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**.
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 applies to.

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.

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**.

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.

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](http://sis.berkeley.edu/training)