Creating Appointment Availability

How to create advising appointment availability

Advisor Home - My Availability Tab

1. **Before Getting Started:** One of the features that advisors can utilize within the platform to increase their efficiency is the advising appointment system. Utilizing the advising appointment system allows advisors to create days/times they are available to meet and then have the students self-select an appointment time without engaging in the back/forth dialog that often accompanies the process of scheduling an appointment. A few important items to note:
   - Until students are logging into the platform, the only way for students to self-select the day and time is to create appointment availability and then to create an Appointment Campaign. More on Appointment Campaigns in other BHSC Advisor Resources.
   - Creating an Appointment Campaign with "students" can mean either assigned advisees or non-assigned advisees, depending on an advisor’s goals or intentions. Navigate to Advanced Search to find students with certain criteria that are not assigned advisees or to Advisor Home – Students tab to access assigned advisee lists.

2. **Step One:** Navigate to the Advisor Home – My Availability Tab.
   - For the first time, click Edit Appointment Constraints.
     - **Hours in advance** – Edit the amount of time in advance that you want to have as a buffer before a student can schedule an appointment. For example, if you desire a day’s notice, input 24 hours in advance.
     - **Default Appointment Length** – This is simply a default appointment length time. For example, if you typically meet with students for a half hour, enter a 30 min default. It can later be overridden in varying campaigns or appointments.
     - **Require available times for students** – This feature should remain checked in order to ensure that the system is only allowing students to schedule times that have been created as available. If you uncheck this feature, the system will allow the student to schedule any amount of time, whether you are available or not.
     - **Click Update Constraints**

3. **Step Two:** Under the Times Available section, click on the Action dropdown and select Add Time.
4. **Select Days/Times:** Select the days/times desired for the availability you’re creating. If you are creating a singular date, you must select the corresponding day of the week for that date (i.e. November 7th is a Monday.) If you are selecting a range of dates, you can schedule these in one step, as long as the reoccurring days/times are the same. For example, if you are creating MWF 8:00-10:00 availability, you can do so in one step. If you are creating MF 8:00-10:00 availability but wanted 10:00-noon availability for Wednesday, then that would be achieved by establishing two different availabilities.

5. **Purpose – Drop-ins/Appointments/Campaigns:** You must select the purpose for which you’re creating availability. *Typically, most advisors will select Appointments as the purpose of their availability.* Even if you’re utilizing Campaigns, students from a Campaign can still select availability with an *Appointments* purpose selected – but not vice versa. For example, if you select *Campaigns* purpose then only students within Campaigns will be allowed to schedule during this time. Perhaps you wanted to create availability on Fridays to do Probation Campaigns to your advisees on academic probation. You could create availability with the purpose of *Campaigns* and then only students as part of a Campaign could select from your Friday availability to meet with you. *Drop-ins* purpose would be selected for advisors that are utilizing an Advisement Center/Kiosk Mode and offering walk-in services.
6. **Duration:** Select a duration from either a *Semester, A Range of Dates, or Forever.* Semester will default to the begin/ends dates of that semester. A *Range of Dates* allows you to select a timeframe involved and *Forever* means that you’re creating that availability indefinitely until you modify or delete that availability. **Selecting a known, limited Range of Dates is recommended when first learning the platform.**

   □ **Range of Dates** – When selecting a range of dates, if the *Starting On* date is not today’s date, then the saved availability will appear as inactive/highlighted in pink. Students can still schedule in an inactive date range. Once the *Starting On* date occurs, the availability will no longer be considered inactive. **To avoid this, select today’s date for the Starting On date unless you are intentionally creating availability that isn’t until a future date.**

7. **Location:** Locations are generic advisement areas located on-campus. These are not intended to represent actual building or physical locations. Select the generic location that best describes your location. For example, *Advisor’s Office or Major/Departmental Advisement Office* are likely applicable locations to most advisors.

8. **Select Student Services:** *Student Services can be thought of as Appointment Reasons.* Student Services are dependent upon the Location selected. Most staff advisors should select as many applicable reasons as possible to increase the chance of students finding your availability for appointments (once students are logging in.) Other advisors, such as certain faculty advisors, should only select the Student Services that correspond to your advisement practice. For example, if you are not involved in Probation Advising or Senior Checkout/Graduation reviews, don’t select those as possible appointment reasons.

9. **Textbox:** In the textbox, it is important to list your physical/building location to give the student guidance as to where to meet for the appointment. This is also an area to give the student other instructions such as *“Please review your degree audit in advance of our meeting.”*

   **NOTE:** In order to maximize the possibility of a student connecting with an advisor for assistance, the appointment system is not restrictive to only assigned advisees. While students are not logging in, an advisor will be able to limit or control appointment availability access by choosing the students within their Appointment Campaigns. However, outside of Campaigns/once students are logging in, the system will not restrict appointments only to your assigned advisees. **If this type of limitation is desired, you should select the location of Advisor’s Office and the student service (appointment reason) of Advising: Assigned Advisor. This location/service has been intentionally built to restrict appointment availability to assigned advisees only.**

**Modify or Delete Availability**

1. **Step One:** Navigate to the *Advisor Home – My Availability Tab.* To modify availability after it has been created, click the *Edit* link next to the availability that is desired to be edited. Make desired edits and click *Save.* To delete availability after it has been created, click the radio button next to the desired availability to delete, click the Action dropdown and select *Delete Time.*