Appointment Center Glossary & Guide

Accessing the Appointment Center
⇒ Once logged into SSC Campus, scroll to the very bottom of the page.
⇒ At the bottom right, click on the ‘Additional Modes’ button.
⇒ Select ‘Appointment Center’
⇒ Select the location associated with your department/services. This will be the same located advisors use when setting up appointment availability for our department/office.

Glossary - To be used with the Appointment Glossary Images
(1) Location
At the top of each appointment center view, the location will always be displayed. Only appointments and advisors with posted availability associated with the location listed will be displayed in the appointment center.

(2) Student Search Box
Enter a student’s name or ID to in order to search for a student.

From here, you can:
⇒ View upcoming appointments at this location for the student
⇒ Check-in the student for an appointment
⇒ Cancel the appointment
⇒ Move the appointment
⇒ Message the organization (i.e. advisor)
⇒ When in the drop-in appointments view, students can be dropped into queues once searched for and if advisors have drop-in availability.

*Note new appointments are not scheduling through the ‘student search box’
(3) Appointment Center View Options
There are 3 views within the appointment center, each with unique functionality based on the structure of services and workflow.

1. **Scheduling Grid** – Serves as the default view. Provides a calendar grid view of the daily appointments at a specific location. Allows for moving, canceling, checking in appointments, and viewing an advisor’s schedule.

2. **Drop-in Appointments** – When advisors have drop-in availability set-up, students can be dropped in to see advisors through this view.

3. **Scheduled Appointments** – Through this view, a list of all scheduled appointments on a given day at the location is available. Mass actions such as cancelling appointments for an entire day can be completed through this view.

(4) Services and Staff Filters
Using these filters, the view can be limited to specific services and staff. It is important to note that this list of staff is bound to availability for today only. In other words, if an advisor does not have availability today, they will not appear in the list. Changing the date/time filters do not apply to the services and staff filters. These options are bound to today’s date. Filtering by services allows you to see advisors with availability for that service/reason.

(5) Date/Time View Filters
Select the date for which you would like to give information. If the calendar view needs to be expanded, update the times as well. After clicking ‘refresh’, you will be able to view appointments/calendars on the day for which you selected. Use this filter when moving appointments or scheduling new appointments.

(6) Axis View Options
Applying to the scheduling grid view only, change the information displayed on top and left side to align with your person preferences.

(7) Find First Available
When viewing a single day in the appointment center, if the entire day is booked and there is no availability, use this button to find the first available time slot at the location from the date chosen until the end of the term. Once an available slot is found, the appointment grid will reload on that day. It is important to note that this option finds the first available time for the entire location. It is not tied to the student’s schedule and availability or an individual advisor’s availability. In other words, it will not find the first available time that both the student and advisor are available.
(8) Advisor Name
In the scheduling grid, the advisors with posted availability will be displayed for the date. It is important to note that if an advisor does not have any availability on that given day, then they will not be displayed. For example, if an advisor does not have appointment availability on Tuesday, then on every Tuesday in the appointment center, their name will not be a filterable option nor will they display in the scheduling grid. The assumption is that if an advisor is not available on a given day, then they are not open to meeting with students, thus we would not be scheduling an appointment for them on that day nor have a need to view their schedule within the appointment center.

(9) Busy Blocks
Any block labeled ‘busy’ is a time conflict coming from the calendar integration.

(10) Appointment / Service Block
These blocks are appointments that were scheduled within SSC Campus. Hover over the appointment for a quick view of the information or click into the appointment to move, cancel, check-in, or view additional details.

(11) First Available Queue
When using the drop-in appointments view, students in the first available queue have indicated they would like to meet with the first available advisor with drop-in availability. Students cannot be moved between the queues, rather when an advisor on drop-in advising is available to meet with a student, they would use the first available queue menu to select the student, then use the ‘actions’ of start the appointment. Starting the appointment will remove the student from the queue indicating that the next available advisor should meet with the student who is now at the top of the list.
(12) Drop-in Options
After using the student search box to find the student who would like to see an advisor with drop-in availability, select the queue from the left side menu for which you would like to add the student. Advisors with drop-in availability posted will be displayed with a bolded name and the number of students already in their queue below. There is also the option to ‘check-in without specific staff’, which will place the student in the first available queue.

(13) QueueMenus – Service
In each queue menu, the student’s name and ID will appear along with the reason for their drop-in visit (from your services set-up) and the time they checked into the queue.

(14) Queue Menus – Specific Advisor’s Queue
Each advisor will have their own queue menu displaying students who have dropped in specifically to meet with them. Using the actions menu, the appointment can be started.

(15) Date Filter
Within the scheduled appointment view, you can filter by a specific date to see all of the schedule appointments at a specific location. From the list of students, you can mass check-in/out and cancel appointments. In the case of a campus closure during which appointments need to be cancelled for an entire day, the scheduled appointment view within the appointment center and date filter will allow you to do that.
Guide

In this section, directions for the following actions are included:

- Check-in Student in / View a Student’s Upcoming Appointments
- Cancel an Appointment
- Move an Appointment
- Create/Schedule an Appointment

With the exception of creating a new appointment, the majority of Appointment Center actions are initiated by searching for a student. When you search for a student, any upcoming appointments at the location will appear as separate tiles. These actions can also be completed by clicking into the existing appointment on the schedule grid.

If the student has an appointment, within the appointment tile you can **CHECK-IN** the student for the appointment, which will notify the advisor (via the advisor’s personal settings and add a flag to their top menu bar indicating a student is in their queue).
To CANCEL the appointment – click the ‘actions’ drop-down from the appointment title and select ‘cancel’.

In the cancel appointment pop-up box:
- Indicate that you would like to cancel for ENTIRE APPOINTMENT
- Select the appropriate reason
- Add any notes related to the appointment cancel interaction – student called in, student emailed, etc.
- Click ‘Cancel Appointment’

To MOVE (i.e. Reschedule) the appointment – click the ‘actions’ drop-down menu and select ‘move’.

When you select ‘move’ the schedule grid will display a yellow action bar.

- You can use the date refresh to move between dates and select a time.
- The student’s scheduled will appear in the grid on the left most column.
- Click into an open/available time.
- The appointment will move to the next date/time/advisor.
- A yellow progress/status bar will appear at the top to confirm.

Note: We do not recommend or advise the use of the ‘edit’ function. The calendar view and overall process is not aligned with the appointment center functionality. The process is not intuitive. All functions can be completed using the move and cancel functions.
To CREATE/SCHEDULE a new appointment, view the schedule grid. Find the available advisor, date, and time for which you would like to schedule the appointment. Click into the available time (similar to how you would add a new calendar appointment in your regular electronic calendar).

⇒ When you click into the time, the ‘create an advising appointment’ pop-up will appear.
⇒ Select the service/reason for the appointment. Only services and reasons for which the advisor is available will appear as options.
⇒ Search for the student by name or ID, then click the student’s name to add them to the appointment.
⇒ Confirm the date/time.
  o If the date/time need to be edited (for example, perhaps the click was at the 11:05am slot instead of 11am), click ‘edit details’.
  o From edit details, you an update the date/time and duration.
⇒ Save the appointment