



JOB AID

Academic Advising: Manage Student Appointments (Front Office Staff)

09/02/2021





Contents

A. View Advisor My Appointments	2
B. View Appointment.....	6
C. Create Advisor Appointment	8
D. Create Student Appointment	10
E. Create Guest Appointment	13



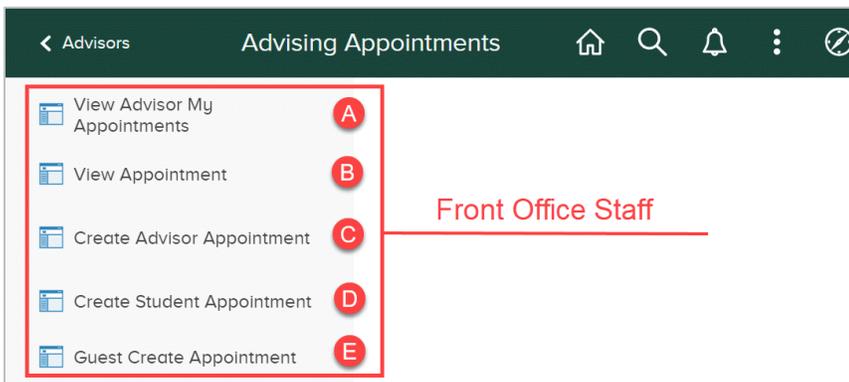
Academic Advising: Manage Student Appointments (Front Office Staff)

The Advising/Tutoring Appointments tile on the Advisors home page provides advisors, tutors and administrative staff easy access to view, schedule 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 Front Office Staff functions.



A. View Advisor My Appointments

Designed for front office support staff and those who support a group of advisors or tutors. This option permits them to look-up an advisor or tutor's scheduled appointments, in addition to allowing them to view and adjust advisor/tutor appointment settings on behalf of the advisor/tutor.

1. Click the **View Advisor My Appointments** link from the left menu.
2. Enter the Advisor/Tutor **ID**, **Campus ID** (NetID) or **Last Name/First Name** and click **Search**.

The **My Appointments** page will open where administrative staff can view or take action on current, future and past appointments, in addition to creating impromptu appointments.



My Appointments

[Bulk Cancel Appointments](#) **A** [Create Impromptu Appointment](#) [Create New Appointment](#)

[Settings](#) **B** **C** **D**

Today's Appointments - Friday Sep 25 2020

E

03:00 PM - 03:30 PM	Sparty Spartan	Status: Scheduled
Phone	SID: [redacted]	Check In
Appt ID: 000000023	Reason: Academic Advising	No Show
	Description: support	Cancel

Future Appointments **F**

Monday Sep 28 2020						
Time	Sparty Spartan	SID	Appt ID	Status	Select Appointment	
09:00 AM - 09:30 AM	Sparty Spartan	[redacted]	000000020	Scheduled	Select Appointment	

Tuesday Sep 29 2020						
Time	Sparty Spartan	SID	Appt ID	Status	Select Appointment	
09:00 AM - 09:30 AM	Sparty Spartan	[redacted]	000000021	Scheduled	Select Appointment	

[View Appointments History](#) **G**

A. Bulk Cancel Appointments: Used to bulk cancel advising/tutoring appointments.

[Return to My Appointments](#)

Please select the appointments you would like to cancel

Tuesday Oct 6 2020 [Select All Appointments](#) [Clear All Selections](#)

Select Appointment	Time	Sparty Spartan	SID	Appt ID	Status
<input type="radio"/> No	12:00 PM - 12:30 PM	Sparty Spartan	1591 [redacted]	000000091	Scheduled

Wednesday Oct 7 2020 [Select All Appointments](#) [Clear All Selections](#)

Select Appointment	Time	Madeleine [redacted]	SID	Appt ID	Status
<input checked="" type="radio"/> Yes	01:00 AM - 01:30 AM	Madeleine [redacted]	1590 [redacted]	000000087	Scheduled
<input checked="" type="radio"/> Yes	01:30 AM - 02:00 AM	Sparty Spartan	1591 [redacted]	000000088	Scheduled

Cancellation Message to Students

I am currently out sick and will send a follow-up email to reschedule. I apologize for any inconveniences.

[Cancel Appointments](#)

- Staff can manually select multiple appointments by toggling between **Yes/No** under the Select Appointment section for any given day.
- They may also bulk select/clear all appointments for a given day by clicking either **Select All Appointments** or **Clear All Sections**.
- Once all necessary appointments have been selected, staff can add a **Cancellation Message to Students** explaining the reason for cancellation.



- Click **Cancel Appointments** to complete the bulk cancellation process and this will send an email message to all affected students.

B. Settings: This link provides quick access to review or modify the advisor/tutor's previously established appointment settings. See this [separate training document](#) to learn more about updating the My Appointment Settings page.

C. Create Impromptu Appointment: Impromptu appointments are intended to be a system of record, in addition to being a tool to schedule last-minute advising appointments with students, offering more flexibility.

1. When you click this button, you will be taken to a search page where you will first need to enter either the advisor's/tutor's ID and/or their first/last name, followed by clicking on the **Search** button.
2. The **My Appointments** page will appear; click the button labeled **Create Impromptu Appointment**.
3. You will be brought to a search page where you will now need to search for the student by either their ID, first name, and/or last name. Click **Search** once the student's information has been entered.
4. The **New Impromptu Appointment** page will appear where you will need to enter details related to the appointment, including the reason, duration, additional information, method, and date and time.

Note: If you use 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.

5. Once all details have been inputted, click **Save Impromptu Appointment** and the appointment will be added to the advisor's 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.



New Impromptu Appointment

Student ID:

Advisor:

College or Academic Support Unit: Communication Arts & Sciences Advising

Reason: Advertising Creative

Duration:

Additional Information:

Method:

Date: Begin: End:

02	42	PM
03	43	AM
04	44	
05	45	
06	46	
07	47	
08	48	

D. Create New Appointment: See *Create Advisor Appointment* section below for step-by-step instructions.

E. Today's Appointments: Any appointment(s) an advisor/tutor has for the current day will appear in the Today's Appointments section, in addition to any relevant information pertaining to the appointment(s).

A student can be checked in, marked as a no show, or have their appointment for that day cancelled altogether in this section, as well. An email message is sent if the appointment is cancelled.

F. Future Appointments: This section allows advisors and tutors to view a comprehensive list of all future appointments, view details of those appointments, and/or take action on those appointments as needed. For each future appointment, you can click the Select Appointment button to view appointment details.

G. Appointment History: Click the link to view a history of appointments.



My Appointments

Return to My Appointments

History of Appointments

Search From Date: 09/14/2020 **1** Search To Date: 10/14/2020 **2** Refresh History

Tuesday Oct 13 2020

Time	Spartan	SID	Appt ID	Status	Select Appointment
01:00 AM - 01:30 AM	Spartan	15	000000098	Scheduled	5 Select Appointment

Monday Oct 12 2020

Time	Spartan	SID	Appt ID	Status	Select Appointment
09:00 AM - 09:30 AM	Spartan	15	000000112	Scheduled	Select Appointment
10:30 AM - 11:00 AM	Spartan	15	000000094	Cancelled	Select Appointment

1. **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.
2. **Refresh History:** Click this button to update the display based on the date range entered.
3. **Appt ID:** The same appointment ID will appear in the advisor/tutor's meeting event within their Outlook calendar.
4. **Status:** Scheduled, Cancelled or No-Show.
5. **Select Appointment:** Click to view appointment details. An Existing Appointment page will open.

Existing Appointment

Student ID: 15 Spartan

Advisor: 15

Reason: 0056 Description: Communication

Duration: 30 Minutes

Additional Information (Required): test

Method: Zoom

Date: 10/13/2020 Begin: 100AM EDT End: 130AM EDT

Check In Cancel Appointment No Show Status: Scheduled

B. View Appointment

Designed for front office support staff and those who support a group of advisors or tutors. It is on this page that a staff member would look up an appointment and check the student in (or cancel, if for example a student calls to cancel OR mark the appointment no show).

1. Click **View Appointment** on the left side menu.

The Search page will open.



View Appointment

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Appointment ID:	begins with ▼	<input type="text"/>
ID:	begins with ▼	<input type="text"/>
Name:	begins with ▼	<input type="text"/>
Appointment Date:	= ▼	<input type="text"/> 
Status:	begins with ▼	<input type="text"/>
Academic Advisor:	begins with ▼	<input type="text"/>
Name:	begins with ▼	<input type="text"/>

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

2. Enter information into one or more of the search fields as follows:
 - a. **Appointment ID:** Unless you know the appointment ID, leave blank. This value is auto-generated by the system and included in the confirmation email to advisor/tutor and student.
 - b. **ID:** This is the student's Campus Solutions ID number. Enter if known.
Note: Within Campus Solutions, the 'A' in student IDs (APID) has been replaced with a '1.'
Example: A123456789 (Legacy SIS ID) = 1123456789 (Campus Solutions ID)
 - c. **Name:** Type Student's "First Name (space) Last Name" (e.g., Sparty Spartan).
 - d. **Appointment Date:** To search by date, click the calendar icon and select a date from the calendar.
 - e. **Status:** Type the first few letters of the status: *Scheduled, No Show, Cancelled, or Checked-In*.
 - f. **Academic Advisor:** Type the Campus Solutions ID for advisor/tutor, if known.
 - g. **Name:** Type Advisor/Tutor's "First Name (space) Last Name"
3. Click **Search**.

Search Results that meet the criteria you entered will be listed at the bottom of the screen. You can continue entering search criteria to further refine the Search Results, if needed.



Advising Appointments

View Appointment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Appointment ID: begins with

ID: begins with

Name: begins with

Appointment Date: < 10/15/2020

Status: begins with

Academic Advisor: begins with

Name: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Appointment ID	ID	Name	Appointment Date	Status	Reason	Academic Advisor Name	Begin	End	Duration	Time
000000006	15	Madeleine	09/02/2020	Cancelled	Academic Advising 18	Patrick	3:30PM	4:00PM	30 Mins	
000000009	15	Madeleine	09/11/2020	Scheduled	Academic Advising 18	Patrick	4:00PM	4:30PM	30 Mins	
000000011	15	Madeleine	09/11/2020	Cancelled	Academic Advising 18	Patrick	1:00PM	1:30PM	30 Mins	
000000012	15	Madeleine	09/14/2020	Scheduled	Academic Advising 18	Patrick	8:00AM	8:30AM	30 Mins	
000000013	15	Elizabeth J	09/14/2020	Cancelled	Academic Advising 18	Patrick	8:30AM	9:00AM	30 Mins	
000000010	15	Madeleine	09/15/2020	Scheduled	Academic Advising 18	Patrick	8:00AM	8:30AM	30 Mins	
000000016	15	Madeleine	09/16/2020	Cancelled	Academic Advising 18	Patrick	8:00AM	8:30AM	30 Mins	
000000017	15	Madeleine	09/16/2020	Scheduled	Academic Advising 18	Patrick	8:00AM	8:30AM	30 Mins	
000000008	15	Madeleine	09/18/2020	Cancelled	Academic Advising 18	Patrick	2:00PM	2:30PM	30 Mins	
000000023	15	Sparty Spartan	09/25/2020	Cancelled	Academic Advising 12	Charlie	3:00PM	3:30PM	30 Mins	
000000020	15	Sparty Spartan	09/28/2020	Cancelled	Academic Advising 18	Patrick	9:00AM	9:30AM	30 Mins	
000000029	15	Sparty Spartan	09/28/2020	Cancelled	Academic Advising 18	Patrick	6:00PM	6:30PM	30 Mins	

In the Search Results list, click any column header to sort on that column, or click any item in a specific row to view that appointment. When you click an item to view, the Existing Appointment page will open.

This is also where staff can **Check-in** a student, **Cancel Appointment**, or mark as a **No Show**.

Existing Appointment

Student ID 15 Sparty Spartan

Advisor 18 Patrick

Duration 30 Minutes

Method Zoom

Date 09/28/2020 Begin 8:00PM EDT End 8:30PM EDT

Status Scheduled

C. Create Advisor Appointment

Designed for front office support staff and those who support a group of advisors or tutors. It is on this page that a staff member would create a new appointment on behalf of an advisor/tutor and student.



1. Click Create Advisor Appointment from the left menu.

The **New Appointment** page will open.

2. **Student ID:** Enter student’s Campus Solutions 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.’

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

3. **Advisor ID:** Enter the advisor or tutor’s Campus Solutions ID or click the look-up button to search.

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

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

6. **Duration:** Front office staff can alter an appointment’s duration. Click the drop-down and select from the durations available.

After selecting Duration, additional fields will appear.

7. **Additional Information (Required):** Enter details to help an advisor or tutor prepare for the appointment.

8. **Method:** Click the drop-down and select the meeting method (i.e., Zoom, Phone, etc.)

After selecting a Method, the available dates/times for the advisor/tutor will be listed with an option to Choose Time for a desired date.



09/30/2020
Wednesday
Time selected Choose Time (EST) ▾
Select Time

10/01/2020
Thursday
Time selected Choose Time (EST) ▾
Select Time

10/02/2020
Friday
Time selected 04:00 PM-04:30 PM ▾
Select Time

9. **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.

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

The appointment **Date**, **Begin** and **End** times will display for your review before you officially book the appointment.

Date [blurred] Begin 3:30PM EDT End 4:00PM EDT

Book It! Select a different Date/Time

11. Click **Book It!** to confirm or click **Select a different Date/Time** to go back to the list of available dates/times to make a new selection.

You will see a confirmation that the appointment was successfully created, and the advisor/tutor will receive an email confirmation.

Appointment Successfully Created

D. Create Student Appointment

Designed for front office support staff and those who support a group of advisors or tutors. It is on this page that a staff member would create a new appointment on behalf of a student.

1. Click the Create Student Appointment from the left menu.



2. Enter the Student **Last Name** and **First Name**, or search by a student's ID in the ID field.
3. Click **Search**.
4. Enter **New Appointment** details as follows:

- a. **Category:** Select Advising or Tutoring.
 - b. **Advising/Tutoring Unit:** Click the drop-down and make a selection.
 - c. **Appointment Reason:** Click the look-up button and make a selection from the list.
 - d. **Duration:** Will default to the preset duration for that appointment reason.
 - e. **Additional Information:** Enter information to help an advisor or tutor prepare for the appointment.
 - f. **Appointment Type:** Click the drop-down and select a meeting method (i.e., Zoom, Phone, etc.).
5. Click **Select Advisor/Tutor**



The system will return a list of available advisors/tutors and appointment dates/times meeting the criteria entered above. In addition, a Drop-In Times button is available to view any advisors with drop-in time blocks for the advising/tutoring unit and reason selected.

- Choose Time:** For the preferred date, click the drop-down and select a time from the list. Once you have selected a time, the Select Time button will activate.
- Select Time:** Click to confirm the selected time.

The appointment **Date**, **Begin** and **End** times will display for your review before officially booking the appointment.

- 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 see a confirmation that the appointment has been successfully created, and the advisor/tutor and student will receive an email confirmation.



E. Create Guest Appointment

This section will cover how to create a guest advising appointment for someone who is not currently an MSU student, such as a student considering a transfer to MSU from another institution. Depending on your security roles, you may not have access to some items presented in the screenshots below.

- From the left-hand menu, select **Guest Create Appointment**.
- You will then need to insert the necessary information to create the new appointment.
 - Last name, first name, email address, and 10-digit phone number are all required to create the appointment.
 - Select the appointment category (Advising or Tutoring)
 - The Advising/Tutoring Unit is already chosen for you, based on your access.
 - Choose an appointment reason by clicking on the magnifying glass and choosing a reason from the pop-up window.
 - With the guest's input, enter additional information about the appointment. This helps the advisor prepare for the appointment.
- Once all information has been entered, click **Select Advisor**.



- Now select an available advisor, followed by a timeslot. Click **Select Time** afterwards to continue.

Begin | Advisor | Schedule | Complete!

Display Name

[Refresh Availability](#) (Sorry, this can take time to load) [Drop-In Times](#) [Return to Main page](#)

Advisor/Tutor Patrick

Location I offer in-person appointments. Please let me know via email if you would like to meet in 177 Bessey Hall. **Email** sis.test@qaad.msu.edu **Telephone**

09/01/2021
Wednesday

Time selected 01:00 PM-01:30 PM

[Select Time](#)

[< Prev Days](#) [Next Days >](#)

- A final screen will appear to review the appointment details before booking the appointment. Once all details have been checked, click **Book It!**

Begin | Advisor | Schedule | Complete!

Name (Last Name, First Name)
Spartan,Sparty

Email Address
Sparty@hotmail.com

Country Code 001 **Phone** 517/555-5555

Category
Advising

Advising/Tutoring Unit
Communication Arts & Sciences Advising

Reason 0005 **Description** Advertising Creative

Appointment Duration
30 Minutes

***Additional Information (required)**
Sample test

Appointment Type (required)
Zoom Appointment

Advisor Patrick

Location I offer in-person appointments. Please let me know via email if you would like to meet in 177 Bessey Hall.

Email sis.test@qaad.msu.edu

zoom type

Date 09/01/2021 **Begin** 1:00PM EDT **End** 1:30PM EDT

[Book It!](#) [Return to Select Advisor](#)

- A green box will appear at the bottom of the page indicating the appointment was created.

Appointment Successfully Created



- At this point, email messages are sent to the guest and the advisor notifying them of the new appointment.
- The appointment will appear on the advisor's Outlook calendar.
- Advisors will also be able to see their appointments scheduled for guests by going to the **My Appointments-Advisor-Single** menu.
 - Notice below, the section for a student's ID is replaced with the word "GUEST."
 - By clicking **Select Appointment**, the advisor will be able to see the appointment details (guest's name, email, additional information, etc.).

10:00 AM - 10:30 AM

Email Appointment

Appt ID: [REDACTED]

SID: GUEST

Email: [REDACTED]

Phone 001 740/274-1296

Reason: Advertising Creative

Description:
test

Future Appointments

Wednesday Aug 25 2021

Time	Name	SID	Appt ID	Status	Method	Select Appointment
01:00 PM - 01:30 PM	[REDACTED]	GUEST	0000048193	Cancelled	Zoom Appointment	Select Appointment
01:30 PM - 02:00 PM	Spartan, Sparty	GUEST	0000048194	Scheduled	Zoom Appointment	Select Appointment