Advisor and Student Services Professionals
Training Guide: Offering and Booking Appointments

Before your first time using Connect for appointments, make sure you have completed the steps in the Create Your Profile and Set Your Preferences guide.

Office Hours
Create Office Hours
“Office Hours” let students know when you are available to meet with them. You must have at least one office hours block/availability set up in order for the Scheduling feature to be available for your students. You can make as many office hours blocks as you want. Perhaps you offer different days/times during registration, or shorter appointments on certain days, or drop ins on Fridays...all these would be a new block.

1. Click the hamburger menu>Appointments >Office Hours button.
2. Add a title for your office hour block. Students see this title on your profile and when they are scheduling with you.
3. Choose certain days, times and locations for the office hours to occur. Tip! For best syncing results, set up blocks for each day of the week, rather than one block recurring multiple times a week.
4. Specify the Office Hour type (this displays to students) and the minimum and maximum appointment lengths (this does not display). If your lengths are the same, that will be the length of the appointment. If they are different, the student can select how long they want to book with you.
5. Include additional information in the **Instructions** box, such as what to have prepared for the meeting. This should be general enough that it will apply to every student who books within this block (you can enter individual instructions when making an appointment).

6. Click the **Start/End Date** box to set dates for when your Office Hours should begin and end for the term.
   a. You must set an end date!
   b. You 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.
   c. Note! Connect will only pull in GCal events 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.

7. Click **Submit**.

**Edit Office Hours**

*If you need to change details of the block, such as dates or instructions. Note you cannot edit the days/recurrence. If that needs to change, you should cancel the block and create a new one.*

1. Click the hamburger menu, then click **Appointments**.
2. Find an existing Office Hour block, and hover over the **office hours icon** next to the title. This will open the Office Hours pop up card.
3. Click **Edit**.
4. An **Edit Office Hours** display page appears. This is the same page with the options you used to set up the original block.
5. **Make edit(s)** as necessary.
6. Click **Submit**.

**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.
○ *Do not decline or cancel your block in GCal* as the student will not receive a notification of the cancellation.

2. To cancel in NYU Connect
   ○ In the Appointments Screen, using the daily or weekly view, **hover over the office hours 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 an appointment(s) in the block letting them know how to reschedule or any other details.
Appointments

Students can schedule directly with you! Add your Link to schedule with me (found in your Profile) to your email signature. Note that your scheduling link will not work if you click on it (as you are not a student who can make an appointment with you!). You can also schedule an appointment with a student directly.

Schedule an Appointment

1. While on the student folder, click the Appointment button.
2. Enter the day and start/end time. Note that Connect will check the appointment against your GCal so you will not be able to double book yourself. If the appointment falls within one of your designated office horus blocks, you will be able to schedule.
3. Select the location.
4. Choose a reason (this is the same list of reasons a student gets when they book with you).
5. If the appointment is regarding a specific course the student is currently enrolled in, you can select from the dropdown.
6. Use the detailed description field to add notes for the student that will be a part of the email and GCal invite the student receives.
7. Click Submit.
8. You and the student will receive an email confirmation and GCal invite.
Meeting Outcomes and SpeedNotes
Use this feature during your meeting to take notes about what was discussed. You can opt to send long-form notes to the students as a way to confirm action items and follow up plans, and the SpeedNotes to document what was discussed in the meeting quickly.

1. Click the Meetings menu item from the options on the right in the student's folder.
2. Find the appointment and hover over the calendar icon.
3. Click Outcomes.
4. If the start/end time differs from the meeting time, you can enter the actual start/end times here. Great for reporting!
5. If the student did not show up, check the Student missed appointment - this will trigger an email to the student letting them know to reach out to you to reschedule. Also useful for reporting! Here is the email the student will receive:

   **Subject:** We missed you at your appointment!

   Dear [student chosen name],

   Since you missed your appointment with [name] make sure to take a moment to reschedule in NYU Connect for another date and time to ensure you get the support you need.

   If you run into trouble viewing their availability, send [name] an email directly from your Success Network in NYU Connect. Additionally, the NYU Connect team in Student Success is here and happy to help with issues you may run into with NYU Connect - we are just an email to nyuconnect@nyu.edu

   In success,
   The NYU Connect Team
7. 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.

8. Click the **SpeedNotes** tab.

9. **Check any/all of the items discussed.**
   
   a. These are not required, but encouraged.
   
   b. Use these to cut down on the narrative notes if/as appropriate.
   
   c. This will not be sent/visible to the student, but will be displayed to others who have access to see the student's appointments (other advisors, etc).

4. Click **Submit**.

**Student Experience/Guide for Scheduling**

- Check out the student guide here.

**Notes on Google Calendar (GCal) Integration**

- Always cancel/edit invites from the system of origin. If you need to cancel/edit Connect Office Hours, do so in Connect.

- Make sure every recurring event - whether office house in Connect or a recurring meeting on your GCal - has an end date. Recurring invites without end dates tend to break the 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).
  
  o 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 - even if you deleted the event!
● 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 the **Link to schedule an appointment with me** under your Profile Settings.

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**Have questions? Want a 1:1 walk through? We are here for you!**

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