Getting Started with Web Scheduling

**Overview**
It allows students to schedule, reschedule and cancel appointments with staff online.

There are three steps required to get started with web scheduling:

**Step 1: Share your Calendar with APLUS (required)**
*Where: Preferences > Calendar > Access*
Here, you will need to grant APLUS access to your calendar. Make sure you click the blue “Grant Access” button.

**Step 2: Create your custom URL (required)**
*Where: Preferences > Web Scheduling > URLs*
Create web addresses, or URLs, which you can direct students to for online appointment scheduling.

**Unit**
Select the unit that is relevant to this URL.

**Public URL**
If you would like to share it with other staff in your unit.

**Active URL**
Once you’re done setting it up. (Uncheck it later if you want to take the URL offline).

**Require notes field**
Students are presented with a comment box before scheduling an appointment which are displayed in the staff calendar as prep notes. By default students are not required to enter any notes. Change this as needed.
URL Prefix
Add a name to your URL. e.g., *james, cla-advising, csom.*

Custom Notes
Add custom notes if you would like to display some additional information to the student while he/she is selecting a staff member from the list shown.

Banner Text
You can add optional banner text that will be displayed in the upper part of the web scheduling website. e.g., “CLA Advising Online Schedule”

Contact Info
You can also add contact information to the online scheduling page.

Link URL to
Select the appropriate place to link the URL. If you are sharing this URL with your unit, then you probably want to select either an **Intake** or **Staff List**. If the URL is for yourself, then you can pick **“My Public Schedule”**

- **Intake Process**: a questionnaire which students complete prior to scheduling an appointment.
- **Staff List**: students pick a staff from the presented list.
- **My Public Schedule**: will lead the student directly to your available appointment blocks.

**Note**: You may click Preview to view what your URL will look like to students.

**Step 3: Create your Availability (required)**

**Where: APLUS Calendar**
1. Click on the day and time you’d like to set up appointment slots. Hold and drag to adjust the length of time.
2. Click on the **“Appointment Slots”** tab.
3. Choose the type of appointment block: *Appointments, Drop-ins, Workshops*.
4. Choose the relevant unit for this block.
5. Check the **“Web Accessible”** box to make appointment slots available to students for online scheduling.
6. Select a filter from the drop down menu. New filters can be added by creating custom filters. See section below.
7. If you wish to make the appointment block available to only certain students, click the Private button.

**Note**: private blocks will generate a block-specific URL for the student to access that particular block. Simply create the appointment block, save your changes, and click on it again to copy/paste the generated URL.

You can also make it **repeat over** a period of time like once a week or every other Tuesday. Repeating events saves you the time and effort it would take to create multiple separate events and lets you easily change all events in the series at once. This can be set at the bottom part of the **“Event Details”** panel.

**At this point** your availability should be ready for students to start scheduling appointments. It’s highly recommended to preview your URL so you are sure targeted students can see your appointment blocks.
Step 4: Web Scheduling Preferences (optional)

Where: Preferences > Web Scheduling > General

Here, you can setup your constraints for appointments scheduled online, including the following options:

1. Minimum and maximum number of weekdays from today in which student can schedule appointments, i.e., *no same-day appointments, appointments scheduled up to a month in advance*, etc.

2. Cancellation policy: setting the definition for a “late” cancellation, how many late cancellations before preventing online scheduling (for example), including no-shows/late reschedules as cancellations, and so on.

3. Maximum number of appointments for any given student in a week

4. Maximum number of appointments for a staff member in a day

5. Whether or not to have newly created appointment slots default to being web accessible

6. Default filter for a newly created appointment slot.

Step 5: Custom Filters (optional)

Where: Preferences > Web Scheduling > Filters

This is where you can create sets of rules, called “filters” in APLUS, which can be used to limit your online appointment availability to just those students who meet the filter criteria.
Filters are an incredibly powerful way of customizing your availability:

1. Create your own set of personal appointment slot filters or make them available for others in your unit using the “Private/Public” drop-down menu next to the the units drop down list.
2. Use “+ Add Filter Attributes” to build your set(s) of requirements - keep it simple or setup complex combinations to meet you and your unit’s needs.
3. Use group/attribute options to have complete control over your availability e.g., “everyone in my college except for those who’ve applied to graduate”.

Step 6: Intakes Processes (optional)
Where: Preferences > Web Scheduling > Intake
Available only to unit coordinators.
In this section, you can create questionnaires called Intake Processes, which students complete prior to scheduling an appointment with staff.

1. Completed intakes from students can be viewed in your APLUS Calendar (if they setup an appointment) and/or in the student’s contact log in APLUS
2. You can use the “Stop” action to end the intake process prior to reaching the calendar of staff availability and instead display an information box to the student e.g., “Call the front desk”
3. Questions can be nested within other questions for arbitrarily complex intake processes
4. You can have questions link to other intake processes, which is useful for multi-unit appointment scheduling i.e., student selects the unit they’d like to meet with and that unit wants to collect some additional information before letting the student select a time to meet
5. Units can have as many intake processes as they’d like
Basic Operations (Student Interface)

How to Cancel an Appointment
In the web scheduling interface, students are able to cancel a scheduled appointment. This can be done by clicking on the “Home” button located at the upper-left corner of the page.
If there is an appointment scheduled, it will show up under “My Upcoming Appointments”. Click “Cancel” to proceed canceling the appointment.

How to Reschedule an Appointment
In the web scheduling interface, students are able to reschedule a scheduled appointment. This can be done by clicking on the “Home” button located at the upper-left corner of the page.

If there is an appointment scheduled, it will show up under “My Upcoming Appointments”. Click “Reschedule” to select a different date/time with the adviser selected on the original appointment.