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Summary: On this screen, we discuss AccuCampus appointments, how to configure them and how to schedule them using Services and/or Locations. We also talk about staff Scheduling and assignments.
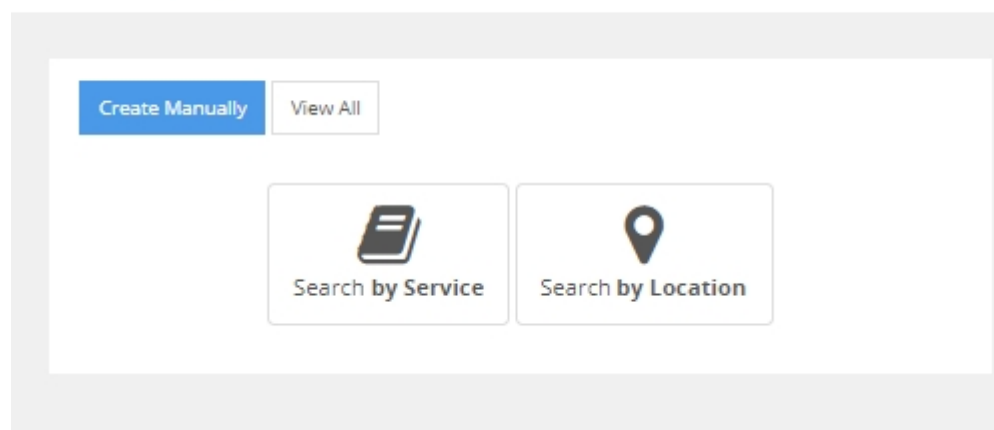
Appointments

Use this option to schedule an appointment between **Student(s)** and **Tutor** or **Advisor** in a **Location** (based upon the **Tutor's Schedule**, **Tutor Assignments**, and **Center Assignments**). Here you can also view all appointments scheduled in the Centers (depending on your access in AccuCampus.

Make Appointment

Way to Access: **Appointments** > **Make Appointment**
Purpose: To schedule a **Student** with a **Tutor** or **Advisor** for an appointment.

Make Appointment Buttons

In this section there are several buttons that are useful when making **Appointments**:

- **Create Manually** - Use this option to select all the appointment options manually. This is only recommended to be used by administrators or trained users.

- **View All** - This option takes you to **View All** the appointments (already created).

Make Appointment Options

- **Schedule by Service** - Use this option to pick the **Service** that the Student wants help with before selecting the other required appointment options.

- **Schedule by Location** - Use this option to pick the **Center** that the Student wants help with before selecting the other required appointment options.

Schedule (Appointment) by Service

Use this option to select the **Service** first to see what **Locations** offer help with the selected **Service**.

1. There are 2 ways to search for the **Service**; you can search for the **Service** in the search box or simply click one of the options in the suggested **Services**.

1. Once the **Service** is selected you see a list of **Location** that offer this **Service**.

1. Now for each **Location** shown for that **Service** there are several options:

- **Make Appointment**- Please click this button to create an Appointment in such **Location**, **Note** There are other options that are displayed if the **Location** set up the information, please see details below.

- **Send-email**- If this **Location** was configured with an email account this link will show as a way to contact the **Location**.

- **Visit Website**- If this **Location** was configured with a website URL this link will show as a way to navigate to such website belonging to the **Location**.

Make Appointment

- Select the **Location**, **Semester**, **Period**, **Student**, **Service**, **Event(optional)** as needed.

SEARCH BY STAFF- Select this option to search for the Staff who meets the conditions set above, a new screen will show with the names, click on one of them as needed:

After clicking in one of the tutors a new screen will show underneath so you can select a block of time from their availability, select one as needed:
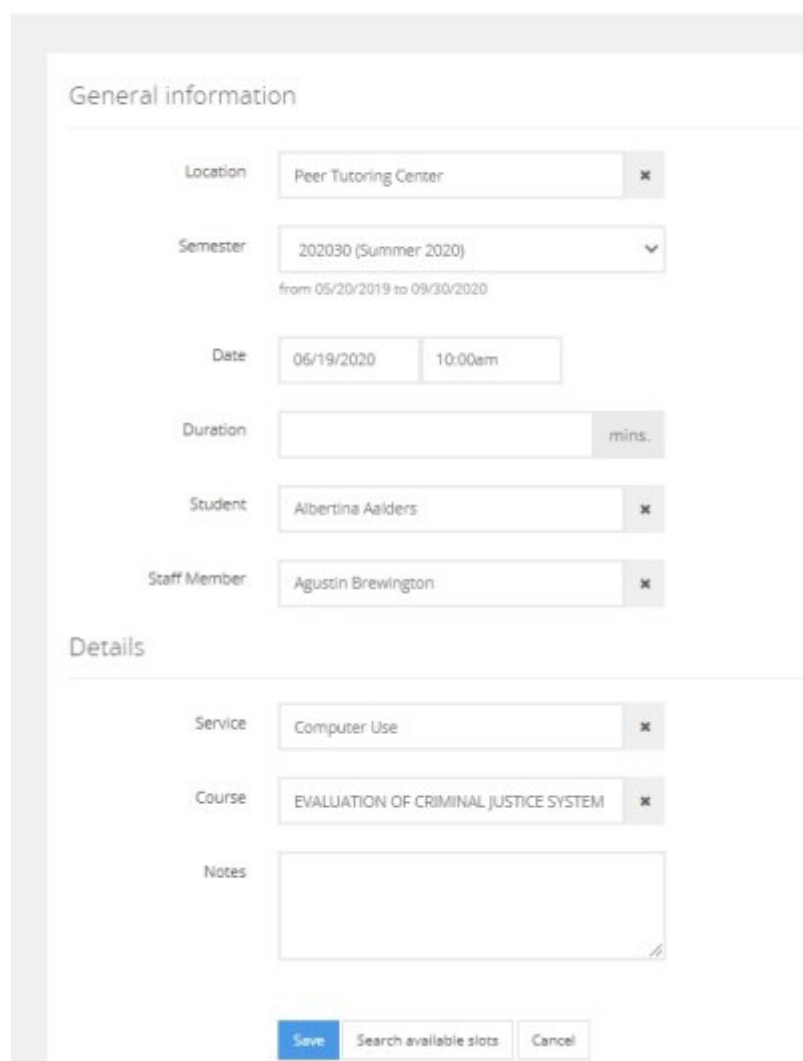
Pick an available time slot

Friday 19 June 2020

| 10:00am | 10:15am | 10:30am | 10:45am | 11:00am | 11:15am | 11:30am | 11:45am |

After selecting the block of time from the choices, a screen will show with the appointment ready to be saved.

SEARCH BY DATE- Select this option to search for Available Dates for ALL tutors that meet the above-mentioned filters.

If you choose to use selection by dates a new screen will show with all available tutors AND their available blocks of times, please click a block of time below:

After selecting the block of time a screen will show with information that the appointment is ready to be saved.
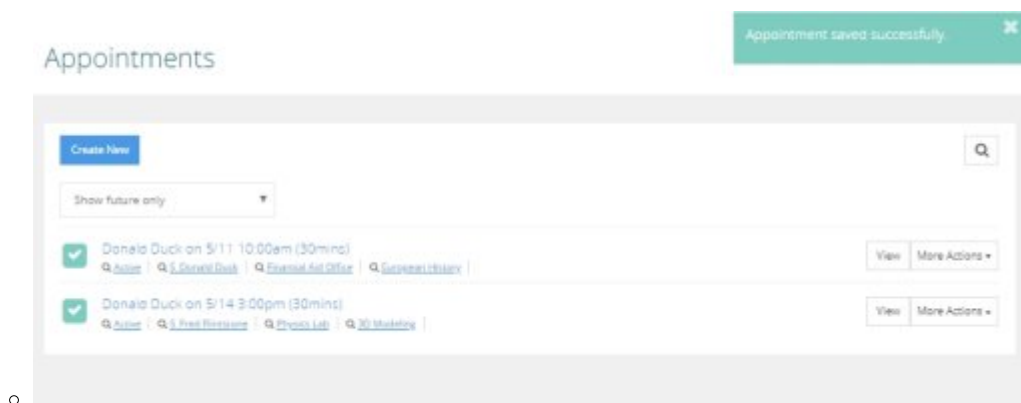
Schedule (Appointment) by Location

Use this option to select the **Location** first to see what **Services** they offer.

1. There are 2 ways to search for the **Location**; you can search for the **Location** in the search box or simply click the **Make Appointment** link on the Location that the **Student** prefers to visit. **Note**: There are other options that are displayed if the **Location** setup the information. As an example above if the address is included then a map will display this **Location**, additionally, there is an option to visit the **Location**'s website if provided, and if they set up an e-mail there is an option to contact the **Location**..

1. Once the **Location** is selected you can click on the magnifying glass in the **Services** search box to see a list of **Services** that are offered at the selected **Location**.

Now you get to select the other options such as the **Student** (will be pre-selected if you are logged in as a Student), **Course**, **Staff** (optional if known), and the **Date range**. Simply click the **Search** button once you have the fields completed and a list of available **Staff** will be displayed. When you click on one of the available **Staff** it further displays time slots for that **Staff** over the time period you selected. Now just select the starting time you would like to make for the appointment. **Note**:This is all based on the **Staff Schedules**, **Staff Assignments**, and **Location Appointment Settings**.

The final step in the process is to adjust the appointment duration (if necessary), add notes, and verify the options selected are good. Once everything looks good click the **Save** button. The system will verify the appointment is following all the rules set up in AccuCampus and schedule the appointment.

1. Done! Now you should see a green confirmation box that states "The appointment was scheduled successfully!" in the lower-right corner of the screen.

Appointments

Create New

Show future only ▾

☑ Donald Duck on 5/11 10:00am (30mins)
　Q Active | Q S.Donald Duck | Q Financial Aid Office | Q European History |　　　View | More Actions ▾

☑ Donald Duck on 5/14 3:00pm (30mins)
　Q Active | Q S.Fred Firestone | Q Physics Lab | Q 3D Modeling |　　　View | More Actions ▾

Appointment saved successfully.

○

Appointments-Create Manually

Click the "Create Manually" button (to avoid the Appointment Wizard) to set all the parameters on the same screen.

Make Appointment

General information

Location	Type to search...
Semester	202120 (Winter 2021) ▾ from 05/20/2019 to 03/31/2021
Date	
Duration	60 mins.
Schedule as	Administrator ▾
Student	Type to search...
Staff Member	Type to search...

Details

Service	Type to search...
Course	Type to search...
Notes	

Save | Search available slots | Cancel

Some users need additional permissions to be able to perform this process, talk to your administrator if in doubt

Setting up Appointment Options

Appointments Configuration

How to Access: Advanced Options > Settings > Appointments

Purpose: This page is used to configure Appointments information in AccuCampus.

Options

Scope

- **Setting Scope selection** - Select from this list the scope to create/edit the configuration, you can leave it at the Account Level for global settings first, then you can change it to a Location to do some changes as needed. To learn how to change scopes see the next chapter.

1-Disable appointments scheduling - Use this option to disable appointment-scheduling for the Scope selected above.

Appointments-scheduling is one of the main features in AccuCampus, it is highly recommended to have a meeting with the school/center directives and discuss this before doing it.

2-Service Selection

- **Service Selection** - Select between AUTO (to show the services in the appointment) or DISABLED (if you will not require the user to select **Services**).
- **Allow selecting none** - Select this option to make **Service** selection optional.
- **Allow selecting multiple services** - Select this option to allow users to create appointments with multiple **services** required.

3-Event Selection

- **Event Selection** -Choose whether an event can be selected as part of an appointment. You can also allow users to select "none."

4-Staff Selection

- **Staff Selection** - Please adds a filter to allow the attendee to select a specific staff member when scheduling an appointment. If unchecked, the attendee will be shown all available staff members.
- **Allow Creating Appointments** - Choose the time frames during which appointments can be made.

5-Allow creating appointments

- **Duration Restrictions** - Choose the minimum, maximum, and default length of appointments.

6-Count Visit Towards Appointment

- **Count Visit Towards Appointment** - Set limits on how early or late an attendee can sign-in and still be counted as attending the appointment. It also allows you to set a minimum amount of time for an attendee to be signed in for the appointment to count.

7-Maximum Appointment Time Per Week

- **Maximum Appointment Time Per Week** - Use this option to set limits on the total amount of time an attendee or staff member can be in appointments. This is typically set at the location level, not the global level.

8-Maximum # Of Appointments Per Week

- **Maximum # Of Appointments Per Week** - Use this option to set the maximum number of appointments per week that a staff member or attendee can attend. This is typically set at the location level, not the global level.

9-Appointment Actions Restrictions

- **Appointment Actions Restrictions** - Use this option to set restrictions on editing, canceling, and restoring appointments by all users.

10-No-Show Restrictions

- **No-Show Restrictions** - Use this option to set limits on how many "no-shows" an attendee can have before they are no longer allowed to make appointments.(The student will need to contact the administrator or tutor to clear a "no show" or work a valid solution)

11-Back To Back Restrictions

- **Back To Back Restrictions** - Use this option to create a time buffer between appointments.

12-Group Appointment Restrictions

- **Group Appointment Restrictions** -Use this option to decide if staff members must assist with events.

13-Reminders

- **Reminders** - This triggers a reminder notice for appointments at a set time period prior to the appointment start-time.

14-Instructions

- **Instructions** - Use this option to specify instructions presented to users when making an appointment.
- **SAVE BUTTON** - This saves the configuration.

Make sure the configuration is correct AND that your scope is set to what you want to change BEFORE saving, some changes can not be recovered

Entering Staff Schedule and assignments

This is only applicable to those users who have a role declared in the category: "Users available as staff", this is in the Advanced Options–> Settings–>User Roles–>Role Mappings section. After clicking the "Staff Availability" option in the user list a page similar to this screenshot should appear where

avail Filters services.
* **Available
for** - Select
from the
list if this
availability
is for walk-
ins,
Appointme
nts, or
both.

Kathy Burns Availability

Available for Services

○ Available to all services

● Only these specific services...

Services [Type to search...] 🔍 Add Service

Available for Courses

○ Available to all courses

● Only these specific courses...

All courses in group [Type to search...] 🔍 Add Subject

Semester 202030 (Summer 2020)

Courses [Type] 🔍 Add Course | Lookup | View All Users

Schedule

☐ Available at any time
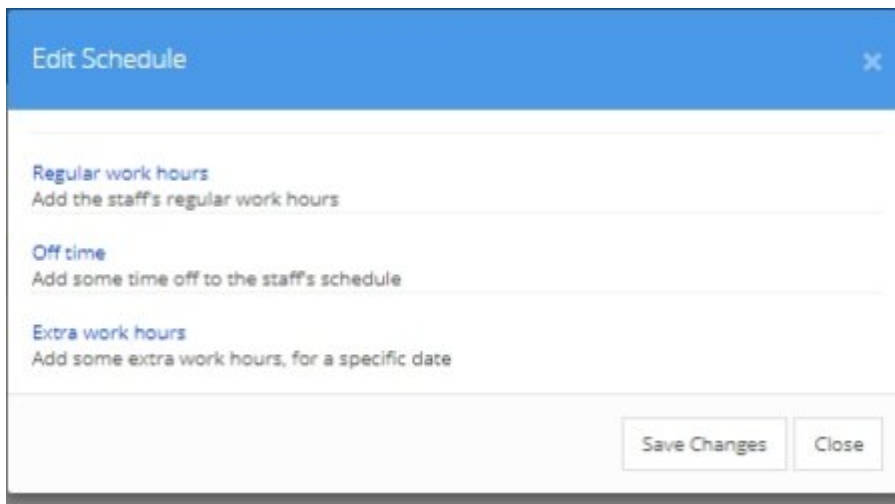
Add Schedule

Regular work hours

Schedule exceptions

* **Available to all services**- Select this option for this user to be available for all **Services**.

- **Only these specific services...**- Select this option for this user to be available to selected specific **Services** only, when using this option search for **Services** and click "Add Service" as

needed.

- **Available to all courses**- Select this option for this user to be available for all **Courses**.

- **Only these specific courses...**- Select this option for this user to be available to selected specific **Courses** only.

- **All courses in group**- use this option to specify a "Group" of **Courses**, all **Courses** that belong to this "Group" will be added to this availability.

- **Semester**- This will show the current semester if you need to change this click "Change Term" in the "More Actions" block to the top-right of the screen.

- **Courses**- Select this option for this user to be available to selected specific **Courses** only, please use the list to search for **Courses** and click "Add Course" as needed.

- **Available at any time**- Check this option to make the user availability as "always available", uncheck this option to specify a schedule.

- **Add Schedule**- Please click Add Schedule to show a list of options and now specify between Regular Work Hours, Off Time, and Extra Hours", next you will be requested to enter the "Day of the Week", "Time", Location and Max # of Attendees.

Viewing and Canceling Scheduled Appointments

Go to Appointments–> View All:

a
ilable on this screen on each listed item.

- **Appointment Information/Title** - Click this title to edit or update the **Appointment** information.

- **View** - This allows you to see the appointment information.

- **More Options** - This gives you several options to modify the **Appointment** selected.

- **Cancel** - This gives you the option to **Cancel** the **Appointment** selected.

- **Mark as No-Show** - This gives you the option to mark the **Appointment** selected as a **No-show**.

- **Mark as Show** - This gives you the option to mark the **Appointment** selected as a **Show**.

- **Restore** - This gives you the option to **Restore** the canceled or voided **Appointment** selected.

- **Virtual Sign-in** - For online appointments only, this option allows you to sign-in to an online appointment.

- **Void** - This gives you the option to mark as **Void** the **Appointment** selected.

Generating Appointment Reports

Go to General–> Reports:
Search for the Appointments section, go through each description so you can find the right report for each need, each report brings a number of filters and output formats:

Appointments

Scheduled Appointments

Shows all the scheduled appointments grouped by staff member. It specifies if the appointments are active, canceled or voided and if the attendee showed up or not.

Daily Appointments

Shows all the appointments grouped by day and staff member. It specifies if the appointments are active, canceled or voided and if the attendee showed up or not.

Walk-ins or Appointments

Lists each user that visited the center during the reporting period with a flag showing if the visit was a walk-in or appointment visit.

Staff Appointments Summary

Shows a summary statistics of appointments grouped by staff member.

Appointment No-Shows

Shows the scheduled appointments grouped by staff member which resulted in a no-show.

Staff Weekly Appointments

Shows the appointments scheduled by that staff member and week.

Staff Availability for Appointments

Shows staff member's weekly availability for appointments along with scheduled appointments.

Detailed Weekly Appointments

Shows the details of the appointments scheduled by week.

Zero Appointments

Shows the users who did not schedule an appointment within the given period.

Appointments Calendar

Shows all the appointments in a calendar.

See this example for all appointments that were scheduled this week.

Reports > Scheduled Appointments

Change Filters

Report filtered by

Date range: Dec 13, 2020 - Dec 20, 2020 11:59pm
Status: All
Staff members: Jorge2 rodriguez

rodriguez, Jorge2

Attendee	Date	Start	End	Status	No-show	Location	Course	Services
Aalders, Albertina	12/14/2020 (Mon)	4:00PM	4:30PM	Active	Yes	Tutoring and Learning Center	20th CENTURY EUROPE	Online Peer Tutoring
Aalders, Maitilde	12/16/2020 (Wed)	8:00PM	9:00PM	Active	N/A	Peer Tutoring Center	DRAWING I: FOUNDATIONS OF DRAWING	Online Peer Tutoring
Aasen, Albertine	12/17/2020 (Thu)	11:00AM	12:00PM	Active	N/A	Writing Center	19TH CENTURY EUROPE	Online Peer Tutoring
Abadines, Majid	12/17/2020 (Thu)	2:00PM	3:00PM	Active	N/A	Peer Tutoring Center	JAZZ DANCE II	Online Peer Tutoring
Aasen, Maitreya	12/18/2020 (Fri)	10:00AM	11:00AM	Active	N/A	Peer Tutoring Center	19TH CENTURY EUROPE	Online Peer Tutoring

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