


# Appointment Scheduling

## Appointment Scheduling

Users with appropriate permissions can schedule appointments by checking the box beside student names in various lists throughout the application and by clicking on Schedule Appointment in the Action Menu. These lists are typically found on your home page and in Search areas of the application. The system will then display the Schedule an Appointment page.

  
SSC University

### Schedule Appointment

**Filters**

Type:

Reason(s):

Comments:

Location:

Select a Date:  

October 2015						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Reminders  
 Send an email reminder?  
 Send a text reminder?

**People Attending (1)**  
Gonzalez, Laura (Student)

**Select An Advisor**

SELECT	ADVISOR	AVAILABLE TIMES
<input type="radio"/>	Brown, Tim	mon-tue, thu 11:00am-3:00pm <b>Drop-In Availability:</b> mon-tue, thu 2:00pm-5:00pm
<input type="radio"/>	Eagan, John	mon, wed, fri 12:00pm-5:00pm tue, thu 2:00pm-5:00pm <b>Drop-In Availability:</b> mon, wed, fri 8:30am-12:00pm
<input type="radio"/>	Hamzaee, Maanle	mon-fri 5:00am-9:00pm
<input type="radio"/>	Hoffman, Doug	mon-fri 8:00am-5:00pm
<input type="radio"/>	Irish, Allie	mon-fri 9:00am-4:30pm (September 18, 2015 - February 8, 2016)
<input type="radio"/>	Kilpatrick, Steven	tue, thu 10:45am-4:00pm (Fall 2015) mon, wed, fri 10:15am-5:00pm <b>Drop-In Availability:</b> mon, wed, fri 10:15am-5:00pm (Fall 2015)

## Appointment Components

- **Type** is what determines whether the appointment you are creating is an Advising, Tutor, or General Event appointment. While both Advisor and Tutor appointments are fairly self-explanatory, a General appointment may not be. A General Event appointment can be considered an obligatory event for the student. Events that can qualify are things like Football practice, Honors Society Lunch etc. The reason adding these types of events to a student's calendar is important is because those events will then show up as "Conflicts" when scheduling future appointments (more on "Conflicts" shortly). It is usually a best practice to only include those General events when they occur during the regular school day, or office hours.
- **Reasons** is where you will select what the purpose of the appointment is. For example, Career Counseling and Graduation Audit can be valid reasons for advising appointments. For Advising and Tutoring appointments, reasons are configured by your Application Administrators. For general events, the reasons field is open.
- **Comments** is a section where extra commentary can be entered about the appointment. These comments are seen by both the student(s) and the advisor when they look at their calendar and receive their appointment notification email.
- **Select a Date** prompts users to select a week in which you would like to schedule the appointment. This lets users see the entire week, and not just a single day, to determine which is the best day to schedule the appointment.

- **Location** is where you will meet your students. Select the correct location from the drop-down list.
- **Reminders** are sent the day of the appointment. The email reminder is sent the morning of the appointment and the text message reminder is set “X” number of minutes before the appointment. “X” number of minutes is actually defined on the Admin tab by your Application Administrator. You can mouse over the “?” mark, besides the text reminder, to see what the current value of “X” is.
- **Add an Attendee** lets the advisor add extra users without having to exit the schedule appointment page. Simply type in the user's name, select them, and they will be added to the appointment.
- **People Attending** are the users who will be scheduled for this appointment. The user scheduling the appointment is able to *Remove* or *Add an Attendee* prior to saving the appointment.
- **Select an Advisor** is the list of advisors who have availability at the selected Location. If you are creating an appointment for yourself, simply check your name. However, showing all advisors gives users the ability to create appointments for any advisor at that location (this option can be turned off to where advisors are only able to create appointments for themselves. See your Application Administrator for more information).
- **Length** refers to the length of the appointment. While it will default to whatever the advisor had setup in the availability, it can be overridden here.
- **The Scheduling Grid** is where you will actually select what time this appointment will take place. You will notice that a checkbox will appear for any times that are available for scheduling. If something is already scheduled or “Conflicts” with that time, you will see that notated on the grid. For example, Appointments, Free Busy, Conflicts (such as a students class), or in some cases Drop in's for walk in appointment times. A blank means the selected advisor does not have availability for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.

#### Choose A Time To Meet

Length:

Availabilities?:

TIME SLOT	10/11 (SUN)	10/12 (MON)	10/13 (TUE)	10/14 (WED)	10/15 (THU)	10/16 (FRI)	10/17 (SAT)
6:00a-6:30a							
6:30a-7:00a							
7:00a-7:30a							
7:30a-8:00a							
8:00a-8:30a	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS
8:30a-9:00a	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS
9:00a-9:30a	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	<input type="checkbox"/>	CONFLICTS
9:30a-10:00a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:00a-10:30a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:30a-11:00a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:00a-11:30a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Availabilities** is where you can override preset availabilities and schedule the appointment at any time at any day. Select the option ‘Ignore Availabilities, unlock the calendar’ and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.
- **Repeat This Appointment?** Is where you can make this appointment recurring. While there are many options to choose, the most common and easiest to use is ‘Weekly’. Select Which Days, Every how many weeks and Repeat Until to make this appointment repeat.

To finish, click the **Save Appointment** button. When the appointment is saved, the system will send

appointment notification emails to each of the attendees with the details of the appointment. It will also update each attendee's calendar.

### Upcoming Appointments

The purpose of this tab is to give the advisor a quick and easy view of all of their upcoming appointments. We also provide users with the necessary tools they need to manage those upcoming appointments.

### Upcoming Advising Appointments

Actions ▾							Show Cancelled
<input type="checkbox"/>	DATE	ATTENDEE	REASON	COMMENT	REPORT FILED?	DETAILS	
<input type="checkbox"/>	1/1	10/16/2015 01:30p - 02:00p	Gonzalez, Laura	Advising		Not Yet.	<a href="#">Details</a>

### Cancel Appointment

Need to cancel an appointment? Check the appointment and click the Cancel Appointment button within the Actions Menu.

**CANCEL UPCOMING APPOINTMENT** ✕

**Cancel Appointment For:**

Laura Gonzalez ▾

Reason:

Medical Emergency ▾

Comments:

Student is not feeling well and plans to reschedule.

Close **Cancel Appointment**

The Application Administrator creates and defines Cancellation Reasons in the event that an advisor might need to cancel an upcoming appointment. Notice the advisor is given the option for whom to cancel the appointment for, required to select a reason why the appointment is to be cancelled and lastly an option to enter a comment about the cancellation. Clicking the Cancel Appointment button will instantly send out Cancellation Emails to all of the attendees alerting them the appointment has been cancelled.

By default, the Upcoming Appointments grid will NOT show cancelled appointments. Check the Show Cancelled check box to include cancelled appointments in the list of upcoming appointments.

As a last note about the Upcoming Appointments tab, as soon as the appointment starts, it will drop off this list and appear on the Recent Advising Appointments grid. For example, if an advisor has an appointment today at 9:30am, as soon as the time reaches 9:30, that appointment will be dropped from the Upcoming Appointments list and added to the Recent Advising Appointments list.