Advising Appointment

Article Number: 524 | Rating: Unrated | Last Updated: Jun 5,
2014 at 4:14 PM
 This article provides a walkthrough on how to complete the
different processes of an advising appointment.

Adding an Advising Appointment

- Click Advising Appointment from the sub-menu
- From the Appointments page, click Add Advising Appointment
- From the Advising Appointment Details page, fill in the appropriate information
   Note: For information on setting up rooms, see Designate a Room for OCR.
- Fill in the appointment description field, which will be viewed by students
- Click Save

Adjusting the Advising Schedule *(start times & breaks)*   *Back to Top*

- After the appointment has been saved, review the schedule
- Select the desired start time for the first appointment from the Start Time drop-down menu
- Select the Slot # that you wish your break to follow
- Click the drop-down menu under the slot start time
- For example, if you would like a 15 minute break after Slot #1, adjust the start time for Slot #2 to 9:15
- The system will automatically enter the 15 minute break after the interview slot and adjust the start/end times for the remaining slots
- Repeat this process for additional breaks at other points in the interview schedule
   Note: Breaks under 1 hour are designated as â€œshort breaksâ€• and breaks over 1 hour are listed as â€œlong breaks.â€•

Reviewing the Schedule/Adding Candidates   *Back to Top*

- From the Dashboard toolbar, click Other CSO Activities
- Click Advising Appointments from the sub-menu
- Select the desired advising appointment date from the Appointments page
- From the Advising Appointment Details page, review each candidate
- To add a candidate to a particular slot, click the Add Student icon next to the desired time slot
- From the Select Candidate page, select the candidate from the list, or utilize the candidate name search field
- Click Add Appointment Signup next to the desired candidate
   Note: The candidate will now be noted as â€œOn List.â€•

Adding Candidates from the Waitlist   *Back to Top*

- From the Advising Appointment Details page, click the Student Waitlist tab
- Click the Promote icon next to the desired student
- To add the candidate to a particular slot, click the Add Student icon next to the desired time slot

- From the Select Candidate page, select the candidate from the list, or utilize the candidate name search field
- Click Add Appointment Signup next to the desired candidate
  Note: The candidate will now be noted as "On List."

Adding Details after the Advising Session *Back to Top*

- From the Advising Appointment Details Page, select the desired candidate
- To mark that candidate as attended the appointment, click the Attended (calendar) icon
- To add notes from the appointment, click the Notes (notepad) icon
- To email the candidate, click the Email (envelope) icon

Adding a recurring appointment Â *Back to Top*

- From the Advising Appointment Details, click 'Copy' under 'Actions'
- On the Schedule Copy Modal, select one of the following:
  - Copy once to new date
  - Use this option to copy the appointment only once to the specified date
  - Recur every weekday for X weekday(s)
    - Use this option to copy the appointment to every day of the week for the specified number of weekdays
    - This can be used to copy an appointment up to 260 times.Â
  - Recur every week for X week(s)
    - Use this option to copy appointment to once a week for the specified number of weeks
    - This can be used to copy the appointment to the next 52 weeks
  - Recur day X of every month for X month(s)
    - Use this option to copy the appointment to a specific date in a month for the specified number of months
    - This can be used to create an appointment from the 1st to 31st of a month for up to 12 months