

End User's Guide to Spartan Success Network (SSN)

Powered by Starfish<sup>®</sup> Connect Version 3.1

## Purpose

This document provides guidance on setting up your office hours in Spartan Success Network (SSN), making appointments with students, and documenting outcomes. It is intended for staff members who will manage a calendar in SSN to make, edit, and document student meetings.

## **Related Resources**

For the latest FAQ and tips for using these features, please visit SSN Help by clicking the **Help** link to the right of your profile link on your SSN Home page.

Browse the help library by navigating through topics on the left-hand side of the screen or use the search bar at the top of the help library to search for answers to your questions.

# Table of Contents

Purpose
Related Resources1
Important Definitions
How Spartan Success Network (SSN) Communicates with your Online Calendar
When the SSN Calendar is updated5
When an invitation is canceled or declined5
Get ready for students
Personalize your profile6
Edit Institutional Profile6
Edit Appointment Preferences7
Verify Basic preferences7
Add Locations8
Add Calendar Managers9
Save Appointment Preferences9
Edit Email Notifications preferences10
Verify Appointment Notification settings
Update Tracking Item Notifications
Save Email Notification preferences11
Establish your availability12
Create an office hour block with the Office Hours Setup Wizard
Add Office Hours13
Edit or Cancel office hours15
Edit office hours15
Cancel a series of office hours15
Cancel a single occurrence of an office hour block
Add less structured office hours (Scheduling Wizard)
Add a Group Session19
Edit or cancel a group session21
Edit a group session21
Cancel a group session
Cancel a single occurrence of a group session
Manage group session participants
Reserve time on your calendar
Make and manage Appointments
Add, edit, or cancel appointments on your SSN calendar
Add an appointment to the calendar
Modify scheduling details of an appointment
Document outcomes from a meeting
Use SpeedNotes to document common outcomes
Cancel an appointment
Review appointment information and meeting outcomes
Review appointment and meeting information on the student folder
Filter student lists based on meetings

36
36
36
36
37
38
38
39
40
40
41

## **Important Definitions**

- **Appointment:** A documented set of details shared between a student and a calendar owner (e.g. advisor, instructor) about a planned meeting. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.
- Appointment Type: Grouping of appointment reasons and activities (i.e., SpeedNotes) that a common set of roles can add and/or view. Your Spartan Success Network (SSN) administrator will create appointment types and associated reasons and SpeedNotes that will be available to you based on your role. You may be able to use appointment types to allow different groups of students to see different office hours on your calendar.
- **Calendar attachment (iCal):** Attachment to an emailed calendar invitation that allows a user to accept or decline from his/her email client (e.g., Outlook, Google). iCal is the industry standard to communicate meeting information between online calendaring software.
- **Calendar Manager:** A SSN user who can see and edit another user's SSN calendar. A calendar owner can designate his/her own calendar managers by navigating to Profile > Appointment Preferences. Or, a SSN Admin can batch upload these relationships.
- **Calendar Owner:** The SSN user associated with a SSN calendar. The calendar owner can add office hours and make appointments with students on his or her calendar. Only users with staff roles are calendar owners. Students do not own calendars in SSN.
- **Group Session:** Similar to Office Hours, but more than one student can sign up for this particular block of time. The Calendar Owner decides how many students can sign up for each Group Session.
- Meeting: A documented occurrence of a meeting between a student and a calendar owner (i.e., advisor, instructor) that includes details about the outcomes of the meeting. Calendar owners may designate available times for walk-in meetings, or restrict availability to scheduled appointments only. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.
- Office Hours: Calendar owners can add blocks of time called "Office Hours" to their calendars to indicate when they are available to meet with students. Calendar owners or calendar managers can add appointments outside the blocks, but students can only self-schedule within the block. Office Hours allow students to sign up for individual one-on-one slots within the time parameters entered by the calendar owner.
- **Outcomes:** Results of a meeting documented on the Outcomes tab of an Appointment in SSN.
- **SpeedNotes:** Activity codes that provide an easy way for staff to document common outcomes of an appointment. Specific SpeedNotes are set up by the institution per Appointment Type.

# How Spartan Success Network (SSN) Communicates with your Online Calendar

SSN supports **Two-Way Calendar Communication** via email with most online calendars (e.g., Microsoft Outlook, Google, Entourage). As illustrated below in figure 1, when an appointment is scheduled or updated in SSN, a calendar invitation email (with iCal attachment) is sent to both parties (the student and the calendar owner) and users can accept or decline in their email client.



Figure 1: Two-Way Calendar Communication

This two-way communication about *SSN* appointments is automatically available and requires no additional integration or installation.

#### Important Note:

If your institution has integrated SSN with Exchange or Google, you should update your profile to allow *external* appointments to be visible in SSN. Details are provided in the <u>External Calendar</u> <u>Integration</u> section.

#### When the SSN Calendar is updated

SSN triggers an updated calendar invitation (iCal) to be sent to the calendar owner when a new or updated block of time is available for student meetings (e.g. <u>when office hours are added</u>).

Both the student and the calendar owner will be sent an iCal when a student appointment is <u>scheduled</u>, <u>changed</u>, or <u>canceled</u>.

Staff users can modify whether or not they receive these notifications in the <u>Appointment Notifications</u> section of their Profiles. SSN highly recommends receiving email notifications for all changes as illustrated below.

Send me an email with a calendar attachment for every:

change to my appointments
change to my Office Hours/Group Sessions

## When an invitation is canceled or declined

When you cancel or decline a SSN invitation from within your external calendar (e.g., Microsoft Outlook), the cancel/decline is sent to SSN and is reflected on your SSN calendar. Note: you *cannot modify* SSN appointments times in your external calendar. Only Accept, Cancel or Decline are

reflected in SSN. You must elect to "send a response" when declining in order for SSN to be notified of the change.

Users must have calendars that support calendar invitations and iCal attachments, (e.g. Microsoft Outlook or Google Calendar) for this to work.

## Get ready for students

Before you begin taking appointments with students, you will want to personalize your profile, and set up your availability via <u>office hours</u> or <u>group sessions</u>. Each of these tasks is covered in the sections that follow.

## Personalize your profile

Click your name in the top right corner of your Spartan Success Network (SSN) **Home** page to open your **Profile.** Your profile has three tabs: Institutional Profile, Appointment Preferences and Email Notifications. Click the profile tab name to edit it. Setup for each tab is described below.

#### Edit Institutional Profile

INSTITUTIONIA PROFILE	APPOINTMENT PREFERENCES EMML NOTIFICATIONS	
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	Vasmin Gold       Interpret interpre	
The second s	C Display without some	
edacoulture, and gold case mits	in, Serbien web der blicken Deren für 12 gent, Auflehren Haupelan weben ein Katerin web vereinen, Sold wexame, weinig oder heuge, Desame, Lond zubig heig pas sollt europeinem webpaper als sollt op Sonaccent Maarmene weben mei Ma	
My Biography		
Figure 18 years in industry the	inau youthell. This can include your equilational background, write equivalence, are early read and dy, or early information that would be relevant to all the relations. The relation of the US Generovers of Daniers (include), that any sense that general to all the relations and the US Generovers of Daniers (include), that any sense that general to all the relations and the US Generovers of Daniers (include), that any sense that general to all the relations all the US Generovers of Daniers (include) that any sense that general to a sense of the use of the relation of the US Generovers of Daniers (include) that any sense that general to a sense of the relation of the US Generovers of the relation of the relation of the US Generovers of the relation of the US Generovers of the relation of the relation of the relation of the US Generovers of the US Generovers of the relation of the relation of the relation of the US Generovers of the relation of the	
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- 1. Use the "Upload photo" link to add a profile photo. (Your institution may already have added one).
- 2. Update any contact information that is not pre-populated.

Click to view or edit your profile.

nt Preferences

il Notifications

- If configured by your institution, you can provide an alternate email address in addition to your institutional email for SSN email notifications.
- Institution Email: yasmin@starfshsofege.edu Alternate yasmin@gmail.com Email Send my correspondence to: () Institution Email () Alternate Email () Both
- 4. Write a description about yourself in the **General Overview** and **My Biography** fields.

General Overview	
A general message should go here. Tell people how you can help them during y	our office hours.
I welcome students to my office. The been with the McGraw Center for 14 years, and graduate school selection, among other things. Of course, I will glady help href="http://www.staffishaolutions.com">Leam more about mel-va>	In that time I have helped a number of students with career decisions, internships,
My Biography	
Use this space to tell others about yourself. You can include your educational ba would be relevant to others on campus. Students are more likely to reach out to ;	ckground, work experience, areas of research and study, or any other information that you if they know a little about you.
Espent 15 years in industry after receiving my PHD. Much of it was with the Smit courses; but I have been an advisor at the McGraw Center for 14 years.	tsonian and the US Government. At Escellent University, I not only teach Biology

**Best Practice:** This is the information that students see when making an appointment with you. A photo and personal information helps students put a face to a name and feel more comfortable reaching out for help.

5. Click the **Submit** button at the top or bottom of the page to save your updates.

#### **Edit Appointment Preferences**

This tab defines defaults related to how students can interact with your office hours. Set your preferences before you begin <u>adding Office Hours</u>.

#### Verify Basic preferences

APPOINTMENT PREFERENCES	EMAIL NOTIFICATIONS
for your office hours blocks. You can	change these whenever you add a block of office hours
15 minutes	
None	
😔 5:00 PM 🔡 the day	before the office hours
🗍 9:00 AM 🔤 the day	of the office hours
	for your office hours blocks. You can 15 minutes

1. Select a value for **Minimum Appointment Length**. SSN recommends 15 minutes. This will be used as the default when you set up new Office Hours. (Your institution settings for specific appointment reasons may override your selection when a student makes an appointment).

- Select a radio button and specify the specific value to define your Scheduling Deadline. The deadline is imposed based on the start time of any office hour blocks vs.an individual time slot. If set to 'None,' a student may schedule an appointment with you right up to the time slot.
- 3. Check the box to "Allow drop-ins after deadline has passed" if you wish to include a note in your calendar letting students know that they cannot schedule, but can walk in to your office after the scheduling deadline has passed.

#### Add Locations

Add all possible meeting locations, including physical offices, phone numbers, chat services, or anywhere else you might want to meet with students. When you build your calendar availability/ add Office Hours, you will select which of these locations apply to each set of hours.

1. Click Add Location.

My Locations		
nter locations for your meeti	ings with students. Meetings can be	in an office, online, over the phone, or anywhere else you like.
Add Location		
Type click to add a location	ame *	Instructions
	03-555-1186	This phone number is for scheduled appointments only.
Office	Landis Hall, Room 1179	

 Select the type of location, enter a descriptive name and enter any relevant instructions.

Students will see this information when scheduling an appointment for office hours that have been designated for this location.

3. Click the Save button.

Repeat this process to add any additional meeting locations.

Туре	Office
Name	Advising Center North Rm 118
Instructions	Sign in at the main desk
<ul> <li>Required fields</li> </ul>	

Use the edit icon () to the right of any location in your list to make changes. Use the delete icon () to the right of any location to remove it.

Add Location			
Туре	Name 🔺	Instructions	
Office	Advising Center North Rm 118	Sign in at the main desk	( / 3)

#### Add Calendar Managers

In the Calendar Managers section of the **Appointment Preferences** tab of your profile, you can designate other users who can see and edit your SSN calendar.

1. Click Add Calendar Manager.

#### Calendar Managers

O Add Calendar Manager	
Calendar Manager .	
Bokma, Laura	
Goldfinger, Auric	

- 2. Begin typing a user's name. Search results will begin to populate.
- 3. Select a user from the search results and click the **Submit** button.

dd Calendar Monager	
vant	
Jordan, Grant	
	Never Mind Submit

t

Repeat these steps to add more calendar managers.

You may return to this page of your Profile at any time to add or remove calendar managers.

	Jordan, Grant	<u>qiordan@starfishsolleqe.edu</u>	gjordan	
--	---------------	------------------------------------	---------	--

Use the delete icon (circle with an x) to remove a calendar manager.

#### Important Note:

SSN Administrators can also assign calendar Managers. If you are unable to remove a calendar manager from this area, contact your SSN Administrator.

#### Save Appointment Preferences

When you have made all desired edits to each of your **Appointment Preferences** profile settings, click the **Submit button** at the bottom or top of the Appointment Preferences tab to save your changes.

#### Edit Email Notifications preferences

You can set preferences for email sent to you from SSN for both Appointments and Tracking Items (e.g. flags, to-dos and referrals).

#### Verify Appointment Notification settings

Specify if and when you wish to receive Planning Reminders, Appointment Alerts, and calendar attachments. Institution defaults will be used if you don't update these options. Each of these is described below:

INSTITUTIONAL PROFILE	APPOINTMENT PR	EFERENCES	EMAIL NOTIFICATIONS	1
NOTE: Il you do not receive	Starfish email notifical	lions when ex	pected, please make sure t	they are not marked as SPAM.
Appointments No	tifications			
Op not send appointme	ent notifications on wee	kends 💽		
1997 C	end me a separate em end one email reminde lon't send me an email i	r with all appo		
1200	Planning Reminders	a service of the serv	the day of	🔽 the appointments
Appointment Alerts: [] - S	iend me an email 15		minutes before	the start of an appointment
Bend me an email with a c	alendar attachment for	every:	6 W 15	
I change to my appointing	ients 🕑 change to m	Office Hours/	Group Sessions	
Read tests times from	my external Google cale	indar		
Tidened sized miners ontit				

- **Planning Reminders**: Receive optional email reminder(s) sent separately for each of the day's appointments, in one email, or not at all. Specify the date and time for reminders.
- **Appointment Alerts**: Receive an optional email reminder sent a certain number of minutes before the start of an appointment.
- Calendar Attachments: Receive emails with calendar attachments for schedule

**CBest Practice:** It his highly recommended to keep both calendar attachment options checked (change to my appointments and change to my Office Hours/Group Sessions). This ensures that your external calendar (e.g., Outlook, Google, Entourage) receives all of the latest information from your SSN calendar.

• Read busy times from my external Google (or Exchange) calendar: If your institution has enabled integration with Google or Exchange, busy times from your external Google or Exchange calendar can be displayed in SSN. Follow the "Click here" link for instructions to complete your personalized setup.

See the External Calendar Integration section for more details.

#### Update Tracking Item Notifications

Your SSN administrator has determined which items you will be emailed. Items that may trigger an email to you are listed in the Flag Rules table below your notification options.

Name	Category	Description
<ul> <li>Health Counseling Referral</li> </ul>	ACADEMIC: REFERRAL	Referral to the Health Counseling Office
★ Strong Engagement	ACADEMIC: KUDOS	A kudo for terrific class participation.
🎮 Academic Concern - Urgent	ACADEMIC: FLAG	HIGH level of academic concern.
Attendance Concern	ACADEMIC: FLAG	Raise this flag for students who have missed 2 or more class sessions in a row or 3 or more total class sessions in a term
Paying for College	FINANCIAL: FLAG	Do you have a financial concern that might impact your ability to stay at the institution?
🍽 Health Concern	SOCIAL: FLAG	This student has been exhibiting signs of a health issue.
☑ Reserve Assistive Technologies	ACADEMIC: TO_DO	Disabled students who require assistive technologies to complete course work or attend classes should reserve the

You have the ability to customize how you receive those emails including whether you will receive your notifications as a summary email of all recent activity or as individual email for each item. As noted, items marked with the emergency notification icon (<sup>1</sup>) will be sent when raised regardless of your settings.

You can also use a combination of both options.

Tracking Item Notifications	3		
Send me a summary email of all tracking ite	em activity:		
🗍 Daily at 8:00 AM			
🗹 Weekdy on Monday 🔽 at	5:00 AM		
Send me an immediate email whenever:	🔲 an item is raised	💷 an item is cleared	an item is assigned to me

- Select either the **Daily** or **Weekly** summary option to receive one email at the frequency specified with all relevant activity since the previous summary. Specify the time of day (for daily) or day of week and time of day (weekly).
- Select the checkbox for each event for which you want an immediate individual email to be sent to you. Events include when an item is raised (or created) when an item is cleared (or closed) and when an item is assigned to you.

**C**Best Practice: Combine a daily summary (typically first thing in the morning to ensure it is inclusive of any system-raised flags that were processed overnight) with an immediate email when an item is assigned to you.

#### Save Email Notification preferences

Click the **Submit** button in the top or bottom right of the Email Notifications page to submit any changes you have made for appointment notifications or tracking item notifications.

### Establish your availability

Students can only schedule an appointment at times you indicate are available by adding office hours or <u>group sessions</u>. There are three ways you can add office hours: use the <u>Office Hours Setup Wizard</u> for quick initial setup, use the <u>Add Office Hours</u> button to add additional blocks at any time, or use the <u>Scheduling Wizard</u> to setup multiple office hour blocks that don't follow a consistent recurrence.

#### Create an office hour block with the Office Hours Setup Wizard

The first time you log in to SSN the Office Hours Setup Wizard will display if you have a role that can be a calendar owner. Use the wizard to quickly create appointment availability.

Office Hours Setup Wizard

- 1. Complete the fields presented to specify:
  - What day(s) do you have office hours? - check the boxes for each day.
  - What time are your office hours? - enter a start and end time.
  - Where are they? select the Type of setting and enter the Details in the field provided (e.g. the building and room number of your office).
  - If relevant, provide **Instructions** for students who make appointments with you.
- 2. Click the **Set up Office Hours** button to save your office hours.

If your office hours don't repeat weekly, click here. Go ahead and get started by adding one time block for now! You can always add more later. 1. What day(s) do you have office hours? IM IT IW IT IF IS IS 2. What time are your office hours? Enter Start Time to Enter End Time 3. Where are they? in an office Type Details Enter an office location Instructions Knock once and enter Show me this Office Hours Setup Page again next time I login If I don't have any Office Hours Bet up Office Hours

A confirmation message will display on the screen.

- To personalize your profile, add locations and other preference, click Go to Profile>>
- To add additional office hours, group sessions, reserved time, or to start adding appointments, click Go to Calendar >>.

Thank you for turning on Office Hours!
You can complete your profile and preferences by going to your Profile.
Go to Profile>>
You can add more blocks or edit your office hours by going to your calendar.
Go to Calendar>>

**Note:** If you choose not to complete the wizard now, but want to use it later, check the box labeled "Show me this Office Hours Setup Page again", and then click the **Close** button.

#### Add Office Hours

The **Add Office Hours** option is meant for setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the <u>Scheduling Wizard</u>.

 Click the Add Office Hours button on your SSN Home page or Appointments page.



This opens the **Add Office Hour** form.

Add Office Ho	Never Mind Submit
Calendar	, My Calendar
Title	Dr. Gold's Major Advisor
What day(s)?	Every Tues, and Thurs. V Repeats every: 1 V week(s)
	Repeat on: 🗌 Mon 🕑 Tue 🗌 Wed 🕑 Thu 🗌 Fri 🗌 Sat 🗌 Sun
What time?	9:00 AM to 11:30 AM
Where?	Note: You may select more than one location to give students a choice.
	Advising Center North Rm 118 sign in at the front desk
	✓ Virtual Conference Room Dial 887-000-1444 and use your student ID as the pass code.

- 2. Enter a **Title** (name) for this block of time. Students will see this name when they view your calendar. The title will also help your or others managing your calendar identify different types of office hours.
- 3. Select What day(s)? and indicate any recurrence (e.g. Repeats every 1 week).
- 4. Use the **What time?** fields to enter the start and end time for the office hours.

#### Important Note:

Once this office hour block is saved, you will **not** be able to edit the days on which the office hours occur or the type of frequency (e.g. weekly) but you will be able to edit how often the block recurs (e.g. 1 week vs. 2 weeks) and the specific times available.

Select Where? meetings will be held using the checkbox(es) next to your location(s). If you choose more than one location, the student will be able to choose his/her preferred location for the meeting. To add additional locations options, go to the <u>Appointments Preference</u> page of your profile.

Office Hour Type 👔	Scheduled And Walk-ins
	Take either scheduled appointments or walk-ins
How long?	15 minutes     minimum appointment length       15 minutes     maximum appointment length
Appointment Types	Select the types of meetings you will have in these office hours. ✔ Advising  Departmental Overview Tutoring

- 6. Select the **Office Hour Type** for meetings you will take during this block.
  - Select **Scheduled And Walk-ins** if you will be using the kiosk/waiting room features, and you plan to take walk-ins between appointments.
  - Select Scheduled Appointments Only if you will not take any walk-ins.
  - Select **Walk-ins Only** to show the time as available to students, but disallow anyone from making advance appointments
- 7. Select **How long?** meetings can be by selecting a minimum and maximum duration. If the minimum and maximum are identical, the student will not be given a choice of duration. Note that institution settings for specific appointment reasons, may override your settings.
- If your role has permissions to add more than one <u>Appointment Type</u>, you will see checkboxes that allow you to select which types apply to this block of time. Appointment Types dictate:
   which students can schedule during this time (based on the role that connects you),
  - 2) the appointment reasons shown to students,
  - 3) which SpeedNotes will display, and
  - 4) which roles can view the appointment and its notes.

**Note:** An appointment type with the recurrence icon ( $\Im$ ) indicates an **appointment** that recurs on the same date and time for the duration of the term.

 Use the Instructions box to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow Walk-ins.

INSTRUCTIONS	START/END DATE	
hese will be sent to a	nyone who makes an appointment	

- 10. Optionally, click the **Start/End Date** tab to set a time frame for a repeating office hour block. For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.
- 11. Click the **Submit** button at the top or bottom of the Add Office Hours form to save your Office Hour block.

#### Edit or Cancel office hours

Edit or cancel a series of office hours from the **Agenda** tab in the **Appointments** section of SSN.

August 1811	C Darline S Spanned B Southers & South 7 Stating Start 3	Manual Tana
		Pyl. 06-14-0215
	Gold, Yaamin G	
	Meetings on Today	Availability
	Doing of 2008 are         Ange: Final           IP         Name: Promostant           IP         Name: Remostant           IP         Name: Remostant	Contract Network Contract Network Contract Network Network Network Network Network Network Network
	Theory of 2000 pro-           (1)           (2)           (3)           (4)           (4)           (5)           (5)           (5)           (6)           (7) <td>Office Heads     Monip Set 5 4 50%     Monip Set 5 4 50%     Monip Set 5 4 50%     Monip Set 5 5000     Monip</td>	Office Heads     Monip Set 5 4 50%     Monip Set 5 4 50%     Monip Set 5 4 50%     Monip Set 5 5000     Monip
	∓ overhei ₩ Aritantromen	Tri Aug 15 D-1910 Conce Heave Tri Aug 14 - 4 (Per

#### Edit office hours

- 1. Hover over the office hours menu icon ( $^{(2)}$ ) next to an office hour title to open the **Office Hours** pop up card.
- Select Edit Office Hours to modify: the <u>frequency</u> of the office hour block's recurrence, the <u>time of day</u>, <u>locations</u>, <u>office hour</u> <u>types</u>, minimum and maximum <u>duration</u> of appointments, <u>appointment types</u>, <u>instructions</u>, or a <u>start/end date</u> of the series.

Availability	
Office Hours	
08-10-2015 at 2:45 pm     Novising Center North Rm 118	
Agen O Cancel • O Walt-In	_

3. Click the **Submit** button on the **Edit Appointment** form to save your changes.

Notes: You cannot edit the days of the week or the nature of the recurrence (e.g. weekly).

You cannot modify the time range for a single occurrence of an office hour. Selecting **Edit Office Hours** will modify all occurrences of this set of office hours. To reduce availability within an office hour block on a specific day, add <u>reserved time</u> to cover the part of the office hours you want to remove from availability.

#### Cancel a series of office hours

- 1. Hover over the office hours icon  $(\bigcirc)$  next to an office hour title to open the **Office Hours** pop up card.
- Click Cancel, then click "The entire series" to cancel all occurrences of the office hour block. You will be prompted to confirm the date from which to cancel the series, and to add

Office H	
Office Ho	urs)
	015 at 2:45 pm c Center North Rm 118
🖌 Edit	O Cancel • O Walk-in
🥒 Edit	Cancel • O Walk-in

a message that will be sent to anyone who had time scheduled with you during the office hours you are canceling.

Click the Submit button on the Cancel Series
 Confirmation form to cancel the office hour block.

**Best Practice**: include an explanation and provide guidance on how to reschedule or connect to other available resources.

<ul> <li>Today (9513-2014)</li> <li>Sewood Date 2014 08-14 (9-53)</li> </ul>
Rease select the date to concel this office hour series from.
Unfortunities, my start schedule fait changer. I have benafed my examp office hour block. Phose sets: a new appointment time how my optisted office hour black.
Tau can send a message to people with appointments, explaining why you cancelled this office hour series.

#### Cancel a single occurrence of an office hour block

Cancel an individual occurrence of an office hour series from the **Day** tab of your **Appointments** section of SSN. Use the mini calendar on the left to select the desired day.



- 1. Hover over the icon associated with the block of hours for the selected day (2).
- 2. Click **Cancel**, from the pop up card that is displayed then select "Just this one" to cancel office hours for the selected day. You will be prompted to confirm the cancellation and can add a note that will be included in an email to those whose appointments are canceled.
- **Best Practice:** include an explanation and provide guidance on how to reschedule or connect to other available resources.
- 3. Click the **Submit** button to cancel the Office Hour occurrence.

to you want to delete this office	hours occurrence?
fou can selfd a message to people anceled this Office Hours Block	with appointments, explaining why you
Neve a family emergency and need to our meeting. Please go to Starfish and p	head out early today so I will not be able to keep pick an available time stot next week.
and the second se	

#### Add less structured office hours (Scheduling Wizard)

Students can only schedule an appointment at times you indicate are available by adding office hours or <u>group sessions</u>. The <u>Add Office Hours</u> option is geared toward setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the Scheduling Wizard.

**C**Best Practice: This feature is particularly useful for advising rush weeks, midterm course meetings, or other scenarios where you need to hold several different office hour sessions for students within a week or two.

1. Click the **Scheduling Wizard** button from your SSN **Home** page or **Appointments** page.



 Complete the first page of the scheduling wizard by entering the Title, location (Where?), duration (How long?), <u>Appointment Types</u> and Instructions that should be applied to *all* of the office hour blocks that are to be created. (You will find additional descriptions of these fields in the <u>Add Office Hours</u> section).

**Note:** Any office hour block that does not share these details must be created separately.

K.			×
Scheduling Wizard			
is useful for serving up your of To get started, specify the tid	alendar for advising rush e. location, and other set	instructors to schedule multiple office hour blocks for multiple days in a single week. This periods and other times when you book several blocks of time for seeing students, sings for the office hours blocks you are setting up.	
		times for the week's office hours.	4
information you specify here.		ce hour blocks. Note that all blocks created in step 2 of this within will use the	
Title	Advising Hours		
Where?	Advaing Hours Note: You may select more then one location to give students a choice.  Advaing Hours Hell, Room 301 Please check in with the front deak.  Call 703-535-111 Please coll read your schedwied time.		
How long?	15 minutes	minimum appointment length	
	8 hours	makimum appointment length	
Appointment Types	had back and been the street of the second of	Meetings ill General Advising	
Instructions These will be visible to anyor			
		Messer Milital Ne	xt>
		Chemistry (Chemistry)	-

3. Click the **Next** button

4. The date and time page of the wizard is displayed using a Monday through Friday grid for the current week. The date range is displayed in the top right corner of the grid.

								tay 5 - Way 0.2	8014 C.3
Ma	-55	1 104	e 5/6	We	iii 5/2	18	44/8	1	:54)
9:00 AM	9:30 ANI	12:00 PM	200.011	10.00 AM	11.00 AV	2.00 PM	0.05 PM	Sort Time	first Time
10:00 AM	11-00-AM	Start Time	End Torra	1-05 PM	2:35 PM	502.7WI	7:00 PM	Siars Time	EndTime
StartTime	End Time	Start Time	End Time	Start Time	End Time	Start Title	End Time	Start Title	End Time
0 A01A	mitther Räsch	· Anth	nother Black	O :501.5	nother Bash	O :401.6	Ante: Esst	O Adda	And the test the test

- 5. Use the <> controls to the right of the date range to navigate to the week in which you want to begin scheduling the office hours.
- 6. In the selected week, enter the start and end times for each block in the appropriate day columns. You can schedule multiple office hour blocks on any day within the week.

If you need to schedule more than three blocks on any day, select the "Add Another Block" link in the column for that day.

- 7. To add blocks to another week, use the < > controls to move to the next week. Don't click finish until you've entered all of the blocks!
- 8. Click the **Finish** button to create all of the office hour blocks. A summary will be presented.



 The summary will include a list of hours that could not be created due to conflicts between the blocks you specified and existing calendar items. Make a note of failed blocks before clicking Finish to exit the wizard.

#### Add a Group Session

Group sessions allow you to create blocks of time in which a specified number of students can meet with you as a group. The steps are similar to <u>adding office hours</u> but include selections that are specific to group sessions.

 Click the Add Group Session button from the Home page or Appointments page.

Home	Appointme	nts 🔻	Students 👻	
Co Add (	Office Hours	🛗 Ad	ld Appointment	Add Group Session
				2

#### This opens the Add Group Session form

₩.	×
Add Group Se	ession Never Mind Submit
Title	Calculus Workgroup
When?	Weekly <b>Prepeats every:</b> 1 veek(s)
	Repeat on: 🗹 Mon 🗌 Tue 🗌 Wed 🗌 Thu 🗌 Fri 🗌 Sat 🗌 Sun
What time?	11:00 AM to 12:00 PM
Where?	Advising Center North Rm 118 sign in at the front desk
	Virtual Conference Room Dial 887-000-1444 and use your student ID as the pass code.

- 2. Enter a **Title** (name) for this group session. Students will see this name when they view your calendar.
- 3. Select **When?** the group session will occur and select the recurrence (e.g. **Repeats every** 1 week).
- 4. Use the **What time?** fields to enter the start and end time for the group session.

#### Important Note:

Once the group session is saved, you will not be able to edit the days on which the session occurs or the type of frequency (e.g. weekly) but you will be able to edit how often the block recurs (e.g. 1 week vs. 2 weeks) and the specific times.

 Select Where? meetings will be held. To add additional locations options, go to the <u>Appointments Preference</u> page of your profile. Only one location can be selected for a group session.

Reason	supplemental instruction	
How many students?	6	
Enter the maximum number of students that can sign up for the session.  Allow students to see other students who have signed up  Support supplemental instruction Restrict the session to students in the same section or course. Note that the selected reason controls whether restriction is limited to the same course or section.  INSTRUCTIONS START/END DATE These will be sent to anyone who makes an appointment Submit your discussion responses by Friday at noon		
<ul> <li>Allow students to</li> </ul>	see other students who have signed up	
Support supplem	ental instruction	
INSTRUCTIONS START/END DATE		
These will be sent to a	nyone who makes an appointment	
Submit your discussion	responses by Friday at noon	
	v	
_	Never Mind Submit	

- 6. Select the **reason** associated with this group session. Reasons listed are those associated with the <u>Appointment Types</u> your role has permission to add. If you don't find the reason you expected, contact your SSN administrator.
- 7. Enter how many students (maximum) can sign up for the session.
- 8. If students should be able to see the names of other students who have signed up for the session, check the box labeled "Allow students to see other students who have signed up".
- 9. If this group session should be limited to students in the same course/ course section, check the box labeled "Support supplemental instruction". When this option is checked, participants will be limited to the course/course section selected by the first student who signs up.

#### Important Note:

The supplemental instruction option is most often used with Tutoring Service Calendars. The restriction may be either course or course section based (e.g. restricted to Biology 101 students, or to Biology 101, section 02 students). This depends on options your SSN administrator set for the <u>appointment type</u> associated with your group session reason. Contact your SSN Admin to learn more about this option.

- 10. Use the **Instructions** box for information that should be shared with students who sign up.
- 11. Click the **Start/End Date** tab to designate a time frame for the group session if it recurs (as set in step 3 above). For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.
- 12. Click the **Submit** button at the top or bottom of the form to save your Group Session.

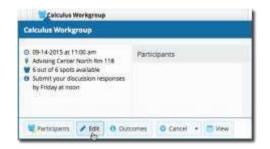
#### Edit or cancel a group session

Existing group sessions will display on your **Agenda** tab within the **Appointments** section of SSN.

Sicherther2011-	Giffermer Galances (	Advent Character of Sciences and
4 7 4 9 10 11 11 10 10 10 10 10 11 11 10 10 10 10 10 10 10 20 20 20 20 20 20 20 20 20 20 20 20	Aprilio Bio Week Streete Gold, Yasmin	Man, 38521-8818 + +
Appendixment Types An appendixment Types Analysis (bit) Analysis (	Meetings on 09-21-2015.	Availability Constant State Honors Serve 10 State Honors Serve 10 State Honors Serve 10 State Honors Server 20 State Honors Server 20 State Honors Management Server 20 State Honors Fritze 20 Statement

#### Edit a group session

- 1. Hover over the group session icon (<sup>1)</sup>) to open the group session pop up card.
- Click Edit on the pop up card You can edit the <u>frequency</u> of recurrence, <u>time of day</u>, <u>location</u>, <u>reason</u>, <u>number of participants</u>, <u>visibility of students</u>, <u>instructions</u> and the series <u>start/end date</u>.

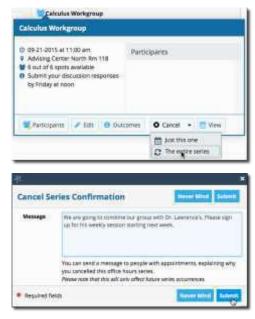


**Note:** You *cannot* edit the days or the nature of the recurrence (e.g. weekly). Some changes are prevented after students have signed up.

3. Click the **Submit** button to save your **Edit Group Session** form.

#### Cancel a group session

- 1. Hover over the group session menu icon (<sup>1</sup>) to open the group session pop up card.
- 2. Select **Cancel**, "The entire series" to cancel all occurrences of the group session. You will be prompted to confirm the date from which to cancel the series, and can add a note that will be included in an email to those whose sessions are canceled.
- 3. Click the **Submit** button to cancel the group session series.



#### Cancel a single occurrence of a group session

You can cancel an individual occurrence of a group session series from the **Day** tab of the **Appointments** section of SSN. Use the mini calendar on the left to select the desired day.

1. Hover over the edit icon associated with the group session for the selected day (😂).

Group Session: 8 out of 6 spots available 👹 Marage hetictores	Calculus Workgroup		
	05-21-2015 at 11:00 am     Advang Center North Rin 118     Courd 6 spots waitable     Substrict/au document responses     By Index 4 noon	Participants	
	Rentparts / Infr @ Outure	mes O Cantali + 🚍 Hew	
	5	Dist the ups	18

- 2. Select **Cancel**, "Just this one" from the Group Session pop up card to cancel session for the selected day.
- You will be prompted to confirm the cancellation, and can add a note that will be included in an email to those whose session is canceled.

Best Practice: include an explanation and provide guidance on how to reschedule a session or connect to other available resources.

4. Click the **Submit** button to delete the group session occurrence.

Delete Group Session	Never Mind Submit
Do you want to delete this group sessi	on occurrence?
You can send a message to people with a canceled this Group Session.	oppointments, explaining why you
Our regular meeting room was flooded overnig week.	ht so we will not be able to meet this
Required fields	Nover Mind Submit

#### Manage group session participants

You can add or remove participants in an individual group session using the **Manage Participants** link on the **Day** view of the group session.

Agenda	Day Week Schedule
10:00 am	
:15	
:30	
:45	
11:00 am	Group Session: 6 out of 6 spots available
:15	
:30	
:45	
12:00 pm	
:15	
:30	
:45	
1:00 pm	
:15	

- 1. Select Manage Participants.
- 2. Search for a student by typing his/her name into the **Add participant** field, then click the **Add** button to add the student to the list of participants.

PARTICIPANTS	OUTCOME5	SPEEDWOTE 5		
here are 6 of 6 s	pols available.			
Add participant	bames		- Add	
Course:	Barnes, 3 Journeolog SF030014	starfishao/utiona.com		
Session Particip	pants = E	mall	Course	Tools
There are no p	attropants currently			
				Never Mind Submit

Repeat this process for each student you want to add.

To remove a participant, click the delete icon (  $\bigotimes$ ) associated with the student's name under the **Tools** column.

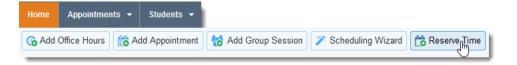
Participants	Dutcomes	Spendinger		
vere and 5 of 6 sp	ots available			
Add participants	-			1
Course:				
Session Ferrique	na	Inul.	Course	Toda
Bornet, Jamie		voorni@starfiatsolution	s.com No course	8
				×.

3. When you are finished with your participant updates, click the **Submit** button to save your changes.

#### Reserve time on your calendar

Use the **Reserve Time** option to show time on your calendar as unavailable to avoid creation of an appointment during that time.

1. Click the Reserve Time button from the action bar on your **Home** page or **Appointments** page.



- Fill out the Reserve Time form to include a description of the reserved block, the date and time of occurrence. If the block recurs each week, use the "Repeat Weekly Until" checkbox to indicate a weekly recurrence, and select the end date for the block using the date picker provided.
- 3. Click the **Submit** button to add the reserved time to your calendar.

*	×
Reserve Tin	ne
	art and end time to block off time in your calendar as being for appointments.
Calendar	My Calendar
Description	Class Prep
When	08-25-2014 🗰 9:00 AM to 9:30 AM
Repea	t Weekly Until 12-15-2014 🗎
	Never Mind Submit

## Make and manage Appointments

Students may only schedule appointments with you during times you have designated as available, either through your <u>office hours</u> or <u>group sessions</u>.

Calendar owners and their designated <u>calendar managers</u> can add appointments wherever they choose with a few exceptions:

- You cannot overlap a reserved time: If you use the <u>Reserve Time</u> feature to block time on your calendar, you will not be able to add an appointment in the time occupied by the reserved time without first removing the reserved time from your calendar.
- You cannot overlap a group session: you cannot add an individual appointment that overlaps with a group session previously added to on your calendar.
- You cannot overlap an <u>external hold</u>: If your Spartan Success Network (SSN) calendar is integrated with an external calendar via <u>Exchange or Google integration</u>, you will find "External Holds" on your calendar. These represent items that exist on your other calendar (Outlook or Google). You will not be able to add appointments that conflict with external holds on your SSN calendar.

#### Add, edit, or cancel appointments on your SSN calendar

#### Add an appointment to the calendar

- 1. Initiate a new appointment using either of these options:
  - Click the Add Appointment button from your Home or Appointments page.
  - Click the sign up icon (•) for an existing office hour slot using the **Day** or **Week** view of your calendar on the **Appointments** page.

Ho	me	A	poin	tmen	is *	1	Students 🝷					
App	point	men	t Too	Is		«	G Add Offic	e Hours	Add Ap	pointment		
•		Augi	ust 20	914 🕶					-	-		
s	М	т	W	т	F	s	AGENDA	DAY	WEEK	SCHEDULE		
27	28	29	30	31	1	2				Tu	e, 08-26-2014 < >	
3	4	5	6	7	8	9	MA 00:90					^
10	11	12	13	14	15	16	15			0	Dr. Gold's Advising	
17	18	19	20	21	22	23		0.000		0	TRANSPORT OF ANALYSIN .	
24	25	26	27	28	29	30	30	- Sug	k to sign up			
31	- 1	2	3	14	5	6	35	Cli	Click to sig			
			-				10:00 AM	O CIL	Click to sign	rup		
			Toda				115	O Click	k to sign up			
Cal	enda	ar Ma	anag	er			30	O Clic	k to sign up			
App	ointrr	nent 1	ypes	i -		^	45	O Clid	k to sign up			
AllA	ppoi	ntme	nts		~		11:00 AM	Ciici	k to sign up			
	waila		Constraint.		-		晤	O clid	k to sign up			
							1.0.0					

This opens the Add Appointment form

SCHEDULH	ING OUTCOMES	SPEEDNOTES	
Calendar	My Calendar		
With	Doel		Search: @ Adivo larma () Al Nama
When	Student Joe	a. 15. Ka	Detailed Description
Where	004455789	shoowed and	
Reason	(Sendarcare		
Course	Seattmuse_		
Sharing	Shared O Private		Enter a detailed description about the appointment This is viewal by you and the student with whom the appointment is made.
Permin	nions. Please select a re	ason to see who else can	view this shared appointment.
Regure	id Aelds		
<ul> <li>Require</li> </ul>		ason to see who else can	view this shared appointment.

2. Begin typing the name of the desired student into the **With** drop down list box. SSN will find matching students with whom you have a relationship. Select the desired student from the list.

If you start the appointment from an existing office hour block, the "appointment types" setting

in that block may further limit the students available in your list.

- 3. If you used the **Add Appointment** button rather than selecting an existing time slot, specify **when** the meeting will take place (date, start time, end time).
- 4. Select the desired location from the options available in the **When** drop down list.
- 5. Select a **Reason** for the meeting. The reasons available are based on the student you selected and the <u>appointment types</u> that you have access to in your role/ relationship with that student.

If you have selected a timeslot from a set of existing office hours, the reasons will be further limited to those associated with the appointment types settings for the office hours.

#### Important Note:

Each reason is tied to an appointment type. Each appointment type defines which roles may view or modify an appointment of this type, and what <u>SpeedNotes</u> will be available. Once you choose a reason, information about which other roles have permission to see the appointment will be shown in the section labeled **Permissions** ( Permissions:).

- 6. If relevant to the meeting and permitted by your role, select a **Course** from the list presented.
- 7. Select a radio button for **Sharing** to either make the appointment **Shared** (roles listed in the Permissions area for this student can see the appointment and its outcomes) or **Private** (only the person with whom the appointment is made can see it).

- Type a Detailed Description for the meeting that will be visible/emailed to you and the student.
   Best Practice: This is optional but recommended to set expectations for the meeting.
- 9. Click the **Submit** button to schedule the meeting.

SCHEDULIN	G OUTCOMES	SPEEDINGTE'S	
alundar	Ny Calendar		
+ With Restant, Joe + When 0935-2014 1 920 W 10 9:45 W		1	Skarct: 🛞 Active terms 💿 All farme
		10 MI 10 9.45 MI	Detailed Description
Where	Where Advance Castar borth Res TTE	Lafa take a took al your place for the correng term and make aver you aren't evolutioning with courses that all report heavy in person requirements.	
Reaton			
Course	No Cóurse		
Sharing	. Shared O Private		Enter a detailed description about the appointment. This is news by you and the student with whom the appointment is made.
• Par	nary Advisor	Nowing roles may be able to r	ces this appointment if they have a relationship with the cludarit(a)
<ul> <li>Regate</li> </ul>	2 14125		

The appointment will appear on the calendar owner's calendar in the selected date and time.

Но	me	4	poin	tmen								
App	pointi	ment	Too	NS		*	G Add Offic	e Hours	📸 Add Ap	pointment		
•		Aug	ust 20	014 <del>+</del>		÷						
s	· M.	T	W	Ţ	F	s	AGENDA	DAY	WEEK	SCHEDULE	1	
27	28	20	30	-31	1	2	11. A.				Tue, 08-26-2014 <>	
3	4	5	6	7	8	9	09:00 AM				100,00-20-2014( )	1
10	11	12	13	14	15	16.	15			0	Br. Gold's Advising Hours	ſ
17	18	19	20	21	22	23	bio dic	82 5	Student, Joe (	9:30 am)		t
24	25	26	27	28	29	30	28	1000	icit to sign up			ſ
31	- 5	2	3	4	5	6	10.00 AM	- 142,913	ick to sign up			h
			Toda	÷.			15	0 0	ick to sign up			
Cal	enda	ar Ma	влао	er				-	ick to sign up			
						~	45	0 0	ick to sign up			l
app	ointm	ient i	ypes		_		11:88 AM		ick to sign up			ł
	Appol				~		10	and the second	ice to sign up			
	waila	ble C	inly			¥		-	one on the first rate.			4.9

The appointment is also available from the calendar owner's **Home** page on the **Appointments** and **Recent Changes** channel.

Colleg Hears	Annese .	10-Desig Services	6.Derk	≠ 55eming#	the the
C System Arrent					
Welcome B	ack!				
Rort Ourp	e				
				Deptie	14635.4ys
Sheel Addressly		108 28 3114 41 1 114	a.	(Derget #	146 35 days
State Ad Activity	alment Month In	u Wehgmup (0)-14-2			16631-044

The appointment will also appear on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. If you included a detailed description, it will be listed on the Meetings tab.

Deta/Time	Reason	Scheckled By	With	Location
田 10-0-2115 d # 03 pm Calcel	Conplete Withdrawai	Yearvin Gene	Vasmin Gold	Advising Center North Rm 1.
12-17-2014 at 6.30 pm (Appoin	Dereval Advance Visit	Yearon Gale	Vasmen Cased	New Bluten Hall
09-09-02-2014 at 11:00 am (Appel	Pra-reportation	Yaurm Geld	Yasiriri Gold	Witaid Conference Room
08-29-2014 of 9:50 am Wopow	Giert Success Team	Vernin Gold	Sa Satin	Gilbert Hall, Room 202 (My
12 m 00-20-2014 af 3:30 em (Aldom	Pre-registration	YMMIN OPE	Yearren Goog	Advising Center North Rvi 1.
1.5.1.5				
Description. Lat's take a look of p paratin requirements	our pare for the corning	term and make ours y	ou per 1 iverauling wit	olourses that all require heavy in
Comment Discound Jur's chalo	riges with boiling on some	same that 2 days (	a wook, and how this trip	acts photoes for courses. Ho is
	Conservation (1975)     Conservation (1975)     Conservation     Conservation	Construction     C	End (0.50-0215 of 8(0) pm Cancel, Concluse Worksweit Yearnin Good     To: 17-015 4 6(0) pm Cancel, Dennis Astrony Missi Yearnin Good     To: 07-0216 at 11:00 an (Appen, Dennis Astrony Missi Yearnin Good     To: 07-0216 at 11:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 an (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Yearnin Good     To: 07-0216 at 3:00 at (Appen, Dennis Scherbert Missi Year	El      El Colo 2015 of e (0) pri Cance. Considere Wondrawal Yaumin Good Yaumin Good      El T-2-214 e E 30 pri Papori. Uneven Aniversi Visit Yaumin Good Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2017 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria Yaumin Good      El Colo 2016 al T-2016 A Decembra Pri registratoria      El Colo 2016 A Decembra Pri registratoria Pri registratoria      El Colo 2016 A Decembra Pri registratoria      El Colo 2016 A Decem

Both the student and calendar owner 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 <u>Email Notification</u> settings.

	Man 6/25/2014 9-53 AM	
m	Starfish Calendar <calendar-ea@dostarfish.com></calendar-ea@dostarfish.com>	
-	You have an appointment with Yasmin Gold on 8/26/2014 9:30 AM EDT	
Required	joestar ()star fisicollege. edu	
When	Tuesday, August 26, 2014 9:30 AM-9:45 AM	
Location	Advising Center North Rm 116	
Hi Joe,		1
Please	find below details to the appointment that has been scheduled:	ſ
Schede	aled By: Yasmin Gold	
Meetin	g With: Yasmin Gold and Joe Student	
Date:	8/26/2014 9:30 AM EDT	
Locati	on: Advising Center North Rm 118 (sign in at the front desk)	
Reason	a for Meeting: Pre-registration	1
Instru	ctions: Walk-ins should sign in to the Kiosk and wait to be called.	
11110 000000	ption: Let's take a look at your plans for the coming term and make sure you werloading with courses that all require heavy in person requirements	

#### Modify scheduling details of an appointment

 Hover over the Appointment icon (<sup>26</sup>) associated with an appointment to open the pop up card and make updates. The appointment is available from your calendar, the Appointments or Recent Changes channels on your <u>Home</u> page, or from the student folder <u>Meetings</u> tab.



From the Appointments pop up card you can edit the

<u>scheduling details</u> of an upcoming appointment and <u>add or edit outcome details</u>. If configured on your SSN system, you may be able to use <u>SpeedNotes</u> to document common outcomes.

You can also <u>cancel an appointment</u> from this menu.

- Select Edit from the <u>Appointment pop up card</u> to bring up the Scheduling tab of the Edit Appointment form. From here, you can edit appointment scheduling details including:
  - When and Where the meeting will occur.
  - The Reason associated with the meeting.
     Note: This may impact who else can view the meeting, and which <u>SpeedNotes</u> will be available for documenting outcomes.
  - The **Course** associated with the appointment. (optional)
  - The Sharing setting for the meeting. Select private if only you, your calendar manager and the student should see this meeting. A shared meeting will be visible to those with a role that has access to the appointment type and a relationship to the student. These roles are noted in the Permissions section of the form (Permissions:).
  - **Detailed Description** that is shared with the student and documented on the Meetings tab of the student folder (optional but recommended).

SCHEDULIN	G OUTCOMES	SPEEDNOTE S	
	Ny Calendar		
When	08-26-2914 10	0.0 AM to 10 15 AM	Detailed Description
Where	Where Advising Center North Rm 118		Lefs take a look at your plans for the coming term and make sure you aren't overloading with courses that all require heavy in person requirements
Reason	Pre-registration		
Course	No Course		
Sharing	Shared      Private	8	Enter a detailed description about the appointment. This is viewab by you and the student with whom the appointment is made
	ions: People with the fo lary Advisor	Bowing miles may be able t	is see this appointment if they have a relationship with the student(s)
Required	d Reids		

3. Click the **Submit** button to save changes.

An updated iCalendar (iCal) attachment will be emailed to the student. The calendar owner will also receive the updated iCal if the calendar owner's <u>email notificaitons preferences</u> are set to notify when changes are made to an existing appointment (recommended).

#### Document outcomes from a meeting

- 1. Hover over the **Appointment** icon  $\binom{26}{2}$  ) associated with an appointment.
- 2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form.

<u> </u>			
Edit App	ointment		Maver Mind Submit
SCHEDULIN	G OUTCOMES	SPEEDNOTE S	5.
Date Attendance	08-25-2014 🕤	10:30 AM	to 10.49 Add
Comments		ng to investigate a mo	g on campus more than 2 days a week, and how this impacts choices for nore flexible work schedule with his boss to see if he could take morning
			ment, viewable only by you and other people with whom the appointment is shared, before or after the appointment for record-keeping purposes.
Email	Send a copy of	note to student	
	ions: People with th hary Advisor	e following roles may	y be able to see this appointment if they have a relationship with the student(s).
			Hever Mind -Salamit

- 3. Capture the meeting's *actual* start and end time next to the **Date.**
- If the student is a no-show for a meeting, check the Attendance box labeled "Student missed appointment".
   Note: Depending on your institution's settings, this may trigger an email to the student.
- Add your notes into the Comments box.
   Note: Click the Email check box labeled "Send a copy of note to student" if your comments should be shared with the student via email.
- 6. Click the **Submit** button to save your updates.

Your updates will be available in the student folder on the <u>Meetings</u> tab for this appointment.

#### Use SpeedNotes to document common outcomes

SpeedNotes are preconfigured appointment activities that can be checked off to quickly capture recurring meeting outcomes.

If SpeedNotes exist for any appointment types in your SSN system, the **SpeedNotes** tab is available whenever the **Edit Appointment** form is open.

Edit Appointment					
SCHEDULING	OUTCOMES	SPEEDNOTES			

If the selected appointment type has no SpeedNotes associated with it, the tab contents will be blank.

#### Important Note:

The reason selected for your appointment on the **Scheduling** tab is connected to an appointment type, and that appointment type determines which SpeedNotes are displayed. If you don't see the SpeedNotes you were expecting, you may need to select a different reason or check with your SSN administrator.

- 1. Hover over the **Appointment** icon (<sup>26</sup>) associated with an appointment.
- Select <u>Outcomes</u> or <u>Edit</u> from the **Appointment** pop up card to bring up the Edit Appointment form.
- 3. Click the **SpeedNotes** tab. Available options may be grouped into categories. Within any category, items are listed alphabetically.
- 4. Check all boxes that are relevant to your meeting.

K.				
Edit Appoin	itment			Never Mind Submit
SCHEDULING	OUTCOMES	SPEEDNOTES		
	pics discussed and	activities completed	in this meeting.	
Academic Plas				
📋 Change Majo	e .		Complete Intake Form	
Complete Aca	ademic Plan		Major Selection	
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🗌 Degree Audit	Review		Graduation Plan	
Registration				
Drop Classes	10 12		Registration Planning	
E Full Withdraw	al for Term			
				Never Mint Submit
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5. Click the **Submit** button to save your updates.

#### Cancel an appointment

1. Hover over the appointment menu icon (<sup>26</sup>) associated with an appointment to bring up the **Appointment** pop up card.

The Appointment pop up card is available from <u>your calendar</u>, the **Appointments** or **Recent Changes** channels on your <u>Home</u> page, or from the student folder <u>Meetings</u> tab.

You can also <u>edit an existing appointment</u> from this menu.

- 2. Select **Cancel** from the Appointment pop up card.
- 3. The **Cancel Appointment** form is displayed. Type a note explaining the reason for the cancellation (optional but recommended).

**C**Best Practice: include an explanation for the cancellation, and provide guidance on how to reschedule or connect to other available resources.

Cancel Appointment	
Are you sure you want to cancel your 10:00 am app	contment with log Student?
/ou can send this person a message explaining w saved with the appointment notes:	
Joe, I apologize for the short notice. I must unexpected out for the rest of the week. I would be happy to res want to meet with someone this week, please rea your Success Network.	schedule with you next week, but if you
	Never Mind Submit

4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

The calendar owner will also receive the iCal for the cancellation if the calendar owner's <u>email</u> <u>notifications preferences</u> are set to notify when changes are made to an existing appointment (recommended).

#### Review appointment information and meeting outcomes

Review appointment and meeting information on the student folder

You can open the student folder by clicking on the link associated with the student's name wherever it appears in SSN.

For example from the **Appointment** channel on your **Home** page.



Or from the appointment on your calendar

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Click on the **Meetings** tab of the student folder to review information about upcoming and past meetings for this student.

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E fatherin	⊞	12 18-14-2014 at 9:00 am	Pre-registration	Teamin Gold	taana Gold	Virtual Cardwolka Razm	4 mercine Si percenter forminge

The **Meetings** tab of the student folder includes upcoming appointment information as well as meeting notes captured in SSN. It may also include historical meeting information from external systems.

The information that is available to you on the **Meetings** tab is based on the role(s) that connect you to your students and the appointment types those roles have permission to view.

The icons to the left of each meeting in the list provide additional information or available actions related to the meeting:

⊞ Click the expand icon to the left of any appointment listed to view additional details about the meeting. For example the **Description** that was included when the appointment was created, any **Comments** entered on the **Outcomes** tab and any **Activities** that were checked off on the **SpeedNotes** tab.

Hover over the <u>appointment</u>icon to update the appointment.

If the student was marked as a no show on the <u>Outcomes</u> tab, the missed appointment icon will be displayed instead of the standard appointment icon.

If the appointment presents information from an external system, the historical appointment icon will displayed. This type of meeting cannot be edited. External meeting will only exist if your institution has imported meeting outcomes from another system (e.g. tutortrac).

#### Filter student lists based on meetings

26

19

Use the **Meetings** filter from the list of **Additional Filters** available on your **My Students** and **Tracking** tabs to identify students that have or have not scheduled appointments.

 Click on the My Students tab from within your Students area in SSN. Then click the Add Filters button.

lome	Арр	ointments •	Studient	• • •			
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- 2. Select **Meetings** from the filter options on the left and check the box to the left of the word **Students** in the filter criteria area to make this filter active.
- Select whether you want to filter to students "Who have had/ scheduled a meeting" or to those "Who have *not* had/scheduled a meeting. Optionally, you can filter to a specific Appointment Type/ Reason and a range of Dates.

			-			
Additional Filters				Clear Ad Filters Hever Mind	Sitte	111
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날 Cohorts & Relationships @	Who have had/scheduled meetings					
🗰 Meetings 🥥		O Who have not had	Pscheduled meeting	2s		
Success Plans		Appointment Type /	Pre-registration		~	
		Reason Dates	08-11-2014	to 09-12-2014	0	
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4. Click the **Submit** button activate your filter

Your student list will be displayed showing only those students who matched your Meetings filter criteria.

Home Appoin	ntments 👻	Students 👻	Services 👻	Admin	Search for Students	Q
OVERVIEW	MY STUDENT	TS TRACK	ING			
Flag 🔹	Referral	5 To-Do 🍗 ł	Kudos 🔥 Su	ccess Plan		≡ More ▼
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						×
Name		Email			Phone	mo
C Stud	l <u>ent, Joe</u> 456789		starfishcollege.ed	lu	Phone	0

Click the Clear Filters button (<sup>\*</sup>) to remove your filter, or click the **Edit Filters** button to modify your filter criteria.

**Note:** Canceled appointments *will not be* included in the filter results for students that have had/scheduled an appointment, but scheduled appointments where the student was marked as a no show *will be* included.

#### Use calendar managers

#### Designate someone to manage your calendar

Calendar Managers can see, add, and edit appointments on the calendar owner's SSN calendar.

You can designate other users to be your calendar manager through <u>Appointment Preferences</u> in your profile.

Institutions can create calendar managers via SIS import or administrator upload. You must contact your SSN administrator to remove calendar managers created via these methods.

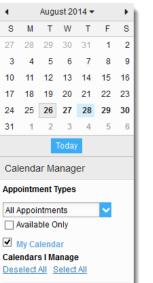
#### Manage another's calendar

#### Calendar viewing options

If you are designated as a calendar manager for someone else, when you reach your SSN Calendar on the **Appointments page**, you will find a list of calendars you have permission to manage under the **Calendars I Manage** heading in the **Calendar Manager** section on the left of the page, beneath the small monthly calendar.

You can filter the calendars displayed by appointment type and/or by individual users' calendars:

- Use the **Appointment Types** filter to limit the view to calendar owners who have office hours of the selected types.
- Check /uncheck the boxes associated with each name under the Calendars I Manage heading to limit which calendars are displayed.



To make it easier to distinguish among calendars, each name is displayed in its own color. The color of the name in the listing matches the color used to display appointments on the main calendar.



As a calendar manager, you will find a **Schedule** tab in addition to the **Agenda**, **Day**, and **Week** tabs. If you are opening more than 3 calendars at the same time, rely on the schedule view. If you manage a large number of calendars the "Select all" calendars option will only be available in the schedule view.

When you click the **Schedule** tab, SSN may display a quick reference pop up that includes these tips for using the schedule view:

- Use the time scale option at the top of the schedule view to look at the combined schedules in 15 minute, 30 minute or 1 hour increments.
- Click on an individual's name in the schedule view to jump to viewing that user's calendar in the day view.

Close the Quick Reference pop up using the "x "in the top right corner.

#### Make and update appointments for others

If you are a calendar manager for others, you will have additional calendar selections when adding an appointment to the calendar.

On the Add Appointment form, you will find a drop down selector in the **Calendar** field listing those individuals for whom you have the calendar manager permission.

*							
Add Appointment							
SCHEDULIN	G OUTCOMES SPEEDNOTES						
Calendar	✓						
* With	My Calendar						
	Starfish, Sue						

Select the desired staff member to add an appointment to his/her calendar. Options presented in terms of students, locations and appointment types will be based on the selected user's role(s).

The same holds true if you add office hours, group sessions, or reserved time.

If you elect to add appointments, office hours, group sessions or reserved time from your **Appointments** page, individuals who are not checked in the **Calendars I Manage** section *will not* be listed as options in the drop down box for **Calendar** on the "Add" forms.

appointment Ty	pes	
All Appointment	is i	~
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aselect All Se	Incl All	
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#### Important Note:

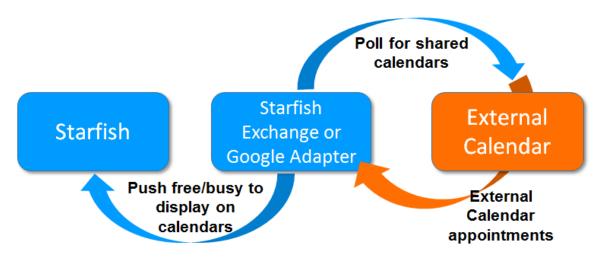
Once the appointment, office hour block, group session or reserve time is created, you *cannot* modify the person whose calendar it belongs to (i.e. you cannot move it to another person's calendar by selecting another calendar).

## **External Calendar Integration**

Integration with an external calendar allows free/busy information from a staff member's external calendar to be displayed on that staff members' Spartan Success Network (SSN) calendar.

This type of integration is available for <u>Google</u> or <u>Exchange</u>, and your institution must have configured one of those options with SSN in order for you to take advantage of it.

With SSN's adapter installed, SSN will poll your external calendaring system for shared calendars, and then display the free/busy information from those shared calendars on the corresponding SSN user's calendar.



#### Figure 2: External Calendar Integration

In order for your external calendar's information to be available to the SSN adapter, you must set up your Email Notification/ Appointment Notification preferences as described below.

#### Configure integration in your profile

Select the Email Notifications tab from your Profile menu.

If either Google or Exchange integration has been enabled on your SSN system, just above the **Tracking Item Notifications** heading you will find a check box labeled:

C Venerie fiel	<b>.</b>
Institutional Pre	Click to view or edit your profile.
Appointment Pr	

"<u>Read busy times from my external Google calendar</u>" or "<u>Read busy times from my external Exchange</u> <u>calendar</u>".

Check the box and then follow the "Click here" link for set up steps specific to your type of integration.

#### Set your profile to read busy times from Google

🕼 Read busy times from my external Google calendar	
Paste your Google Calendar private link here	
Important: In order for this setting to take effect, you must share your private calendar link with Starfish. Click here for furthe	r instructions.

After you check the "Ready busy times" box in the Appointment Notifications section of your profile, you must paste your personalized Google Calendar private link into the text box provided. You can use the "Click here" link to find these instructions:

To get your **Google Calendar** private link:

- Open your Google Calendar and click on the drop down menu icon to the right of the calendar you want to share.
- 2. Select the **Calendar Settings** option

Calendar	Display only this Calendar
CREATE	Calendar setting
and the second second	Create event on this calendar
<ul> <li>August 2014</li> </ul>	Share this Calendar
SMTWTF	
27 28 29 30 31 1	Reminders and notifications
345678	
10 11 12 13 14 15	
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My calendars	Choose custom color
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3. Scroll down to the Private Address heading and click the ICAL button to get your private URL.



4. Copy the Private URL provided by Google and paste it into the Google Calendar private link field in your profile's **Email Notifications** > **Appointment Notifications** section.

	r calendar from other applications. You can cop	and paste this in
y calendar product that supports the iCal form		
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5. Be sure to click the **Submit** button on your Profile > **Email Notifications** tab to save changes.

#### Set your profile to read busy times from Exchange



After you check the "Ready busy times" box in the **Appointment Notifications** section of your profile, you must share your Outlook (or Microsoft 365) calendar with the SSN email address specified in the line labeled **Important** under the "Ready busy times" checkbox.

Follow the "Click here" link to find detailed instructions specific to your version of Outlook or Microsoft 365. Generally speaking, you will share your calendar with the email address specified and give it the ability to read "full details".

#### External calendar holds on your SSN calendar

If you have configured Google or Exchange integration as described in the <u>previous section</u>, information from your external calendar will begin to appear on your SSN calendar. Items from your external calendar will appear as *external holds* on your SSN calendar.

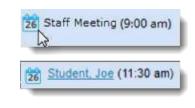
An external hold is distinguishable from a SSN appointment on your SSN calendar in two ways:

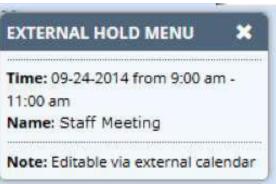
- 1. The title on the calendar does not include the hyperlink to the student folder.
- When you hover over the appointment menu icon (<sup>28</sup>) the External Hold card is displayed rather than the SSN Appointment card.

As noted on the **External Hold** card, this item is editable only in the external calendar. You cannot edit or cancel this meeting from within SSN.

External holds will be respected when a calendar owner or manager is adding an appointment or other reserved time to the calendar.

Time will show as unavailable and appointments will not be able to be added over external holds.





# **Document Version History**

Version	Description of updates	Date of update
2.0	Refined to include newest screens and additional options added in the summer of 2014.	9/10/14
2.01	Updated Student Folder image (meetings tab) with updated student folder layout	08/14/15
3.0	Updated to reflect hover vs. click on many items and new icons for appointments, office hours, group sessions	9/18/15
3.1	Updated information about related resources.	10/20/16