Appointment Scheduling User Guide

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Email Notifications & Google Calendar (GCal) Integration

1. Select the dropdown arrow and click “Email Notifications.” This will display the “Appointments Notifications” page to personalize your GCal appointment notifications.

2. Under the “Appointments Notifications” section:
   a. Decide if you want planning reminders, i.e., appointment emails (not required)
   b. Check both options under “Send me an email with a calendar attachment.” Otherwise you will not receive calendar invites.
   c. Integrate your Google Calendar into NYU Connect to carry over your busy times so you can not be double-booked.
      i. Check the “Read busy times from my external Google calendar” box.
d. Open your Google Calendar in a new tab and click the dropdown arrow next to “My Calendars” to view your calendars.
e. Select the 3 dotted icon to the right of the calendar you wish to sync.
f. Select the “Settings and sharing” option.

3. A “Settings” page appears. Scroll down to the “Integrate Calendar” section.

○ Copy and paste the link from the “Secret address in iCal format” box into the box underneath “Read busy times” from Step 2.
Notes on Google Calendar (GCal) Integration

- Office Hour Blocks created in NYU Connect transfer to your GCal when you integrate. You do not have to accept these blocks on GCal to hold the time for students, but you **cannot** decline them — if you do, the office hours will be canceled.
- When you receive an invitation to your GCal, that event automatically transfers to your NYU Connect calendar (even if you did not accept).
  - The only way an invite disappears from your NYU Connect calendar/availability is if you respond, **“No” and then delete the event from your Google Calendar, or if you mark yourself as “Free” instead of “Busy”**.
- If you have a “ghost” meeting in NYU Connect that you do not see on your GCal, search for the event in the GCal search bar, then mark yourself as free.
- Integration is only for about a month in the future. You can schedule advising appointments as far out in the future as you would like, but it is recommended you do so for about 30 days out.
- When you integrate your calendar for the first time it takes at least 45 minutes to complete the sync.
- Changes to your GCal take approximately 10 minutes to sync into NYU Connect. NYU Connect appointments will transfer to your GCal in real time/when you receive the email notification.
- If you want to add a link in your email signature for students to use to schedule with you, use this URL: [https://nyu.starfishsolutions.com/starfish-ops/](https://nyu.starfishsolutions.com/starfish-ops/) which will take them directly to their success network where they can see/schedule with you.
Appointment Preferences

1. Click on the “Appointment Preferences” tab.
2. Set your default settings for appointment length and for scheduling deadlines in the “Basics” section.
   - The “Minimum Appointment length” defaults to 15 minutes; you can extend the time here or when you are creating Office Hour blocks.
   - The default deadline for when students are able to schedule an appointment is “none.” You can change that by choosing a time the day before office hours, the day of office hours, or a specific number of hour(s) before your office hours.
   - Check “Allow drop-ins after the deadline has passed” box if you want to allow students to visit during your office hours if they missed the scheduling deadline.

3. Click the “Add Location” button to set appointment location(s). Multiple locations can be set. You must have at least one location available to offer appointments in NYU Connect.

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### NYU Connect

**Basics**

Please choose your default settings for your office hours block. You can change these whenever you add a block of office hours.

- **Minimum Appointment length**
  - Default: 15 minutes

- **Scheduling deadline**
  - Options: None, 5:00 pm the day before the office hours, 9:00 am the day of the office hours, 1 hour(s) before the office hours

- **Allow drop-ins after deadline has passed**

### My Locations

Enter locations for your meetings with students. Meetings can be in an office, online, over the phone, or anywhere else you like.

- **Add Location**
- **Type:** Office
- **Name:** 10 Astor Place
- **Instructions:** Take the elevator to the 3rd floor. Room is 3rd door on the left.
4. First select a type, then enter the location name.
   ○ Instructions should give information about where to find you, and must be less than 100 characters. You will have another opportunity to enter instructions for the student, when you set-up office hours.

5. If someone else manages your calendar or make appointments for you, scroll down to the “Calendar Managers” section. Click the “Add Calendar Manager” button to add them to your calendar.

6. Start typing a user’s name. Search results will begin to populate. Select a user from the search results and click “Submit”.
   ○ The list of users is comprised of NYU Connect users that are not assigned the “Student” role.
   ○ If you do not see the person you are looking for, email nyuconnect@nyu.edu to request the “Calendar Manager” role (for staff or grad students) or “Student Calendar Manager” role (for undergraduate student workers).
   ○ Repeat this process to add more calendar managers.

   b. To remove calendar manager, go to the Calendar Manager page of your Profile and use the delete icon (circle with an x).
Institutional Profile

1. Click on the “Institutional Profile” tab.
2. Your ID card photo has been imported. You can change it - be sure the photo is 200x200 pixels.
   ○ If you do not want a photo displayed, email nyuconnect@nyu.edu and the Support Team will replace your photo with the NYU Torch.
3. Set your desired Login Page.
   ○ If you typically create flags, kudos or notes → Students > My Students.
   ○ If you typically view/manage flags, kudos or notes → Students > Tracking
4. Add your title. This is what students sees if you are in their Success Network.
   ○ If you leave your title blank, students will see the roles you have in NYU Connect (which can be confusing!).
5. You can add an alternate email and/or your cell phone number. This is optional.
6. In Biography and General Information, we encourage you to enter details about yourself. Students see this information if they are connected to you in NYU Connect. You may want to enter what you can assist students with, a bit about your education/research interests/background, etc.
7. Click "Submit".
Office Hours

Create Office Hours

1. Click the hamburger menu, then “Appointments” and then click the “Office Hours” link to add office hours.

2. Customize your office hours by completing the following:
   a. Add a title for your office hour block.
      ○ Students see this title on your profile and when they are scheduling with you.
   b. Choose certain days, times and locations for the office hours to occur.
   c. Specify the Office Hour type (this displays to students) and the minimum and maximum appointment lengths (this does not display).
   d. Include additional information in the “Instructions” box.
e. Click the “Start/End Date” box to set dates for when your Office Hours should begin and end for the term. Click “Submit”.
   ○ In order to set a “Start/End Date,” Office hours must be set first.
   ○ Users can opt to set office hours through the end of the term, the end of the day based on a specific date, or after a certain number of occurrences. Note that the calendar integration is for 80 days in the future, so you may want to take this into account when you decide how far out to offer office hours.
Edit Office Hours

1. Click the hamburger menu, then click “Appointments”.
2. Find an existing Office Hour block, and hover over the office hours menu icon next to the title. This will open the Office Hours pop up card.
3. Click “Edit”.

![Office Hours Block]

4. An “Edit Office Hours” display page appears. This is the same page with the options you used to set up the original block.

![Edit Office Hours Page]

5. Make edit(s) as necessary and then click “Submit”.

![Submit Button]
Cancel Office Hours

1. If you are unable to hold office hours you already set up, you can either:
   ○ Add a hold on your GCal which will remove your NYU Connect availability if you do not have appointments scheduled during the block, or
   ○ Cancel the office hour block(s) in NYU Connect so you can send a message to student(s) scheduled during that time.

2. To cancel in NYU Connect:
   ○ In the Appointments Screen, using the daily or weekly view, hover over the office hours menu icon next to an office hour title to open the Office Hours pop up card. Click “Cancel”.
   ○ If the block is a part of a series, you have the option to cancel one occurrence or the entire series.

3. Send a message to the student(s) that have appointment(s) in the block.
Schedule an Appointment

1. Schedule an appointment from the Student’s Folder by clicking the “Appointment” button.

2. Enter appointment details.

3. The information you enter in the “detailed description” field will be a part of the email and GCal invite the student receives.

4. Click “Submit”.
   - You and the student will receive an email confirmation and GCal invite.
Meeting Outcomes and SpeedNotes

1. Open the student’s folder you are meeting with. Click the “Meetings” menu item from the options on the right.
2. Find the appointment and hover over the calendar icon. Click “Outcomes”.
   - If the start/end time differs from the meeting time, you can enter the actual start/end here.
   - If the student missed the appointment, check the “Student missed appointment” - this will trigger an email to the student letting them know to reach out to you to reschedule.
     i. Default email:
        
        **Subject: Missed Appointment**

        Dear [Student First Name],

        We noticed you missed your appointment with [provider name/person they had an appointment with - full name]. It’s okay, we know things can pop up last minute, but we encourage you to log in to NYU Connect and reschedule the meeting for another date/time.

        Your success matters! [NYU Connect](#) is filled with features that are designed to help you find your way through NYU. If you have any additional questions, please do not hesitate to contact the Office of Student Success and connect with a Specialist.

        Sincerely,
        The Office of Student Success
        [studentsuccess@nyu.edu](mailto:studentsuccess@nyu.edu)

     ii. If you want the system-generated email to be sent to the student, also check the “Send a copy of note to student” and enter a note there. This will be sent to the student.

     o You can use the “Comments” box to write a narrative/notes from the meeting. You can opt to send this to the student by checking the box above, but the default is that this is not sent to the student.
3. Click the “SpeedNotes” tab.
4. You can opt to check any/all of the items discussed.
   a. These are not required, but encouraged.
   b. This will not be sent to the student.
5. Click “Submit”.

Student Experience/Guide for Scheduling

Should you need information on the steps for how a student can set-up an appointment in NYUCConnect, visit the student page of NYU Connect.