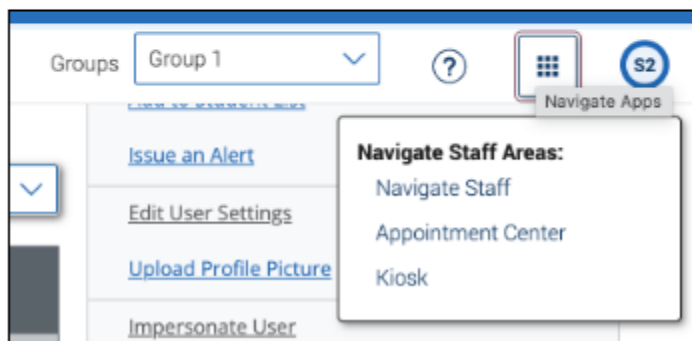
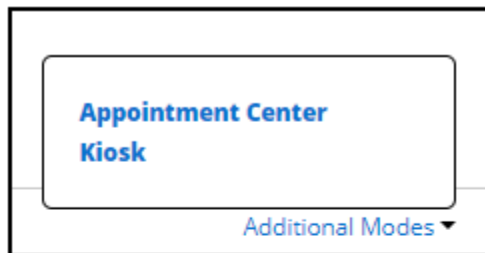


Appointment Center

The Appointment Center allows staff at an individual location to manage appointments for that location. For example, a front desk worker can manage appointments for a tutoring center using Appointment Center. Actions possible using Appointment Center include managing the scheduling grid, scheduling appointments, editing appointment details, and canceling appointments. Staff can also view a list of drop-in and scheduled appointments for the day or week. More information about the aspects of the Appointment Center are covered below.

First, launch Appointment Center. Click **Additional Modes**(bottom right corner) and select **Appointment Center** or use the App Switcher.



After opening Appointment Center, select your Location on the **Choose Appointment Center Location** screen. You have now launched Appointment Center for your Location.

Staff using Appointment Center have several tasks. One is to schedule appointments for students. This is handled on the Scheduling Grid.

Staff can narrow down the Scheduling Grid by Care Unit, Student Service, Staff Member, and Date/Time. The Staff, Service, and Course filters are interdependent. For example, if you have a student looking for lower-level math tutoring, choosing that Student Service narrows the number of staff showing on the Scheduling Grid, as only Staff with availability for lower-level math tutoring should appear. Any time you add or remove a selection in one of these three filters, the options available in the other filters are narrowed or widened based on that selection.

Scheduling Grid ▼ 🔗

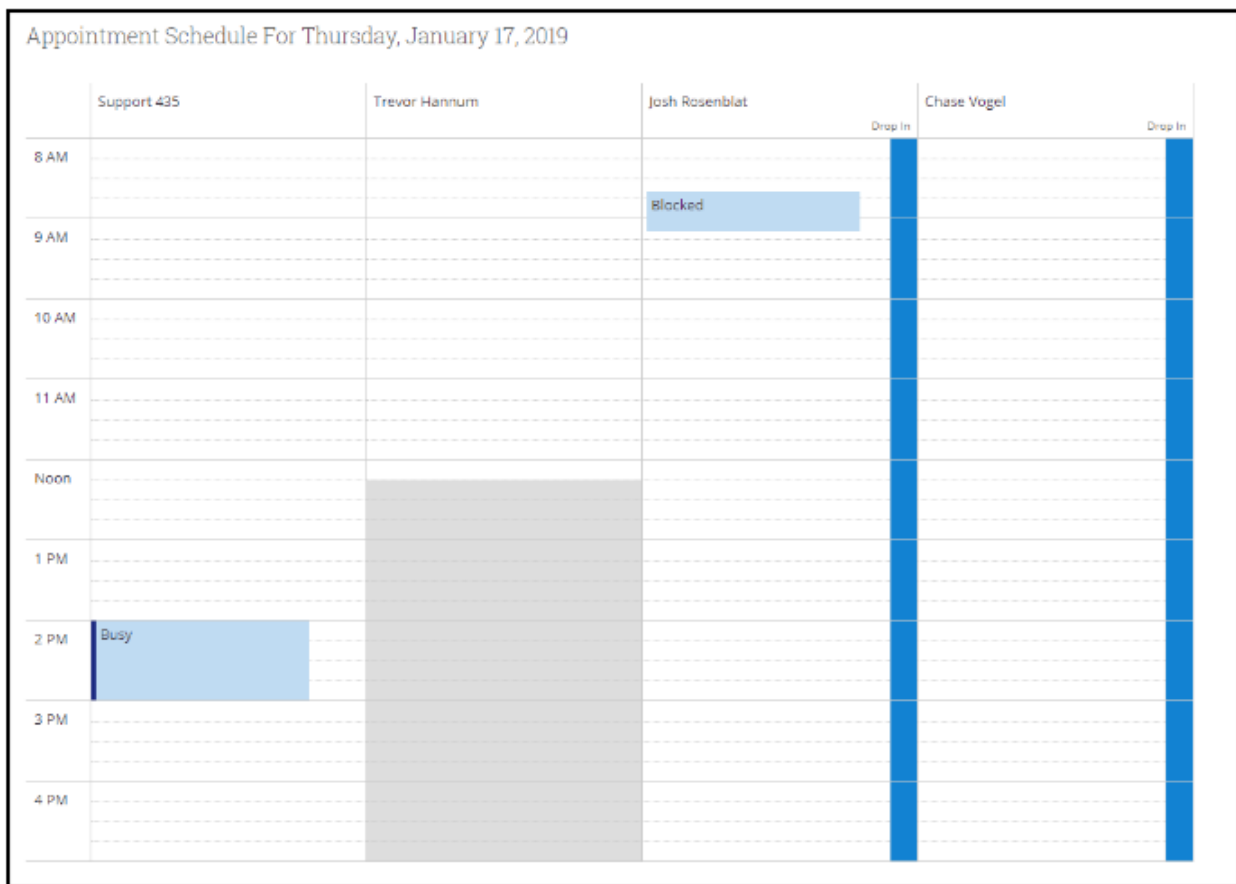
Date: 12/13/2021 📅 Start Time (ET): 8:00AM 🕒 End Time (ET): 5:00PM 🕒 Refreshed Today 1:31 pm ET 🔄

Care Unit: Advising Whitehurst University ▼ Service: All Services ▼ Staff: All Staff 👤

Meeting Types: All Meeting Types ▼

[Find First Available?](#)

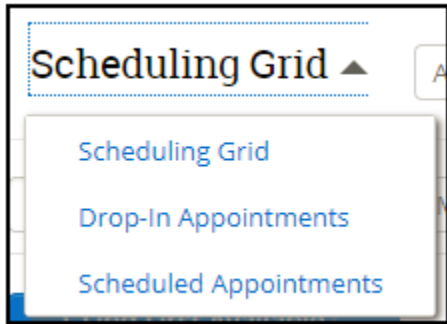
The Scheduling Grid has a calendar interface. Available appointment times are shown as white blocks. Unavailable times show as grey blocks.



You can schedule appointments from the Scheduling Grid by clicking on an open slot. Once you select a slot, a dialog opens, letting you set the details of the appointment.

The other two pages in the Appointment Center are the **Drop-In Appointments** page and the **Scheduled Appointments** page. These screens appear as a set of queues that the staff member working at the front desk can help manage, though staff are often the ones taking the actions that move students between the queues.

Switch to either screen by selecting that option from the drop-down menu.



The Drop-In Appointments page has four queues: Students in First Available, Students Checked In With Staff, In-Progress Visits and Students Checked In for Track Time. A front-desk worker can select a student from any of those queues and take action on them. Front-desk workers can also take a student in the First Available Queue and check them in for a Track Time or Record Visit service.

To add a student to a Staff Queue on this screen, please click **Add to Staff Queue**. The dialog below appears. Enter the Students, Staff, and Service before adding to the staff member's queue.

A screenshot of a dialog box titled 'ADD TO STAFF QUEUE' with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Search for a Student (Attendee):** A search input field with the placeholder text 'Enter Student Name' and a magnifying glass icon. To the right of the field is a blue link that says 'Create a Student'.
- Choose a Staff (Organizer):** A dropdown menu with the placeholder text '--Please Select A Staff--'.
- Choose a Service:** A dropdown menu with the placeholder text '--Please Select A Service--'. To the right of the dropdown is a blue link that says 'Show Additional Services for this Location'.
- Add a Comment:** A text area with the placeholder text 'Enter a comment'. Below the text area, it says 'You have 250 characters remaining.'
- Buttons:** At the bottom right, there are two buttons: a 'Cancel' button and an 'Add to Staff Queue' button.

Follow a similar procedure to check a student into a Track Time or Record Visit appointment/visit.

Each queue on the Drop-In Appointments page has different set of actions the front-desk worker can take. They are listed below.

Student In First Available's Queue and Students Checked In With Staff (Same Actions)

- **Send a Message:** Sends a message to the student through the platform.
- **Move to Top:** Moves students to the top of the queue.
- **Remove:** Removes student from the queue.
- **Check Out:** Removes student from the queue and checks them out.

In-Progress Visits

- **Send Message to Attendee:** Sends a message to the attendees/students.
- **Send Message to Organizer:** Sends message to the staff member attendee is checked in with, AKA the organizer.
- **Check Out:** Checks attendee/student out of the appointment.

Students Checked In For Track Time

- **Send a Message:** Sends a message to the student through the platform.
- **Remove:** Removes student from the queue.
- **Check Out:** Removes student from the queue and checks them out.

The Scheduled Appointments page shows all of the scheduled appointments for the current day and lets the front desk worker take action on those appointments.

Actions workers can take on appointments include:

- Send Message to Attendee (Student)
- Send Message to Organizer(s)
- View Appointment Details
- Check In
- Check Out
- Mark No-Show
- Cancel Appointments

When choosing multiple appointments, actions are limited to sending messages and canceling appointments. This gives staff the ability to cancel all appointments for a given day in a particular location.

Staff workers also have the ability to select any date and see appointments on the selected day.

Additionally, if there are two Appointment Center locations being managed from the same computer, users can use the Location switcher. The user opens a new tab with the existing Appointment Center loaded. Then they use the filter at the top of the main page and select a

new Location from the dropdown. Once selected, Appointment Center reloads as the new Location.