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|  | Starfish Scheduling Workbook |  |
|  | Updated 2021 |  |
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# Week 1: Appointment Scheduling

Objectives

This course provides information about planning and configuring appointment types for scheduling meetings within Starfish. Participants are introduced to appointment scheduling concepts for effectively scheduling, sharing, and documenting student meetings. This course specifically focuses on best practices for configuring appointment types and speednotes and how users may integrate Starfish with external calendars for enhanced calendar management.

Upon completing this course, you will be able to:

* Define appointment scheduling foundational concepts
* Explain how to make and take appointments in Starfish
* Configure appointment types and speednotes
* Plan appointment types according to recommended best practices
* Describe the role of a calendar manager and calendar administrator in Starfish

Additional Resources

* [Faculty/Advisor Meeting Management](https://help.starfishsolutions.com/Starfish/FI3VYgGm6zb3OWi2R2d2/Help/Admin/IRC/Content/EndUserHelp/Schedule_and_Document_Meetings/Schedule_and_Document_Meetings.htm)
* [Administrator Guide to Starfish Scheduling](https://help.starfishsolutions.com/Starfish/FI3VYgGm6zb3OWi2R2d2/Help/Admin/IRC/Content/Downloadable_Files_for_Clients/Starfish_Scheduling_Guide.docx)

Key Terms

|  |  |
| --- | --- |
| **Term:** | **Definition:** |
| Appointment | A documented meeting between a student and a calendar owner |
| Appointment Reason | The purpose for meeting with a student under any given appointment type |
| Appointment Type | Defines the reasons and activities that a designated role can use to schedule and/or document meetings with students |
| Calendar Attachment |  |
| Calendar Owner | User who will hold appointments with students |
| Calendar Manager | Users who have been granted a relationship to a calendar owner, who has rights to that user's calendar to view and schedule appointments on behalf of that user |
| Calendar Administrator | A role that has the same privileges as Calendar Managers plus they can lock designated calendars and control the designated locked calendars. |
| Direct Link | Also sometimes called and “Internal Link,” Direct Links are hyperlinks that can more easily direct students to specific locations within Starfish, such as a scheduling page for an individual or service. |
| Events | Appointment types used to create events in Starfish outside of a calendar to document attendance for an event |
| External Calendar | Institutional Outlook, Office 365, or Google calendar, which a calendar owner may sync with their Starfish calendar to reflect busy time outside Starfish. |
| Group Session | Office hours that allow for meetings with multiple students at once. The calendar owner can specify the number of students that can be accommodated in a given session. |
| Office Hours | Blocks of time provisioned by calendar owners during which they allow students to either schedule appointments, attend unscheduled walk-in meetings, or both. Students may only self-schedule appointments during Office Hours, but calendar owners may record appointments outside of these blocks. |
| Outcomes | May be documented for any appointment and captured as notes that are visible in the Student Folder and can be emailed to the student |
| Reserve Time | Allows users to block time from their Office Hours during which a student should not be able to schedule an appointment |
| Scheduled Appointment | Scheduled appointments can be scheduled by either the student, the calendar owner, or the calendar manager in advance and can be used to document meetings retroactively |
| SpeedNotes | An optional feature of appointment scheduling that allow users to capture information about the activities performed during a meetin |
| Walk-in Appointment | Used to accommodate students who walk-in for an unscheduled appointment during available Office Hours |

Roles and Relationships

1. Roles:
   * Roles define which users have calendars in Starfish. Parent role privilege sets typically have calendars, but the student privilege set does not. Users with calendars can set Office Hours, and appointments can be scheduled with them through Starfish.
   * Roles define which appointment types are available for scheduling/recording meetings with students.
2. Relationships:
   * Relationships define the students with whom meetings can be scheduled.
   * Active relationships are required in order to use appointment types, since adding and viewing appointments are defined by the role a provider has in relation to a student.

Primary Appointment Type Components

1. Appointment Type: Defines the reasons and activities that a designated role can use to schedule and/or document meetings with students.
   1. Users will have access to one or more appointment types based on their role(s) in Starfish, and the appointment types that they can add can be used to setup office hours that allow for different groups of students to schedule appointments with them. For example:
   2. Roles can be granted permissions to view information about student appointments that students have had with other providers (where appropriate), making it easier to share information about a student in need and to break down silos/barriers to communication.
2. Appointment Reasons: The purpose for meeting with a student under any given appointment type
   1. If the appointment type defines the kind of appointment being scheduled and the roles that can add or view it, the appointment reasons govern the specific topic being discussed within that type of appointment.
   2. Example: An Instructor may have access to use a Teaching Appointment type that includes reasons such as: Course add/withdrawal, course tutoring, discuss grades, discuss prior course work, general visit, and review exam or quiz.
3. Permissions: Appointment permissions are granted to indicate which users can add and/or view a given appointment type. For example, an instructor may be given permission to add Teaching Appointments and view them, and the student's primary advisor may be given permission to view only (so that they can be made aware of the outcomes of those appointments).
4. Outcomes: These may be documented for any appointment and captured as notes that are visible in the Student Folder and can be emailed to the student to reinforce what was discussed during a meeting.
5. SpeedNotes: Speednotes are an optional feature of appointment scheduling that allow users to capture information about the activities performed during a meeting. The user can simply check a box beside the activities that took place during the meeting, and those activities can be easily reported later. Speednotes are also linked to appointment types so that the list of activities available for a user to select are determined by the type of appointment that occurred.
6. Events: Appointment types can also be used to create events in Starfish that are added outside of a calendar to document attendance for an event such as a freshman seminar or a resume workshop. Appointment type permissions can be granted to make certain appointment types available to roles for use when documenting these events.
7. Scheduled versus walk-in appointments: Scheduled appointments can be scheduled by either the student, the calendar owner, or the calendar manager in advance and can be used to document meetings retroactively. Walk-ins are used to accommodate students who walk-in for an unscheduled appointment during available Office Hours. Office Hours can be made to accommodate either scheduled appointments, walk-in appointments, or both when the calendar owner is able to accommodate walk-ins between scheduled appointments.
8. Reserve Time: This allows users to block time from their Office Hours during which a student should not be able to schedule an appointment.
9. Calendar Manager/Basic User Relationships: Calendar managers are users who have been granted a relationship to a calendar owner, who has rights to that user's calendar to view and schedule appointments on behalf of that user. Calendar manager relationships can be added to Starfish administratively (relationships file or batch upload) or can be granted directly by the calendar owner within the Starfish interface.
10. Calendar Locking: locking calendars is an optional feature that restricts Calendar Owners (and the owner's Calendar Managers) from making some changes to their calendars.
    * 1. When a calendar is locked, Calendar Owners and their Calendar Managers can add appointments within office hour blocks, add walk-ins within office hour blocks, and manage the students in group sessions. For all appointments/sessions, they can add outcomes or cancel the appointment session. An owner's Calendar Administrator can make any and all changes to the locked calendar without unlocking the calendar first.

Activity: Planning Roles and Reasons

Choose two roles at your institution and create a list of reasons for why they might meet with students.

|  |  |  |
| --- | --- | --- |
| **Roles:** |  |  |
| **Reasons:** |  |  |

Knowledge Check: True or False

1. Appointment types define the reasons and activities that a designated role can use to schedule and/or document meetings with students.
2. Appointment types configured in Starfish can be added by any user, without regard to role.
3. SpeedNotes are meeting activities that can be easily reported.
4. SpeedNotes are not related appointment types.
5. Calendar owners have no control over the number of students that can attend a scheduled group session.

Making and Taking Appointments

Prepare to take student meetings

1. Users need to setup office hours in Starfish to set their availability so that students can schedule appointments with them.
2. Creating an Office Hour block.
   1. In order to setup office hours, they must provide a location where they plan to meet with students. If the user has not entered a location from within the profile, this can be done at the same time as the user creates the Office Hour Block. All subsequent locations must be added via the profile.
   2. Select an appointment type. Note that no appointment type displays if the user has roles that can add only one type. Users who can add multiple types must select at least one but can choose to select more, making the Office Hour block either more or less accessible according to the students' roles or possible reasons for meeting.
3. Creating a Group Session.
   1. Group sessions are created similarly to Office Hour blocks except that a reason must be specified instead of an appointment type. This is to ensure that all of the students will sign up to meet at that same time for the same reason.
   2. Indicate the maximum number of students allowed to participate in the session.
   3. Indicate whether students are allowed to see others who have signed up.
   4. Supplemental Instruction allows academic group sessions to be limited to groups of students who wish to meet about a specific course or section. When supplemental instruction is enabled, the first student to sign up for the session dictates the course or section about which other students can sign up for that same session. For example, you would not want to hold a group session to tutor students on 4 different math classes at the same time. With supplemental instruction enabled at the course level, when Student A signs up for Math101, other students who wish to sign up for that same session must also do so for Math101.
4. Creating an Event
   1. To record event attendance after the fact, select “Create Event,” and record the Event Owner, Title, and other details. Reasons listed will be for appointment types you have permission to create Events for.
   2. Record attendees by copying a list of student Usernames, Student IDs, or Integration IDs (select which value you are using) into the Attendees tab
   3. Record Outcomes (free text) and Speednote Activities covered in the event. These will be the same for all event attendees and be recorded on the student folder for those with view permission for this Eent/Appointment Type.
5. Creating Reserve Time blocks
   1. Use reserve time to block availability for your calendar or others’ for whom you are a calendar manager during established office hours.
   2. Select the calendar, category (if categories are enabled at your institution) Title, and time for the reserve time block, and whether you would like it to repeat.

Knowledge Check: True or False

1. Starfish allows calendar owners to create sessions for which multiple students can sign up to meet at the same time.
2. Students can schedule appointments with people, even if those people have not yet created any kind of Office Hour or Group Session in Starfish.
3. When viewing a provider's calendar, students can see which appointment slots have been taken and which students are meeting with the provider at that time.
4. Starfish allows users to block time in their Office Hours to prevent students from scheduling appointments at that time.
5. Students can access a provider's scheduling availability via the Courses tab if that user has a course-based relationship.

Appointment Type Configurations

Appointment Type Properties

1. Navigate to Admin tab, and from there to Feature Configuration> Appointment Types.
2. Give the new appointment type a unique name. This will be seen by calendar owners when creating office hours.
3. Add a description of the appointment type to explain who will use it, and what it will be used for. This helps facilitate training and system maintenance but is only visible administratively.
4. Setup Advanced Options to further dictate the appointment type behavior.
   1. Appointment types can be setup administratively to either always or never recur.
      * Recurring appointments are useful for appointment types in which the student might schedule a weekly meeting.
      * Recurring appointments occur every week for the duration of the term. Recurring appointments are not available for events.
   2. No Show Emails can be enabled so that students who miss meetings will be sent an email when a provider marks the student as a "no show" for a scheduled appointment.
   3. Appointment Verification (rarely used) can be enabled to allow students to certify that they were present at an appointment by entering their student ID in the provider's view of the Outcomes tab of the appointment.
   4. Supplemental Instruction:
      * This is what allows Group Sessions to support meeting with students at the same time according to a section or course enrollment.
      * Each appointment type must be set to either section or course, which means that the Calendar Owner is bound by this administrative setting (the calendar owner cannot limit by course is the administrator set this type to limit by section).

Appointment Type Permissions and Referrals

1. From the grid, indicate which roles should be allowed to add appointments of this type, which should be able to view only, and which should be used for Events.
2. This is where you can configure which appointment types may be used to log meetings with prospective student users.
3. Disclosable under FERPA should be checked for any appointment type that should include a FERPA notice for calendar owners when scheduling and managing appointments of that type.
4. Referrals can be required for the appointment type in order to limit which students may schedule appointments of this type.
   1. If this is enabled, students can only schedule appointments of this type after the specified referral has been made active for the student.
   2. When the referral is cleared, the student's permission to schedule appointments of this type will also be revoked.

Activity: Planning Appointment Permissions

For the following sample appointment types, list at least one role that should be able to add an appointment of that type and a different role that should be able to view it.

|  |  |  |  |
| --- | --- | --- | --- |
| **Appointment Type** | **Role that can Add** | **Can record Events** | **Can View** |
| Teaching |  |  |  |
| Advising |  |  |  |
| Financial Aid |  |  |  |
| Tutoring |  |  |  |
| Freshman Seminar Event |  |  |  |

Appointment Type Email Templates

Each appointment type can be configured to send custom messages to students and providers when appointments are scheduled, cancelled, or updated. In most cases, the Default template is recommended, but when customized messages are necessary, they can be configured in the Starfish Message Template editor and then specified here.

Appointment Type Reasons

1. Each appointment type should account for the most common reasons why a student would schedule a meeting of that type.
2. When adding a reason, indicate the name so that it is clear to the student or calendar owner scheduling the appointment.
3. Select a category for the reason. The menu consists of a set list of categories used for reporting purposes, and the selected category is not displayed to end-users.
4. The appointment Duration defaults to "Selected by student" which is used for any appointment reason for which the calendar owner should be allowed to control the possible duration of the appointment.
   1. When this setting is used, the student may choose the length of time for the appointment within the parameters set by the calendar owner.
   2. For appointment reasons that should always have a set duration at the administrative level, and over which the calendar owner and student have no control, a Duration can be set administratively.

Add a SpeedNotes activity

1. Navigate to the SpeedNotes tab under Admin>Feature Configuration.
2. SpeedNotes are also known as "activities" in Starfish because they are used to quickly record activities that took place during an appointment. For this reason, when you wish to create a new SpeedNote for use with an appointment type, you should select the Activity button.
3. Type the name of the activity that you wish to create as an available SpeedNote. Example: Discussed grades.
4. Select a category for the activity. Like the categories for appointment reasons, the menu consists of a set list of categories used for reporting purposes, and the selected category is not displayed to end-users.
5. Repeat as needed to add any activities that should be available as SpeedNotes when documenting appointment outcomes.

Activity:  Planning Speednotes

Brainstorm a list of activities that would be helpful if represented as SpeedNotes for the following appointment types.

|  |  |
| --- | --- |
| **Appointment Type** | **Activities** |
| Advising |  |
| Financial Aid |  |

Add Speednotes to an Appointment Type

1. Once SpeedNotes have been generated in the SpeedNotes tab of the Admin area, they can be added to existing (and new) appointment types.
2. To add SpeedNotes to an appointment type, from the final screen of the appointment type configuration:
   1. Click the "assign activity" button
   2. Select a relevant activity from the list
   3. Associate that activity with a Group to sort them for display when being recorded for an appointment. For example,
3. Submit the activity, and repeat to add others as desired.
4. Once SpeedNotes are added to any appointment type, the associated type(s) will display in the SpeedNotes tab beside the associated activity.

Knowledge Check: True or False

1. Appointment Type descriptions set administratively are visible to students when scheduling appointments.
2. SpeedNotes are also known as activities.
3. SpeedNotes can be displayed in Groups to make them easier for users to locate.
4. An appointment type reason duration of "Selected by student" means that students can choose to schedule the appointment for any length of time, despite the calendar owner's profile and Office Hour Block settings.
5. An appointment type reason duration of a set length of time will override the calendar owner's appointment length settings.

Appointment Scheduling Best Practices

Plan in advance for reporting

Appointment type configurations that impact reporting:

* Appointment types pull into Starfish reports. If you know will need to report on Advising appointments separately from Tutoring appointments, make sure to create separate appointment types for each.
* Likewise, plan appointment reasons and speednotes according to data that you plan to report about.

Appointment Scheduling Reports in Starfish:

* Meetings
* Services
* Activity

Activity:  Planning for Reporting

Use the space below to brainstorm some of the kinds of appointments that your institution would want to be able to report on individually.

|  |  |
| --- | --- |
| **Appointment Type** | **Reporting Need** |
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Two-way appointment scheduling

1. Starfish allows users to manage their Starfish appointments through an external calendar, the calendar that they use outside of Starfish, such as calendars managed through Google or Outlook.
   1. Starfish facilitates this by allowing users to elect to receive a calendar attachment (iCal) as part of the appointment notifications sent by Starfish for scheduled appointments, reserve time, and/or Office Hours and Group Sessions. This is done through a user’s individual profile settings
   2. Users who elect to receive these iCals attachments will be able to view Starfish appointments on an external calendar and that allow users to accept or decline appointments from an external calendar or via email.
   3. This iCal also allows users to accept or decline meetings from their email client (such as Google or Outlook) if they find that they have a conflict and cannot meet at the scheduled time.
2. Institutions may also optionally configure an Exchange integration that allows staff to opt-in to sharing an External Calendar with Starfish, so that appointments in Outlook, for example, will display in Starfish and, like reserve time, can be used to block off time when a user is busy and a student should not be allowed to schedule an appointment.
3. Integrating the external calendar with Starfish is considered a Best Practice because it allows users to manage calendars more effectively without having to toggle between two calendars.
4. **Direct Links:** Calendar owners have access to personal links that will direct a student to their profile or appointment scheduling page. These links can be inserted into Starfish messaging templates and message template snippets, and external applications, such as email signatures and websites. For students to access an individual’s Direct Links, the faculty or staff must: have an active relationship with the student, and be displayed in the student’s Success Network or be a member of an active Service.

Best practices for managing Starfish appointments

1. Scheduling deadlines are recommended as a method to govern how soon before an office hour block students can sign up.
   * This can be set to stop appointment scheduling either the day before or just a few hours before an office hour block begins.
   * This is a best practice for end-users to allow them to more easily control their calendar and to plan in advance for upcoming meetings.
2. Creating separate office hour blocks is recommended for end users who have multiple roles in Starfish and access to multiple types, where those users may want to take only certain types of meetings at certain times. Separating office hours to effectively meeting with different groups of students by role and/or appointment type
3. Adding reserve time to calendars is recommended for end-users who need to make office hour block appointment slots unavailable to students for scheduling without having to edit the entire office hour block.
   * Users who meet with students throughout the day and have large, recurring office hour availability benefit most from using reserve time, so that they can make the entire day open for scheduling, and then just block off slots as they become unavailable.
   * Reserve times can be used to generate an appointment notification with an iCal if the institution wishes to enable that feature. Doing so allows users to add reserve time to their external calendar at the same time that it is added in Starfish, effectively blocking the time on both calendars with one action.

Knowledge Check: True or False

1. Appointment types, appointment reasons, and speednotes are included in reporting.
2. Users can accept or decline Starfish meetings directly from their email account if they have elected to receive notifications with iCal attachments and remember to send a response when doing so.
3. If an institution elects to enable Google or Outlook integration, all calendar owners' calendars will be shared with Starfish, whether they wish to do so or not.
4. Separating office hours by appointment type is never recommended.
5. Users cannot view items from an external calendar within Starfish.

Activity: Plan Appointment Type Configurations

Use the previous activities to map out the configurations for 3 or more appointment types your institution will use

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Permissions | Reasons | Speed notes |
| EXAMPLE:  Advising | Use this type for Advising meetings. | **Add and View:** Advisors, Veterans Counselors, EOPS Counselors, Career Counselors  **Create Events:** Advising Coordinator, Advisors  **View Only:** | Complete withdrawal, course withdrawal, first-year advising, general advising, graduation requirements, major advising, pre-registration, registration/class schedule, seek career advice, | Academic status concern, address time management, adjustment to college, balancing academic goals and life goals, completed degree audit, discussed study skills, discussion of academic goals, discussion of career goals, family concerns, registration for classes, review of campus resources, transfer credit review |
| EXAMPLE: Teaching | Use this type for Instructor office hours. | **Add and View:** Instructors, Counselors  **Create Events:** Department chairs  **View only:** Advisors, Counselors | Course add, discuss grades, discuss an assignment or project, general class questions, I want to be more involved, make up a test, quiz, or assignment, personal issues, review exam or quiz | Discuss an assignment or project, discussed grades, discussed participation, discussed study skills, exam prep, made up a test, quiz, or assignment, reviewed a test or quiz, reviewed coursework |
|  |  | **Add and View:**  **Create Events:**  **View Only:** |  |  |
|  |  | **Add and View:**  **Create Events:**  **View Only:** |  |  |
|  |  | **Add and View:**  **Create Events:**  **View Only:** |  |  |
|  |  | **Add and View:**  **Create Events:**  **View Only:** |  |  |
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