JOB AID

Academic Advising: Manage Student Appointments
(Front Office Staff)

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The Advising/Tutoring Appointments tile on the SIS 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 links to various functions. Please keep in mind that the functions available to you 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. Permits them to look-up an advisor or tutor’s scheduled appointments. Permits them to view and adjust an 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.
A. **Bulk Cancel Appointments**: Used to bulk cancel advising/tutoring appointments.
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- An advisor/tutor 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, the advisor/tutor 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.


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

F. 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. Status: Scheduled, Cancelled or No-Show.

4. 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**: Leave blank. This is auto-generated by the system and included in the confirmation email to advisor 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 or Cancelled*.
   f. **Academic Advisor**: Type Empl 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 switch between ascending or descending order, 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 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 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 the appointment’s duration. Click the drop-down and select a duration from 15 minutes up to 60 minutes.

   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:

   - In Person
   - Microsoft Teams
   - Phone
   - Zoom
After selecting a Method, the available dates established by the advisor/tutor will be listed with an option to Choose Time for the 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 officially booking the appointment.

11. 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 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**.

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 30 minutes.

   e. **Additional Information**: Enter information to help an advisor or tutor prepare for the appointment.
f. **Appointment Type:** Click the drop-down and select the meeting method.
   - In Person
   - Microsoft Teams
   - Phone
   - Zoom

5. Click **Select Advisor/Tutor**
   The system will return a list of available advisors/tutors and appointment dates/times meeting the criteria entered above.

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