Overview

The Student Appointment Scheduler (SAS) is intended to allow users to create, maintain, and adjust blocks of available time within an online calendar. Students may then access this calendar in order to schedule, cancel, and/or view appointment times associated with the different types of appointments available.

Steps

Accessing SAS

1. Log into AdRx from One.IU.
   1.1 Navigate to one.iu.edu.
   1.2 In the Search bar, type, "AdRx" or "advising records" and press ENTER.
   1.3 Click on the Advising Records (AdRx) task.
   1.4 If you are not currently signed in with your CAS credentials, enter your Username and Passphrase when prompted.
   1.5 Proceed with your method of Duo authentication.
   1.6 At the AdRx login page, click Faculty/Staff Login.
2. From the AdRx main page, click My Calendar.
Most users only have only one profile; however, if you do have multiple profiles, you will see your list of profiles in the colored boxes. For example, if you advise in two different departments, you may have a separate AdRx profile for when you serve in each role. When setting appointments, you will be able to select which profile you would like the appointment attached to.

All users have at least one profile, which includes a role that have specific features associated with it. Some features require setup or can be personalized by the user under My Current Profile in the AdRx main page. You can set a personal nickname for your profile, add and access frequently used URLs, include your advisor bio to display for students in the Appointment Scheduler, and more. For more information see the AdRx My Profile document.

Appointment Restrictions

You have the ability to create and delete restrictions that can then be applied to appointment times. Restrictions will only allow students who fit into the parameters to schedule an appointment during that time.

1. To set a restriction, from the Student Appointment Scheduler page, click then Create/Delete Restrictions.
2. Provide a name for your restriction and select from any/all of the parameters you would like associated with that restriction.

3. As you add restrictions, they will display on the right of your screen. You can view the details of the restriction, as well as delete an existing restriction.
Setting Up Your Calendar

When setting up your calendar, you have the choice between looking at an individual day, a week at a time, or by month. Simply select the button in the center of your screen. Please note that appointment blocks cannot be set from the month view.

Navigation between months is available using the calendar in the right corner of your screen.
Setting an Appointment Block

1. To set an appointment, click on any 30 minute box on the calendar. A quick add box will display allowing you to select the type of appointment.

   - Selecting **Appointment** (in-person appointment), **Phone**, or **Online** will allow one student to schedule an appointment of that type with you during that time.

   - **Walk-In**: This is informational only and a student does not need to, nor can they, schedule. The student needs only to show up at the listed times to see the advisor.

   - **Group** will allow the number of students you have set for that block to meet with you during that time. Selecting the **Group** option displays two additional fields to add a description to the group block and indicate the group size.

2. If you have more than one profile, you can select which profile the appointment block is for. If you have only one profile, your default will be this profile.

3. If **Appointment**, **Walk-In**, or **Group** type is selected, choose a building option from the **Building** drop-down. You may also enter a room number using the **Room # (optional)** field.

   - If a ‘Building’ and/or ‘Room’ has been added to your Admin AdRx Profile, this location will be the drop-down default.

   - If the building you are searching for is not in the drop-down, you may select **Building Not in List** and then enter the details into the **Room #** field. The **Room #** text will be displayed to students as the location.

4. You may then click **Create** to add the appointment to your calendar or click **Advanced Options** if you would like to make the appointment longer than 30 minutes, make it a repeating appointment, or apply a restriction.
If **Advanced Options** is selected, the **Create Slot(s)** section is displayed:

The time for the appointment can easily be modified in the start and end time boxes and restrictions can be applied by simply checking the box next to the restriction.

When checking the box **Set Appointment to Repeat**, a dialog box will appear with a drop-down list with three repeat options.
If you select **Every Day** or **Every Weekday**, you will have the ability to set begin and end date for the repeating appointment.

If you select **Weekly**, you can select what days of the week you would like appointment block to repeat on, as well as what the begin and end dates are for the repeat.
Viewing Your Appointments and Scheduling Appointments

Appointments can be viewed by the Day, Week, or Month. With the **Day** and **Week** views you can see the time allotted for each appointment, an icon indicating the type of appointment, if a restriction has been applied to the appointment block, and the advisor profile indicated by its respective fill color.

The 🗒️ indicates that the appointment block is a regular in-office appointment.

The 📞 indicates time allotted for a phone appointment.

The ⏰ designate time allotted for drop-in hours.

The 🌐 indicates an online appointment block.

The 🔗 designates time allotted for group appointments.
The icon indicates that a restriction was placed on that appointment block. You can see the restriction and have the option to remove it by hovering the mouse over the lock.

Clicking on an existing appointment displays options to delete it, schedule a student during that time, or edit it.

When selecting the Month view, you will see the calendar for the month with a listing of how many open appointment blocks you have and how many scheduled appointments you have for each day. Clicking on a specific day will take you to the Daily view.
Scheduling an Appointment for a Student

1. Click on the desired existing appointment block in the Student Appointment Scheduler. The Appointment Slot dialog box is displayed; click Schedule For Student.

2. Enter in the student ID, name, or username and click Search.

3. From the search result(s), click anywhere in the row containing the intended student’s information.
4. Enter in the reason for the appointment in the **Purpose of Appointment** free-form text field and click **Continue →**.

5. Verify the appointment information and click **Create Appointment**.

**Viewing, Deleting, or Editing an Existing Appointment**

If you have scheduled an appointment for a student, or a student has scheduled to meet with you during an appointment block, their name will appear in the box in the Student Appointment Scheduler. Clicking on the block will provide additional details.
1. If you wish to cancel the appointment, click **Cancel For Student**.

   ![Cancel for Ima Student](image)

   **Reason for cancelling appointment:**
   (Will create an AdRx note and send an email to student)

   **When:** 08:00am - 08:30am
   **Appointment Type:** Appointment
   **Student Id:** 0000001111
   **Phone No:** 999/999-9999
   **Reason:** Advisor meeting
   **Profile:** Test Advisor

   ![Keep appointment](image)
   ![Cancel appointment](image)

2. Enter in the reason for the appointment cancellation and click **Cancel appointment**.

   To edit the appointment, you can click **Edit** in the box with the student information. From the **Edit Appointment** screen, you can change the appointment date and time, type, profile, location, and purpose.

   ![Edit Appointment](image)