Appointment Scheduling Guide

Purpose
This document provides guidance on making appointments with students and documenting outcomes. It is intended for staff members who will make, edit, and document student meetings.

Important Terms

- **Appointment**: A documented set of details shared between a student and a calendar owner (i.e. Counselor, Advisor, Instructor, etc.) about a planned meeting. Students may self-schedule; however, some programs may choose the option to omit students from self-scheduling and instead staff members schedule for the students. Calendar owners can schedule future appointments and create appointments to document past meetings.

- **Calendar Attachment (iCal)**: Attachment to an emailed calendar invitation that allows a user to accept or decline from their email client (i.e. Outlook, Google, etc.). iCal is the industry standard to communicate meeting information between online calendaring software.

- **Outcomes**: Results of a meeting documented on the Starfish Appointment Calendar along with email notification in outlook to West Valley email and personal alternative email as defined in the user profile.

- **SpeedNotes**: Activity codes that provide an easy way for staff and faculty to document common outcomes of an appointment. Specific SpeedNotes are also set up for easy MIS Reporting.

Online Scheduling

Starfish supports **Two-Way Calendar Communication** with most online calendars (e.g., Microsoft Outlook, Google). When an appointment is scheduled or updated in Starfish, a calendar invitation (with iCal attachment) is sent to both parties (the
student and the calendar owner) and users can accept or decline in their email client. This two-way integration is automatically available and requires no additional integration or installation.

When the Starfish Calendar is updated: Starfish triggers an updated calendar invitation (iCal) when the following updates are made in Starfish:

- New or updated block of time available for student appointments
- Student appointment scheduled
- Student appointment changed
- Student appointment canceled

When an invitation is canceled or declined: When a user cancels or declines an Starfish invitation from their external calendar (i.e. Microsoft Outlook), the cancel/decline is sent to Starfish and reflected on the Starfish calendar.

Add Appointments

1. Initiate a new appointment using one of two ways:
   - Select Appointment from your home page
   - Select the Sign Up icon for an existing office hour slot using the Day or Week view of your calendar on the Appointments page.
2. Using either method, the **Add Appointment** form displays.
3. In the **People in** field, select the appropriate **Term** for the student.

4. In the **Student** dropdown, enter the student ID number. Starfish will find matching students with whom you have a relationship. Select the appropriate student from the list.

5. If you used the **Appointment** method instead of the **Sign-Up** method, specify **When** the meeting will take place (date, start time, end time).

6. Select the **Location** in the **Where** dropdown list. You may see options such as Student Services, Zoom, and Telephone.

7. Select a **Reason** for the meeting. The reasons available are based on the student you selected and the **Appointment Types** that the institution or department/program have created for you.

8. If **relevant** to the meeting, select a **Course** from the list presented.

9. Select the appropriate **Sharing** settings for this appointment.

10. Enter a **Detailed Description** (displayed on the right-hand side) which will be emailed to you and the student.

11. Select **Submit**. The appointment will be displayed on your **Calendar**, **Home page**, and **Recent Changes** channel. Additionally, the appointment, along with the detailed description displays on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. Both you and the student will receive an email with an iCal attachment for any **future** appointments. Appointments created to document prior meetings will not send an email. If you do not receive an email, check your **Email Notifications** settings.
Manage Appointments

To view and manage existing appointments, you can navigate to your **Day** or **Week** view. Once there, you simply click on the calendar icon on your calendar and the **Appointment** pop up card will display (as shown below). In this pop card, you can edit or cancel an upcoming appointment and add or edit the outcome details. If configured on your Starfish system, you may be able to use **SpeedNotes** to document common outcomes.

**Edit Appointment**

1. Hover over the **Appointment** icon.
2. Select **Edit** to open the **Scheduling** tab. From here, you can edit appointment scheduling details including:
   a. **When** and **Where** the appointment will occur.
   b. The **Reason** associated with the appointment.
   c. The **Course** associated with the appointment (optional)
   d. The **Sharing** setting.
   e. The **Detailed Description** that is shared with the student.
   f. When finished, select **Submit**.

*The **Reason** selection may impact who else can view the meeting, and which **SpeedNotes** will be available for documenting outcomes.*
Complete Outcomes for the Appointment

This step should be completed once the appointment with the student is officially over. This step allows you to document your interaction with your student appointment.

1. Hover over the Appointment icon (displayed in the previous page).
2. Select Outcomes.
3. In the Time fields enter the meeting’s actual start and end time.
4. Select the Attendance checkbox if the student missed the appointment. Depending on your department’s settings, this may trigger an email to the student.
5. Select the Email checkbox if you would like to send a copy of the Outcomes note to the student.
6. Enter your notes into the Comments box.
7. When finished, select Submit.

The Outcomes notes will be available in the student folder on the Meetings tab for this appointment.
Completing SpeedNotes for the Appointment

*SpeedNotes* are preconfigured appointment activities (we are used to knowing them as *In-Meeting Notes* from Campus Calibrate). *SpeedNotes* quickly capture recurring meeting outcomes. These *SpeedNotes* are displayed next to the *Outcomes* tab.

*SpeedNotes* might be different for each department/program on campus. Make sure to only check those *SpeedNotes* related to your area of work. Some *SpeedNotes* will be directly tied *Colleague* (i.e. CZ1, CZ2, CZ3, EA, EC, PD, PX, SB).

1. Hover over the *Appointment* icon associated with an appointment (see page 5 for picture reference).
2. Select *Outcomes* or *Edit* from the *Appointment* pop up card.
3. Select *SpeedNotes*.
4. Select the items that are relevant to your meeting. The above image only shows a small glimpse of the upcoming *SpeedNotes* we will have available on Starfish.
5. When finished, select *Submit*. 
**Cancel Appointments**

1. Hover over the **Appointment** icon associated with an appointment (see page 5 for picture reference).
2. Select **Cancel**.
3. The **Cancel Appointment** form is displayed. Enter a note explaining the reason for the cancellation.
4. Select **Submit** to cancel the appointment.

An updated iCalendar (iCal) attachment will be emailed to the student. You will also receive the updated iCal if your **Email Notification** preferences are set to notify when changes are made to an existing appointment (recommended).