End User's Guide to
Spartan Success Network (SSN)

SPARTAN SUCCESS NETWORK

Powered by Starfish® Connect
Version 3.1

Purpose

This document provides guidance on setting up your office hours in Spartan Success Network (SSN), making appointments with students, and documenting outcomes. It is intended for staff members who will manage a calendar in SSN to make, edit, and document student meetings.

Related Resources

For the latest FAQ and tips for using these features, please visit SSN Help by clicking the **Help** link to the right of your profile link on your SSN Home page.

Browse the help library by navigating through topics on the left-hand side of the screen or use the search bar at the top of the help library to search for answers to your questions.

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Important Definitions

- **Appointment:** A documented set of details shared between a student and a calendar owner (e.g. advisor, instructor) about a planned meeting. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.

- **Appointment Type:** Grouping of appointment reasons and activities (i.e., SpeedNotes) that a common set of roles can add and/or view. Your Spartan Success Network (SSN) administrator will create appointment types and associated reasons and SpeedNotes that will be available to you based on your role. You may be able to use appointment types to allow different groups of students to see different office hours on your calendar.

- **Calendar attachment (iCal):** Attachment to an emailed calendar invitation that allows a user to accept or decline from his/her email client (e.g., Outlook, Google). iCal is the industry standard to communicate meeting information between online calendaring software.

- **Calendar Manager:** A SSN user who can see and edit another user's SSN calendar. A calendar owner can designate his/her own calendar managers by navigating to Profile > Appointment Preferences. Or, a SSN Admin can batch upload these relationships.

- **Calendar Owner:** The SSN user associated with a SSN calendar. The calendar owner can add office hours and make appointments with students on his or her calendar. Only users with staff roles are calendar owners. Students do not own calendars in SSN.

- **Group Session:** Similar to Office Hours, but more than one student can sign up for this particular block of time. The Calendar Owner decides how many students can sign up for each Group Session.

- **Meeting:** A documented occurrence of a meeting between a student and a calendar owner (i.e., advisor, instructor) that includes details about the outcomes of the meeting. Calendar owners may designate available times for walk-in meetings, or restrict availability to scheduled appointments only. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.

- **Office Hours:** Calendar owners can add blocks of time called "Office Hours" to their calendars to indicate when they are available to meet with students. Calendar owners or calendar managers can add appointments outside the blocks, but students can only self-schedule within the block. Office Hours allow students to sign up for individual one-on-one slots within the time parameters entered by the calendar owner.

- **Outcomes:** Results of a meeting documented on the Outcomes tab of an Appointment in SSN.

- **SpeedNotes:** Activity codes that provide an easy way for staff to document common outcomes of an appointment. Specific SpeedNotes are set up by the institution per Appointment Type.

How Spartan Success Network (SSN) Communicates with your Online Calendar

SSN supports **Two-Way Calendar Communication** via email with most online calendars (e.g., Microsoft Outlook, Google, Entourage). As illustrated below in figure 1, when an appointment is scheduled or updated in SSN, a calendar invitation email (with iCal attachment) is sent to both parties (the student and the calendar owner) and users can accept or decline in their email client.
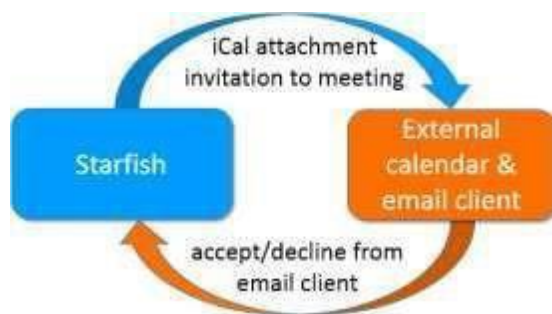

Figure 1: Two-Way Calendar Communication

This two-way communication about **SSN** appointments is automatically available and requires no additional integration or installation.

> **Important Note:**
>
> If your institution has integrated SSN with Exchange or Google, you should update your profile to allow **external** appointments to be visible in SSN. Details are provided in the External Calendar Integration section.

When the SSN Calendar is updated

SSN triggers an updated calendar invitation (iCal) to be sent to the calendar owner when a new or updated block of time is available for student meetings (e.g. when office hours are added).

Both the student and the calendar owner will be sent an iCal when a student appointment is scheduled, changed, or canceled.

Staff users can modify whether or not they receive these notifications in the Appointment Notifications section of their Profiles. SSN highly recommends receiving email notifications for all changes as illustrated below.

When an invitation is canceled or declined

When you cancel or decline a SSN invitation from within your external calendar (e.g., Microsoft Outlook), the cancel/decline is sent to SSN and is reflected on your SSN calendar. Note: you **cannot modify** SSN appointments times in your external calendar. Only Accept, Cancel or Decline are

reflected in SSN. You must elect to "send a response" when declining in order for SSN to be notified of the change.

Users must have calendars that support calendar invitations and iCal attachments, (e.g. Microsoft Outlook or Google Calendar) for this to work.
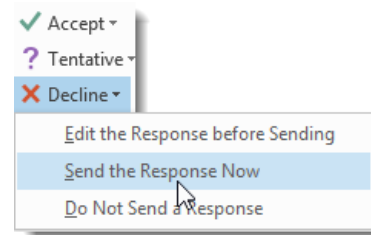
Get ready for students

Before you begin taking appointments with students, you will want to personalize your profile, and set up your availability via office hours or group sessions. Each of these tasks is covered in the sections that follow.

Personalize your profile

Click your name in the top right corner of your Spartan Success Network (SSN) **Home** page to open your **Profile.** Your profile has three tabs: **Institutional Profile, Appointment Preferences** and **Email Notifications**. Click the profile tab name to edit it. Setup for each tab is described below.
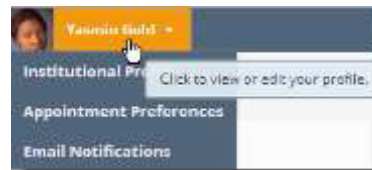
Edit Institutional Profile
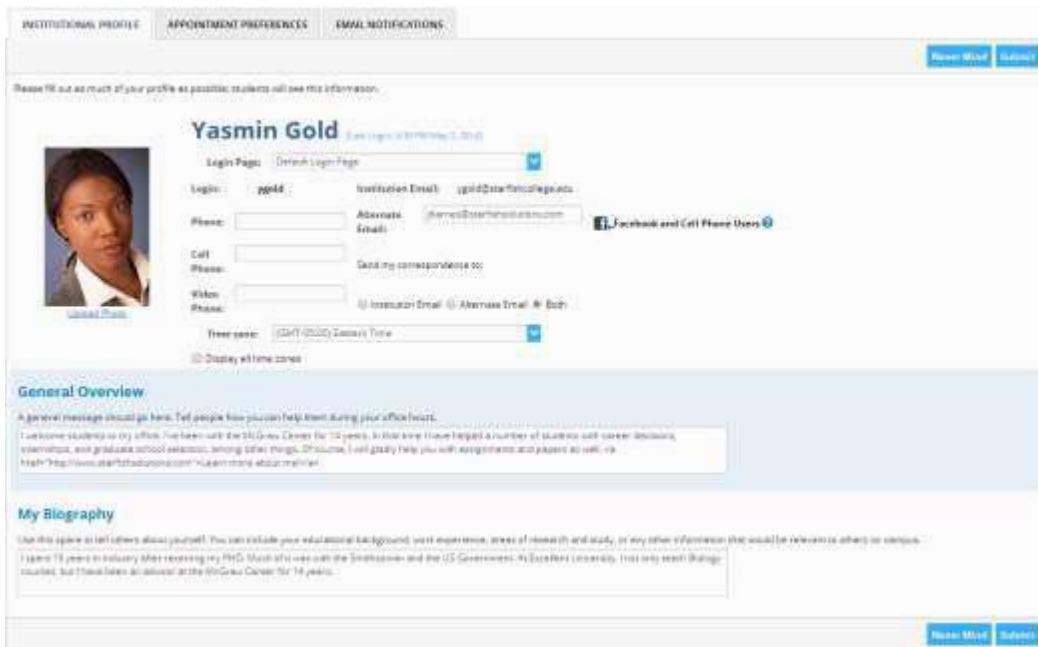
1. Use the "Upload photo" link to add a profile photo. (Your institution may already have added one).

2. Update any contact information that is not pre-populated.

3. If configured by your institution, you can provide an alternate email address in addition to your institutional email for SSN email notifications.

   Institution Email: yasmin@starfishcollege.edu
   Alternate Email: yasmin@gmail.com
   Send my correspondence to:
   ○ Institution Email ○ Alternate Email ◉ Both

4. Write a description about yourself in the **General Overview** and **My Biography** fields.

   General Overview

   A general message should go here. Tell people how you can help them during your office hours.

   I welcome students to my office. I've been with the McGraw Center for 14 years. In that time I have helped a number of students with career decisions, internships, and graduate school selection, among other things. Of course, I will gladly help you with assignments and papers as well. Learn more about me!

   My Biography

   Use this space to tell others about yourself. You can include your educational background, work experience, areas of research and study, or any other information that would be relevant to others on campus. Students are more likely to reach out to you if they know a little about you.

   I spent 15 years in industry after receiving my PHD. Much of it was with the Smithsonian and the US Government. At Excellent University, I not only teach Biology courses, but I have been an advisor at the McGraw Center for 14 years.

   👍**Best Practice:** This is the information that students see when making an appointment with you. A photo and personal information helps students put a face to a name and feel more comfortable reaching out for help.

5. Click the **Submit** button at the top or bottom of the page to save your updates.

Edit Appointment Preferences

This tab defines defaults related to how students can interact with your office hours. Set your preferences before you begin adding Office Hours.

Verify Basic preferences

| INSTITUTIONAL PROFILE | APPOINTMENT PREFERENCES | EMAIL NOTIFICATIONS |

Basics

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

Minimum Appointment length   15 minutes

Scheduling deadline: ◉ 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

1. Select a value for **Minimum Appointment Length**. SSN recommends 15 minutes. This will be used as the default when you set up new Office Hours. (Your institution settings for specific appointment reasons may override your selection when a student makes an appointment).

2. Select a radio button and specify the specific value to define your **Scheduling Deadline**. The deadline is imposed based on the start time of any office hour blocks vs.an individual time slot. If set to 'None,' a student may schedule an appointment with you right up to the time slot.

3. Check the box to "**Allow drop-ins after deadline has passed**" if you wish to include a note in your calendar letting students know that they cannot schedule, but can walk in to your office after the scheduling deadline has passed.

Add Locations

Add all possible meeting locations, including physical offices, phone numbers, chat services, or anywhere else you might want to meet with students. When you build your calendar availability/ add Office Hours, you will select which of these locations apply to each set of hours.
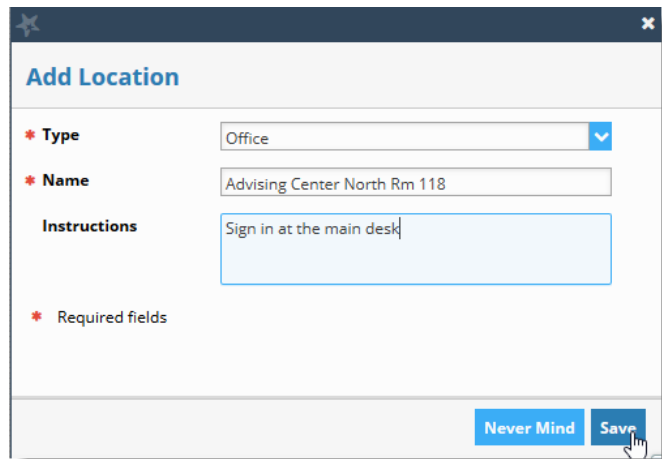
1. Click Add Location.

2. Select the type of location, enter a descriptive name and enter any relevant instructions.
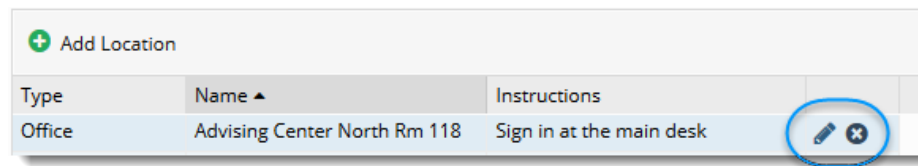
   Students will see this information when scheduling an appointment for office hours that have been designated for this location.

3. Click the **Save** button.

   Repeat this process to add any additional meeting locations.

Use the edit icon (✎) to the right of any location in your list to make changes. Use the delete icon (✖) to the right of any location to remove it.
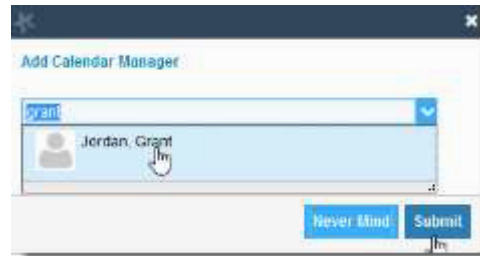
Add Calendar Managers

In the Calendar Managers section of the **Appointment Preferences** tab of your profile, you can designate other users who can see and edit your SSN calendar.

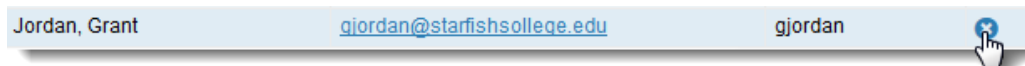1. Click **Add Calendar Manager**.
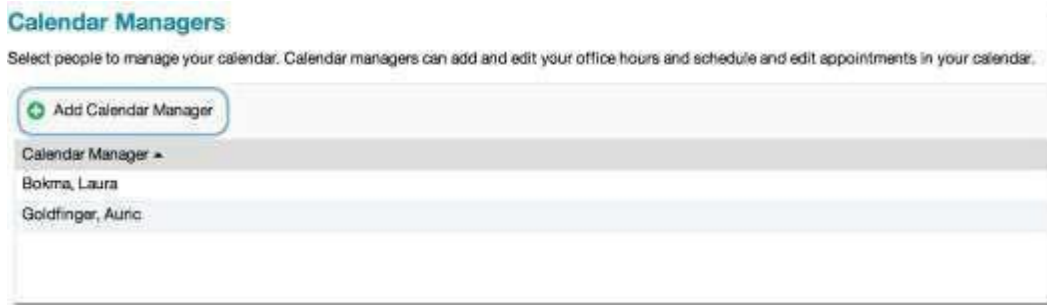
2. Begin typing a user's name. Search results will begin to populate.

3. Select a user from the search results and click the **Submit** button.

   Repeat these steps to add more calendar managers.

   You may return to this page of your Profile at any time to add or remove calendar managers.

   Use the delete icon (circle with an x) to remove a calendar manager.

Important Note:
SSN Administrators can also assign calendar Managers. If you are unable to remove a calendar manager from this area, contact your SSN Administrator.
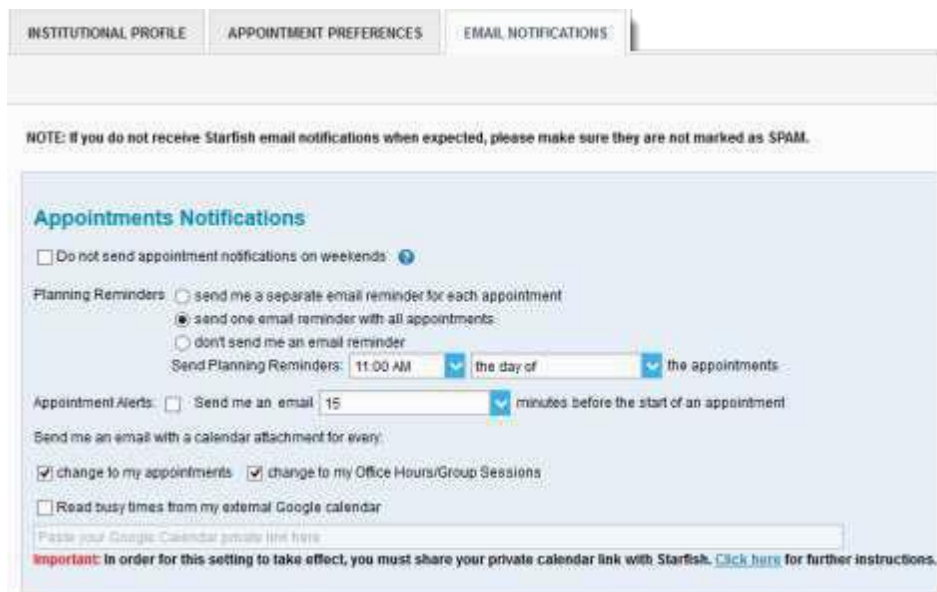
Save Appointment Preferences

When you have made all desired edits to each of your **Appointment Preferences** profile settings, click the **Submit button** at the bottom or top of the Appointment Preferences tab to save your changes.

Edit Email Notifications preferences

You can set preferences for email sent to you from SSN for both Appointments and Tracking Items (e.g. flags, to-dos and referrals).

Verify Appointment Notification settings

Specify if and when you wish to receive Planning Reminders, Appointment Alerts, and calendar attachments. Institution defaults will be used if you don't update these options. Each of these is described below:

- **Planning Reminders**: Receive optional email reminder(s) sent separately for each of the day's appointments, in one email, or not at all. Specify the date and time for reminders.

- **Appointment Alerts**: Receive an optional email reminder sent a certain number of minutes before the start of an appointment.

- **Calendar Attachments**: Receive emails with calendar attachments for schedule

  👍**Best Practice:** It his highly recommended to keep both calendar attachment options checked (change to my appointments and change to my Office Hours/Group Sessions). This ensures that your external calendar (e.g., Outlook, Google, Entourage) receives all of the latest information from your SSN calendar.

- **Read busy times from my external Google** *(or Exchange)* **calendar:** If your institution has enabled integration with Google or Exchange, busy times from your external Google or Exchange calendar can be displayed in SSN. Follow the "Click here" link for instructions to complete your personalized setup.

See the External Calendar Integration section for more details.

Update Tracking Item Notifications

Your SSN administrator has determined which items you will be emailed. Items that may trigger an email to you are listed in the Flag Rules table below your notification options.

You have the ability to customize how you receive those emails including whether you will receive your notifications as a summary email of all recent activity or as individual email for each item. As noted, items marked with the emergency notification icon (❗) will be sent when raised regardless of your settings.

You can also use a combination of both options.

1. Select either the **Daily** or **Weekly** summary option to receive one email at the frequency specified with all relevant activity since the previous summary. Specify the time of day (for daily) or day of week and time of day (weekly).

2. Select the checkbox for each event for which you want an immediate individual email to be sent to you. Events include when an item is raised (or created) when an item is cleared (or closed) and when an item is assigned to you.

👍 **Best Practice:** Combine a daily summary (typically first thing in the morning to ensure it is inclusive of any system-raised flags that were processed overnight) with an immediate email when an item is assigned to you.

Save Email Notification preferences

Click the **Submit** button in the top or bottom right of the Email Notifications page to submit any changes you have made for appointment notifications or tracking item notifications.

Establish your availability

Students can only schedule an appointment at times you indicate are available by adding office hours or group sessions. There are three ways you can add office hours: use the Office Hours Setup Wizard for quick initial setup, use the Add Office Hours button to add additional blocks at any time, or use the Scheduling Wizard to setup multiple office hour blocks that don't follow a consistent recurrence.

Create an office hour block with the Office Hours Setup Wizard

The first time you log in to SSN the Office Hours Setup Wizard will display if you have a role that can be a calendar owner. Use the wizard to quickly create appointment availability.

1. Complete the fields presented to specify:

- **What day(s) do you have office hours?** - check the boxes for each day.

- **What time are your office hours?** - enter a start and end time.

- **Where are they?** - select the **Type** of setting and enter the **Details** in the field provided (e.g. the building and room number of your office).

- If relevant, provide **Instructions** for students who make appointments with you.

2. Click the **Set up Office Hours** button to save your office hours.

A confirmation message will display on the screen.

- To personalize your profile, add locations and other preference, click **Go to Profile>>**

- To add additional office hours, group sessions, reserved time, or to start adding appointments, click **Go to Calendar >>**.

Note: If you choose not to complete the wizard now, but want to use it later, check the box labeled "Show me this Office Hours Setup Page again", and then click the **Close** button.

Add Office Hours

The **Add Office Hours** option is meant for setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the Scheduling Wizard.

1. Click the **Add Office Hours** button on your SSN **Home** page or **Appointments** page.
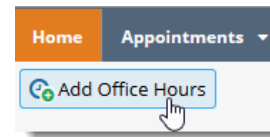
    This opens the **Add Office Hour** form.

2. Enter a **Title** (name) for this block of time. Students will see this name when they view your calendar. The title will also help your or others managing your calendar identify different types of office hours.

3. Select **What day(s)?** and indicate any recurrence (e.g**. Repeats every** 1 week).

4. Use the **What time?** fields to enter the start and end time for the office hours.

Important Note:
Once this office hour block is saved, you will *not* be able to edit the days on which the office hours occur or the type of frequency (e.g. weekly) but you will be able to edit how often the block recurs (e.g. 1 week vs. 2 weeks) and the specific times available.

5. Select **Where?** meetings will be held using the checkbox(es) next to your location(s). If you choose more than one location, the student will be able to choose his/her preferred location for the meeting. To add additional locations options, go to the Appointments Preference page of your profile.

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6. Select the **Office Hour Type** for meetings you will take during this block.

   - Select **Scheduled And Walk-ins** if you will be using the kiosk/waiting room features, and you plan to take walk-ins between appointments.

   - Select **Scheduled Appointments Only** if you will not take any walk-ins.

   - Select **Walk-ins Only** to show the time as available to students, but disallow anyone from making advance appointments

7. Select **How long?** meetings can be by selecting a minimum and maximum duration. If the minimum and maximum are identical, the student will not be given a choice of duration. Note that institution settings for specific appointment reasons, may override your settings.

8. If your role has permissions to add more than one **Appointment Type**, you will see checkboxes that allow you to select which types apply to this block of time. Appointment Types dictate:
   1) which students can schedule during this time (based on the role that connects you),
   2) the appointment reasons shown to students,
   3) which SpeedNotes will display, and
   4) which roles can view the appointment and its notes.

   Note: An appointment type with the recurrence icon (⟳) indicates an **appointment** that recurs on the same date and time for the duration of the term.

9. Use the **Instructions** box to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow Walk-ins.

10. Optionally, click the **Start/End Date** tab to set a time frame for a repeating office hour block. For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.

11. Click the **Submit** button at the top or bottom of the Add Office Hours form to save your Office Hour block.


Edit or Cancel office hours

Edit or cancel a series of office hours from the **Agenda** tab in the **Appointments** section of SSN.
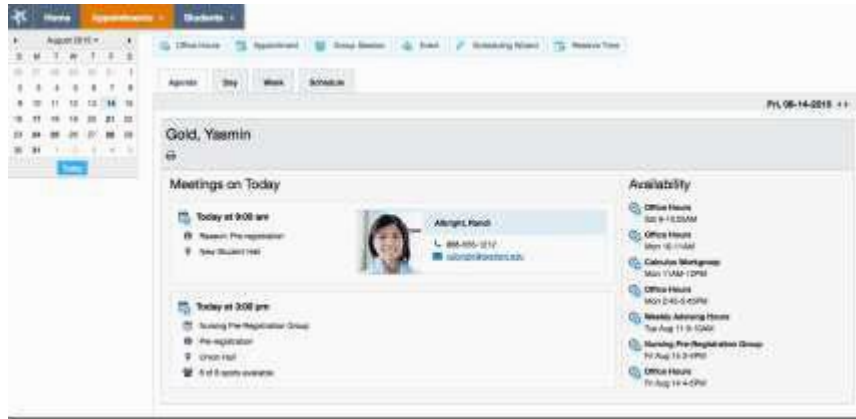
Edit office hours

1. Hover over the office hours menu icon ( ) next to an office hour title to open the **Office Hours** pop up card.

2. Select **Edit Office Hours** to modify: the frequency of the office hour block's recurrence, the time of day, locations, office hour types, minimum and maximum duration of appointments, appointment types, instructions, or a start/end date of the series.

3. Click the **Submit** button on the **Edit Appointment** form to save your changes.
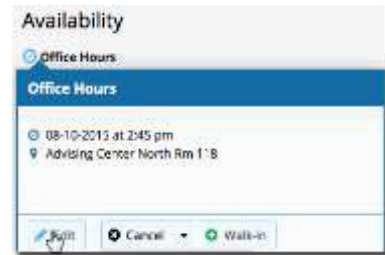
    Notes: You cannot edit the days of the week or the nature of the recurrence (e.g. weekly).

    You cannot modify the time range for a single occurrence of an office hour. Selecting **Edit Office Hours** will modify all occurrences of this set of office hours. To reduce availability within an office hour block on a specific day, add reserved time to cover the part of the office hours you want to remove from availability.

Cancel a series of office hours

1. Hover over the office hours icon ( ) next to an office hour title to open the **Office Hours** pop up card.

2. Click **Cancel**, then click "The entire series" to cancel all occurrences of the office hour block. You will be prompted to confirm the date from which to cancel the series, and to add
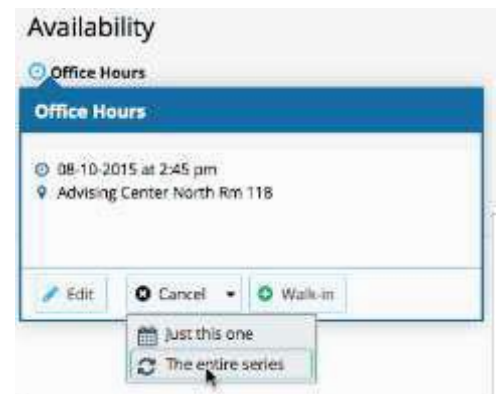
a message that will be sent to anyone who had time scheduled with you during the office hours you are canceling.

3. Click the **Submit** button on the **Cancel Series Confirmation** form to cancel the office hour block.

👍**Best Practice:** include an explanation and provide guidance on how to reschedule or connect to other available resources.

*Cancel a single occurrence of an office hour block*

Cancel an individual occurrence of an office hour series from the **Day** tab of your **Appointments** section of SSN. Use the mini calendar on the left to select the desired day.
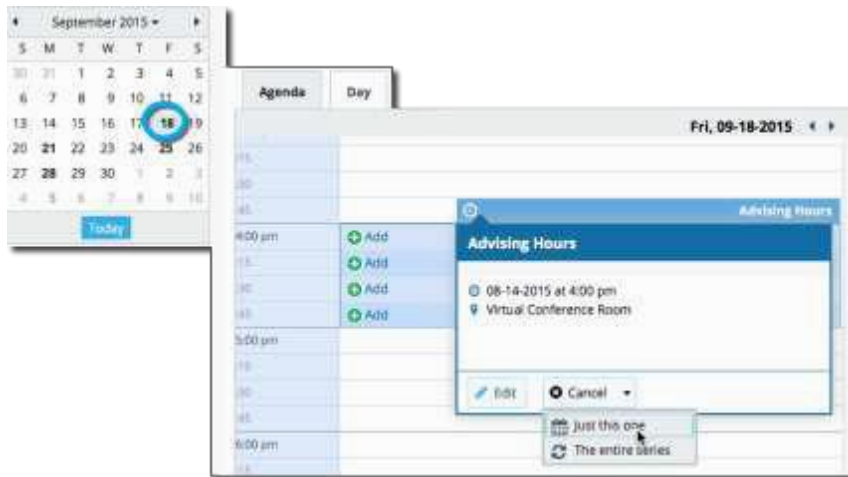
1. Hover over the icon associated with the block of hours for the selected day (🔵).

2. Click **Cancel,** from the pop up card that is displayed then select **"**Just this one" to cancel office hours for the selected day. You will be prompted to confirm the cancellation and can add a note that will be included in an email to those whose appointments are canceled.

👍**Best Practice:** include an explanation and provide guidance on how to reschedule or connect to other available resources.

3. Click the **Submit** button to cancel the Office Hour occurrence.
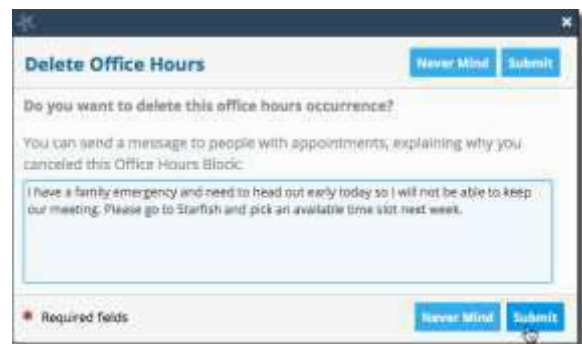
Add less structured office hours (Scheduling Wizard)

Students can only schedule an appointment at times you indicate are available by adding office hours or group sessions. The Add Office Hours option is geared toward setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the Scheduling Wizard.

👍**Best Practice:** This feature is particularly useful for advising rush weeks, midterm course meetings, or other scenarios where you need to hold several different office hour sessions for students within a week or two.

1. Click the **Scheduling Wizard** button from your SSN **Home** page or **Appointments** page.

2. Complete the first page of the scheduling wizard by entering the **Title**, location (**Where?**), duration (**How long?**), **Appointment Types** and **Instructions** that should be applied to *all* of the office hour blocks that are to be created. (You will find additional descriptions of these fields in the Add Office Hours section).

   Note: Any office hour block that does not share these details must be created separately.

3. Click the **Next** button

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4. The date and time page of the wizard is displayed using a Monday through Friday grid for the current week. The date range is displayed in the top right corner of the grid.
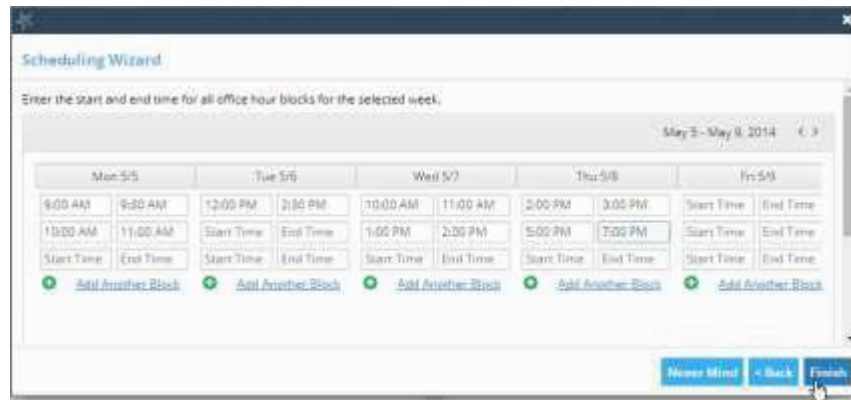
5. Use the < > controls to the right of the date range to navigate to the week in which you want to begin scheduling the office hours.

6. In the selected week, enter the start and end times for each block in the appropriate day columns. You can schedule multiple office hour blocks on any day within the week.

   If you need to schedule more than three blocks on any day, select the "Add Another Block" link in the column for that day.

7. To add blocks to another week, use the < > controls to move to the next week. ***Don't click finish until you've entered all of the blocks!***

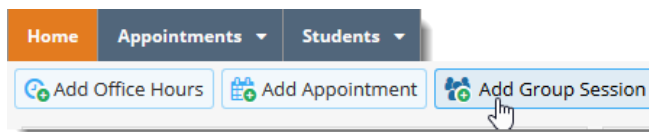8. Click the **Finish** button to create all of the office hour blocks. A summary will be presented.

9. The summary will include a list of hours that could not be created due to conflicts between the blocks you specified and existing calendar items. Make a note of failed blocks before clicking **Finish** to exit the wizard.

Add a Group Session

Group sessions allow you to create blocks of time in which a specified number of students can meet with you as a group. The steps are similar to adding office hours but include selections that are specific to group sessions.

1. Click the **Add Group Session** button from the **Home** page or **Appointments** page.

This opens the **Add Group Session** form

2. Enter a **Title** (name) for this group session. Students will see this name when they view your calendar.

3. Select **When?** the group session will occur and select the recurrence (e.g**. Repeats every** 1 week).

4. Use the **What time?** fields to enter the start and end time for the group session.

Important Note:
Once the group session is saved, you will not be able to edit the days on which the session occurs or the type of frequency (e.g. weekly) but you will be able to edit how often the block recurs (e.g. 1 week vs. 2 weeks) and the specific times.

5. Select **Where**? meetings will be held. To add additional locations options, go to the Appointments Preference page of your profile. Only one location can be selected for a group session.

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6. Select the **reason** associated with this group session. Reasons listed are those associated with the Appointment Types your role has permission to add. If you don't find the reason you expected, contact your SSN administrator.

7. Enter **how many students** (maximum) can sign up for the session.

8. If students should be able to see the names of other students who have signed up for the session, check the box labeled "Allow students to see other students who have signed up".

9. If this group session should be limited to students in the same course/ course section, check the box labeled "Support supplemental instruction". When this option is checked, participants will be limited to the course/course section selected by the first student who signs up.

Important Note:

The supplemental instruction option is most often used with Tutoring Service Calendars. The restriction may be either course or course section based (e.g. restricted to Biology 101 students, or to Biology 101, section 02 students). This depends on options your SSN administrator set for the appointment type associated with your group session reason. Contact your SSN Admin to learn more about this option.

10. Use the **Instructions** box for information that should be shared with students who sign up.

11. Click the **Start/End Date** tab to designate a time frame for the group session if it recurs (as set in step 3 above). For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.

12. Click the **Submit** button at the top or bottom of the form to save your Group Session.

Edit or cancel a group session

Existing group sessions will display on your **Agenda** tab within the **Appointments** section of SSN.
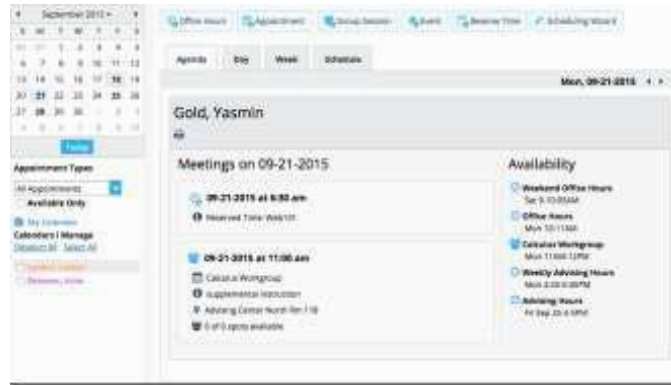
Edit a group session

1. Hover over the group session icon ( ) to open the group session pop up card.

2. Click **Edit** on the pop up card You can edit the frequency of recurrence, time of day, location, reason, number of participants, visibility of students, instructions and the series start/end date.


   Note: You *cannot* edit the days or the nature of the recurrence (e.g. weekly). Some changes are prevented after students have signed up.

3. Click the **Submit** button to save your **Edit Group Session** form.
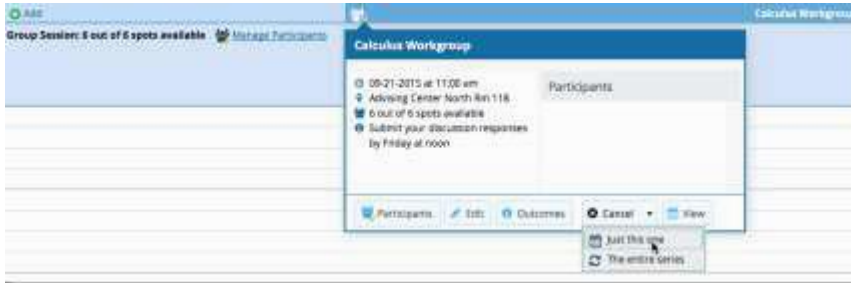
Cancel a group session

1. Hover over the group session menu icon ( ) to open the group session pop up card.

2. Select **Cancel,** "The entire series" to cancel all occurrences of the group session. You will be prompted to confirm the date from which to cancel the series, and can add a note that will be included in an email to those whose sessions are canceled.

3. Click the **Submit** button to cancel the group session series.
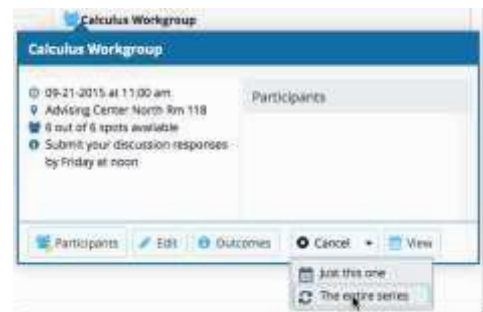
Cancel a single occurrence of a group session

You can cancel an individual occurrence of a group session series from the **Day** tab of the **Appointments** section of SSN. Use the mini calendar on the left to select the desired day.

1. Hover over the edit icon associated with the group session for the selected day ().

2. Select **Cancel,** "Just this one" from the Group Session pop up card to cancel session for the selected day.

3. You will be prompted to confirm the cancellation, and can add a note that will be included in an email to those whose session is canceled.

   Best Practice: include an explanation and provide guidance on how to reschedule a session or connect to other available resources.

4. Click the **Submit** button to delete the group session occurrence.
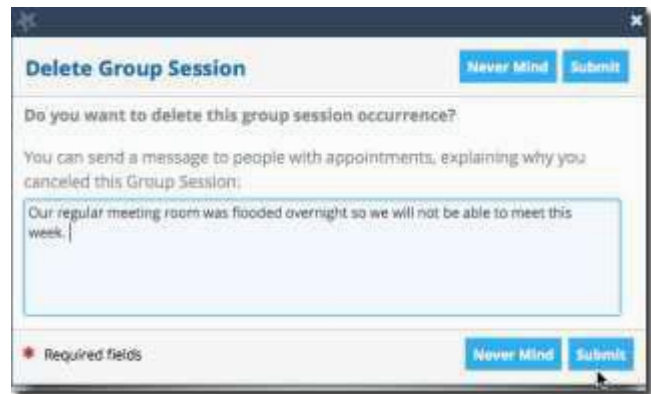
Manage group session participants

You can add or remove participants in an individual group session using the **Manage Participants** link on the **Day** view of the group session.
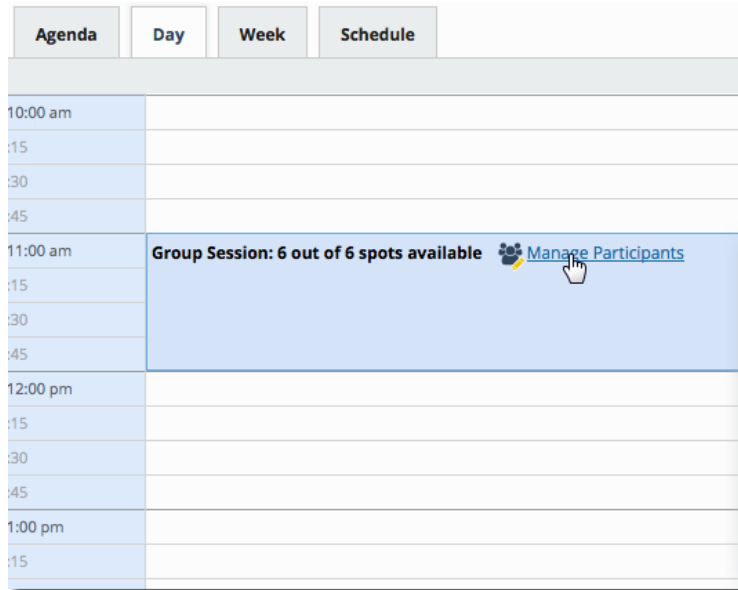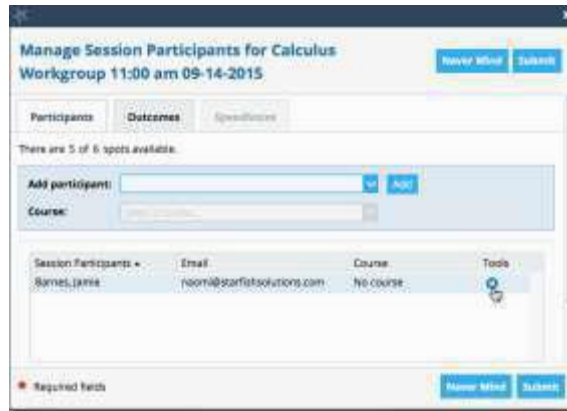

1. Select **Manage Participants.**

2. Search for a student by typing his/her name into the **Add participant** field, then click the **Add** button to add the student to the list of participants.
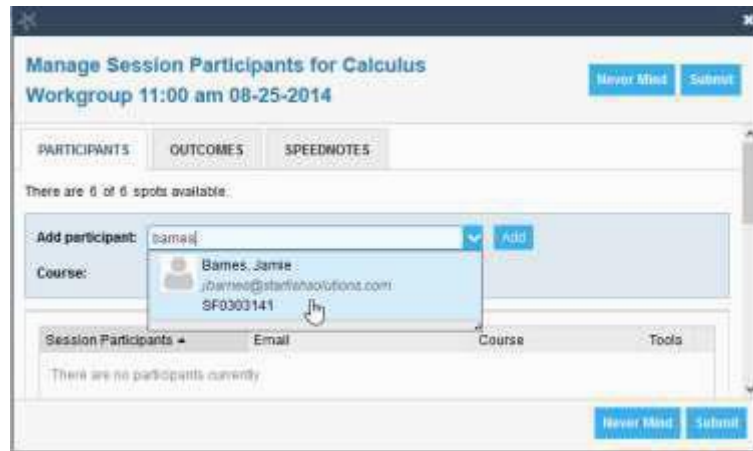
Repeat this process for each student you want to add.

To remove a participant, click the delete icon ( ) associated with the student's name under the **Tools** column.
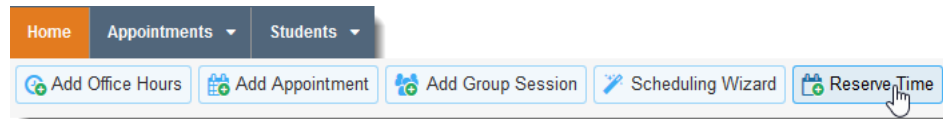

3. When you are finished with your participant updates, click the **Submit** button to save your changes.
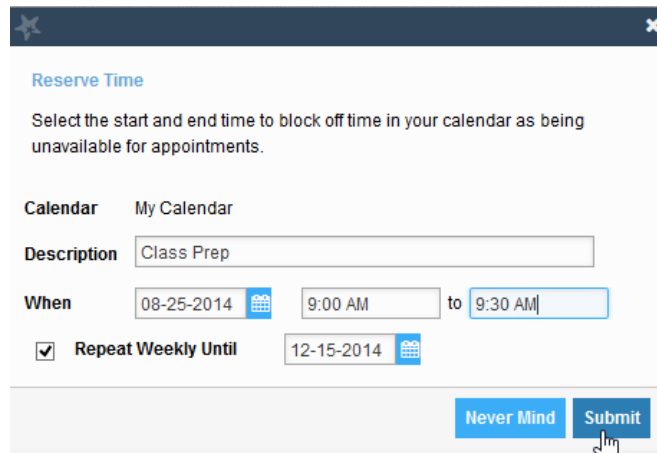
Reserve time on your calendar

Use the **Reserve Time** option to show time on your calendar as unavailable to avoid creation of an appointment during that time.

1. Click the Reserve Time button from the action bar on your **Home** page or **Appointments** page.

2. Fill out the **Reserve Time** form to include a description of the reserved block, the date and time of occurrence. If the block recurs each week, use the "Repeat Weekly Until" checkbox to indicate a weekly recurrence, and select the end date for the block using the date picker provided.

3. Click the **Submit** button to add the reserved time to your calendar.

Make and manage Appointments

Students may only schedule appointments with you during times you have designated as available, either through your office hours or group sessions.

Calendar owners and their designated calendar managers can add appointments wherever they choose with a few exceptions:

- **You cannot overlap a reserved time:** If you use the **Reserve Time** feature to block time on your calendar, you will not be able to add an appointment in the time occupied by the reserved time without first removing the reserved time from your calendar.

- **You cannot overlap a group session**: you cannot add an individual appointment that overlaps with a group session previously added to on your calendar.

- **You cannot overlap an** external hold: If your Spartan Success Network (SSN) calendar is integrated with an external calendar via Exchange or Google integration, you will find "External Holds" on your calendar. These represent items that exist on your other calendar (Outlook or Google). You will not be able to add appointments that conflict with external holds on your SSN calendar.

Add, edit, or cancel appointments on your SSN calendar

Add an appointment to the calendar

1. Initiate a new appointment using either of these options:

- Click the **Add Appointment** button from your **Home** or **Appointments** page.

- Click the sign up icon (⊕) for an existing office hour slot using the **Day** or **Week** view of your calendar on the **Appointments** page.
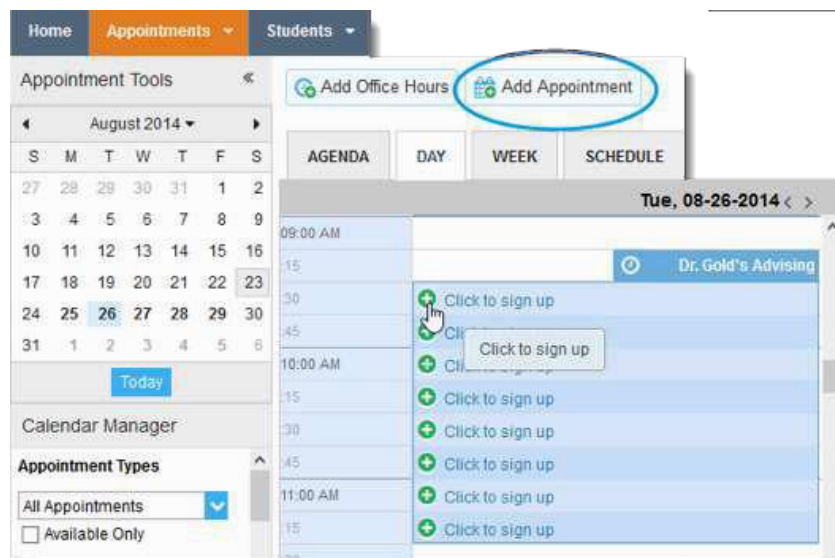
This opens the **Add Appointment** form
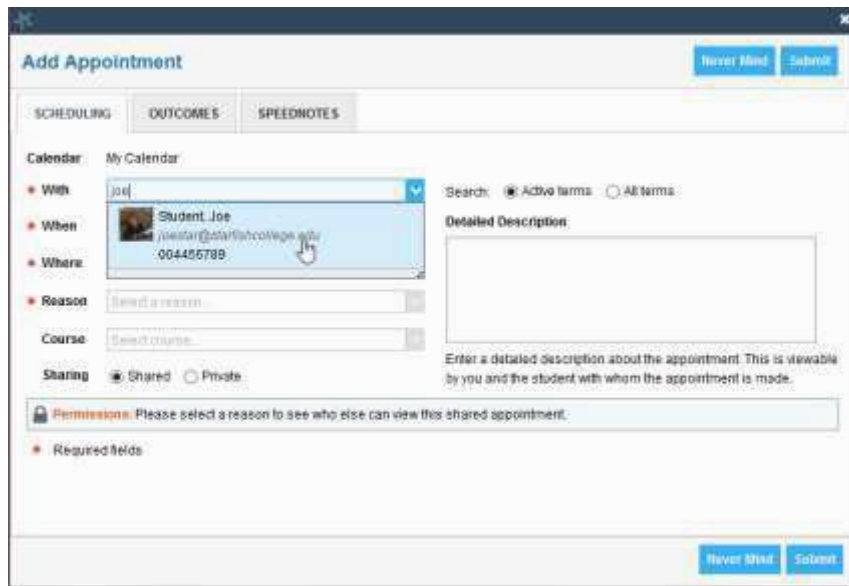
2. Begin typing the name of the desired student into the **With** drop down list box. SSN will find matching students with whom you have a relationship. Select the desired student from the list.

   If you start the appointment from an existing office hour block, the "appointment types" setting in that block may further limit the students available in your list.

3. If you used the **Add Appointment** button rather than selecting an existing time slot, specify **when** the meeting will take place (date, start time, end time).

4. Select the desired location from the options available in the **When** drop down list.

5. Select a **Reason** for the meeting. The reasons available are based on the student you selected and the appointment types that you have access to in your role/ relationship with that student.
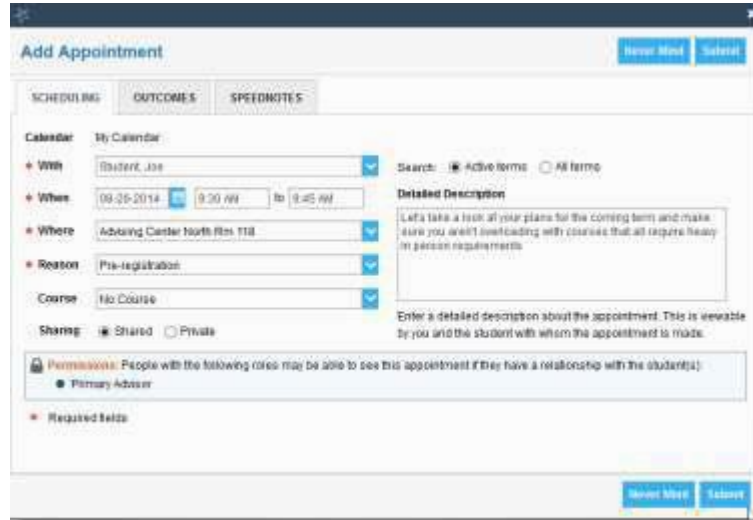
   If you have selected a timeslot from a set of existing office hours, the reasons will be further limited to those associated with the appointment types settings for the office hours.

   > **Important Note:**
   > Each reason is tied to an appointment type. Each appointment type defines which roles may view or modify an appointment of this type, and what SpeedNotes will be available. Once you choose a reason, information about which other roles have permission to see the appointment will be shown in the section labeled **Permissions** (🔒 Permissions:).

6. If relevant to the meeting and permitted by your role, select a **Course** from the list presented.

7. Select a radio button for **Sharing** to either make the appointment **Shared** (roles listed in the Permissions area for this student can see the appointment and its outcomes) or **Private** (only the person with whom the appointment is made can see it).

8. Type a **Detailed Description** for the meeting that will be visible/emailed to you and the student.

👍**Best Practice:** This is optional but recommended to set expectations for the meeting.

9. Click the **Submit** button to schedule the meeting.

The appointment will appear on the calendar owner's calendar in the selected date and time.
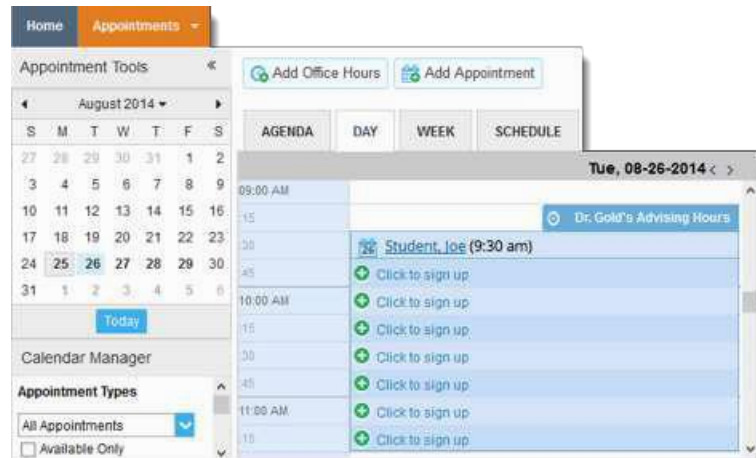
The appointment is also available from the calendar owner's **Home** page on the **Appointments** and **Recent Changes** channel.

The appointment will also appear on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. If you included a detailed description, it will be listed on the Meetings tab.

Both the student and calendar owner will receive an email with an iCal attachment for any *future* appointments. Appointments created to document prior meetings will not send an email. If you do not receive an email, check your Email Notification settings.
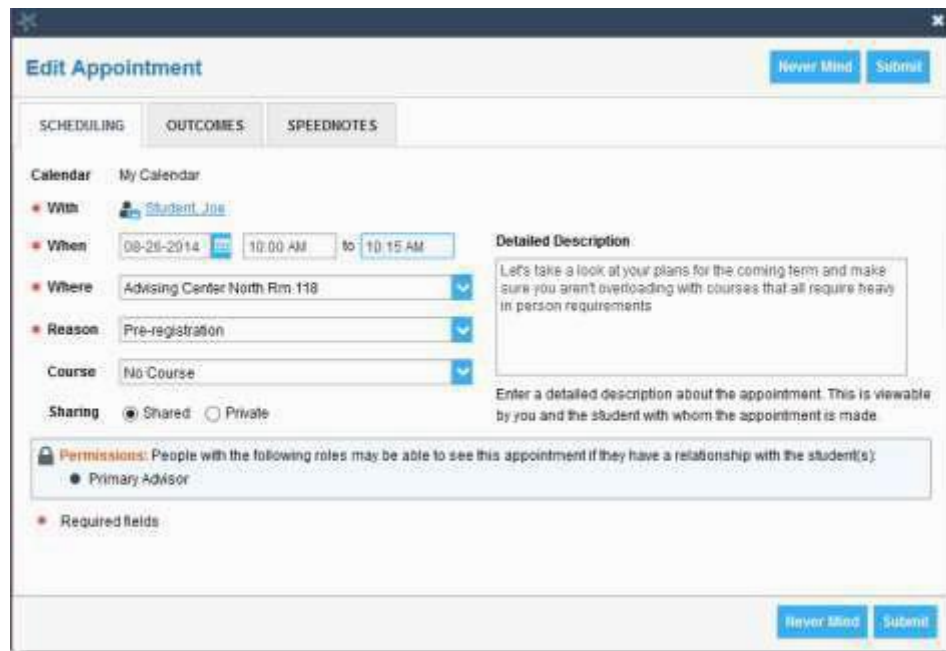

Modify scheduling details of an appointment

1. Hover over the **Appointment** icon (📅) associated with an appointment to open the pop up card and make updates. The appointment is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings** tab.

From the Appointments pop up card you can edit the scheduling details of an upcoming appointment and add or edit outcome details. If configured on your SSN system, you may be able to use SpeedNotes to document common outcomes.

You can also cancel an appointment from this menu.

2. Select **Edit** from the **Appointment** pop up card to bring up the **Scheduling** tab of the **Edit Appointment** form. From here, you can edit appointment scheduling details including:

*   **When** and **Where** the meeting will occur.

*   The **Reason** associated with the meeting.
    Note: This may impact who else can view the meeting, and which SpeedNotes will be available for documenting outcomes.

*   The **Course** associated with the appointment. (optional)

*   The **Sharing** setting for the meeting. Select private if only you, your calendar manager and the student should see this meeting. A shared meeting will be visible to those with a role that has access to the appointment type and a relationship to the student. These roles are noted in the **Permissions** section of the form (🔒 **Permissions:**).

*   **Detailed Description** that is shared with the student and documented on the Meetings tab of the student folder (optional but recommended).

3. Click the **Submit** button to save changes.

An updated iCalendar (iCal) attachment will be emailed to the student. The calendar owner will also receive the updated iCal if the calendar owner's email notificaitons preferences are set to notify when changes are made to an existing appointment (recommended).

Document outcomes from a meeting

1. Hover over the **Appointment** icon (🗓) associated with an appointment.

2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form.

3. Capture the meeting's *actual* start and end time next to the **Date.**

4. If the student is a no-show for a meeting, check the **Attendance** box labeled "Student missed appointment".
   Note: Depending on your institution's settings, this may trigger an email to the student.

5. Add your notes into the **Comments** box.
   Note: Click the **Email** check box labeled "Send a copy of note to student" if your comments should be shared with the student via email.

6. Click the **Submit** button to save your updates.

Your updates will be available in the student folder on the **Meetings** tab for this appointment.

Use SpeedNotes to document common outcomes

SpeedNotes are preconfigured appointment activities that can be checked off to quickly capture recurring meeting outcomes.

If SpeedNotes exist for any appointment types in your SSN system, the **SpeedNotes** tab is available whenever the **Edit Appointment** form is open.
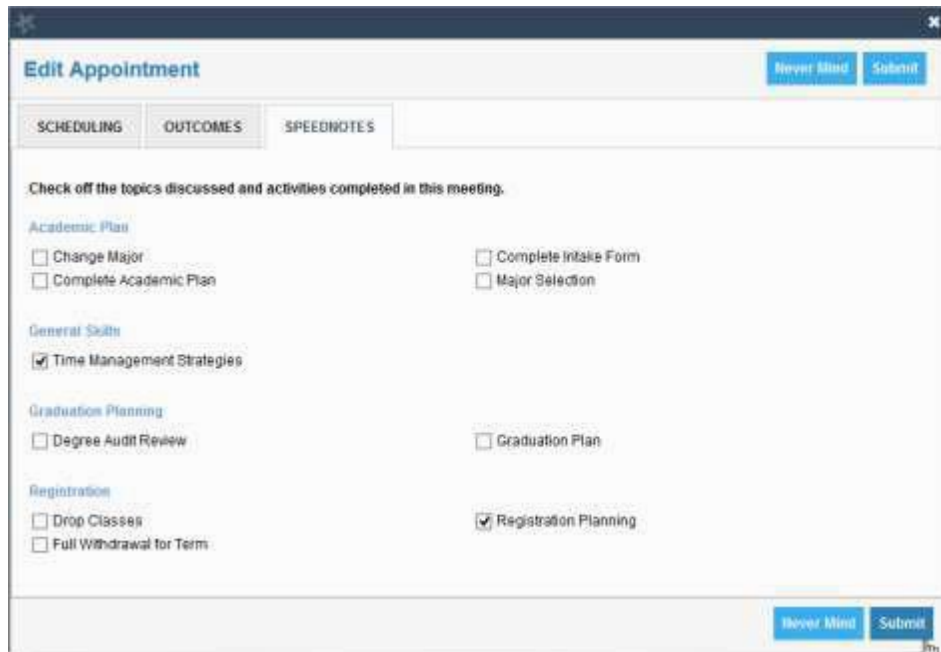
Edit Appointment

| SCHEDULING | OUTCOMES | SPEEDNOTES |

If the selected appointment type has no SpeedNotes associated with it, the tab contents will be blank.

Important Note:

The reason selected for your appointment on the **Scheduling** tab is connected to an appointment type, and that appointment type determines which SpeedNotes are displayed. If you don't see the SpeedNotes you were expecting, you may need to select a different reason or check with your SSN administrator.

1. Hover over the **Appointment** icon (📅) associated with an appointment.

2. Select **Outcomes** or **Edit** from the **Appointment** pop up card to bring up the **Edit Appointment** form.

3. Click the **SpeedNotes** tab. Available options may be grouped into categories. Within any category, items are listed alphabetically.

4. Check all boxes that are relevant to your meeting.

Edit Appointment

Never Mind   Submit

| SCHEDULING | OUTCOMES | SPEEDNOTES |

Check off the topics discussed and activities completed in this meeting.

Academic Plan
☐ Change Major   ☐ Complete Intake Form
☐ Complete Academic Plan   ☐ Major Selection

General Skills
☑ Time Management Strategies

Graduation Planning
☐ Degree Audit Review   ☐ Graduation Plan

Registration
☐ Drop Classes   ☑ Registration Planning
☐ Full Withdrawal for Term

Never Mind   Submit

5. Click the **Submit** button to save your updates.
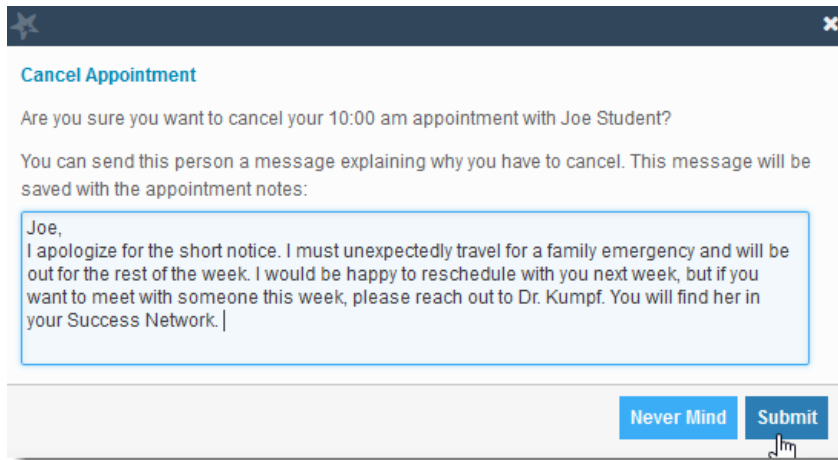
Cancel an appointment

1. Hover over the appointment menu icon (📅) associated with an appointment to bring up the **Appointment** pop up card.

   The Appointment pop up card is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings** tab.

   You can also edit an existing appointment from this menu.

2. Select **Cancel** from the Appointment pop up card.

3. The **Cancel Appointment** form is displayed. Type a note explaining the reason for the cancellation (optional but recommended).
   👍**Best Practice:** include an explanation for the cancellation, and provide guidance on how to reschedule or connect to other available resources.

4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

   The calendar owner will also receive the iCal for the cancellation if the calendar owner's email notifications preferences are set to notify when changes are made to an existing appointment (recommended).

Review appointment information and meeting outcomes

Review appointment and meeting information on the student folder

You can open the student folder by clicking on the link associated with the student's name wherever it appears in SSN.

For example from the **Appointment** channel on your **Home** page.

Or from the appointment on your calendar
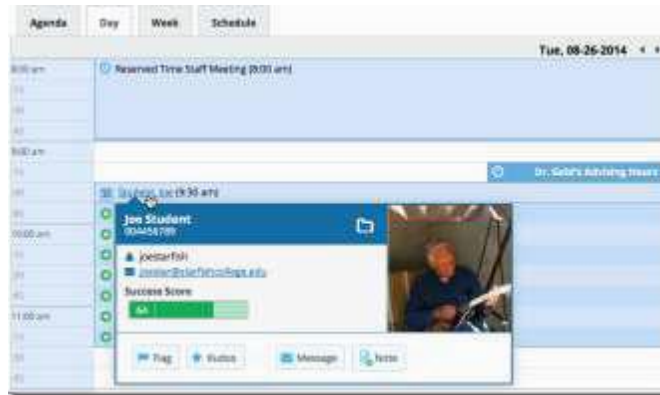
Click on the **Meetings** tab of the student folder to review information about upcoming and past meetings for this student.
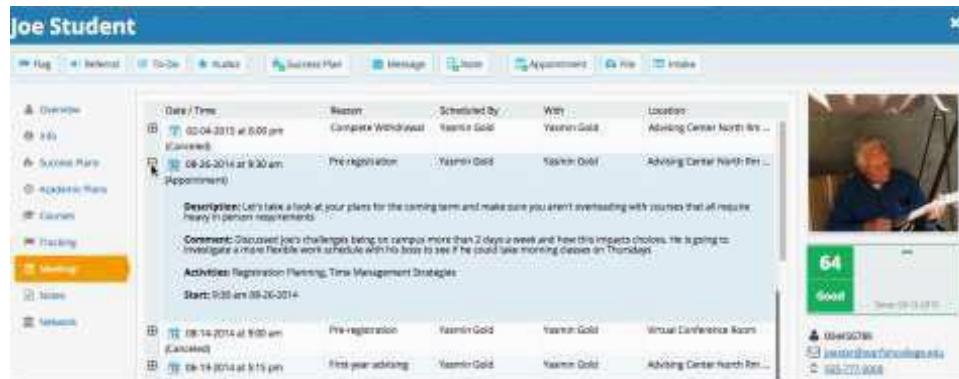
The **Meetings** tab of the student folder includes upcoming appointment information as well as meeting notes captured in SSN. It may also include historical meeting information from external systems.

The information that is available to you on the **Meetings** tab is based on the role(s) that connect you to your students and the appointment types those roles have permission to view.

The icons to the left of each meeting in the list provide additional information or available actions related to the meeting:

⊞ Click the expand icon to the left of any appointment listed to view additional details about the meeting. For example the **Description** that was included when the appointment was created, any **Comments** entered on the **Outcomes** tab and any **Activities** that were checked off on the **SpeedNotes** tab**.**

Hover over the appointment icon to update the appointment.

If the student was marked as a no show on the Outcomes tab, the missed appointment icon will be displayed instead of the standard appointment icon.

If the appointment presents information from an external system, the historical appointment icon will displayed. This type of meeting cannot be edited. External meeting will only exist if your institution has imported meeting outcomes from another system (e.g. tutortrac).

Filter student lists based on meetings

Use the **Meetings** filter from the list of **Additional Filters** available on your **My Students** and **Tracking** tabs to identify students that have or have not scheduled appointments.

1. Click on the **My Students** tab from within your **Students** area in SSN. Then click the **Add Filters** button.
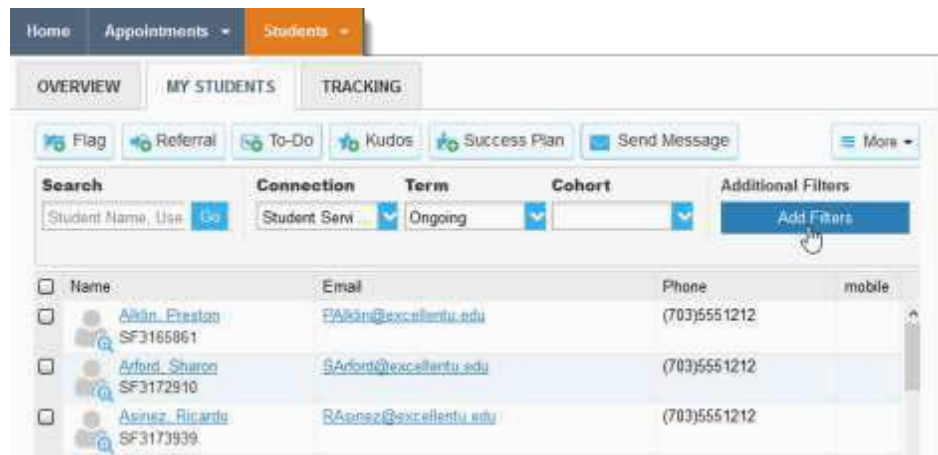
2. Select **Meetings** from the filter options on the left and check the box to the left of the word **Students** in the filter criteria area to make this filter active.
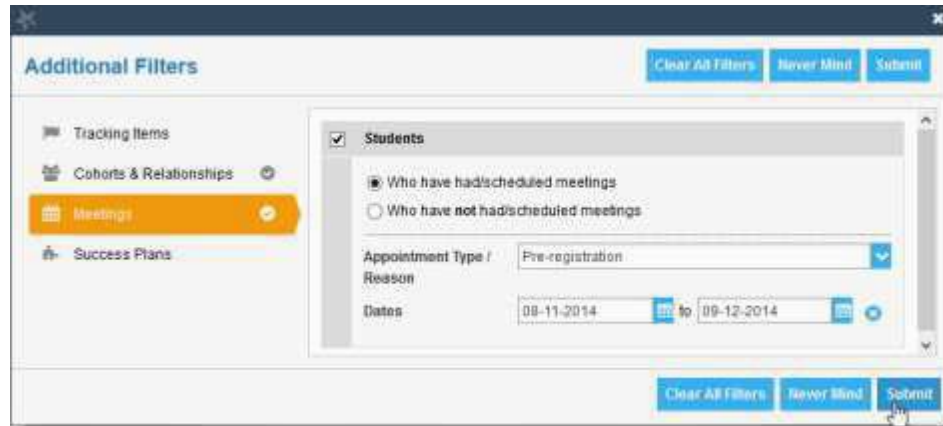
3. Select whether you want to filter to students "Who have had/ scheduled a meeting" or to those "Who have **not** had/scheduled a meeting. Optionally, you can filter to a specific **Appointment Type/ Reason** and a range of **Dates**.

4. Click the **Submit** button activate your filter

   Your student list will be displayed showing only those students who matched your Meetings filter criteria.
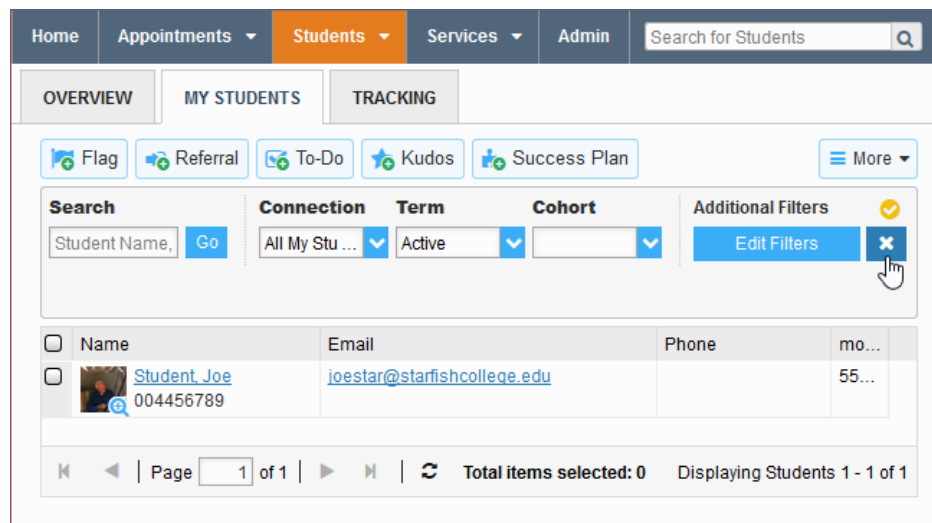
Click the Clear Filters button () to remove your filter, or click the **Edit Filters** button to modify your filter criteria.

Note: Canceled appointments **will not be** included in the filter results for students that have had/scheduled an appointment, but scheduled appointments where the student was marked as a no show **will be** included.

Use calendar managers

Designate someone to manage your calendar

Calendar Managers can see, add, and edit appointments on the calendar owner's SSN calendar.

You can designate other users to be your calendar manager through **Appointment Preferences** in your profile.

Institutions can create calendar managers via SIS import or administrator upload. You must contact your SSN administrator to remove calendar managers created via these methods.

Manage another's calendar

Calendar viewing options

If you are designated as a calendar manager for someone else, when you reach your SSN Calendar on the **Appointments page**, you will find a list of calendars you have permission to manage under the **Calendars I Manage** heading in the **Calendar Manager** section on the left of the page, beneath the small monthly calendar.

You can filter the calendars displayed by appointment type and/or by individual users' calendars:

- Use the **Appointment Types** filter to limit the view to calendar owners who have office hours of the selected types.

- Check /uncheck the boxes associated with each name under the **Calendars I Manage** heading to limit which calendars are displayed.

To make it easier to distinguish among calendars, each name is displayed in its own color. The color of the name in the listing matches the color used to display appointments on the main calendar.
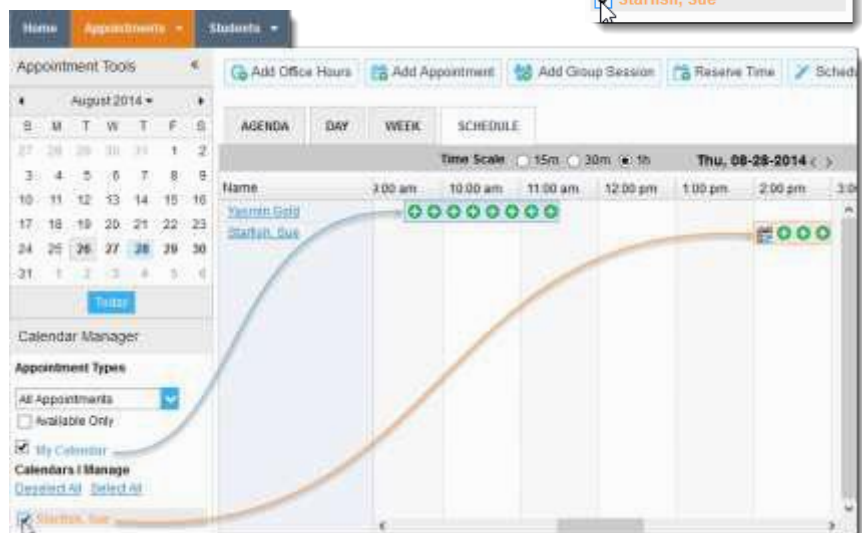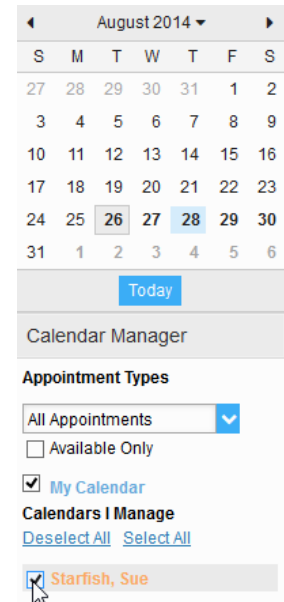
As a calendar manager, you will find a **Schedule** tab in addition to the **Agenda**, **Day**, and **Week** tabs. If you are opening more than 3 calendars at the same time, rely on the schedule view. If you manage a large number of calendars the "Select all" calendars option will only be available in the schedule view.

When you click the **Schedule** tab, SSN may display a quick reference pop up that includes these tips for using the schedule view:
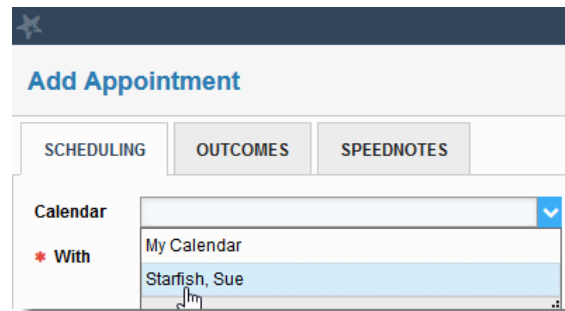
- Use the time scale option at the top of the schedule view to look at the combined schedules in 15 minute, 30 minute or 1 hour increments.

- Click on an individual's name in the schedule view to jump to viewing that user's calendar in the day view.

Close the Quick Reference pop up using the "x "in the top right corner.

Make and update appointments for others

If you are a calendar manager for others, you will have additional calendar selections when [adding an appointment to the calendar](#).
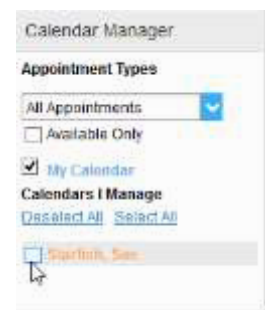
On the Add Appointment form, you will find a drop down selector in the **Calendar** field listing those individuals for whom you have the calendar manager permission.

Select the desired staff member to add an appointment to his/her calendar. Options presented in terms of students, locations and appointment types will be based on the selected user's role(s).

The same holds true if you [add office hours](#), [group sessions](#), or [reserved time](#).

If you elect to add appointments, office hours, group sessions or reserved time from your **Appointments** page, individuals who are not checked in the **Calendars I Manage** section *will not* be listed as options in the drop down box for **Calendar** on the "Add" forms.

Important Note:
Once the appointment, office hour block, group session or reserve time is created, you **cannot** modify the person whose calendar it belongs to (i.e. you cannot move it to another person's calendar by selecting another calendar).

External Calendar Integration

Integration with an external calendar allows free/busy information from a staff member's external calendar to be displayed on that staff members' Spartan Success Network (SSN) calendar.

This type of integration is available for Google or Exchange, and your institution must have configured one of those options with SSN in order for you to take advantage of it.

With SSN's adapter installed, SSN will poll your external calendaring system for shared calendars, and then display the free/busy information from those shared calendars on the corresponding SSN user's calendar.
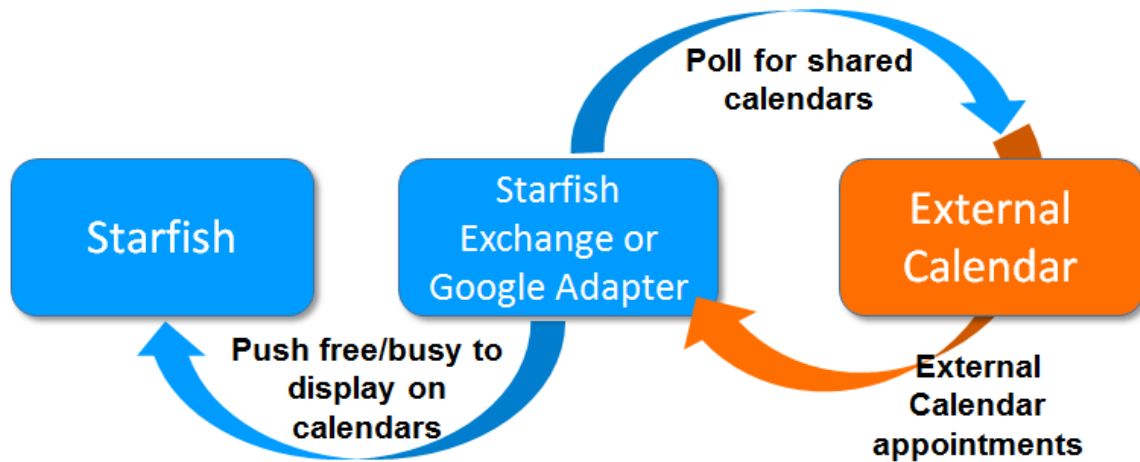
Figure 2: External Calendar Integration

In order for your external calendar's information to be available to the SSN adapter, you must set up your Email Notification/ Appointment Notification preferences as described below.

Configure integration in your profile

Select the Email Notifications tab from your Profile menu.

If either Google or Exchange integration has been enabled on your SSN system, just above the **Tracking Item Notifications** heading you will find a check box labeled:

 "Read busy times from my external Google calendar" or "Read busy times from my external Exchange calendar" .

Check the box and then follow the "Click here" link for set up steps specific to your type of integration.

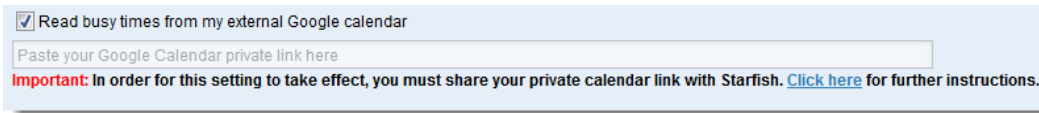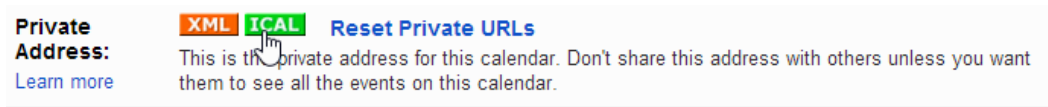## Set your profile to read busy times from Google

After you check the "Ready busy times" box in the Appointment Notifications section of your profile, you must paste your personalized Google Calendar private link into the text box provided. You can use the "Click here" link to find these instructions:

To get your **Google Calendar** private link:

1. Open your **Google Calendar** and click on the drop down menu icon to the right of the calendar you want to share.

2. Select the **Calendar Settings** option

3. Scroll down to the **Private Address** heading and click the **ICAL** button to get your private URL.

4. Copy the Private URL provided by Google and paste it into the Google Calendar private link field in your profile's **Email Notifications** > **Appointment Notifications** section.
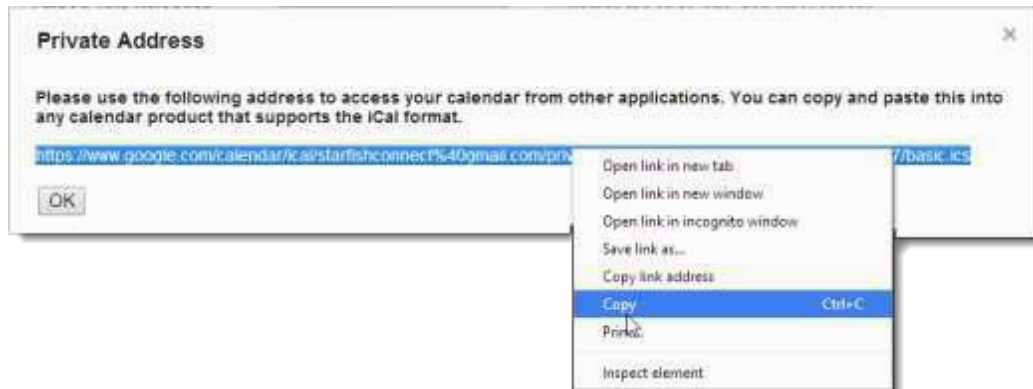
5. Be sure to click the **Submit** button on your Profile > **Email Notifications** tab to save changes.

Set your profile to read busy times from Exchange

you must share your calendar with this email address

☑ Read busy times from my external Exchange calendar
Important: In order for this setting to take effect, you must share your calendar with starfish@thisu.edu . _Click here_ **for further instructions.**

After you check the "Ready busy times" box in the **Appointment Notifications** section of your profile, you must share your Outlook (or Microsoft 365) calendar with the SSN email address specified in the line labeled **Important** under the "Ready busy times" checkbox.

Follow the "Click here" link to find detailed instructions specific to your version of Outlook or Microsoft 365. Generally speaking, you will share your calendar with the email address specified and give it the ability to read "full details".
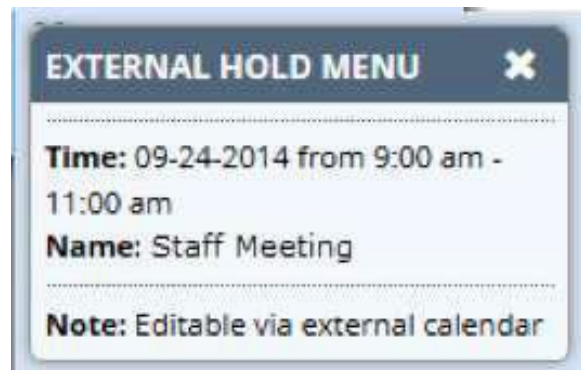
External calendar holds on your SSN calendar

If you have configured Google or Exchange integration as described in the previous section, information from your external calendar will begin to appear on your SSN calendar. Items from your external calendar will appear as *external holds* on your SSN calendar.

An external hold is distinguishable from a SSN appointment on your SSN calendar in two ways:

1. The title on the calendar does not include the hyperlink to the student folder.

   📅 Staff Meeting (9:00 am)

2. When you hover over the appointment menu icon (📅) the **External Hold** card is displayed rather than the SSN **Appointment** card.

   📅 Student, Joe (11:30 am)

   As noted on the **External Hold** card, this item is editable only in the external calendar. You cannot edit or cancel this meeting from within SSN.

   EXTERNAL HOLD MENU ✖

   Time: 09-24-2014 from 9:00 am - 11:00 am
   Name: Staff Meeting

   Note: Editable via external calendar

External holds will be respected when a calendar owner or manager is adding an appointment or other reserved time to the calendar.

Time will show as unavailable and appointments will not be able to be added over external holds.

Document Version History

Version	Description of updates	Date of update
2.0	Refined to include newest screens and additional options added in the summer of 2014.	9/10/14
2.01	Updated Student Folder image (meetings tab) with updated student folder layout	08/14/15
3.0	Updated to reflect hover vs. click on many items and new icons for appointments, office hours, group sessions	9/18/15
3.1	Updated information about related resources.	10/20/16