Student Appointment Scheduler (SAS)

Key Features of the SAS
1. Provides an enterprise-level appointment scheduling system that links directly to AdRx
2. Calendars and available appointment times are controlled by advisors
   - Create/edit recurring appointment slots
   - Restrict specific times to specific groups of students
   - Restrict how far out a student can schedule (through My Current Profile settings in AdRx)
     - Example – student can only schedule 14 days in advance
   - Restrict how close to the appointment the student can schedule (through My Current Profile settings in AdRx)
     - Example – student cannot set an appointment within 25 hours of its start time
3. Scheduler may view and update multiple calendars
4. Students can search for assigned or preferred advisors
   - See a summary of all SIS Assigned Advisors
   - See any other advisors who will allow them to schedule (e.g., unassigned Honors advisor)
5. Student receives confirmation and reminder emails of appointment
   - Student must enter a phone number before they can confirm the appointment
   - Advisor sets message that will be included in the reminder and confirmation emails
   - Subject line has the advisor’s name, day, time, and reason for meeting
6. Cancellations are saved as an Advising Note in AdRx
   - Students are prompted to confirm before cancellation is complete
   - Students must enter reason for canceling appointment

Purpose of the SAS
1. Provides advisors with way to publicize available appointment times
2. Provides students a direct, online method to schedule meetings with advisors
3. Allows for scheduling group advising meetings

Advisor Uses of the SAS
1. Advisors publish available meeting times for specified students or groups of students
2. Advisors craft appointment confirmation and reminder emails (through AdRx) that are sent, automatically, to students
3. Advisors view student-identified topics for the appointment in order to prepare for the appointment
4. Advisors view cancellations and reasons for cancellations in AdRx

Student Uses of the SAS
1. Students access SAS through provided link (now) and One.IU (future)
2. Students search for calendars of assigned or preferred advisors
3. Students independently schedule individual or group meetings with advisor(s), online – 24/7
4. Students cancel/change appointments as needed
5. Students also identify the topics they want to discuss
6. Students receive appointment confirmation and appointment reminder emails

Appointment Reminder with Christina Lee Bezzy on Mon Feb 09, 2:00 PM - 2:30 PM
noreply@indiana.edu
Sent: Sun 2/8/2015 5:52 AM
Student Appointment Scheduler (SAS)

Resources for the SAS

Advisors access the SAS through AdRx

1. Use *My Current Profile*
   - Set up group advising size
   - Create text for appointment confirmation and reminder emails
   - Provide biographical or professional information that is displayed with SAS Search results
   - Set the timeframe in which students are able to schedule, specifically the minimum hours before and up to a specified number of days in the future

2. Use *My Calendar* to create appointment times
   - Make sure SAS appointments are available in your general (Outlook) calendar
   - Click on date → time → indicate what time is for (appointment, group, walk-in, etc.)
   - Click Create
   - Set up restrictions (student populations allowed) for this time

Students currently access the SAS through a specific link provided by the advisor or advising office. Once SAS is out of the Pilot phase and full enabled for IU, there will be access through One.IU and the OCSS website.
Hints & Reminders for the SAS
(Add your own tips; contact OCSS@iu.edu to add them to the generic overview document.)

Questions?
Unit Contact: _____________________________  Campus Contact: _____________________________

OCSS@iu.edu
# Student Appointment Scheduler (SAS)

## Student Appointment Scheduler Set-Up & Preferences

### My Current Profile (on left side of AdRx screen)

**Appointment Calendar**
- Identify how many people could come to a group advising session

**Scheduler for Student**
- Identify how far out (days ahead) students may schedule appointments
- Identify how close (at least this number of hours ahead) students may schedule appointments
- Create your appointment confirmation email
- Create your appointment reminder email

### My Calendar: (on left side of AdRx screen)

**Set up the schedule elements in your SAS calendar**
- Set Restrictions: identify and name the groups of students you restrict an appointment time availability to (e.g. only seniors, only My Advisees, etc.)
- Create recurring walk-in time periods for the rest of this semester
- Create recurring appointment, phone, or online time periods for the rest of this semester; add restrictions, if appropriate
- Add one-time available meeting times that are not recurring; add restrictions, if appropriate
- Add “group advising” times if you already know when they will occur; add restrictions, if appropriate

### Compare your SAS calendar to your Outlook calendar
- Make sure all schedule elements – in SAS – match times that you have blocked out in Outlook
- Go through SAS and remove any schedule elements that conflict (out-of-office, meeting, etc.)