Making and Managing Advisor Appointments (Front Desk)

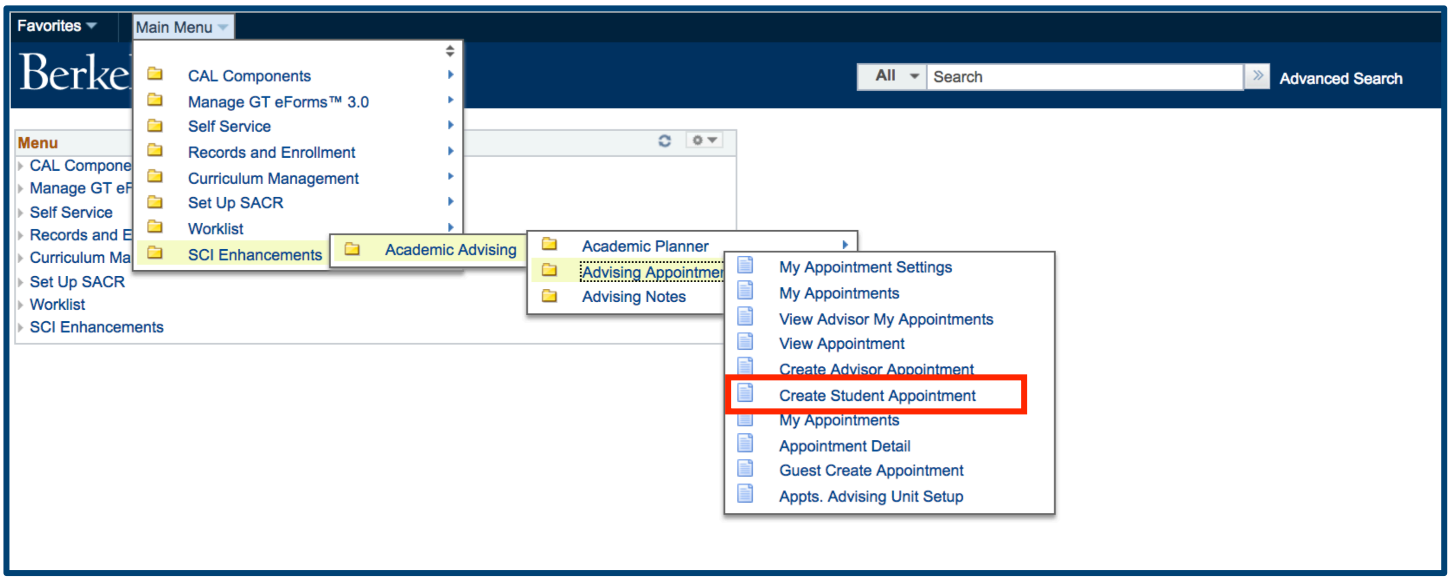
From time to time front desk staff may be asked to make or manage student appointments with advisors. This job aid will cover:

- Scheduling an advising appointment on behalf of a student
- Changing the status of an advising appointment

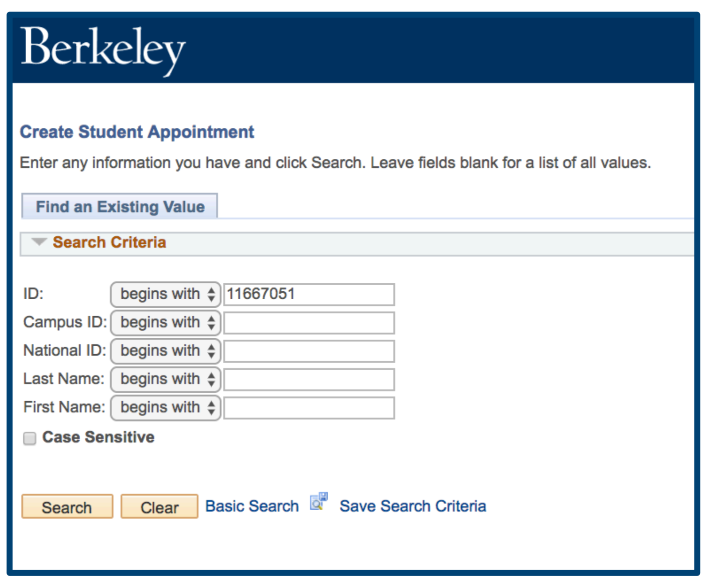
Note: The proper security access is required to perform these tasks.

1. Scheduling an Advising Appointment on Behalf of a Student

Navigation: After logging in to **Campus Solutions** navigate to **SCI Enhancements > Academic Advising > Advising Appointments > Create Student Appointment**

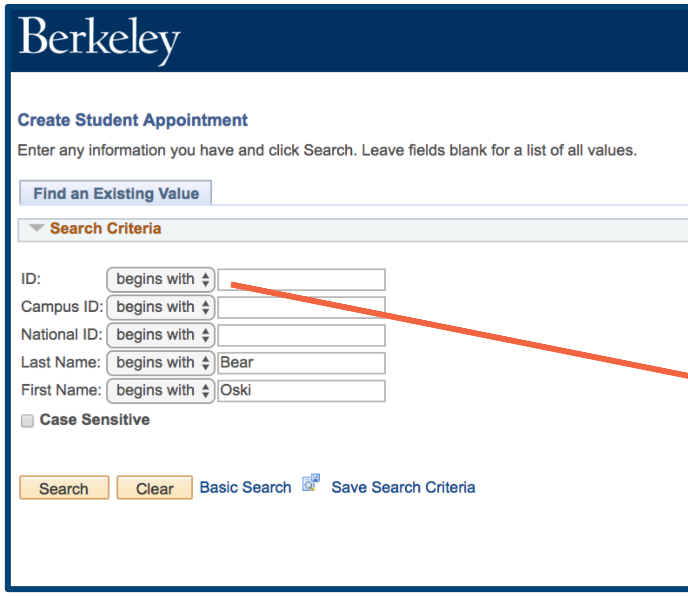


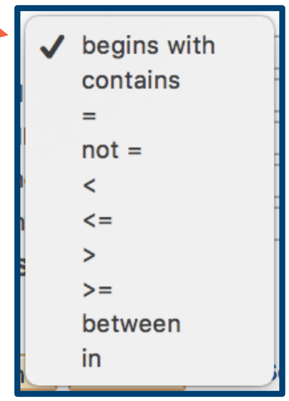
Search for the Student: You can search for a student via their **SID**, **Campus ID**, or **Name**. You may input one or more criteria for your search.



You can use the drop down options to specify how you would like to search for specific criteria.

Click **Search**.

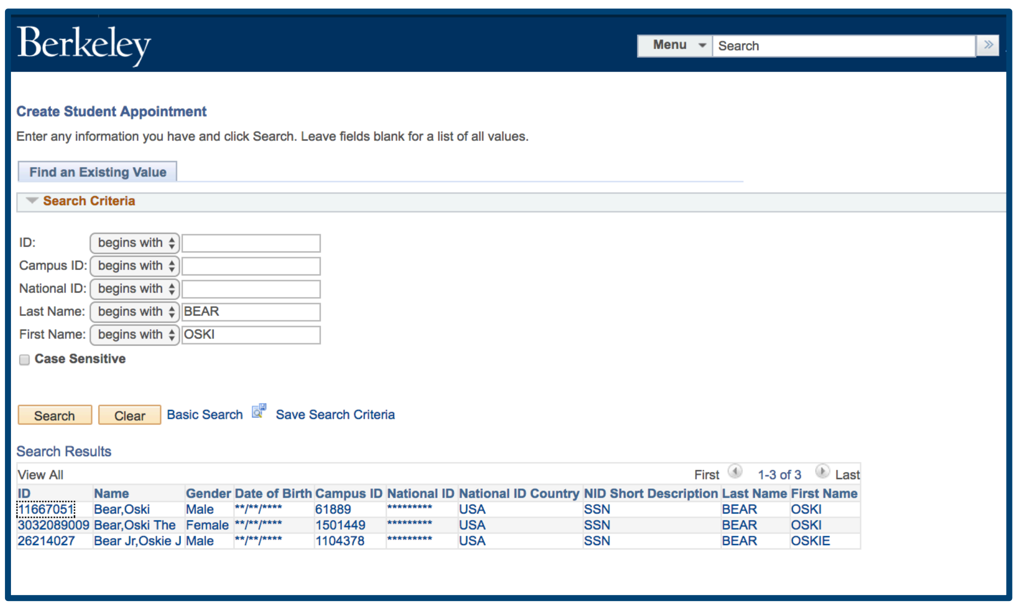


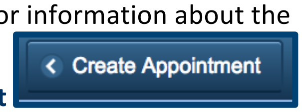


Choose the correct student:

If you search with the student's SID you will automatically be taken to the appointment portal.

If you search for a student by name a list of students matching your criteria will appear. Click on the **student** for which you wish to create an appointment.



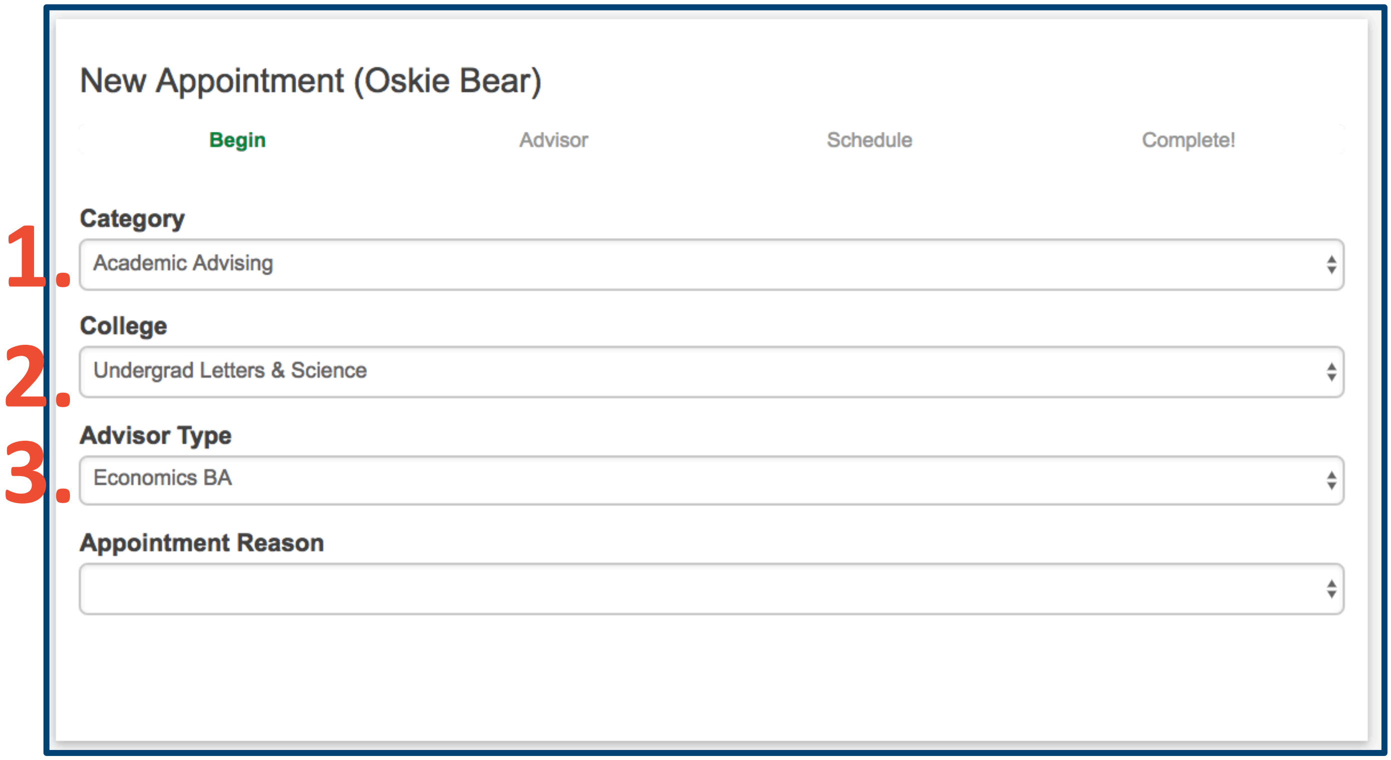
You will be taken to the **Appointment Self Service** portal where you will be asked for information about the appointment. If at any time you would like to go back click the **Create Appointment** 

back arrow in the top left corner. This brings you back to the **Create Student Appointment** page in **Campus Solutions**.

To schedule the appointment, first select the **1. Academic Advising** category.

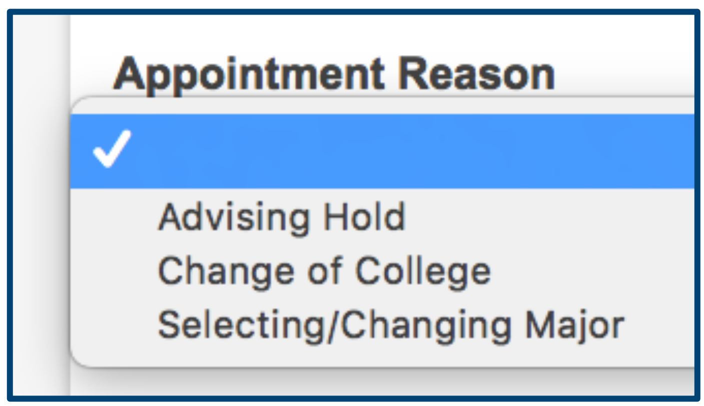
2. College and **3. Advisor Type** will automatically populate with the college and department of the student's declared major. If the student is undeclared it will populate with their college and "**College Advisor**" as their advisor type.

> **NOTE:** Fill this information in with the criteria of the advisor that the student will be meeting with, not the student's own information. This criterion will be used to match the student with available advisors.

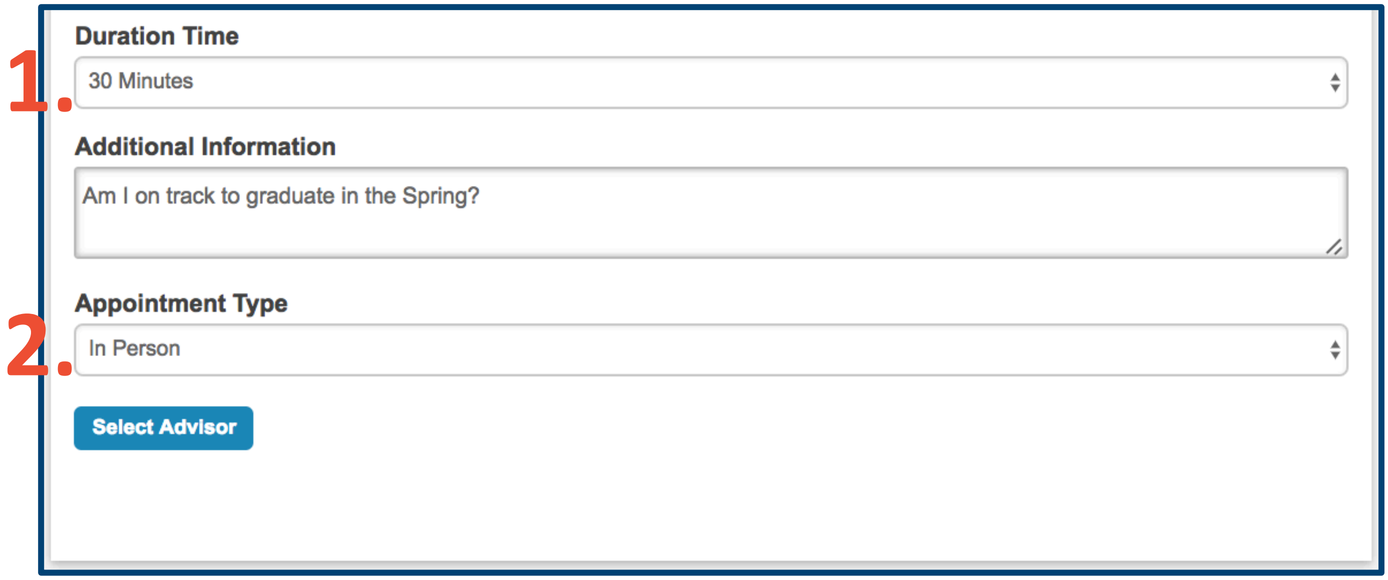


You will then need to choose an **appointment reason**.

> **NOTE:** Reasons will vary by department.



Next, select a **1. Duration Time** and **2. Appointment type**. The **duration times** available will depend on the restrictions of the specific advisor's unit. Some units only allow 30 min time slots; others will allow you to choose between 15, 30 or 45-minute time slots. The **Appointment Types** available will also vary. An advisor can choose to take **In Person**, **Phone**, **Skype** or **Google Hangout** appointments.



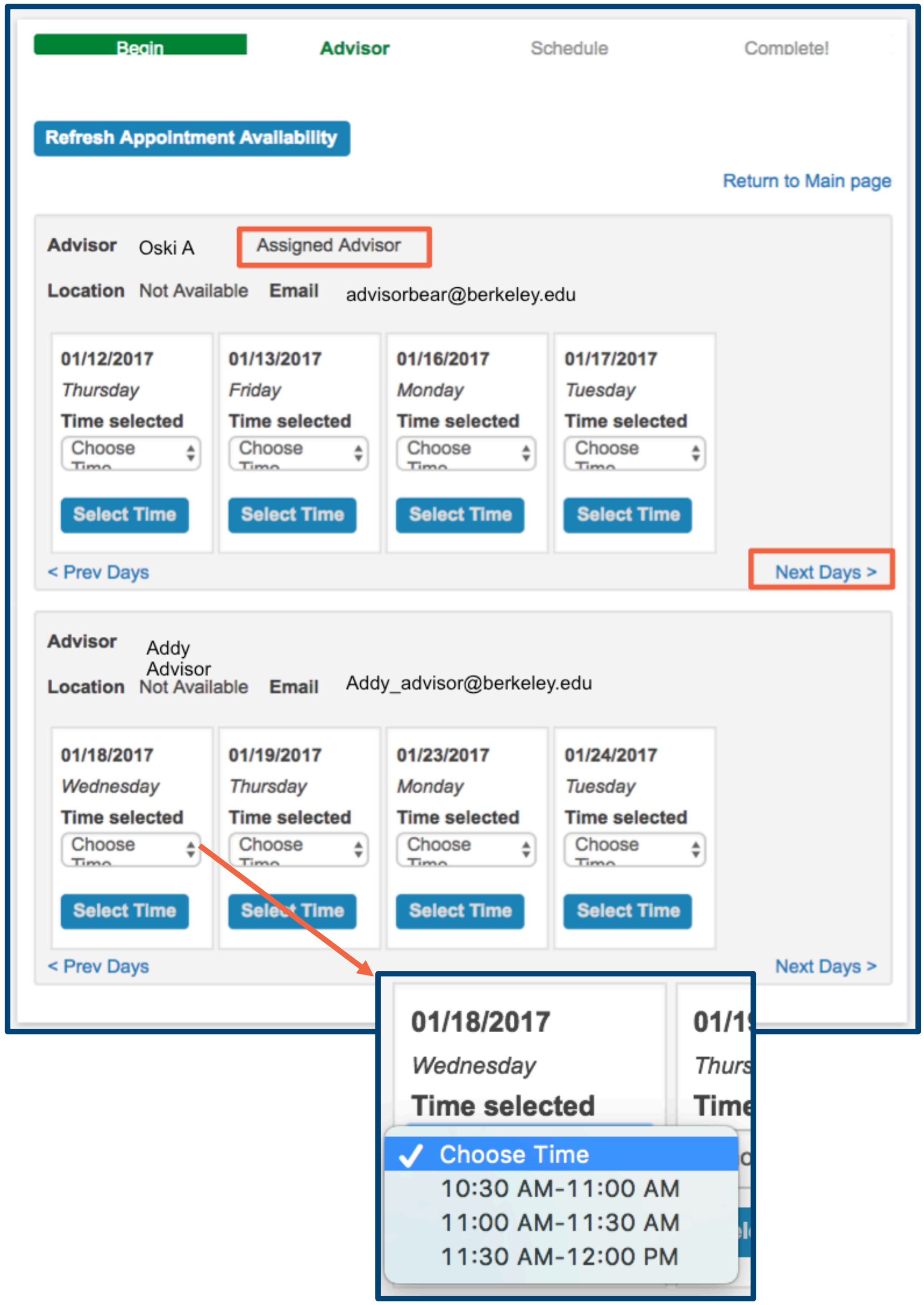
You should also add any **Additional Information** that you would like the advisor to have. For example, since you are only able to add one **appointment reason**, you might list other appointment reasons here.

Click **Select Advisor** to be taken to a list of adviors with the matching criteria.

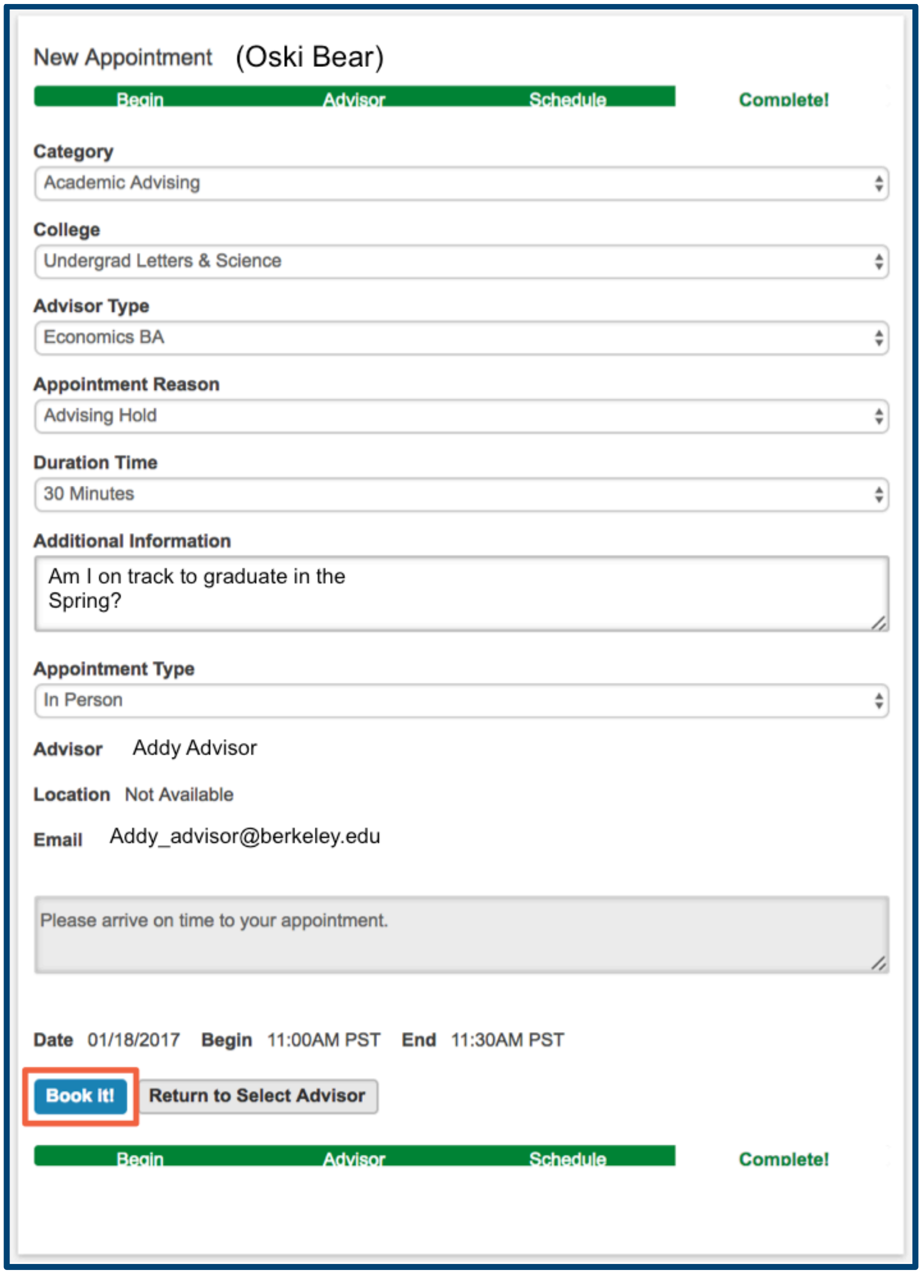
This page displays the available time slots for each advisor with matching criteria. If no advisors match your criteria you will need to **Return to Main page** and try a different input. You can review the advisor's information at the top of each block of time slots. In this example, Oski A is listed first because he is the student's **assigned advisor**.

You can toggle through to future dates by clicking **Next Days**.

When you see the desired date, click the arrows to see the advisor's available times for that day. Once you have chosen the desired date and time, click **Select Time**.

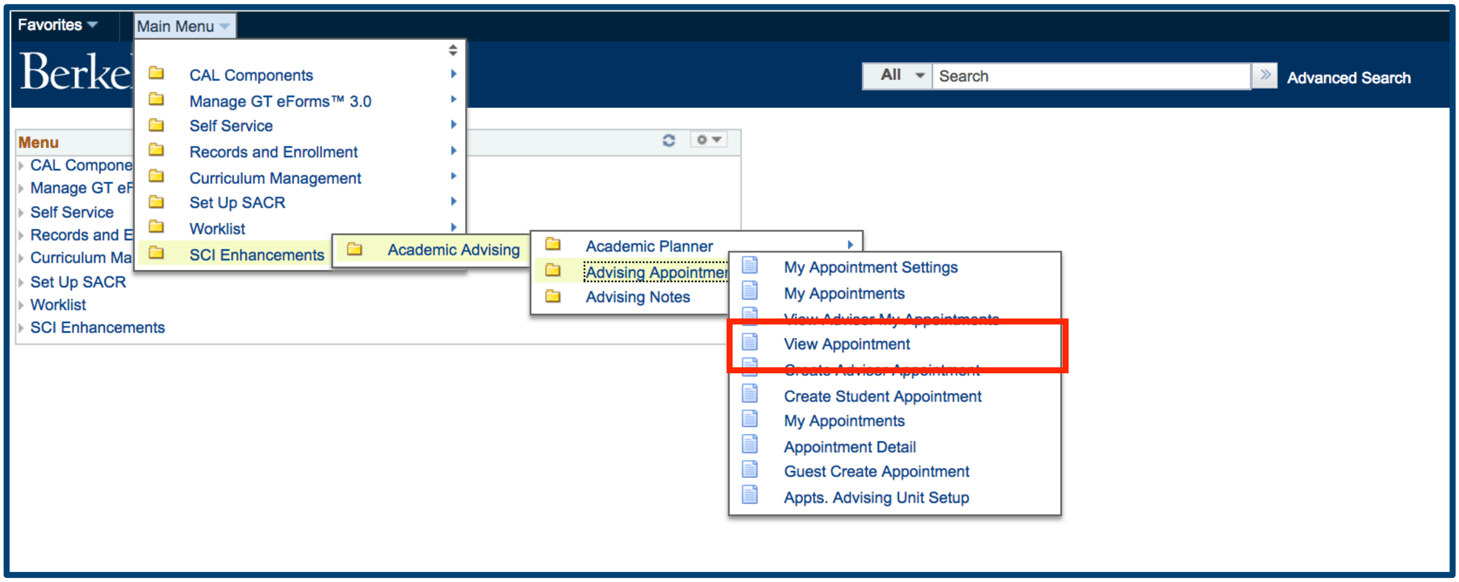


When you have double-checked all of the information, click **Book It!**



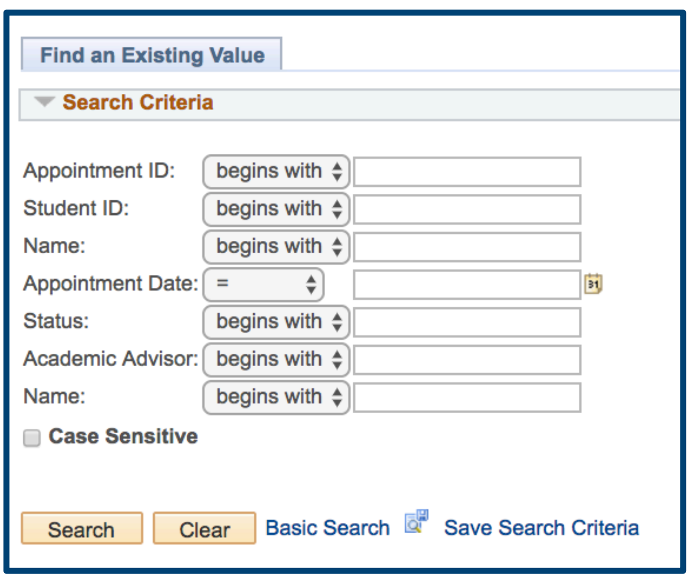
2. Changing the Status of an Advising Appointment

Navigation: From Campus Solutions, navigate to **SCI Enhancements > Academic Advising > Advising Appointments > View Appointment**

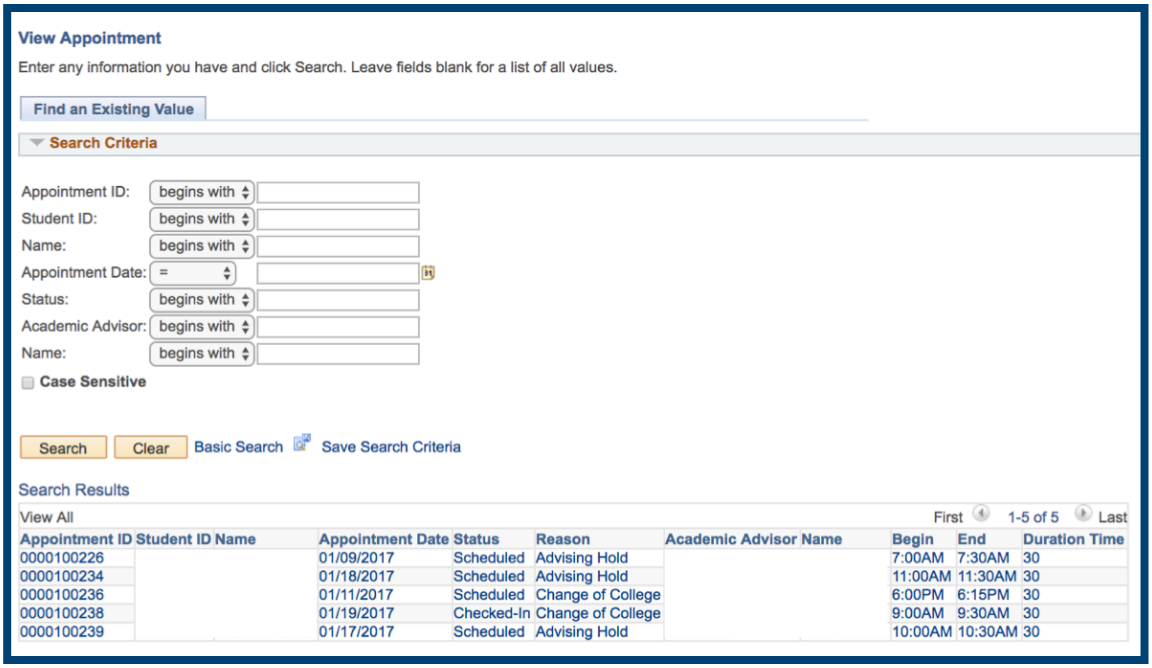


Search for the Student: Search for a student the way you did when making an appointment. There are a few additional search criteria you can use for viewing an appointment: **Appointment ID**, **Appointment Date**, **Appointment Status**, **Academic Advisor ID**, or **Advisor Name**.

Enter one or more of the search criteria then click **Search**.



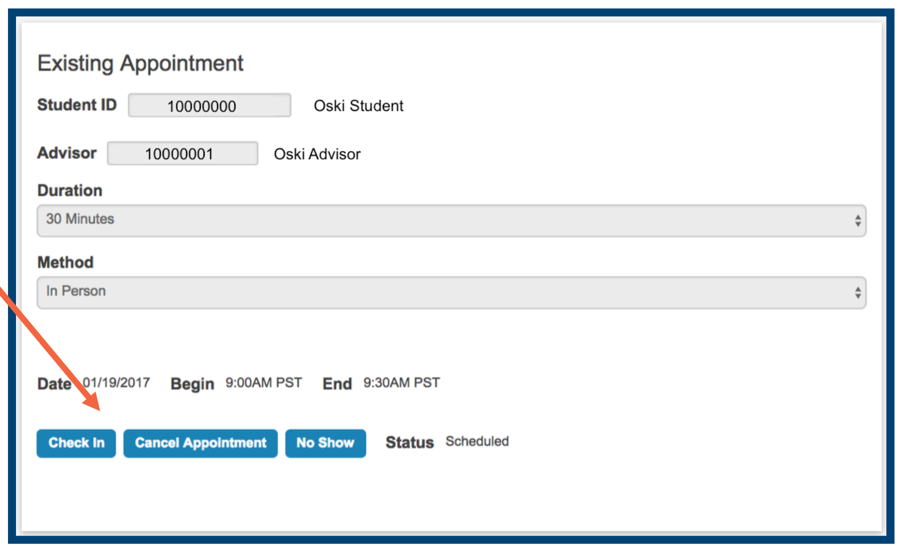
A list of the appointments that match your criteria will show. Click on the **appointment** that matches the appointment you are looking to manage.



Manage Appointment Status:

From here, you can **Check In** the student, **Cancel** the appointment, or mark the student as **No Show**.

When you return to the **View Appointment** page you should see that it reflects the change you made to the **Existing Appointment**.



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