

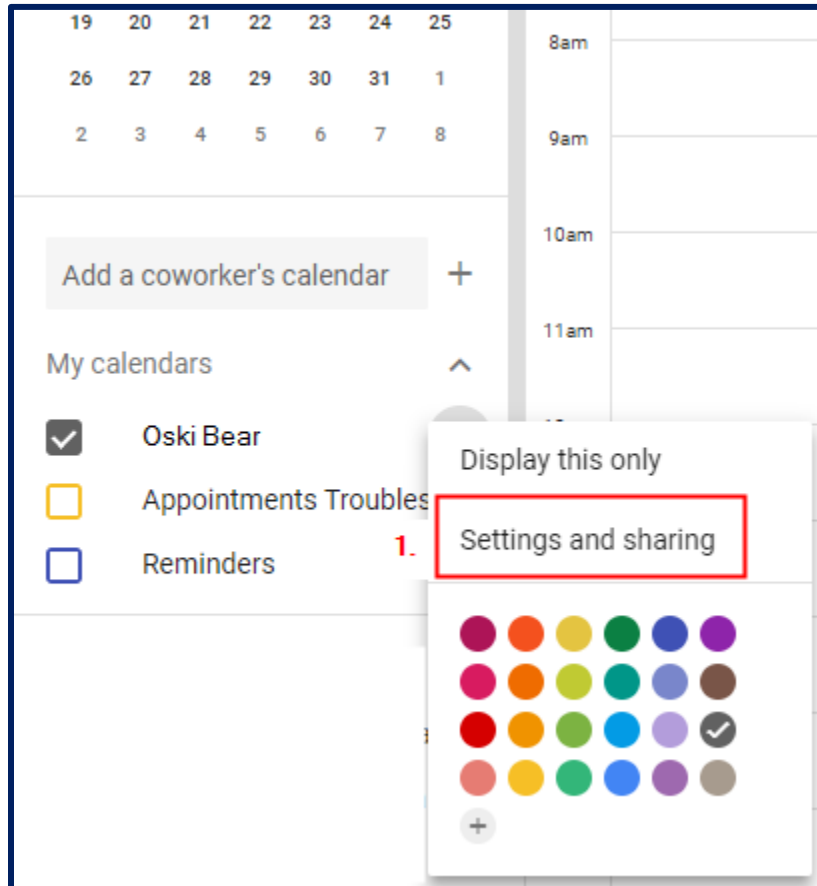
## Advising Appointments

This job aid covers four tasks related to Advising Appointments:

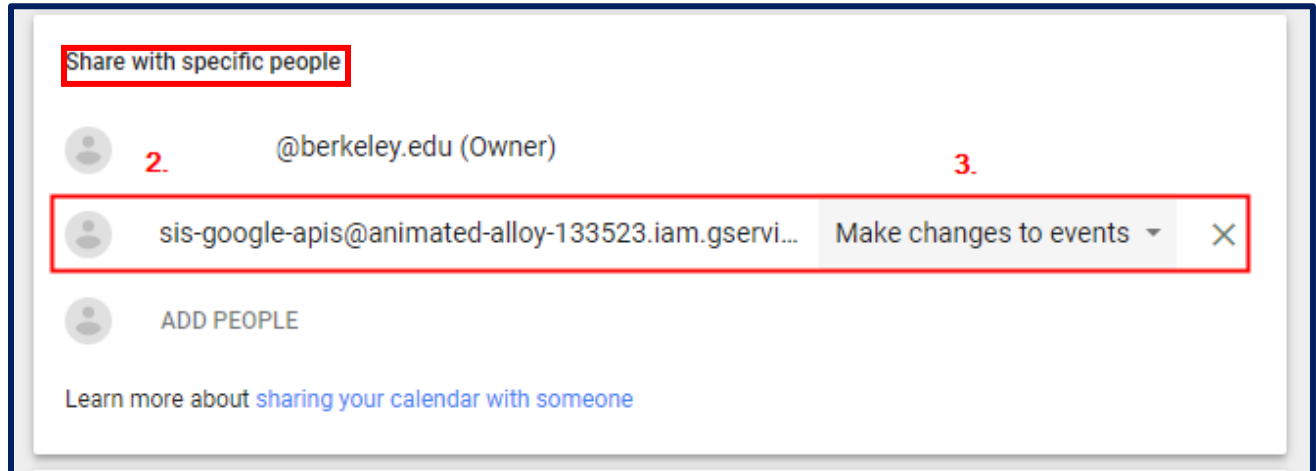
1. Sync your bCalendar
2. Set up your contact information and appointment slots, which are times in which you are available for advising
3. View the appointments students have with you
4. Book an appointment on behalf of a student

### Syncing Your bCalendar

1. Go to your bCalendar settings



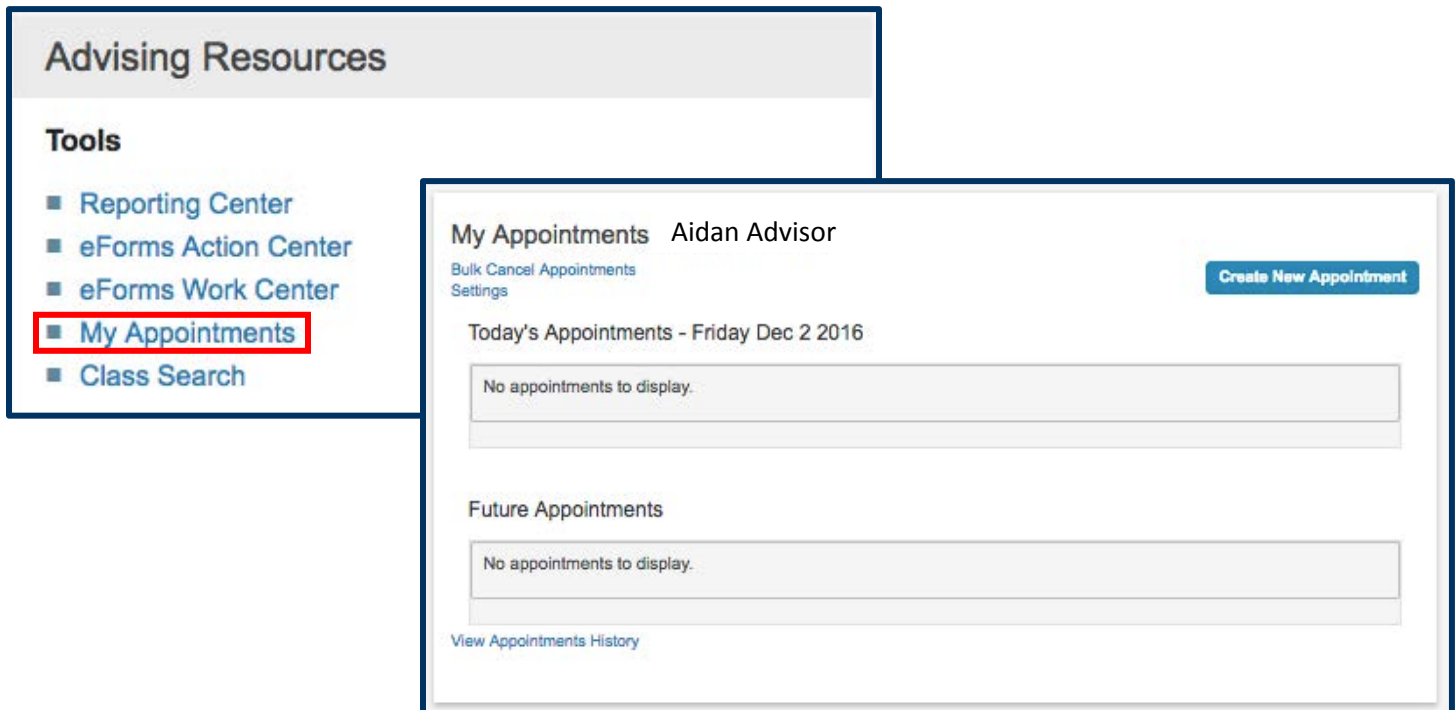
2. Click "Share with specific people"
3. Allow email sis-google-apis@animated-alloy-133523.iam.gserviceaccount.com to "Make changes to events"



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).

**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**  
[Empty]

**Appointment Phone**  
[Empty]

**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. <span>Add Type Delete Type</span>
2 In Person ▾	Please arrive on time to your appointment. <span>Add Type Delete Type</span>
3 Phone ▾	Please call your advisor at the start of your appointment unless otherwise specified by the advisor. <span>Add Type Delete Type</span>

### 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"/> <a href="#">Add Type</a> <a href="#">Delete Type</a>
2 <input type="text" value="In Person"/>	Please arrive on time to you appointment. <input type="text"/> <a href="#">Add Type</a> <a href="#">Delete Type</a>
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"/> <a href="#">Add Type</a> <a href="#">Delete Type</a>

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.

**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

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.

**Save and Update Settings**

[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** 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**

**Same day appointments only**  
 **My assigned students only**

Days this Block applies to

**Mon**     **Tue**     **Wed**     **Thu**     **Fri**     **Sat**     **Sun**

5. Select the days of the week that this block

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

Allowed Reasons for this Block (Leave empty for All)

Reason	
1	<input type="text"/>

[Add Reason](#) [Delete Reason](#)

Student Groups for this Block (Leave empty for All)

Student Group	
1	<input type="text"/>

[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.

Block# 5

Open (can meet)      \*Start Time: 8:00AM      \*End Time: 11:00AM

Closed (cannot meet)

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		5 - Open 08:00AM - 11:00AM Dec 05 - Dec 09		5 - Open 08:00AM - 11:00AM Dec 05 - Dec 09	
		3 - Open 09:00AM - 12:00PM		3 - Open 09:00AM - 12:00PM		
		4 - Open 01:00PM - 04:00PM		4 - Open 01:00PM - 04:00PM		
		1 - Open 05:00PM - 07:00PM		1 - Open 05:00PM - 07:00PM		
		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.

**1.** **Bulk Cancel Appointments**

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

02:00 PM - 02:30 PM  
 In Person  
 Appt ID:0000060101

Susan Student  
 SID: 22200000  
 Reason:Change of College  
 Description:

Status:Scheduled  
 Check In  
 No Show  
 Cancel

**3.** **Future Appointments**

Time	Student	SID	Appt ID	Status	Select
Thursday Nov 24 2016					
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					
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.

### My Appointments

[Return to My Appointments](#)

Please select the appointments you would like to cancel

Thursday Nov 24 2016    [Select All Appointments](#)    [Clear All Selections](#)

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

Tuesday Nov 29 2016    [Select All Appointments](#)    [Clear All Selections](#)

Select Appointment	Time	Student	SID	Appt ID	Status
<input checked="" type="radio"/> Yes	03:00 PM - 03:15 PM	Thomas Holub	11223162	0000000137	Scheduled

**Cancellation Message to Students**

Susan Student    22200000

Cancel Appointments

Return to My Appointments

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**.

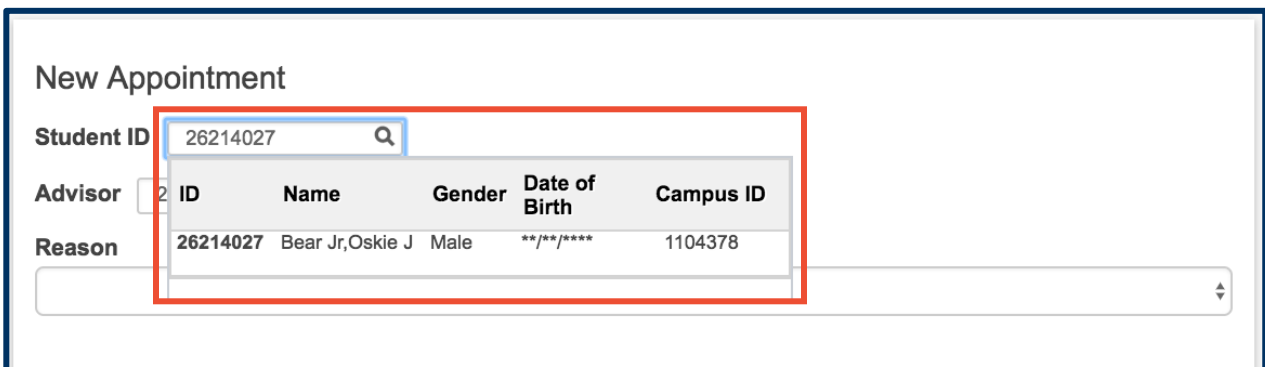
To return to your appointments click **Return to My Appointments**

## Book an Appointment on Behalf of a Student

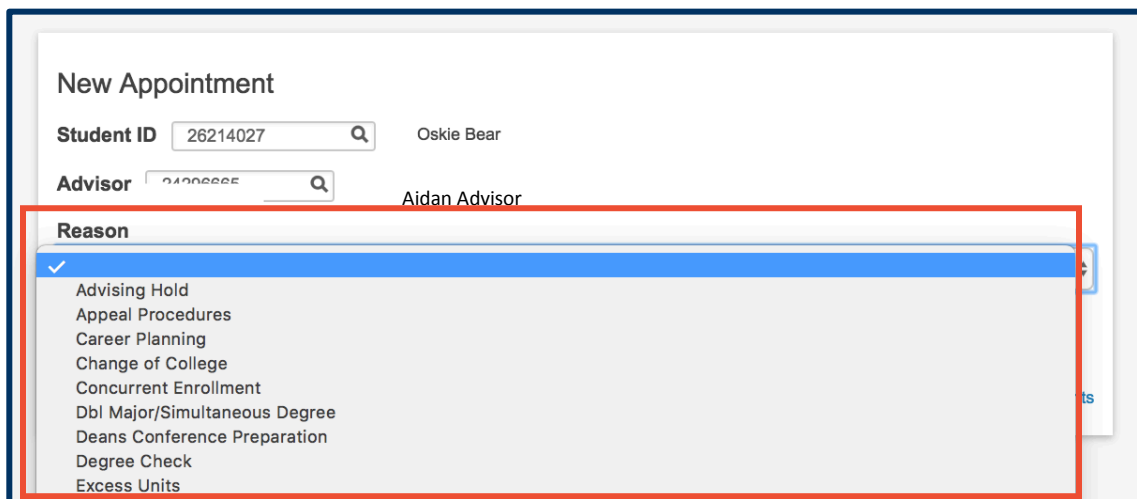
To book an appointment for a student, navigate to your appointments and click **Create New Appointment**.



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.

**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 SIS Production Support:

- Call **510-664-9000** (press **option 6**)
- Email: [sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)

For additional SIS resources, please visit:

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