

# Making and Managing Advisor Appointments (Front Desk)

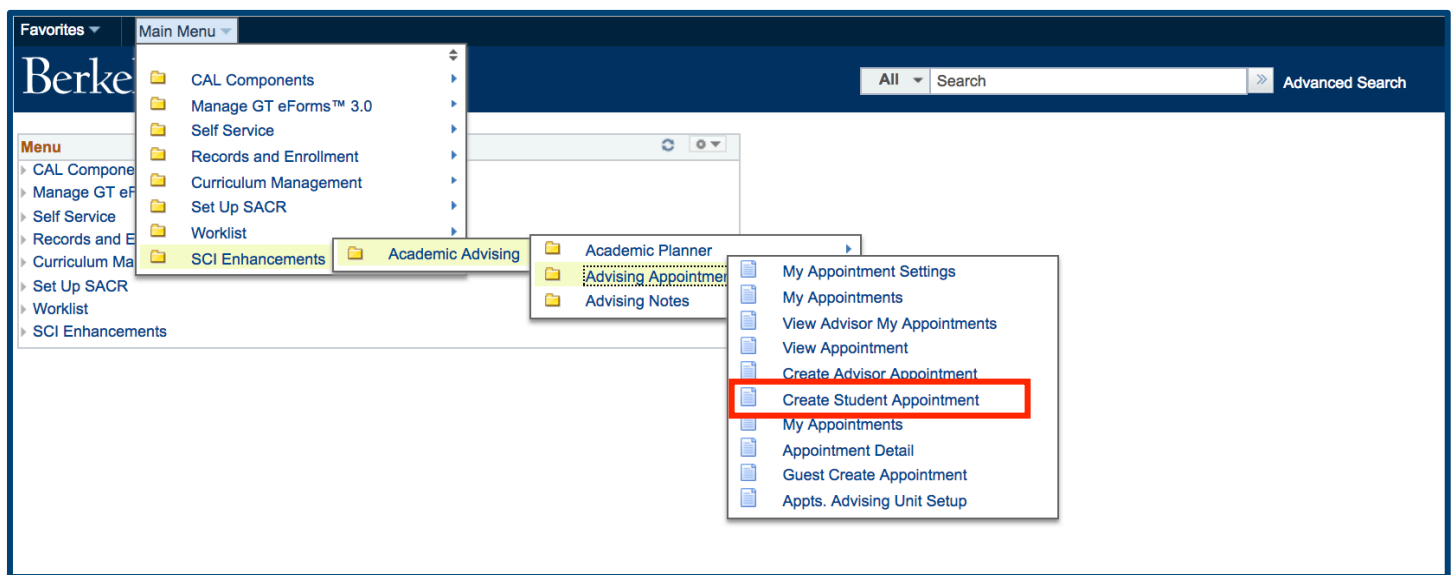
From time to time front desk staff may be asked to make or manage student appointments with advisors. This job aid will cover:

- 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.

The screenshot shows the 'Create Student Appointment' form. It includes a 'Find an Existing Value' button and a 'Search Criteria' section. The search criteria section has fields for ID, Campus ID, National ID, Last Name, and First Name, each with a 'begins with' dropdown and a text input field. There is also a 'Case Sensitive' checkbox. At the bottom, there are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'.

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

Click **Search**.

**Berkeley**

**Create Student Appointment**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

ID:

Campus ID:

National ID:

Last Name:

First Name:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

✓ begins with

contains

=

not =

<

<=

>

>=

between

in

### 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.

**Berkeley**

**Create Student Appointment**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

ID:

Campus ID:

National ID:

Last Name:

First Name:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All First 1-3 of 3 Last

| ID         | Name             | Gender | Date of Birth | Campus ID | National ID | National ID | Country | NID | Short Description | Last Name | First Name |
|------------|------------------|--------|---------------|-----------|-------------|-------------|---------|-----|-------------------|-----------|------------|
| 11667051   | Bear, Oski       | Male   | **/**/****    | 61889     | *****       | USA         | SSN     |     | BEAR              | OSKI      |            |
| 3032089009 | Bear, Oski The   | Female | **/**/****    | 1501449   | *****       | USA         | SSN     |     | BEAR              | OSKI      |            |
| 26214027   | Bear Jr, Oskie J | Male   | **/**/****    | 1104378   | *****       | USA         | SSN     |     | BEAR              | OSKIE     |            |

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.

The screenshot shows a web form titled "New Appointment (Oskie Bear)". At the top, there are four tabs: "Begin" (highlighted in green), "Advisor", "Schedule", and "Complete!". Below the tabs, there are four dropdown menus. To the left of the first three dropdowns are large red numbers: "1.", "2.", and "3.". The first dropdown is labeled "Category" and has "Academic Advising" selected. The second dropdown is labeled "College" and has "Undergrad Letters & Science" selected. The third dropdown is labeled "Advisor Type" and has "Economics BA" selected. The fourth dropdown is labeled "Appointment Reason" and is currently empty.

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

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

The screenshot shows a dropdown menu titled "Appointment Reason". The menu is open, showing a list of options. The first option, "Advising Hold", is highlighted with a blue background and a white checkmark. The other two options, "Change of College" and "Selecting/Changing Major", are listed below it with a light gray background.

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.

1.

**Duration Time**

30 Minutes

**Additional Information**

Am I on track to graduate in the Spring?

2.

**Appointment Type**

In Person

Select Advisor

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 advisors 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**.

**Begin** **Advisor** **Schedule** **Complete!**

**Refresh Appointment Availability** [Return to Main page](#)

**Advisor** Oski A **Assigned Advisor**

**Location** Not Available **Email** advisorbear@berkeley.edu

| 01/12/2017<br>Thursday              | 01/13/2017<br>Friday                | 01/16/2017<br>Monday                | 01/17/2017<br>Tuesday               |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time |
| <b>Select Time</b>                  | <b>Select Time</b>                  | <b>Select Time</b>                  | <b>Select Time</b>                  |

< Prev Days **Next Days >**

**Advisor** Addy  
Addy Advisor  
**Location** Not Available **Email** Addy\_advisor@berkeley.edu

| 01/18/2017<br>Wednesday             | 01/19/2017<br>Thursday              | 01/23/2017<br>Monday                | 01/24/2017<br>Tuesday               |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time | <b>Time selected</b><br>Choose Time |
| <b>Select Time</b>                  | <b>Select Time</b>                  | <b>Select Time</b>                  | <b>Select Time</b>                  |

< Prev Days **Next Days >**

**01/18/2017**  
Wednesday  
**Time selected**

- ✓ Choose Time
- 10:30 AM-11:00 AM
- 11:00 AM-11:30 AM
- 11:30 AM-12:00 PM

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

### New Appointment (Oski Bear)

Begin
Advisor
Schedule
Complete!

**Category**

Academic Advising

**College**

Undergrad Letters & Science

**Advisor Type**

Economics BA

**Appointment Reason**

Advising Hold

**Duration Time**

30 Minutes

**Additional Information**

Am I on track to graduate in the Spring?

**Appointment Type**

In Person

**Advisor** Addy Advisor

**Location** Not Available

**Email** Addy\_advisor@berkeley.edu

Please arrive on time to your appointment.

**Date** 01/18/2017 **Begin** 11:00AM PST **End** 11:30AM PST

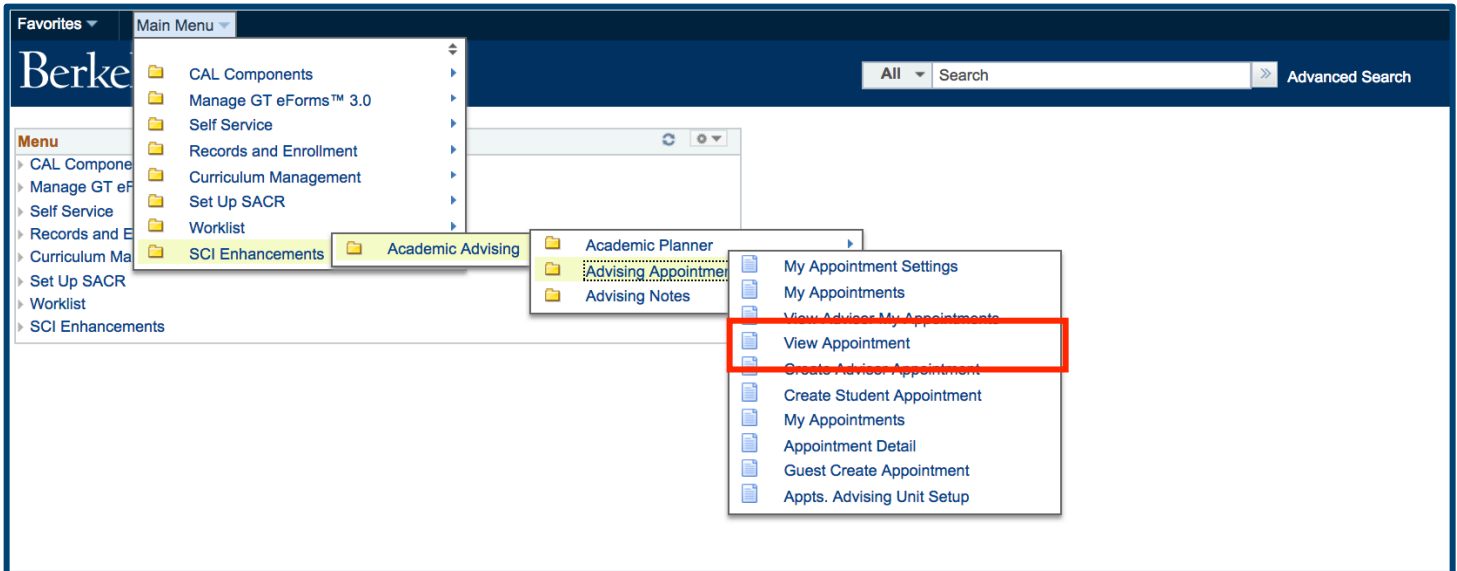
Book It!

Return to Select Advisor

Begin
Advisor
Schedule
Complete!

## 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**.

Find an Existing Value

Search Criteria

Appointment ID: begins with

Student ID: begins with

Name: begins with

Appointment Date: =

Status: begins with

Academic Advisor: begins with

Name: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

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

View Appointment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Appointment ID: 
Student ID: 
Name: 
Appointment Date: 
Status: 
Academic Advisor: 
Name: 
☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

| Appointment ID | Student ID | Name | Appointment Date | Status     | Reason            | Academic Advisor Name | Begin   | End     | Duration | Time |
|----------------|------------|------|------------------|------------|-------------------|-----------------------|---------|---------|----------|------|
| 0000100226     |            |      | 01/09/2017       | Scheduled  | Advising Hold     |                       | 7:00AM  | 7:30AM  | 30       |      |
| 0000100234     |            |      | 01/18/2017       | Scheduled  | Advising Hold     |                       | 11:00AM | 11:30AM | 30       |      |
| 0000100236     |            |      | 01/11/2017       | Scheduled  | Change of College |                       | 6:00PM  | 6:15PM  | 30       |      |
| 0000100238     |            |      | 01/19/2017       | Checked-In | Change of College |                       | 9:00AM  | 9:30AM  | 30       |      |
| 0000100239     |            |      | 01/17/2017       | Scheduled  | Advising Hold     |                       | 10:00AM | 10:30AM | 30       |      |

### 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**.

Existing Appointment

Student ID  Oski Student

Advisor  Oski Advisor

Duration

Method

Date  Begin  End

Status

### Support:

For questions or assistance, please contact the SIS Project:

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

For other jobs aids and videos, go to:

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