

UDSIS Advising Appointment System

The UDSIS advising appointment system allows advisors to establish available appointment offerings to students to view and select from within UDSIS. The appointment system does not currently interface with other calendar systems and must be managed by the advisor within UDSIS. After creating available appointments in UDSIS, students can view an advisor's appointment schedule/availability for 30 days in advance. After logging into UDSIS, select **UDel Customizations – UD Staff Appointments** and select the Department Calendar of **Academic Advising**.

The first time logging in, click the **Staff/Appt Reason** Tab. Unselect any of the reasons that you do NOT want students to be able to view/select from when making appointments. For example, many advisors may not want students to be able to select Probation Advising as a possible appointment reason. Possible appointment reasons include: Pre-registration Advising; Questions About – Change of Major/Minor, Current Class, Graduation/Degree Checkout; Probation Advising; General Advising.

The first time logging in, select the **Unavailable Days** Tab. Using this feature is completely optional and not really necessary if you simply don't create appointments for times you are unavailable. However, if desired, you can enter ranges of dates that you do not want available for appointments. For example, an advisor might enter the week of Spring Break; click **Add Dates to Personal Calendar**. This way no appointments will be created during that time. Click back to the **Create Available Appts.** Tab.

Creating Appointments – Create Available Appts. Tab

- **Select Department Calendar** – Magnifying Glass – Select Academic Advising
- **Date Range** – Select a Start/End Date
- **Time Range** – Select a Start/End Time
- **Duration of Appt** – Select the duration desired for appts – the duration must align with the time range
- **Enter Appointment Location** – Type in your office location
- **Select Days of the Week** – You need to ensure that the days selected match the days of the dates that you have entered (ex: If April 15th is a Monday, you need to select Monday, not Friday); If you select the incorrect day, you will receive a message that zero appointment have been created.
- Click **Create Available Appointments** – Once your appointments are created, a pop-up box will display providing you with a total number of appointments you have created.

The screenshot shows the UDSIS web interface. At the top is the UDSIS logo and a navigation breadcrumb: Favorites | Main Menu > UDel Customizations > Advising Appointments > UD Staff Appointments. Below this is a tabbed interface with tabs for 'Create AVAILABLE appts', 'AVAILABLE', 'EXISTING', 'HISTORY', 'Staff/Appt Reason', and 'Unavailable Days'. The 'Create AVAILABLE appts' tab is active. Below the tabs is a search bar with the text 'Select Department Calendar (Required) Academic Advising'. A red reminder message states: 'REMINDER: Before creating appointments, be sure to enter personal vacation schedule and/or other days that you are unavailable for appointments. Appointments will not be created for days within your personal vacation/time off list or when the University Campus is closed.' The form contains several fields: 'Date Range: Start Date' (04/15/2013) and 'End Date' (04/19/2013); 'Time Range: Start Time' (09:00 AM) and 'End Time' (11:00 AM); 'Default Duration of Meetings' (030 minutes); and 'Appointment Location' (UVC 136). On the right, under 'Days of the Week', checkboxes are selected for Monday, Tuesday, Wednesday, Thursday, and Friday, while Saturday and Sunday are unselected. A yellow 'Create Available Appointments' button is at the bottom.

Viewing Created Appointments

- o Click on the **Available** Tab to view the appointments that you created.
- o Click **View All** to view ALL created appointments. Since your schedule and availability is likely to change, it is recommended that you only create appointments for a few weeks in advance.
- o If you wish to cancel an unscheduled appointment, you can cancel it by clicking **Cancel** next to the appointment you desire to cancel. If you wish to cancel all/multiple unscheduled appointment, you can do so by entering filter options (ex: dates) and then click the **Delete All Available Appts. Shown in Grid Below** button.
- o The screenshot below is an example of created appointments on the **Available** Tab and is comparable to what the student views when they are selecting a desired appointment date.

The screenshot shows a web interface for viewing appointments. At the top, there are tabs: 'Create AVAILABLE appts', 'AVAILABLE', 'EXISTING', 'HISTORY', 'Staff/Appt Reason', and 'Unavailable Days'. Below the tabs is a search bar and a 'Select Department Calendar (Optional):' dropdown set to 'Academic Advising'. There are also filters for 'Date Range/Weekday' and 'Time Range'. A 'Delete All Available Appts Shown in Grid below' button is visible. The main part of the screenshot is a table titled 'Available Appointments' with columns for Appt Calendar Type, Appointment Start Date, Day of Week, Start Time, End Time, Location Description, CANCEL, Student Id, Appointment Reason, and SCHEDULE. The table contains 9 rows of data for 'Academic Advising' appointments.

Appt Calendar Type	Appointment Start Date	Day of Week	Start Time	End Time	Location Description	CANCEL	Student Id	Appointment Reason	SCHEDULE
1 Academic Advising	03/26/2013	Tuesday	9:00AM	9:30AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
2 Academic Advising	03/26/2013	Tuesday	9:30AM	10:00AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
3 Academic Advising	03/26/2013	Tuesday	10:00AM	10:30AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
4 Academic Advising	03/26/2013	Tuesday	10:30AM	11:00AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
5 Academic Advising	03/27/2013	Wednesday	9:00AM	9:30AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
6 Academic Advising	03/27/2013	Wednesday	9:30AM	10:00AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
7 Academic Advising	03/27/2013	Wednesday	10:00AM	10:30AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
8 Academic Advising	03/27/2013	Wednesday	10:30AM	11:00AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE
9 Academic Advising	03/28/2013	Thursday	9:00AM	9:30AM	longest text I can type in ABC	CANCEL	<input type="text"/>	<input type="text"/>	SCHEDULE

Scheduled Appointments – Emails for Advisors

- o Once a student schedules an appointment, advisors will receive a confirmation email which includes information such as the student’s name/ID, appointment reason, current college and declared major.
- o This email can generally be ignored. However, the information included in the confirmation email might prompt advisors to communicate with the student in advance of the scheduled appointment or help clarify as to why the student is requesting an appointment (ex: probation advisement.)
- o The morning of an advisor’s appointments, they will receive an email summarizing all scheduled appointments for the day (the email is titled *Advising Appointment Reminder*.)

Scheduled Appointments – Emails for Students

- o Once a student schedules an appointment, they will receive a confirmation email of the scheduled appointment details such as date and time.
- o The student will also be sent an email the morning of their scheduled appointment to serve as a reminder (the email is titled *Advising Appointment Reminder*.)

Other Features

Access

- Since students often meet with many advisors beyond those specifically assigned to them, the appointment system allows students to schedule with any advisor that has created appointments. Many individuals, like Assistant Deans and Advising Coordinators, do not have assigned advisees but will utilize the system for a variety of appointments. Students can only view your appointments if they select an appointment reason (ex: General Advising) that you are using as an option under the Staff/Appt. Reason.
- UDSIS access for advisors directly correlates to their UDSIS advisor role – **faculty/staff that do not have an advisor access role cannot utilize the appointment system.**

Cancellation Convenience

- If you ever need to cancel a scheduled appointment, you can cancel any created appointments by clicking on the **Cancel** button within the **Existing** Tab. You will be given the option as to whether or not you would like to re-open the date/time to be available for a different student to reschedule.
- An email will be sent to the student informing them of the cancelled appointment.

Other Features

- **Available Tab** – If desired, you can also schedule an appointment for a student (in place of the student doing so themselves) by entering the student ID, Appointment Reason and click Schedule.
- **Additional Info Button** – Displays next to the student's name on the **Existing** Tab. By clicking this button, you can view student data such as ID, phone number and email address.
- **Unavailable Days Tab** - If desired, before creating appointments, you can enter/block personal vacation days that are completely unavailable for appointments. Not required – optional.
- **Existing Tab** – Displays all upcoming scheduled appointments.
- **History Tab** – Displays a historical record of all scheduled appointments – this is extremely helpful when tracking advisement workload.
- **Staff/Appt. Reason** – You can unselect which appointment reasons you would not like to be available for scheduling. For example, many advisors might unselect Probation Advising.

The screenshot shows the 'Staff/Appt Reason' tab in the appointment system. At the top, there are navigation tabs: 'Create AVAILABLE appts', 'Available', 'Existing', 'History', and 'Staff/Appt Reason'. Below the tabs, there is a search bar for 'Appt Calendar Type' with 'Academic Advising' entered and a magnifying glass icon. Below that is a field for 'Faculty/Staff Name(Required)'. The main content area is titled 'Select all APPT REASONS that will be available to students'. It features a table with columns for 'Appointment Reason' and a checkbox for each row. The table has a header row with 'Appointment Reason' and a checkbox. The rows are numbered 1 through 7. The first three rows have checkboxes that are checked, and the last four rows have unchecked checkboxes.

	Appointment Reason	
1	General Advising	<input checked="" type="checkbox"/>
2	Pre-Registration Advising	<input checked="" type="checkbox"/>
3	Probation Advising Required	<input type="checkbox"/>
4	Professional Program Admission/Advising	<input type="checkbox"/>
5	Questions - Graduation/Degree Checkout	<input type="checkbox"/>
6	Questions About Change of Major/Minor	<input checked="" type="checkbox"/>
7	Questions About Current Class	<input checked="" type="checkbox"/>

Sample Communication to Students

Since use of the advising appointment system is optional, a mass notification to students will not be sent. **Advisors are responsible to communicate to their advisees if they are using the UDSIS appointment system.** Below are some instructions and sample text that could be used to easily notify all assigned advisees. Ensure that appointments have been created within UDSIS before sending these instructions.

Notification to Advisees

- Once you have created your appointments and are ready for advisee sign-ups, click on **Self Service**
- Click on **Advisor Center**
- Click on **My Advisees**
- Click on **Notify All Advisees** email button
- Email your advisees with similar text below.

Possible Text to Advisee

Advisee – (Students graduating in May can ignore.) I hope you had a great spring break. Believe it or not, it is time to meet to discuss the Fall semester as registration begins soon. To sign up for an advising appointment, please log into UDSIS and follow the instructions below.

- Click **Self Service – UD Appointment Sign Up**
- Select *Department Calendar – Academic Advising (magnifying glass)*
- Select *Appointment Reason – ex: Pre-Registration Advising (magnifying glass)*
- Select *Faculty/Staff Name – Select My Name [fill in name here] (magnifying glass)*
- *You will then see a list of available appointments. Click View All to see all available appointments.*
- *Find the appointment time you desire and click the Schedule button.*
- *A pop-up box will appear stating that a Confirmation Email has been sent to you.*
- *Review your email for appointment details, such as date and time.*

Please come prepared to your advising appointment with..... [fill in your own instructions]. I look forward to seeing you soon!