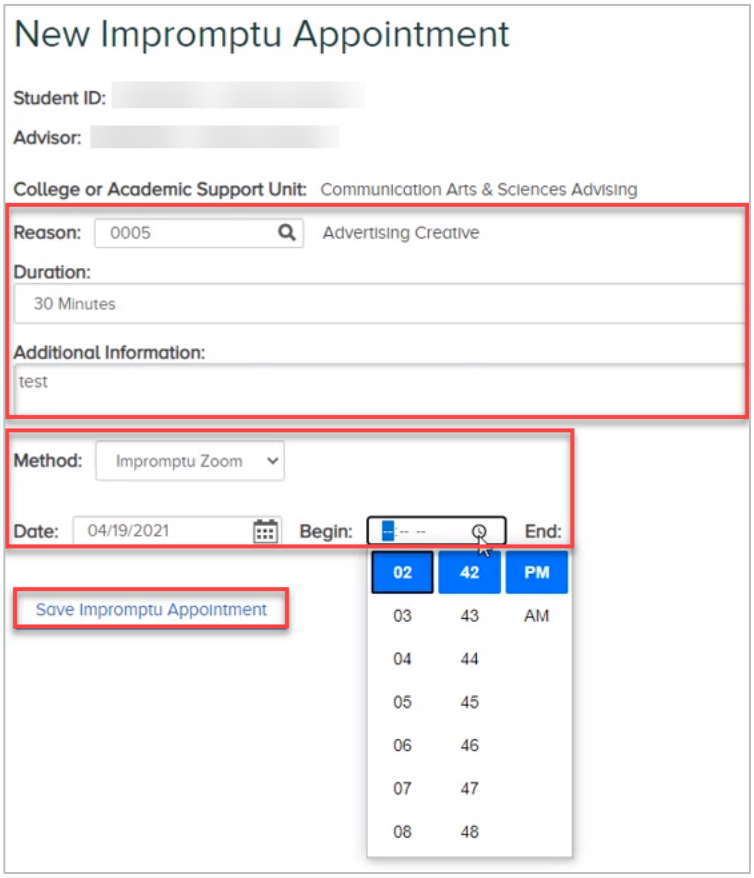
B. Appointment Settings

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

C. Create Impromptu Appointment

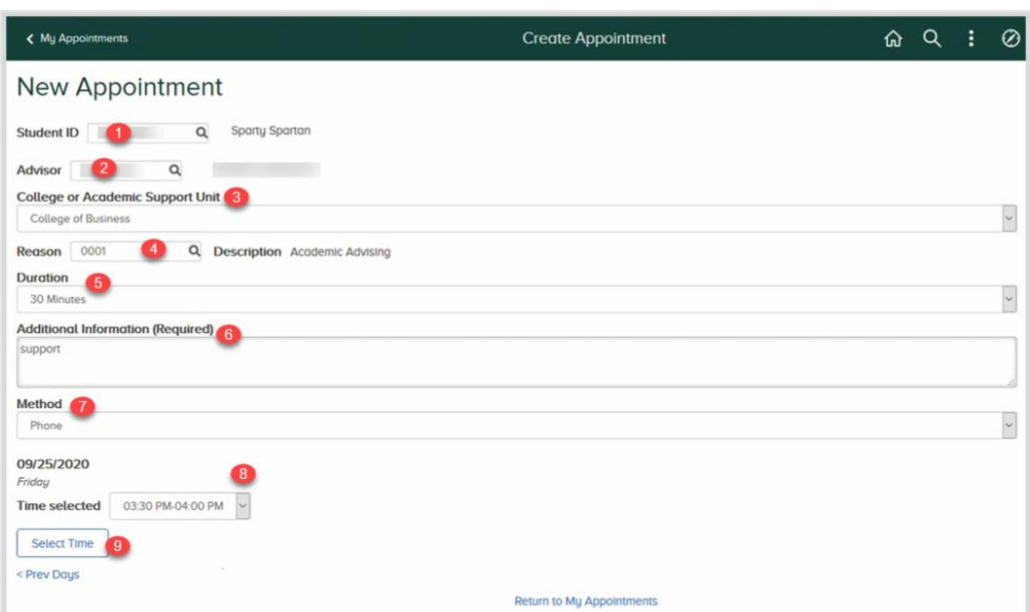
The impromptu appointments feature permits advisors and tutors to schedule and quickly create and log appointments with students, offering more flexibility. Impromptu appointments can be scheduled regardless of Outlook calendar obligations or their Appointment System time blocks.

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.

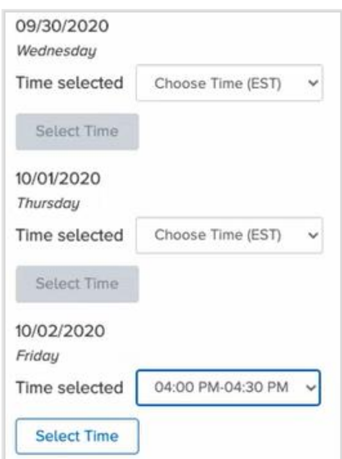
5. **Duration**: Will default to the unit’s default duration. Choose an appointment duration from the drop-down.

   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 be appear with an option to **Choose Time** for the desired date.

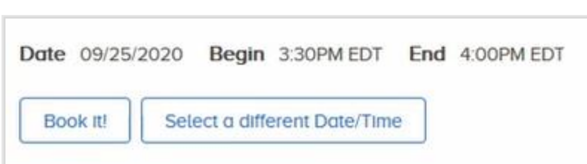


8. **Choose Time**: Click the drop-down and select a time from the list.

   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.

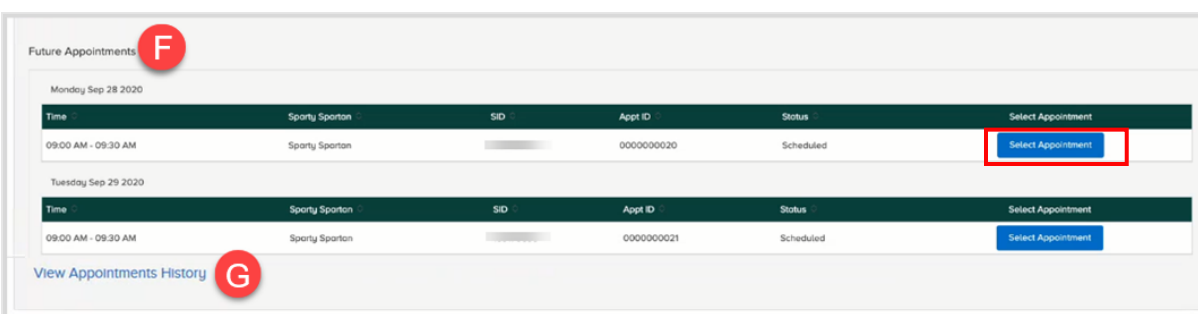
    You will receive a confirmation that the appointment was successfully created, and the appointment will appear in the advisor/tutor's appointment list, as well as on their Outlook calendar and the Outlook calendar of the student.

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.

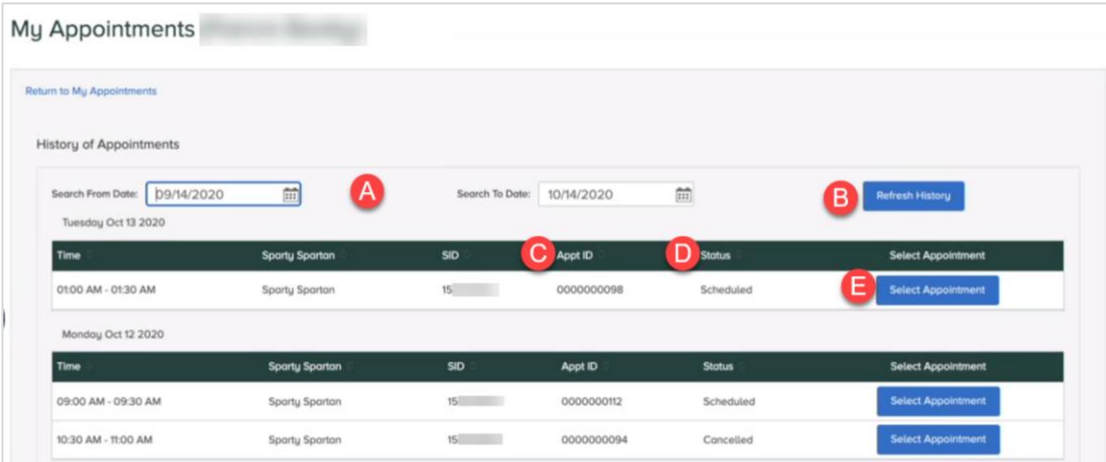


G. View Appointment History

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.