

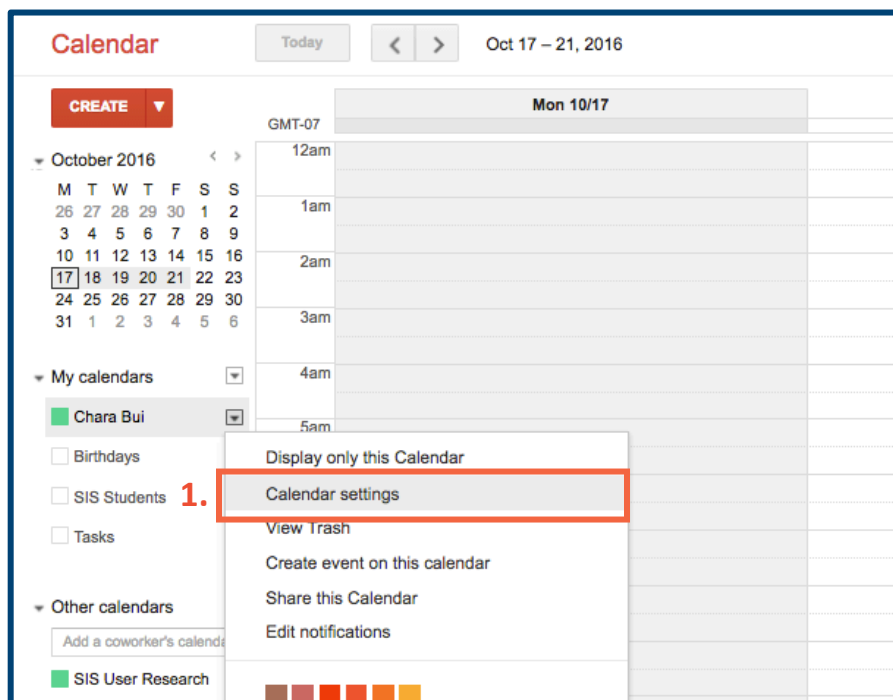
Advising Appointments

This job aid covers four tasks related to Advising Appointments:

1. Sync your bCalendar
2. Set up your contact information and appointment slots, which are times in which you are available for advising
3. View the appointments students have with you
4. Book an appointment on behalf of a student

Syncing Your bCalendar

1. Go to your bCalendar settings
2. Share This Calendar



3. Allow email sis-google-apis@animated-alloy-133523.iam.gserviceaccount.com to make changes AND manage sharing

2. **Chara Bui Details**

Calendar Details **Share this Calendar** Edit notifications Trash

Share this calendar with others

Share with specific people

Person	Permission Settings	Remove
mscharabui@gmail.com	See all event details	Remove
c.bui@berkeley.edu	Make changes AND manage sharing	Remove
sis-google-apis@animated-alloy-133523.iam.gserviceaccount.com	Make changes AND manage sharing	Remove

3. (Red box highlights the row for sis-google-apis@animated-alloy-133523.iam.gserviceaccount.com)

4. Click Save

Navigate to Advising Appointments in CalCentral:

CalCentral > Advising Resources > My Appointments- This link will take you to My Appointments.

Advising Resources

Tools

- Reporting Center
- eForms Action Center
- eForms Work Center
- My Appointments**
- Class Search

My Appointments (Aidan Advisor)

Bulk Cancel Appointments Settings [Create New Appointment](#)

Today's Appointments - Friday Dec 2 2016

No appointments to display.

Future Appointments

No appointments to display.

[View Appointments History](#)

Your Appointment Settings: From My Appointments click **Settings**.

1. Who can make appointments with you- For this setting you can choose from **No-One**, **Only Staff**, or **Staff and Students**. This limits who can make appointments with you on behalf of the student.

My Appointment Settings

The My Appointment Settings allows you to define how an appointment may be conducted, how a student may contact/meet with you during a scheduled appointment, and the times you are available to have appointments scheduled with you (this may be to define time blocks you are unable to meet with all students, time blocks you are only available to meet with certain students and/or time blocks you are available to meet with all students).

1. **Who can make appointments with you** Staff and Students

2. **Appointment Address Line 1**
2850 Telegraph

Appointment Address Line 2

Appointment Phone

Appointment Types

	Available Types	Additional Information
1	Google Hangout	Please be signed in to your @berkeley.edu email address at the start of your appointment. Your advisor will initiate the Hangout. Add Type Delete Type
2	In Person	Please arrive on time to you appointment. Add Type Delete Type
3	Phone	Please call your advisor at the start of your appointment unless otherwise specified by the advisor. Add Type Delete Type

2. Contact Settings

Fill out your **appointment address** (where students will go for in-person appointments) and your **appointment phone number** (the number used for phone appointments).

3. Appointment Types

Appointment Types	
Available Types	Additional Information
1 <input type="text" value="Google Hangout"/>	Please be signed in to your @berkeley.edu email address at the start of your appointment. Your advisor will initiate the Hangout. <input type="text"/>
2 <input type="text" value="In Person"/>	Please arrive on time to you appointment. <input type="text"/>
3 <input type="text" value="Phone"/>	Please call your advisor at the start of your appointment unless otherwise specified by the advisor. <input type="text"/>

You can choose one or more appointment types from the available appointment types (**In Person**, **Phone**, **Skype** or **Google Hangout**). To add a new type click **Add Type**. From the dropdown arrow, select the type. Each option will come prepopulated with **Additional Information**. You can customize this information. For example, you could specify that you will call the student for phone appointments rather than having the student call you.

To make a type unavailable to students, click **Delete Type**.

4. Building Appointment Blocks

The default view for your current schedule is of **weeks with custom block date ranges**. Custom blocks allow you to change your availability for specific date ranges. Creating a custom block overrides your weekly recurring schedule.

You should begin by building your recurring schedule. Switch to **View weekly recurring schedule**.

Current Schedule

View weekly recurring schedule
 View weeks with custom block date ranges

Same-Day Appointments
 Open
 Closed

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	3 - Open 09:00AM - 12:00PM	3 - Open 09:00AM - 12:00PM	3 - Open 09:00AM - 12:00PM	3 - Open 09:00AM - 12:00PM	3 - Open 09:00AM - 12:00PM	
	4 - Open 01:00PM - 04:00PM	4 - Open 01:00PM - 04:00PM	4 - Open 01:00PM - 04:00PM	4 - Open 01:00PM - 04:00PM	4 - Open 01:00PM - 04:00PM	
	1 - Open 05:00PM - 07:00PM	1 - Open 05:00PM - 07:00PM	1 - Open 05:00PM - 07:00PM	1 - Open 05:00PM - 07:00PM	1 - Open 05:00PM - 07:00PM	
	2 - Open 07:00PM - 09:00PM	2 - Open 07:00PM - 09:00PM	2 - Open 07:00PM - 09:00PM	2 - Open 07:00PM - 09:00PM	2 - Open 07:00PM - 09:00PM	

To add a time block, scroll down to **Time Blocks** and click **Add a New Block**.

[Save and Update Settings](#)

Time Blocks

Block# 1 [Add a New Block](#) [Delete Block](#)

*Click **Save and Update Settings** frequently.

1. Blocks can indicate that you are **Open (can meet)** or **Closed (cannot meet)**. In this example we are creating an open block.

2. Input your **Start Time** and **End Time** for the advising block.

3. You can check **Same day appointments** only if you would like to allow students to make appointments the day of.

4. You can specify that you only want to see your assigned students by clicking **My assigned students**

5. Select the days of the week that this block

The screenshot shows a web form for configuring an advising block. At the top right is a blue button labeled "Save and Update Settings". Below it are links for "Add a New Block" and "Delete Block". The form has several sections:

- Block Type:** Radio buttons for "Open (can meet)" (selected) and "Closed (cannot meet)".
- Time:** Input fields for "*Start Time" (5:00PM) and "*End Time" (7:00PM).
- Appointment Options:** Checkboxes for "Same day appointments only" (unchecked) and "My assigned students only" (checked).
- Days:** A row of checkboxes for days of the week: Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), Sat (unchecked), Sun (unchecked).
- Apply Date Range:** A checkbox labeled "Apply Date Range (Overwrites days with recurring blocks):" which is unchecked.
- Allowed Reasons:** A section titled "Allowed Reasons for this Block (Leave empty for All)" with a table containing one row with a dropdown menu and "Add Reason" / "Delete Reason" links.
- Student Groups:** A section titled "Student Groups for this Block (Leave empty for All)" with a table containing one row with a dropdown menu and "Add Student Group" / "Delete Student Group" links.

 Seven blue callout boxes with white text and blue borders point to specific elements in the form, providing instructions for each step.

6. If you only want to see students for specific reasons during this block, you can indicate this here. Click the **Allowed Reasons for this Block (Leave empty for All)** drop-list arrow, and select a reason for the appointment slot(s). You can add or delete reasons here as well.

7. The Student Groups for this Block function will allow you to specify whether you would like to see a specific group (e.g., seniors).

If you do not add a date range to your block, this block will automatically reoccur each week. To **add a custom block** that will override your recurring schedule simply add a new block and then **select a date range** for that block.

Block# 5

Open (can meet)
 Closed (cannot meet)

*Start Time: 8:00AM *End Time: 11:00AM

Same day appointments only
 My assigned students only

Days this Block applies to

Mon Tue Wed Thu Fri Sat Sun

Apply Date Range (Overwrites days with recurring blocks):
 Start Date: 12/05/2016 End Date: 12/09/2016

Current Schedule

View weekly recurring schedule View weeks with custom block date ranges

< Previous Week Dec 04, 2016 - Dec 10, 2016 Next Week >

Same-Day Appointments Open Closed

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	5 - Open 08:00AM - 11:00AM Dec 05 - Dec 09	3 - Open 09:00AM - 12:00PM	3 - Open 08:00AM - 11:00AM Dec 05 - Dec 09	3 - Open 09:00AM - 12:00PM	5 - Open 08:00AM - 11:00AM Dec 05 - Dec 09	
		4 - Open 01:00PM - 04:00PM		4 - Open 01:00PM - 04:00PM		
		1 - Open 05:00PM - 07:00PM		1 - Open 05:00PM - 07:00PM		
		2 - Open 07:00PM - 09:00PM		2 - Open 07:00PM - 09:00PM		

When you click **View weeks with custom block date range** you can scroll through the weeks that deviate from your recurring schedule.

Viewing Appointments

If you click **Return to My Appointments** you will be taken to **My Appointments**. All future appointments are listed here.

My Appointments Aidan Advisor

1. [Bulk Cancel Appointments](#) [Create New Appointment](#)

2. **Today's Appointments - Wednesday Nov 23 2016**

02:00 PM - 02:30 PM | Susan Student | Status: Scheduled
 In Person | SID: 22200000 | [Check In](#)
 Reason: Change of College | [No Show](#)
 Appt ID: 0000060101 | Description: | [Cancel](#)

3. **Future Appointments**

Thursday Nov 24 2016

Time	Student	SID	Appt ID	Status	Select
05:30 PM - 06:00 PM	Susan Student	22200000		Scheduled	Select
06:30 PM - 07:00 PM	Susan Student	22200000		Cancelled	Select

Tuesday Dec 6 2016

Time	Student	SID	Appt ID	Status	Select
08:45 PM - 09:00 PM	Susan Student	22200000		Cancelled	Select

[View Appointments History](#)

1. Bulk Cancel Appointments- You can cancel multiple appointments at once using this feature.

2. Under Today's Appointments you can:

- **Check** a student in
- Mark a student as **No Show**
- **Cancel** an appointment- An email will be sent to the student notifying them of the cancellation.

3. Future Appointments- Here you see all upcoming appointments. Click **Select** to see appointment details.

Bulk Cancel Appointments

When you click the **Bulk Cancel Appointments** link, a list of all future appointments will appear. Under **Select Appointment**, change the slider to **Yes** for all appointments you wish to cancel.

The screenshot shows the 'My Appointments' interface. At the top, there is a title 'My Appointments' and a link 'Return to My Appointments'. Below this, a prompt says 'Please select the appointments you would like to cancel'. The interface displays two appointment rows. The first row is for 'Thursday Nov 24 2016' and has a 'No' slider. The second row is for 'Tuesday Nov 29 2016' and has a 'Yes' slider, which is highlighted with a red box. Below the appointment list is a text area for 'Cancellation Message to Students'. At the bottom, there are two buttons: 'Cancel Appointments' (highlighted with a red box) and 'Return to My Appointments' (also highlighted with a red box). A red arrow points from the 'Yes' slider to the 'Cancellation Message to Students' text area.

Select Appointment	Time	Student	SID	Appt ID	Status
<input type="radio"/> No	05:30 PM - 06:00 PM	Susan Student	22200000		Scheduled
<input checked="" type="radio"/> Yes	03:00 PM - 03:15 PM	Susan Student	22200000		Scheduled

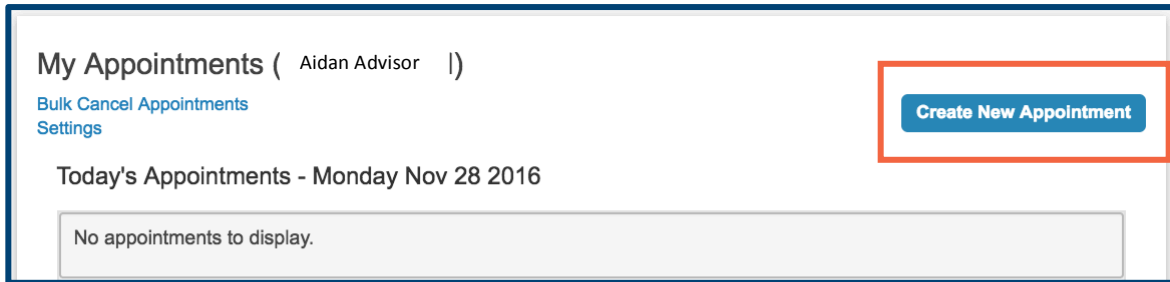
You have the option to customize the message students receive when being notified of the cancellation. If you do not input your own message, an automatic message will be generated.

When you have finished selecting the appointments you wish to cancel, click **Cancel Appointments**.

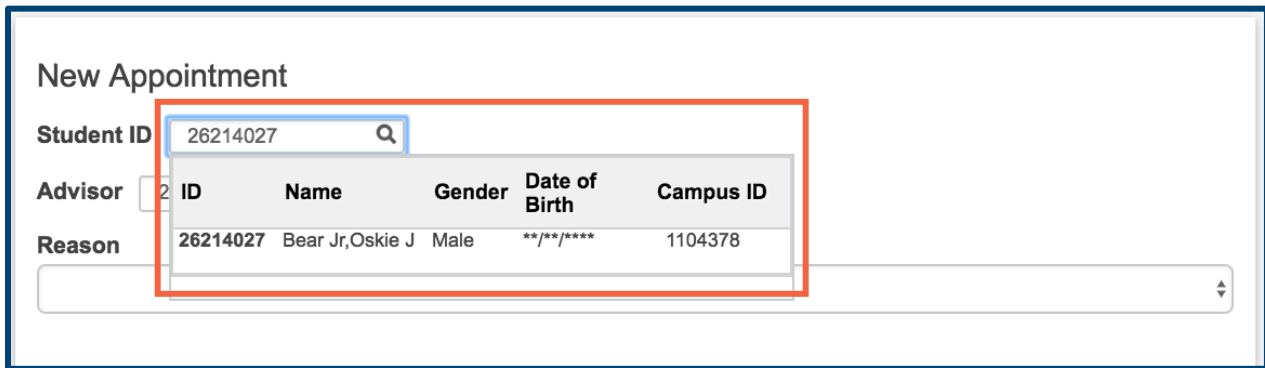
To return to your appointments click **Return to My Appointments**

Book an Appointment on Behalf of a Student

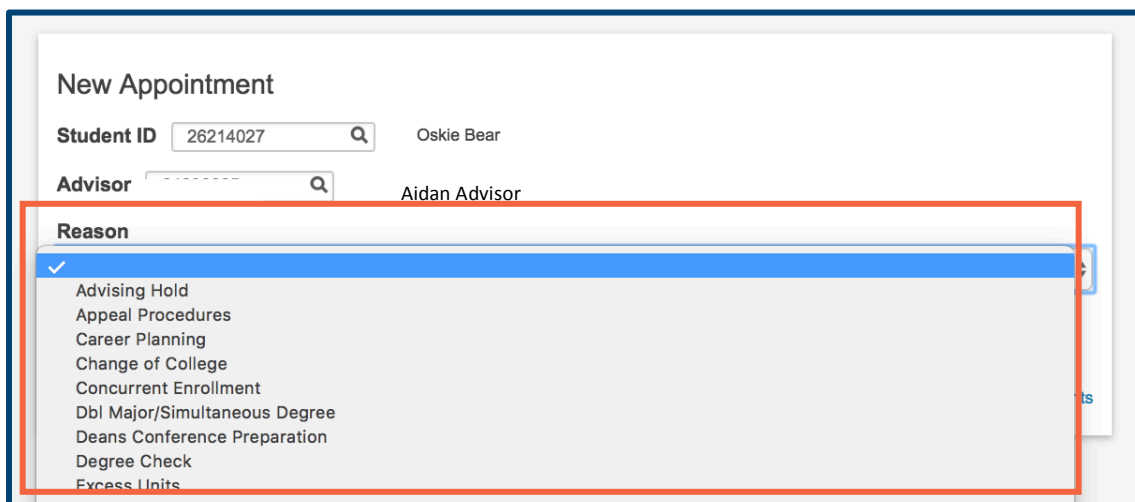
To book an appointment for a student, navigate to your appointments and click **Create New Appointment**.



Next, enter the student's **Student ID** to find the student. Make sure that the information that appears matches the student you are searching for.



You then need to select a **reason** for the appointment.



You will also need to select the **duration** as well as a **method**. Remember that the method can be **In Person**, **Skype**, **Phone** or **Google Hangout**.

New Appointment

Student ID Oskie Bear

Advisor Aidan Advisor

Reason

Duration

Method

Additional Information (Required)

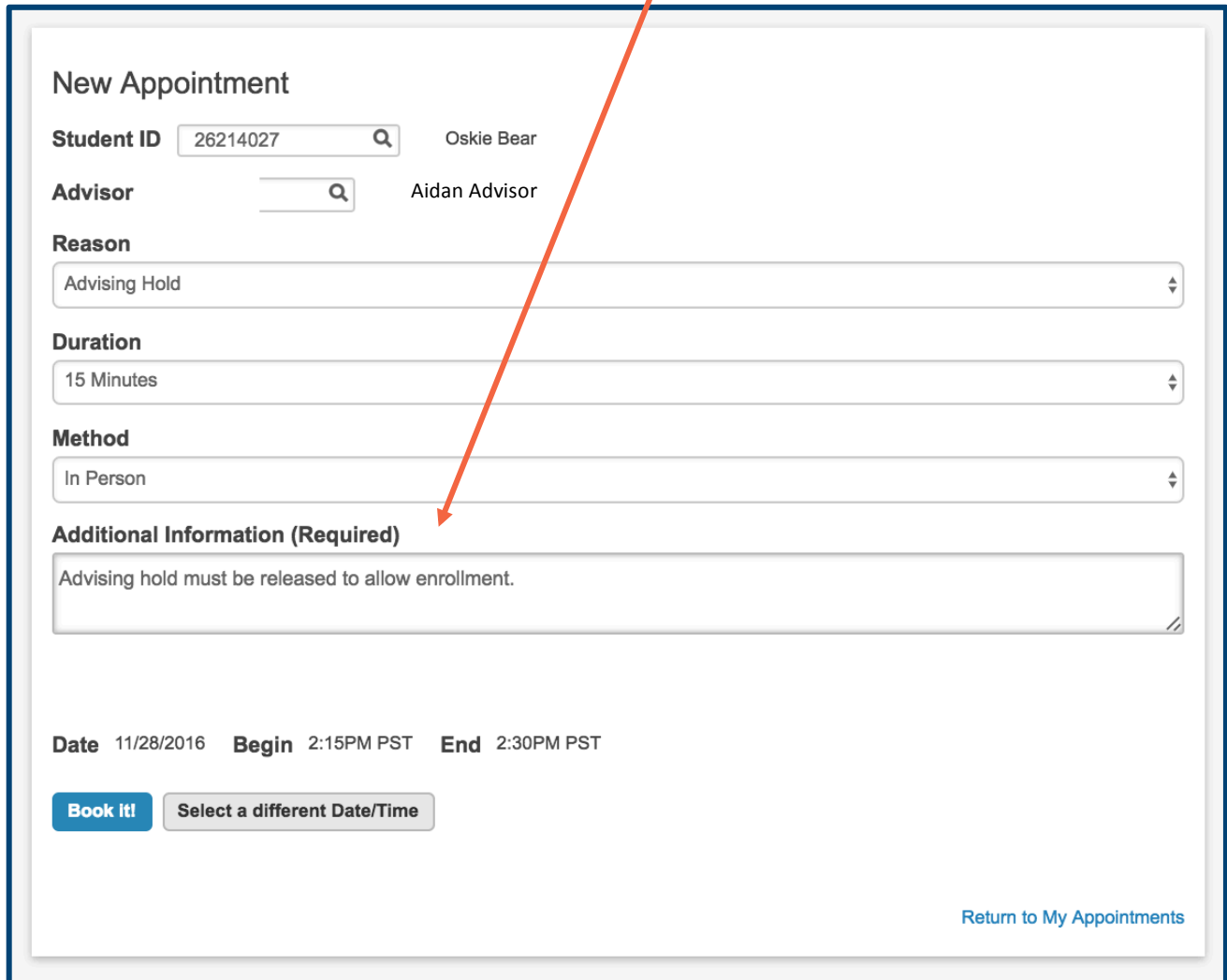
11/28/2016
Monday
Time selected

[< Prev Days](#) [Next Days >](#)

[Return to My Appointments](#)

Once you have entered the necessary information, your available appointments will appear. Click the drop down arrow and select the time you would like to make the appointment. If no appointments appear you can check other days by clicking **Next Days**. Once you have chosen the desired time slot click **Select Time**.

Finally, add a note for the student in the required **Additional Information** slot. This information should explain why it is you are creating the appointment for the student and will be added to the appointment note.



The screenshot shows a 'New Appointment' form. At the top, it has a title 'New Appointment'. Below that are fields for 'Student ID' (26214027) and 'Advisor' (Aidan Advisor). There are three dropdown menus: 'Reason' (Advising Hold), 'Duration' (15 Minutes), and 'Method' (In Person). Below these is a text area for 'Additional Information (Required)' containing the text 'Advising hold must be released to allow enrollment.' At the bottom, there are fields for 'Date' (11/28/2016), 'Begin' (2:15PM PST), and 'End' (2:30PM PST). There are two buttons: 'Book It!' and 'Select a different Date/Time'. A link 'Return to My Appointments' is at the bottom right. An orange arrow points from the top right towards the 'Additional Information' field.

Click **Book It!**

Support:

For questions or assistance, please contact the SIS Project:

- Call **510-664-9000** (press **option 6**)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it

For other jobs aids and videos, go to:

- <http://sis.berkeley.edu/training>