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 view available appointment times and schedule or cancel appointments.

For information on accessing a team member’s SAS calendar in an effort to assist with advising scheduling, see the SAS Team Calendar Management guide.

Contents

How to Access SAS ........................................................................................................... 1
How to Create Appointment Restrictions ........................................................................ 3
Setting up the Calendar View ......................................................................................... 4
How to Create an Appointment Block ............................................................................ 4
Viewing Appointment Blocks and Scheduling Student Appointments ......................... 7
  How to Schedule an Appointment for a Student ....................................................... 9
  How to View, Cancel, or Edit a Scheduled Student Appointment .......................... 10

Steps

How to Access SAS

1. Navigate to one.iu.edu.
2. Search the term “AdRx” or “advising records”.
3. Click on the Advising Records (AdRx) task.
4. If you are not currently signed in with your CAS credentials, enter your Username, Passphrase, and method of Two-Step Duo authentication.
5. At the AdRx login page, click Faculty/Staff Login.
6. From the AdRx main page, click My Calendar.
The Student Appointment Scheduler main page is displayed. Your AdRx profile is displayed in the box located next to your name.

Some users have multiple profiles (each profile instance displayed with a different box color). 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 has specific features associated with it. Some features require setup or can be personalized by clicking My 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 that is displayed for students in the Appointment Scheduler, and more. For more information see the AdRx My Profile document.
How to Create Appointment Restrictions

You have the ability to create restrictions that can then be applied to appointment times. Restrictions allow only those students who fit within selected parameters to schedule an appointment during that time.

1. To set a restriction, from the Student Appointment Scheduler main page, click Manage Restrictions, then click Create/Delete Restrictions.

2. Provide a name for your restriction and select from any of the parameters you would like associated with that restriction.

Existing restrictions are displayed on the right. Hovering over the restriction will display a details pop-up, which also provides the option to delete the restriction.
Setting up the Calendar View

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 appropriate button in the center of your screen. Please note that appointment blocks cannot be set from the month view.

How to Create an Appointment Block

1. To create an appointment block, click on any 30-minute segment in the day or week view.

2. Select the type of appointment:
   - Selecting **Appointment** (in-person), **Phone**, or **Online** will allow one student to schedule an appointment of that type with you during that time.
   - **Drop-in** 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 that time. Selecting this option displays two additional fields to add a description to the group block and indicate the group size.

3. If you have multiple profiles in AdRx, you can select which **Profile** to use for the appointment block. If you have only one profile, it is pre-selected.

4. For **Appointment**, **Drop-in**, and **Group** types 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 pre-selected.
   - 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. This text will be displayed to students as the location.

5. 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 **Advance Options** is clicked, the **Create Slot(s)** page is displayed:
The time for the appointment can easily be modified in the start and end time fields.

Restrictions can be applied by simply checking the box next to the restriction.

Checking the box **Set Appointment to Repeat** will display a dialog box with a drop-down list of three repeat options.

If you select the **Every Day** or **Every Weekday** repeat option, you have the ability to set the begin and end dates for the repeating appointment.

If you select the **Weekly** repeat option, select what days of the week you would like appointment block to repeat and indicate the dates to begin and end the weekly repeat.
Academic Advising
Student Appointment Scheduler

Viewing Appointment Blocks and Scheduling Student Appointments

As mentioned, appointments can be viewed by the day, week, or month.

Selecting the **Day** or **Week** view allows you to see the time allotted for each appointment block, an icon indicating the type of appointment, if a restriction has been applied to the appointment block, and the advisor profile selected for the block (indicated by its respective color).

- 🗓️ indicates that the appointment block is a regular in-person appointment.
- 📞 indicates time allotted for a phone appointment.
- 🕒 indicates time allotted for drop-in hours.
- 📩 indicates an online appointment block.
- 🗣️ indicates time allotted for group appointments.
- ⛔️ indicates that a restriction was placed on that appointment block. Hovering the mouse over the lock displays a restriction details pop-up, which also provides the option to remove the restriction.

If the SAS user has enabled the option to push Outlook Appointments to SAS, their Outlook appointments are displayed with this icon and a light blue background fill. This display is to assist with scheduling decisions; these appointments cannot be edited in SAS.
Selecting the **Month** view will display a calendar with a listing of how many open appointment blocks you have and how many scheduled appointments you have for each day of the month.

Clicking on a calendar day will take you to the day view.

Clicking on an appointment block (when viewing by the day or week) displays its details, provides the ability to schedule an appointment for a student during that block, and allows you to delete or edit the appointment block.
How to Schedule an Appointment for a Student

1. Click on the desired existing appointment block in the Student Appointment Scheduler to display the scheduling dialog box.

2. Click **Schedule For Student**.

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

4. From the search result(s), click anywhere in the row containing the student’s information.

5. Enter in the reason for the appointment in the **Purpose of Appointment** free-form text field and click **Continue**.

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

The appointment is now scheduled and the student is sent an appointment confirmation email.
How to View, Cancel, or Edit a Scheduled Student Appointment

If you or a student scheduled an appointment during an available block, the student’s name will appear in that block in the Student Appointment Scheduler (group appointments display a count of scheduled students).

Clicking on the scheduled appointment will display additional details and provides the ability to cancel, mark as a no-show, or edit the appointment.

- To cancel a scheduled appointment, click **Cancel For Student**, indicate the reason, and submit the cancelation.
• In the event the student does not show to the appointment and you wish to mark it as such, click **No-show**, indicate the reason to mark the appointment as a no-show, and submit the update.

• Clicking **Edit** displays the *Edit Appointment* pop-up, where you can change the scheduled appointment date and time, type, profile, location, and/or purpose.