

Coordinated Student Scheduling Workflow

Student Scheduling Workflow

When students are proactively scheduling their own appointments, we can create a layered dropdown experience to help funnel students toward the best fit.

Step 1: Student Service Category: Type of Advising

Student Service Categories grant the ability to group different services together into buckets. For example, you can create categories for each type of advising.

To setup Student Service Categories please do the following:

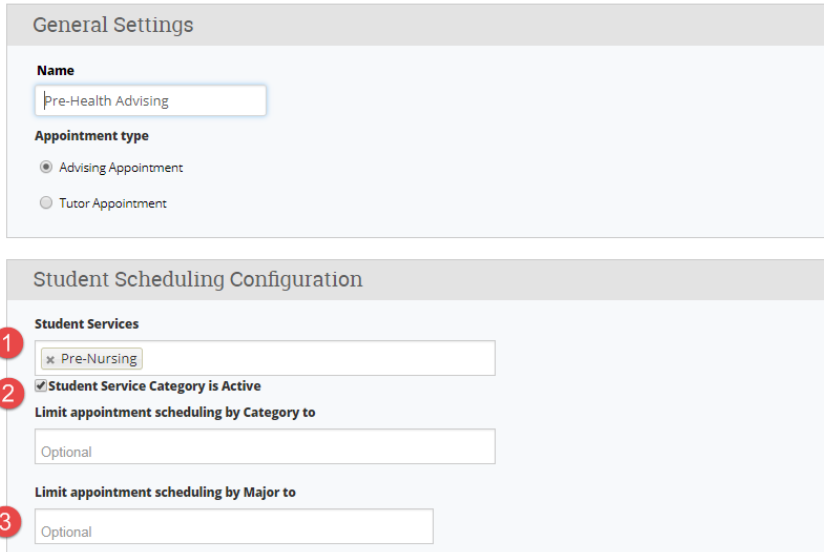
Administration > Student Service Categories > Add New Student Service Category > Add services into "Student Services"

Configuration Requirements:

Student Service Categories need the following configurations to be completed:

1. Student Service(s) Selected
2. Student Service Category is Active
3. (Optional) Limit by Major(s) or Category/Categories

Student Service Categories > Edit Pre-Health



General Settings

Name
Pre-Health Advising

Appointment type

Advising Appointment

Tutor Appointment

Student Scheduling Configuration

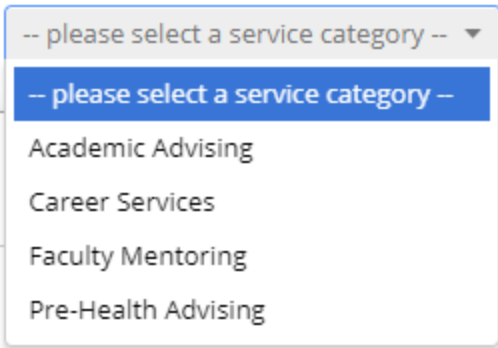
1 **Student Services**
x Pre-Nursing

2 **Student Service Category is Active**

Limit appointment scheduling by Category to
Optional

3 **Limit appointment scheduling by Major to**
Optional

To help you find a time, please tell us why you'd like to see someone.



A screenshot of a web form showing a dropdown menu. The menu is open, displaying the following options: "-- please select a service category --", "-- please select a service category --", Academic Advising, Career Services, Faculty Mentoring, and Pre-Health Advising. The first two options are highlighted in blue.

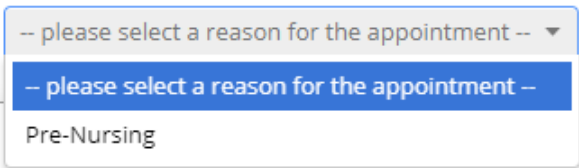
Step 2: Student Service: College-Specific Services

To help you find a time, please tell us why you'd like to see someone.



A screenshot of a web form showing a dropdown menu with the text "Pre-Health Advising" and a downward arrow.

Choose from the following options and click Next.



A screenshot of a web form showing a dropdown menu. The menu is open, displaying the following options: "-- please select a reason for the appointment --", "-- please select a reason for the appointment --", and Pre-Nursing. The first two options are highlighted in blue.

Student Services can be more specific than the student service categories, allowing advisors to set more specific availability.

Configuration requirements:

1. Name (30 characters or less)
2. Active
3. Allow students to choose Advisor - allows students to select the advisor they want, (if multiple advisors are available for that service.)
4. Allow Student to schedule an Advising Appointment – if unchecked, this service will not appear as an option for scheduling.
 - a. Check the box to 'Only Allow Student to meet with Assigned Advisors' if the service should be restricted to assigned advisors.
5. Add student to waiting list – allows a student to be added to an advisor's waiting list as a drop-in.

6. Appointment duration (if desired). If no duration is set, the appointment duration will default to the location's duration.

General Settings

Name of Student Service:

1

Names must be 30 characters or less.

Abbreviated Name of Student Service:

Abbreviated Names should stay around 12 characters or less

Show Abbreviated Service Name in Appointment Center

2 Active

3 Allow Students To Choose Advisor or Tutor

Type of Service

This determines where this service is displayed and what actions are available when it is selected.

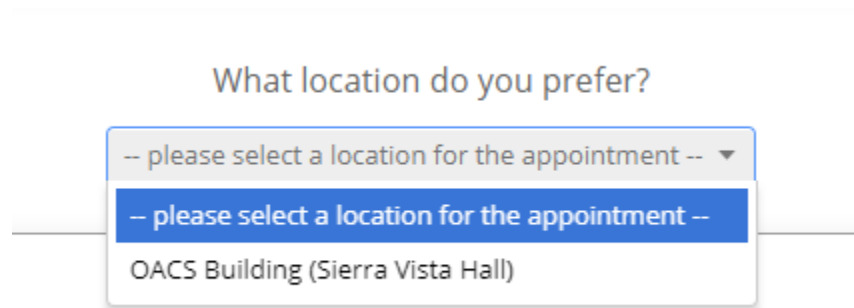
Advising Appointment Please select at least one of the options below...

4 Allow student to schedule an Advising Appointment
 Only Allow Student to meet With Assigned Advisors?

5 Add student to waiting list

6 **Appointment Duration:?**

Step 3: Location: Buildings



To further narrow down the list of available advisors, location will prompt the student to select the building where their appointment will be held.

To setup a Location, please do the following:

Administration > Appointments > Locations > Add a New Location

Configuration requirements:

1. Name (building)
2. Active
3. Default appointment increment
4. Allow Students to Schedule Advising Appointment
5. (Optional) Allow students to view Advising Drop in Availabilities
6. Student Services for this Location – select all services that are offered at the location. If a service is not checked on, it will not be available for scheduling.

Locations > Edit OACS Building

The "General Settings" section of the "Edit OACS Building" page. It includes a "Name" field with the value "OACS Building (Sierra Vista Hall)" (marked with a red circle 1), a "Description" text area, and two checked checkboxes: "Active" (marked with a red circle 2) and "First Available Queue includes All Available Advisors/Tutors?".

The "Advising Appointment Information for this Location" section. It contains a heading "If Advising Appointment will be held at this location, please fill out the fields below." and an "Appointment increment:?" dropdown menu (marked with a red circle 3). Below are three checkboxes: "Allow Students to Schedule Advising Appointment" (checked, marked with a red circle 4), "Allow Students to View Advising Dropin Availabilities" (checked, marked with a red circle 5), and "Allow Students to Request Advising Appointment?". Under the last checkbox are two radio button options: "Show Location All the Time" and "Show Location Only if there is Appointment Availability" (selected).

Step 4: Advisor/Tutor Availability

Advisors and tutors must set their availability in order to allow students to schedule with them. They can set availability from their Advisor homepage under the "Advisor Settings" tab (or "Tutor Settings" tab for tutors).

1. Select the **days and times** when you are available to meet with students.
2. Select whether you will meet with students via **appointments or drop-ins** during that time. The campaign option is availability reserved specifically as dedicated time for targeted students to make appointments with you.
3. Select the duration of the availability (for the term, a specific set of dates, or forever).
4. Choose the **location** where you will be available (this is a single-select list, since you can only be in one location at a time).
5. Select which **student services** you can provide to students during this availability (this is a multi-select list, since you can be available for various services at the same time). **Note:** Leaving this student services field empty means you will appear to be available for *all* advising student services at the location you choose.
6. Under **Availability Details** for each advisor, put in location and other specific details about their availability, such as office location, reminder to bring certain documents, specific directions about the meeting, etc.

Note: Weekend availability is now available at all locations. Students will be able to schedule weekend appointments when users have weekend availability. Users without weekend availability will not show as options for weekend scheduling.

What location do you prefer?

OACS Building (Sierra Vista Hall) ▼

Which advisor? You may select more than one.
If you don't have a preference, just click Next.

Ubersax, Grace

ADD AVAILABILITY ✕

Grace Ubersax is available on

1 Mon
Tue
Wed
Thu
Fri
Sat
Sun

8:00a - 5:00p

for

2 Drop-ins
Appointments
Campaigns

Forever
3

OACS Building (Sierra Vista Hall)
4

Pre-Nursing
5

Please come prepared to discuss your degree audit.
6

Cancel
Save

Times Available

Actions ▼						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT	
<input type="radio"/>	Tue, Wed	8:00a-5:00p	Forever	OACS Building (Sierra Vista Hall)	Pre-Nursing For Appointments	Edit
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Fall Semester 2017	Mentoring Center	Academic Mentoring, Advising Report Reason For Appointments	Inactive/Edit
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Academic Advising Center	Advising, Change Major/Minor For Appointments	Edit
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Academic Success Center	Academic Mentoring, Advising, Advising Report Reason, Career Counseling, Change Major/Minor, Change of Major (IUB), Changes to my Schedule, General Advising, Prospective Student, Selecting a Major, Testing Walkins For Appointments	Edit
<input type="radio"/>	Mon, Wed, Thu, Fri	8:00a-3:45p	Forever	Academic Success Center	Academic Mentoring, Advising For Appointments	Edit

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next →