JOB AID

Academic Advising: Manage Student Appointments (Front Office Staff)

09/02/2021

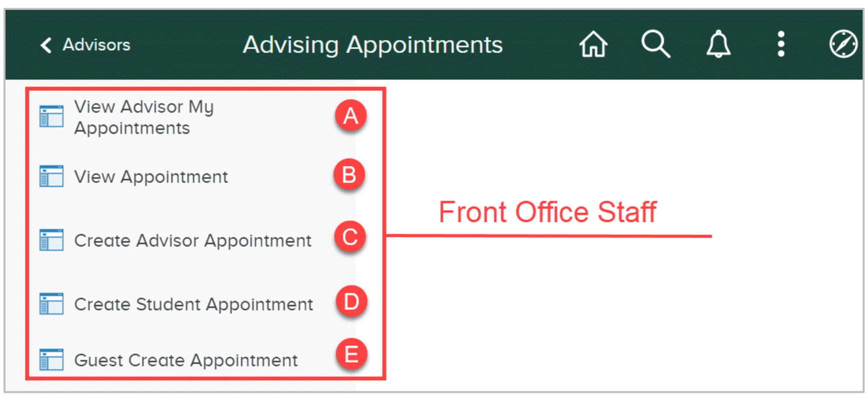
Contents

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.

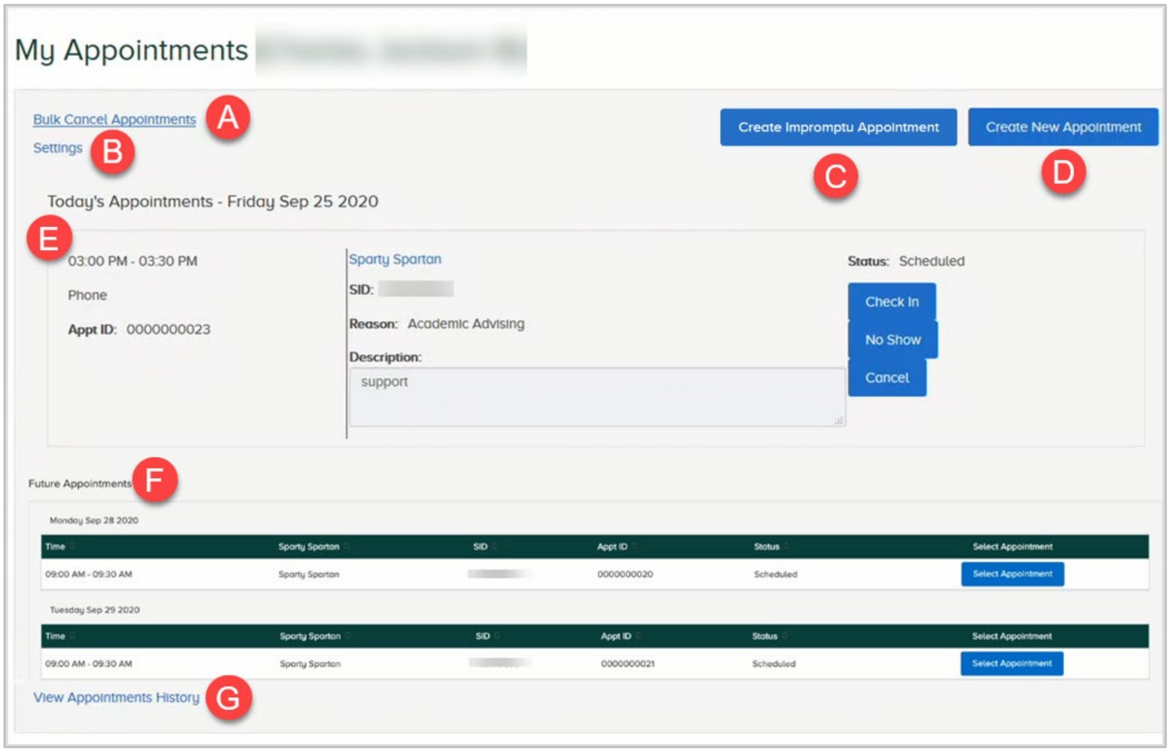


A. View Advisor My Appointments

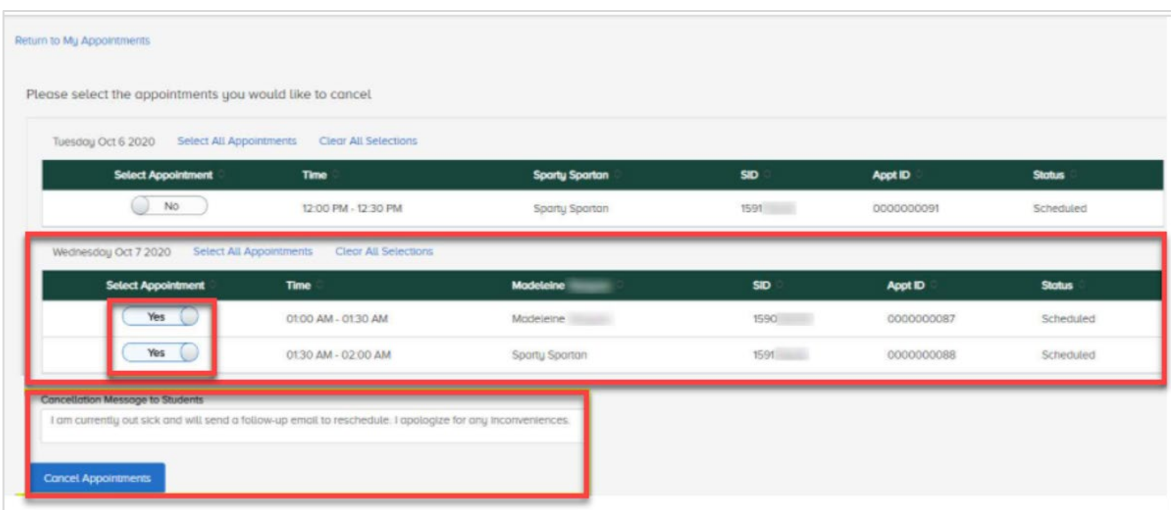
Designed for front office support staff and those who support a group of advisors or tutors. This option permits them to look-up an advisor or tutor's scheduled appointments, in addition to allowing them to view and adjust advisor/tutor appointment settings on behalf of the advisor/tutor.

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.



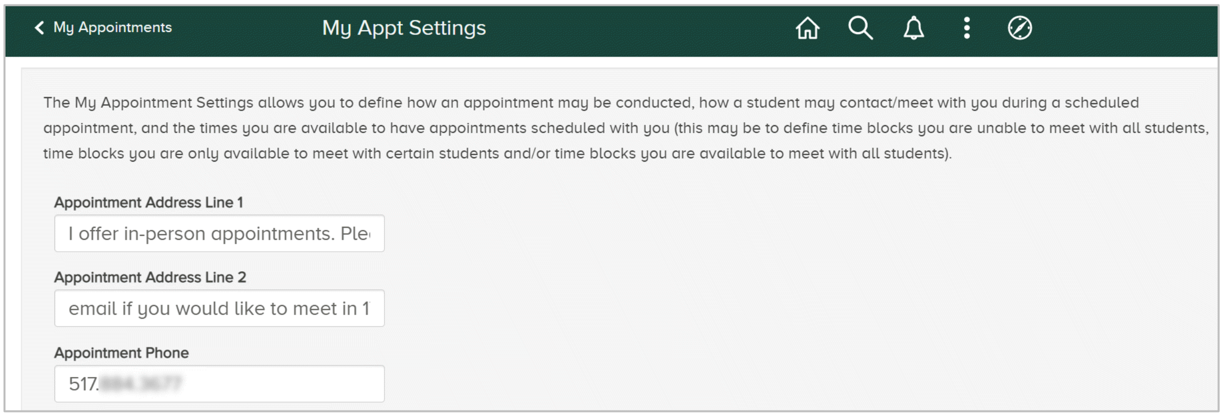
A. Bulk Cancel Appointments: Used to bulk cancel advising/tutoring appointments.



- 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**.

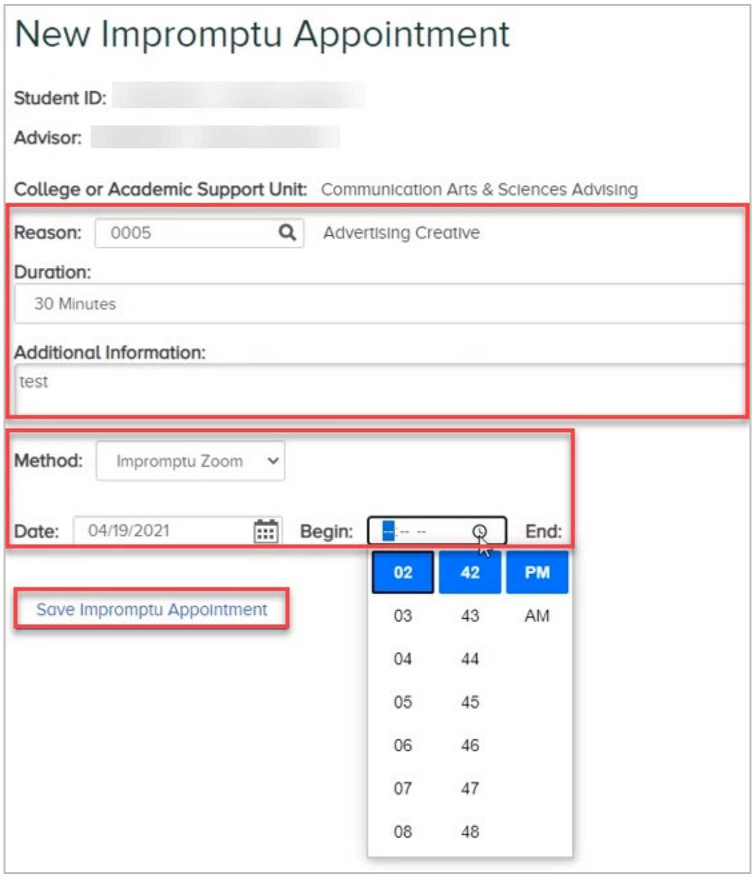
3. You will be brought to a search page where you will now need to search for the student by either their ID, first name, and/or last name. Click **Search** once the student's information has been entered.

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.



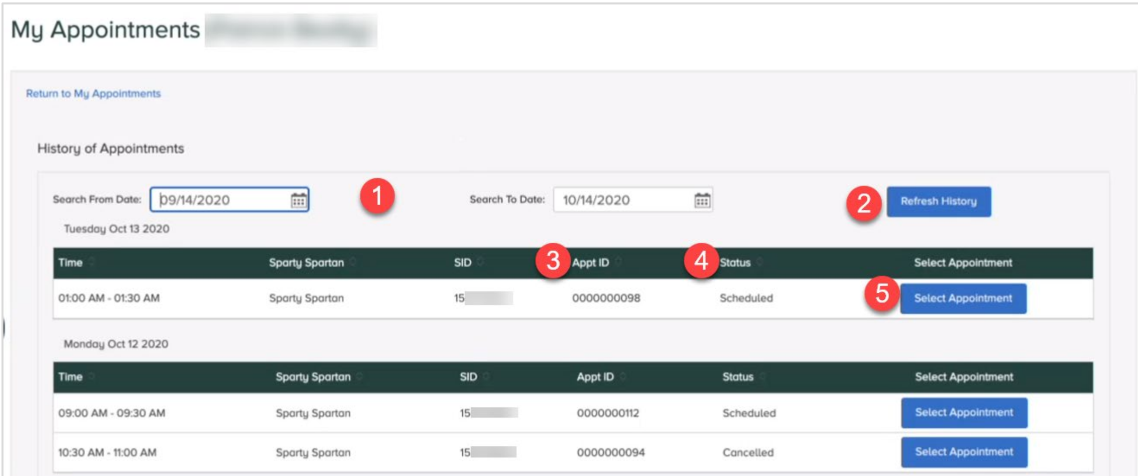
D. Create New Appointment: *See Create Advisor Appointment section below for step-by-step instructions.*

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).

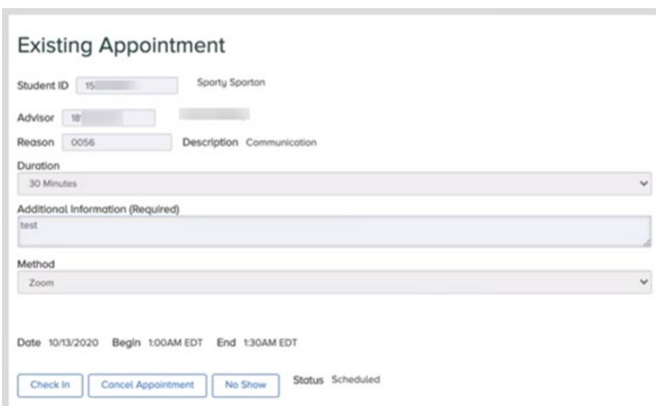
A student can be checked in, marked as a no show, or have their appointment for that day cancelled altogether in this section, as well. An email message is sent if the appointment is cancelled.

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.



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.

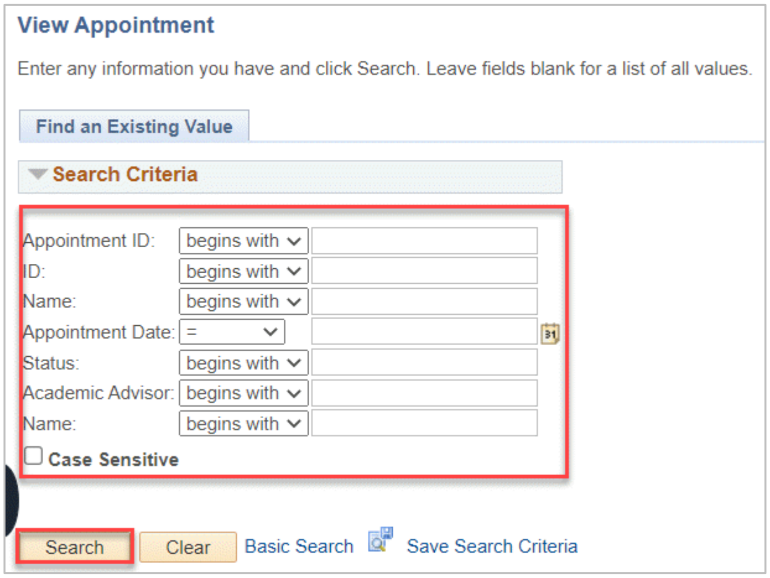


B. View Appointment

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.



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.

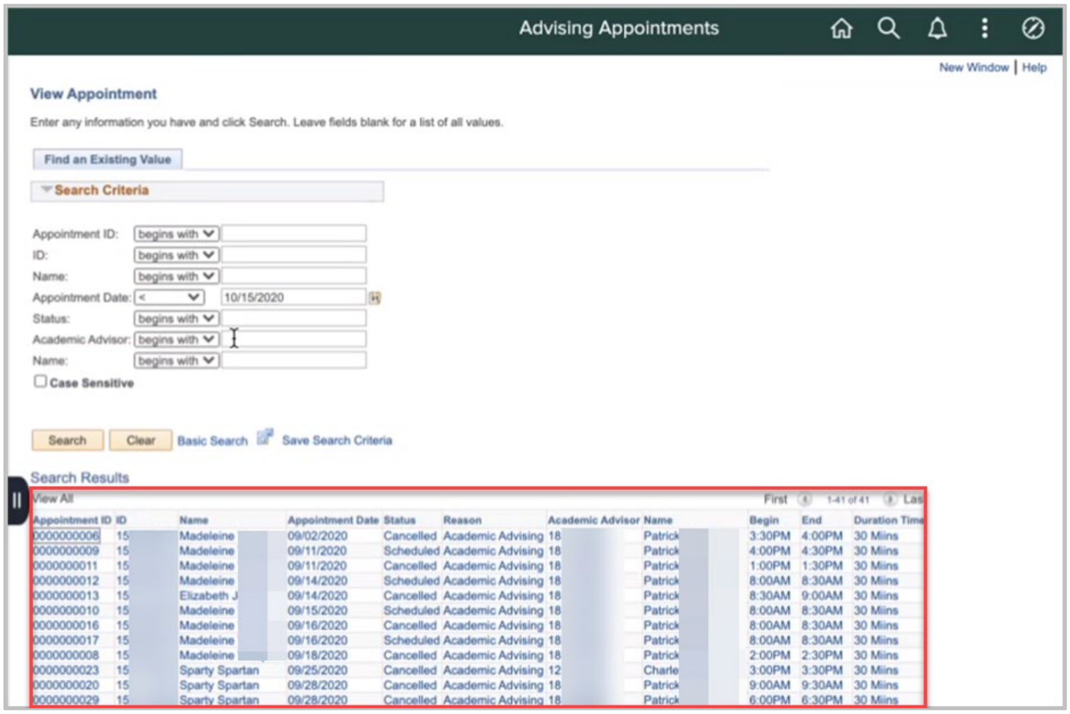
   e. **Status:** Type the first few letters of the status: *Scheduled*, *No Show, Cancelled, or Checked-In*.

   f. **Academic Advisor:** Type the Campus Solutions ID for advisor/tutor, if known.

   g. **Name:** Type Advisor/Tutor's "First Name (space) Last Name"

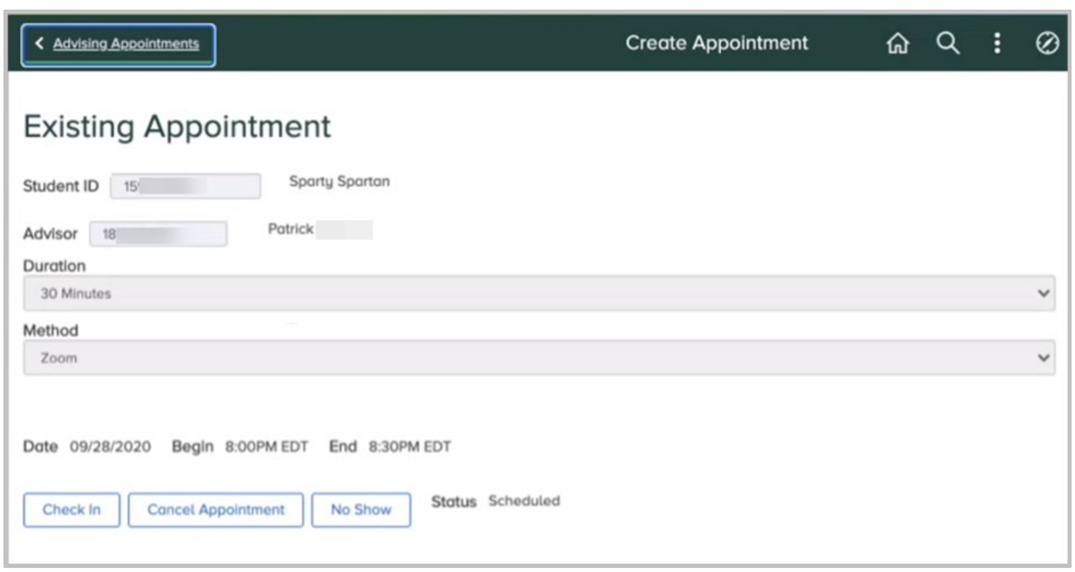
3. Click **Search**.

   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.



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**.

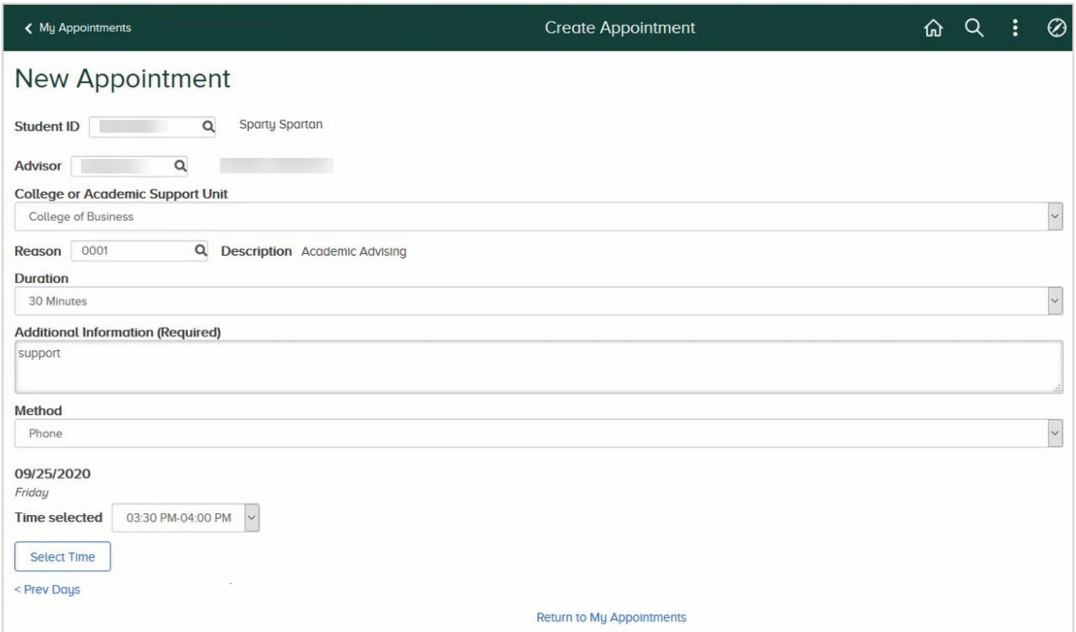


C. Create Advisor Appointment

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.'

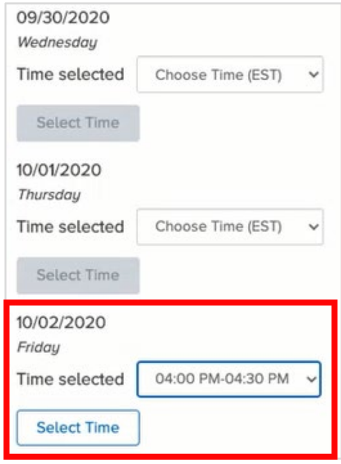
   Example: A123456789 (Legacy SIS ID) = 1123456789 (Campus Solutions ID)

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.

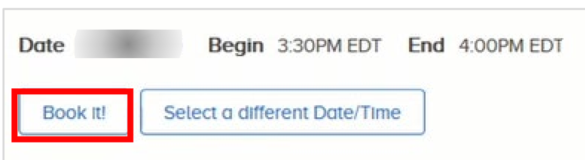


9. **Choose Time**: Click the drop-down and select a time from the list.

   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.



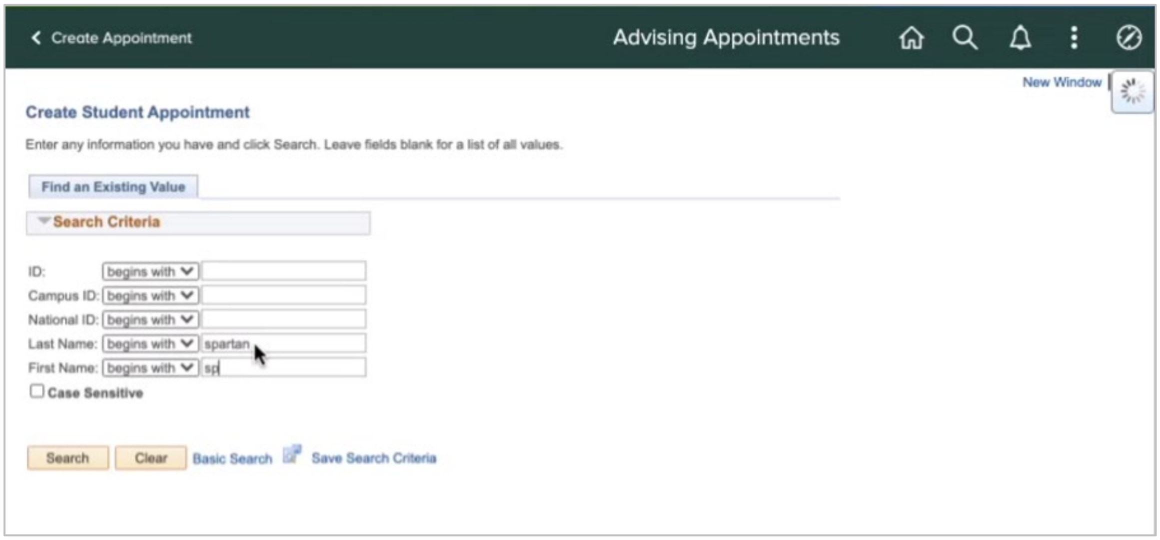
11. Click **Book It!** to confirm or click **Select a different Date/Time** to go back to the list of available dates/times to make a new selection.

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

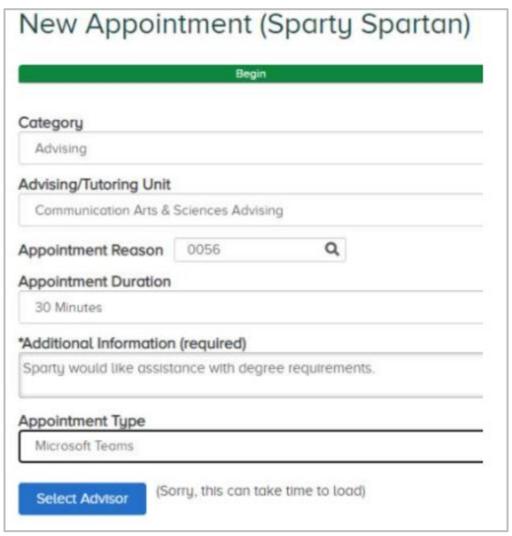
D. Create Student Appointment

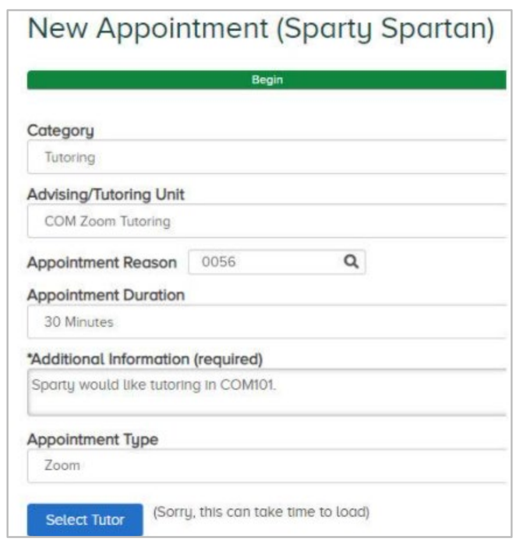
Designed for front office support staff and those who support a group of advisors or tutors. It is on this page that a staff member would create a new appointment on behalf of a student.

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:

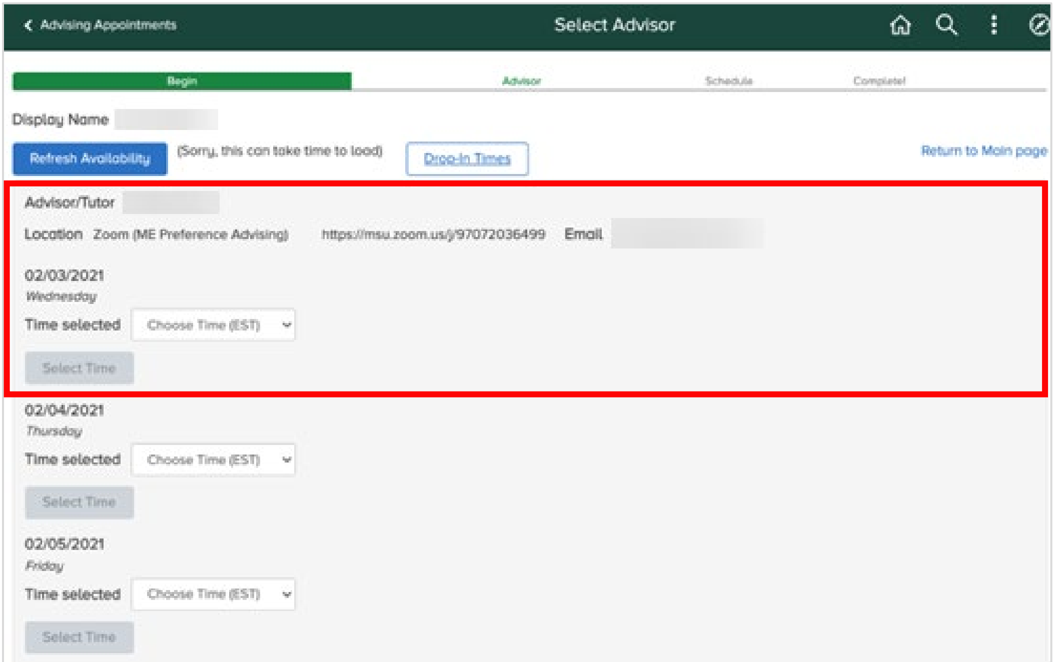




   a. **Category:** Select Advising or Tutoring.
   b. **Advising/Tutoring Unit**: Click the drop-down and make a selection.
   c. **Appointment Reason**: Click the look-up button and make a selection from the list.
   d. **Duration:** Will default to the preset duration for that appointment reason.
   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.

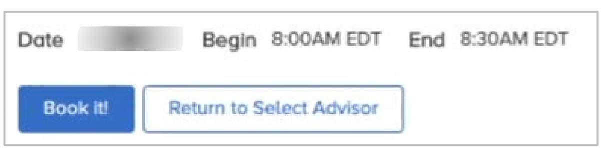


6. **Choose Time**: For the preferred date, click the drop-down and select a time from the list.

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

7. **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.



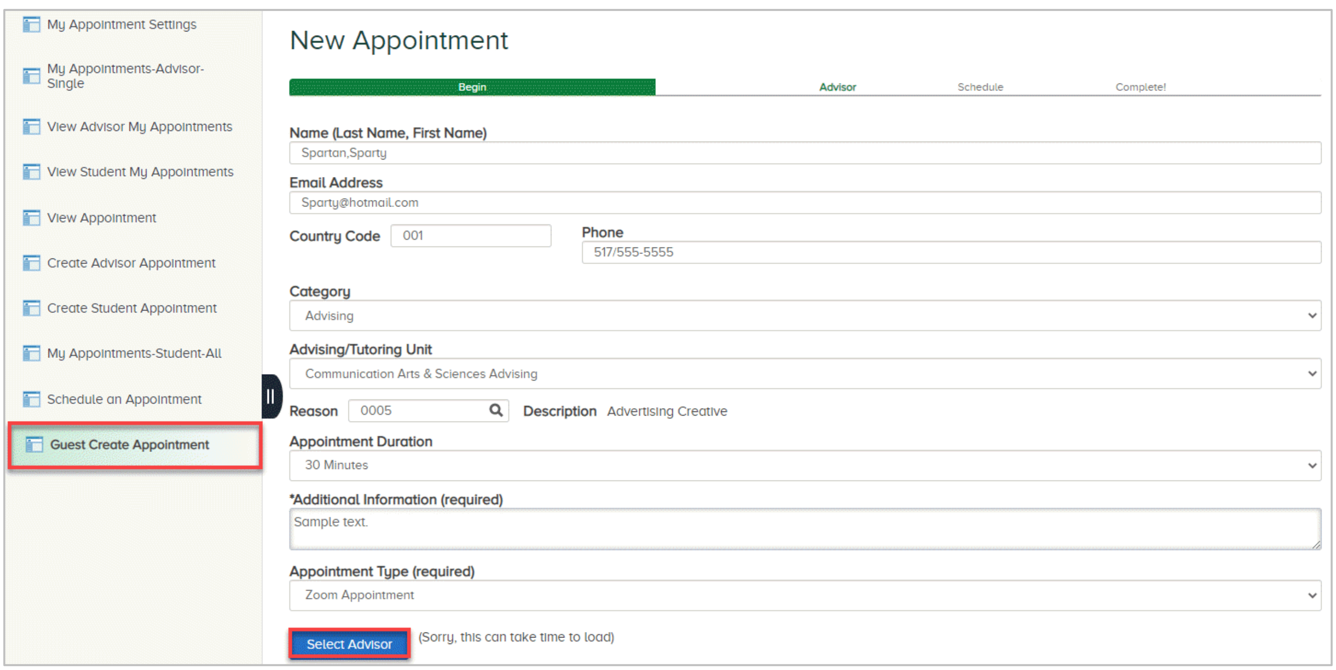
8. Click **Book It!** to confirm or click **Select a different Date/Time** to go back to the list of available times to make a new selection.

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

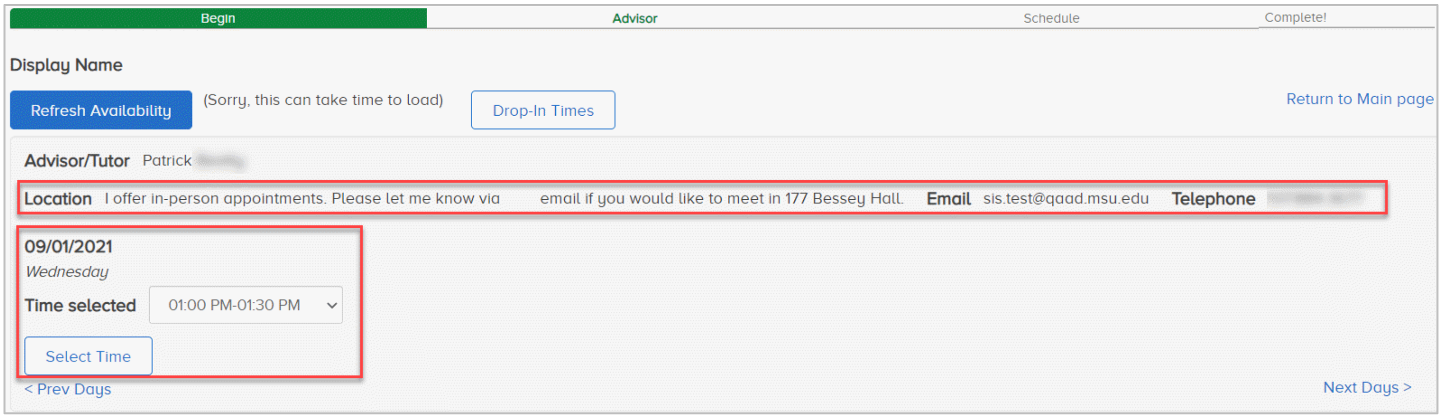
E. Create Guest Appointment

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.

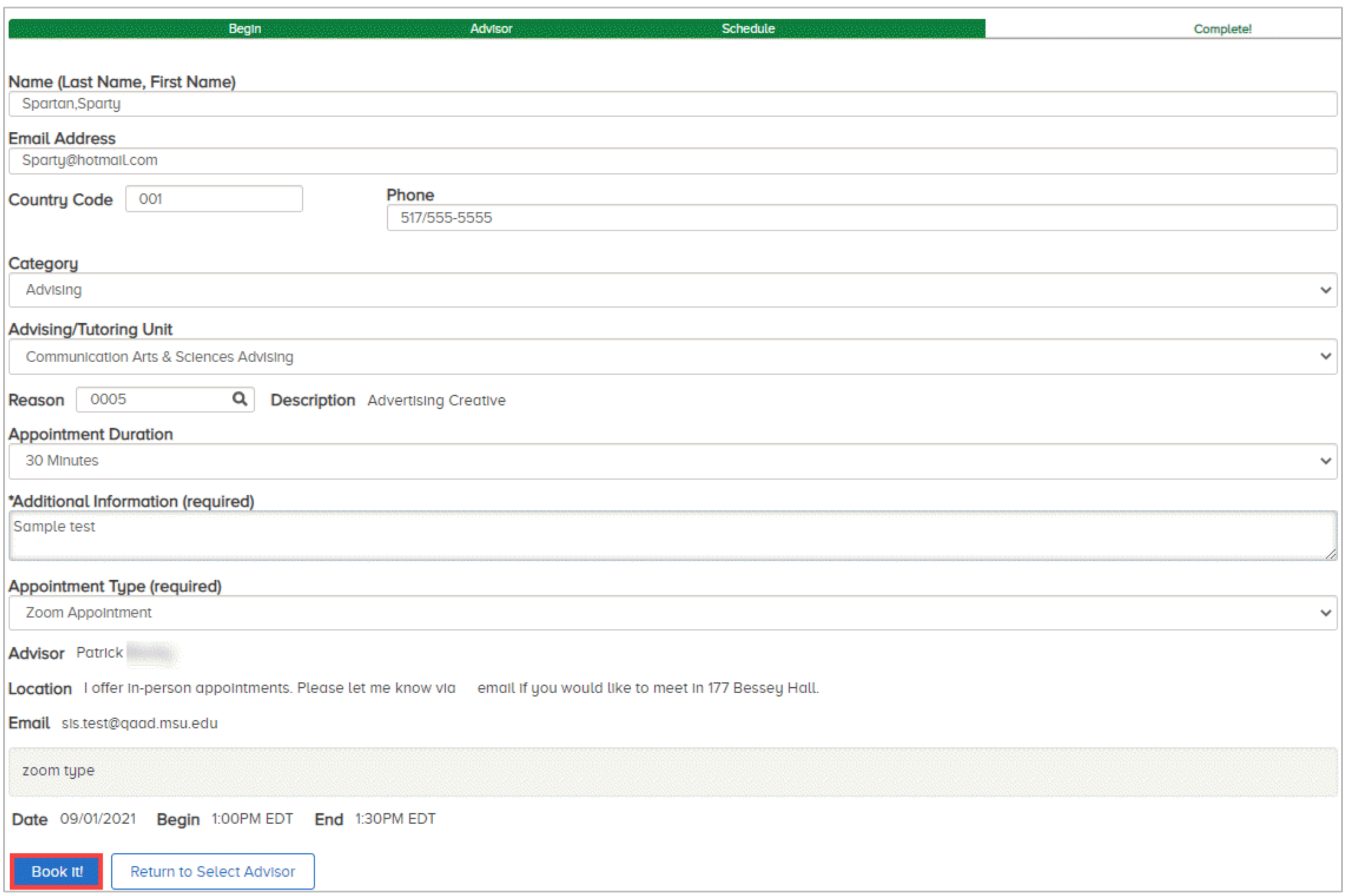
- From the left-hand menu, select **Guest Create Appointment**.
- You will then need to insert the necessary information to create the new appointment.
    - Last name, first name, email address, and 10-digit phone number are all required to create the appointment.
    - Select the appointment category (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.



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



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