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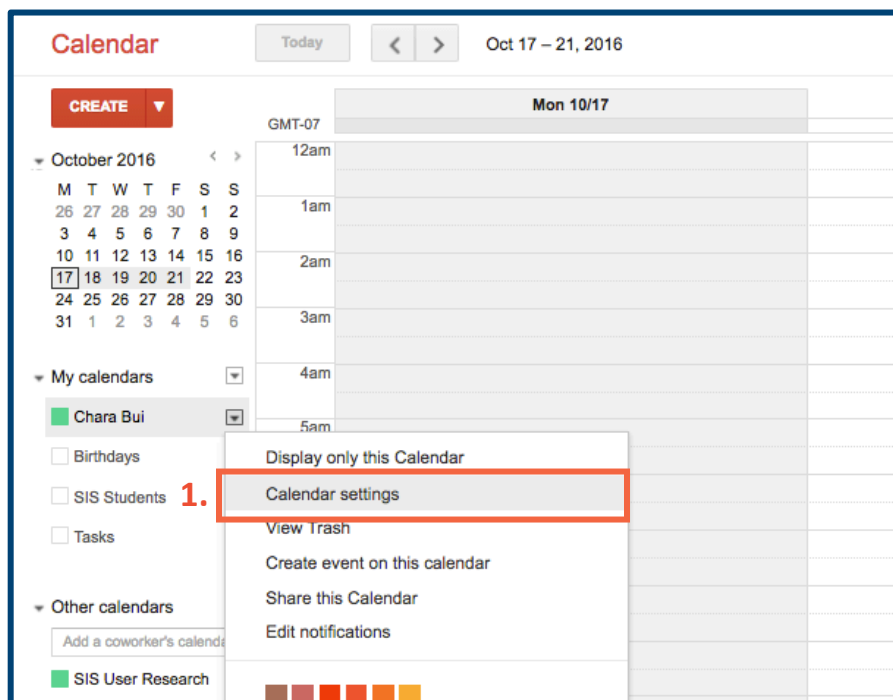
3. Allow email sis-google-apis@animated-alloy-133523.iam.gserviceaccount.com to make changes AND manage sharing

4. Click Save

Navigate to Advising Appointments in CalCentral:

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

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.

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

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**.

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

Save and Update Settings

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

Add a New Block   Delete Block

○ Open (can meet)

○ Closed (cannot meet)

*Start Time   5:00PM
*End Time   7:00PM

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

☐ Same day appointments only

☑ My assigned students only

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

Days this Block applies to

☑ Mon   ☑ Tue   ☑ Wed   ☑ Thu   ☑ Fri   ☐ Sat   ☐ Sun

☐ Apply Date Range (Overwrites days with recurring blocks):

5. Select the days of the week that this block

Allowed Reasons for this Block (Leave empty for All)

Reason	
1	▲▼ Add Reason Delete Reason

Student Groups for this Block (Leave empty for All)

Student Group	
1	▲▼ Add Student Group Delete Student Group

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.

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.

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.

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**.

My Appointments (Aidan Advisor |)

Bulk Cancel Appointments
Settings

Create New Appointment

Today's Appointments - Monday Nov 28 2016

No appointments to display.
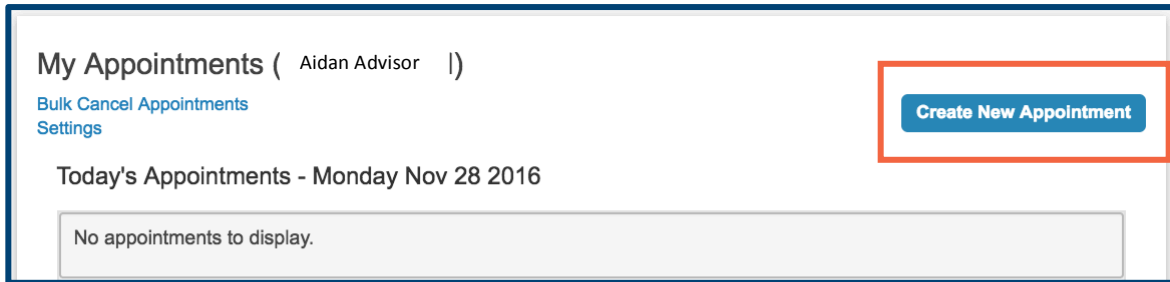
Next, enter the student's **Student ID** to find the student. Make sure that the information that appears matches the student you are searching for.

New Appointment

Student ID   26214027

Advisor

Reason

ID	Name	Gender	Date of Birth	Campus ID
26214027	Bear Jr,Oskie J	Male	**/**/****	1104378
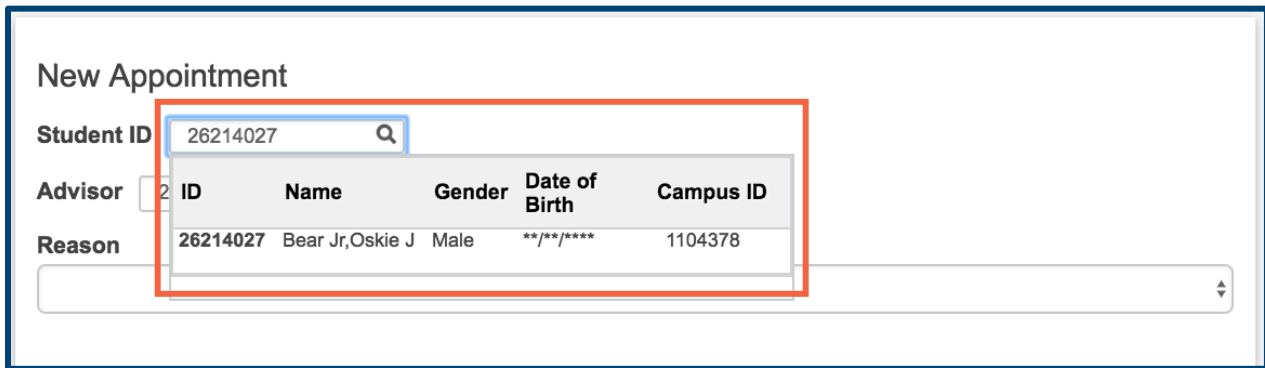
You then need to select a **reason** for the appointment.

New Appointment

Student ID   26214027   Oskie Bear

Advisor   Aidan Advisor

Reason

✓
Advising Hold
Appeal Procedures
Career Planning
Change of College
Concurrent Enrollment
Dbl Major/Simultaneous Degree
Deans Conference Preparation
Degree Check
Excess Units
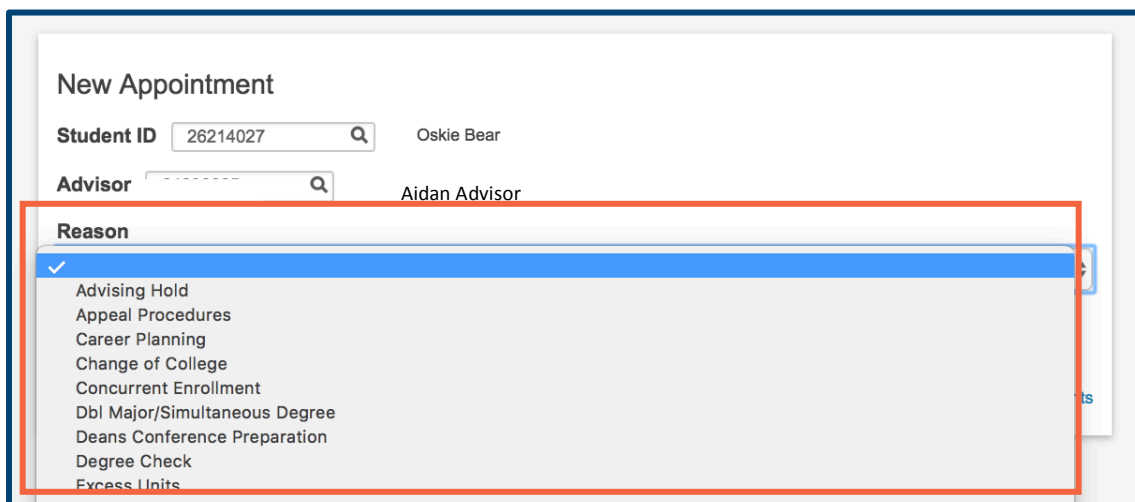
You will also need to select the **duration** as well as a **method**. Remember that the method can be **In Person**, **Skype**, **Phone** or **Google Hangout**.

New Appointment

Student ID   26214027   🔍   Oskie Bear

Advisor | 🔍   Aidan Advisor

Reason

| Advising Hold | ⇕ |

Duration

| 15 Minutes | ⇕ |

Method

| In Person | ⇕ |

Additional Information (Required)

| |

11/28/2016
Monday
Time selected
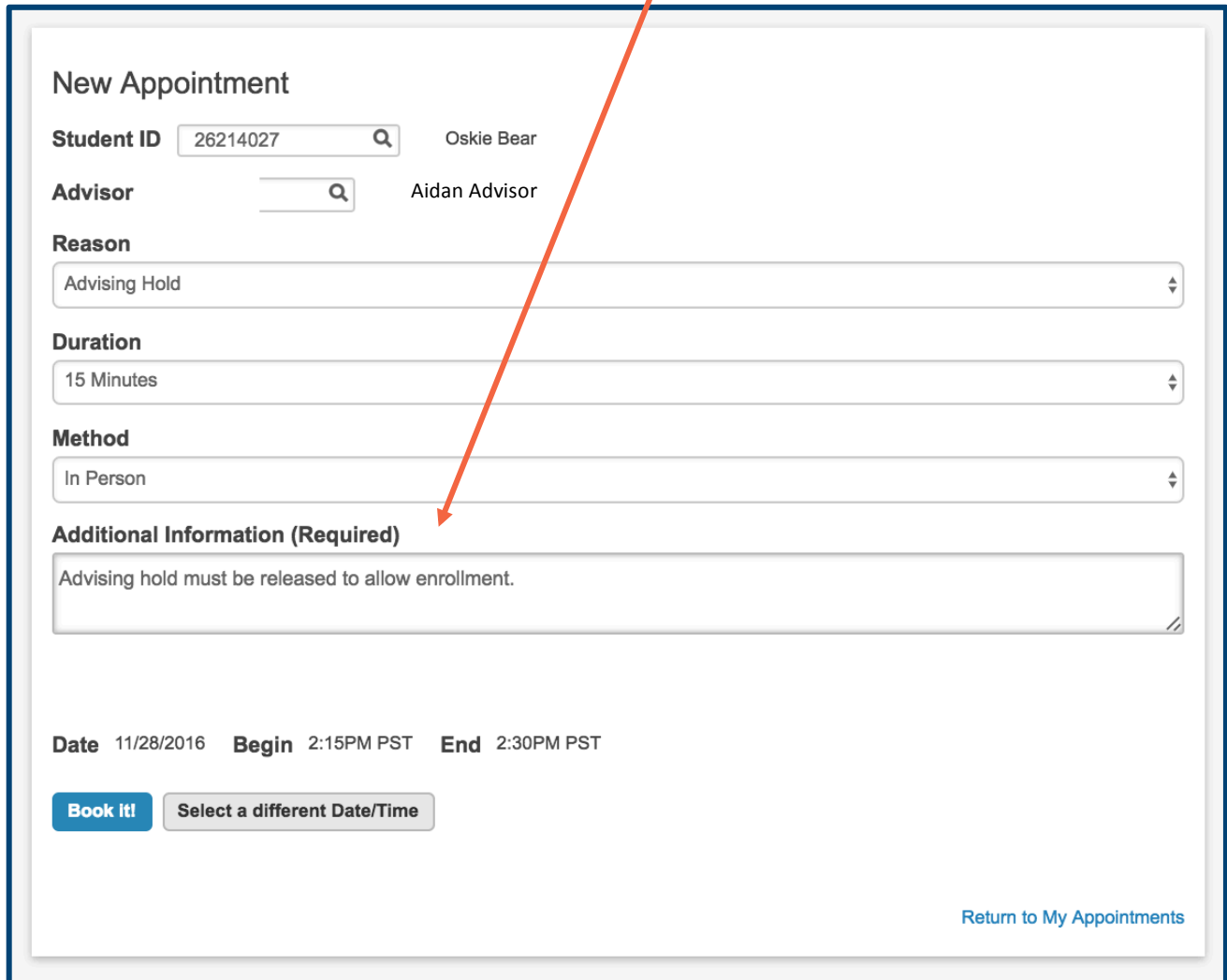| 02:15 PM-02:30 PM | ⇕ |

Select Time

< 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.

New Appointment

Student ID 26214027 🔍 Oskie Bear

Advisor 🔍 Aidan Advisor

Reason
Advising Hold ⬍

Duration
15 Minutes ⬍

Method
In Person ⬍

Additional Information (Required)
Advising hold must be released to allow enrollment.

Date 11/28/2016 **Begin** 2:15PM PST **End** 2:30PM PST

Book It! Select a different Date/Time

Return to My Appointments

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