

End User's Guide to Starfish Connect

Version 3.0

Purpose

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

Related Resources

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



Refer to the sections titled Manage your Starfish Account and Connect with Students

If you have questions that are not answered by this document or what you find on the Reef, or if you have a more general question about how others in the Starfish community are using appointments, please post your question in the **Ask the Community** forum on the Reef

Tenant admins can find additional guidance on configuring Connect features on the Implementation Resource corner on the Features and Workflow page, in the Services, Appointments, and Calendars section.

Table of Contents

Purpose	1
Related Resources	1
Important Definitions	4
How Starfish Communicates with your Online Calendar	5
When the Starfish Calendar is updated	
When an invitation is canceled or declined	
Get ready for students	
Personalize your profile Edit Institutional Profile	
Edit Appointment Preferences	
Verify Basic preferences	
Add Locations	
Add Calendar Managers	
Save Appointment Preferences	
Edit Email Notifications preferences	
Verify Appointment Notification settings	
Update Tracking Item Notifications	
Save Email Notification preferences	
Establish your availability	
Create an office hour block with the Office Hours Setup Wizard	
Add Office Hours	13
Edit or Cancel office hours	15
Edit office hours	15
Cancel a series of office hours	15
Cancel a single occurrence of an office hour block	16
Add less structured office hours (Scheduling Wizard)	17
Add a Group Session	19
Edit or cancel a group session	21
Edit a group session	21
Cancel a group session	21
Cancel a single occurrence of a group session	22
Manage group session participants	23
Reserve time on your calendar	24
Make and manage Appointments	25
Add, edit, or cancel appointments on your Starfish calendar	
Add an appointment to the calendar	
Modify scheduling details of an appointment	
Document outcomes from a meeting	
Use SpeedNotes to document common outcomes	
Cancel an appointment	32

Review appointment information and meeting outcomes	
Review appointment and meeting information on the student folder	
Filter student lists based on meetings	
Use calendar managers	
Designate someone to manage your calendar	
Manage another's calendar	
Calendar viewing options	
Make and update appointments for others	37
External Calendar Integration	
Configure integration in your profile	
Set your profile to read busy times from Google	
Set your profile to read busy times from Exchange	
External calendar holds on your Starfish calendar	
Document Version History	41

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 Starfish 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 Starfish user who can see and edit another user's Starfish calendar. A calendar owner can designate his/her own calendar managers by navigating to Profile > Appointment Preferences. Or, a Starfish Admin can batch upload these relationships.
- **Calendar Owner:** The Starfish user associated with a Starfish 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 Starfish.
- **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 Starfish.
- **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 Starfish Communicates with your Online Calendar

Starfish 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 Starfish, 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 *Starfish* appointments is automatically available and requires no additional integration or installation.

Important Note:

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

When the Starfish Calendar is updated

Starfish 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. <u>when office hours are added</u>).

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

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



When an invitation is canceled or declined

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

reflected in Starfish. You must elect to "send a response" when declining in order for Starfish 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 <u>office hours</u> or <u>group sessions</u>. Each of these tasks is covered in the sections that follow.

Personalize your profile

Click your name in the top right corner of your Starfish **Home** page to open your **Profile.** Your profile has three tabs: <u>Institutional</u> <u>Profile, Appointment Preferences</u> and <u>Email Notifications</u>. Click the profile tab name to edit it. Setup for each tab is described below.

Edit Institutional Profile

INCOMUTIONIAL PROPERTY	APPOINTMENT PROTORENCES	EMAL NOTIFICATIONS	Fairer Wird States
Bases 18 a.c. as reach all also p	www.expandition.com/international para ettar	ifbmason.	
	Legin Page Direct Lo Legin Page (Creation) Plane (Creation) Plane (Creation) Plane (Creation)	traningies David guidžans fatozie postu	L Sectional and (all Plane Uses) €
Contracting and phases and phases and the elementatic and phases and the track of the phases and the track of the phase of the track of	of adaptities, tenong softer, thongs, 2016 interpret - Adaptitions adaptition mentant and program I. You, care of shade your reduct	The proof, is clear to use the paper as warden of standards and a clear, I and galaxy toda provide stangerstand and papers at and standard stategeoused, word requirements, spaces of research and and to the Southanson and the US Generowers, A Spachter (comm	(a) Server of an extension of the available relevants to adhere the company.

- 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.

🗸 Accept -	t i i i i i i i i i i i i i i i i i i i
? Tentative -	
🗙 Decline 🕶	
<u>E</u> dit the F	Response before Sending
_	Response Now
<u>D</u> o Not S	end a Response

C Yanaria tial	
Institutional Pre	Click to view or edit your profile,
Appointment Pr	eferences
Email Notificatio	ons

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

ate
E.
ĺ.

C Institution Email C Alternate Email 📦 Both

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

General Overvie	
A general message shou	d go here. Tell people how you can help them during your office hours.
and graduats school set	office. The been with the McGraw Center for 14 years. In that time I have helped a number of students with career decisions, internships, clion, among other things. Of course, I will glady help you with assignments and papers as well, «a plutions.com?»Learn more about mel*/a»
My Biography	
	rs about yourself. You can include your educational background, work experience, areas of research and study, or any other information t s on campus. Students are more likely to reach out to you if they know a little about you.
	y after receiving my PHD. Much of it was with the Smithsonian and the US Government. At Excellent University, I not only teach Biology 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 <u>adding Office Hours</u>.

Verify Basic preferences

INSTITUTIONAL PROFILE	APPOIN	TMENT PREFERENC	CES EMAIL NOTIFICATIONS
lasics			
Please choose your default settings	for your	office hours blocks. Y	ou can change these whenever you add a block of office hours.
Minimum Appointment length	15 1	ninutes 🔽	
	Sec. in success		
Scheduling deadline:		None	
Scheduling deadline:	0	pering light to be	he day before the office hours
Scheduling deadline:		5:00 PM 🔡 ti	he day before the office hours

1. Select a value for **Minimum Appointment Length**. Starfish 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).

- 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.

Ay Locations		
iter locations for your meet	ings with students. Meetings can be	in an office, online, over the phone, or anywhere else you like.
Add Location		
rick to add a location	ame +	Instructions
Phone	/03-555-1186	This phone number is for scheduled appointments only.

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.

Туре	Office
Name	Advising Center North Rm 118
Instructions	Sign in at the main desk
Required fields	

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 Starfish calendar.

1. Click Add Calendar Manager.

Calendar Managers

O Add Calendar Manager	
Calendar Manager 🔺	
Bokma, Laura	
Goldfinger, Auric	

- 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.

dd Calendar Monager	
od Calendar Makager	10
Jordan, Grant	
- V	
	Never Mind Subr

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.

Jordan, Grant	<u>qiordan@starfishsolleqe.edu</u>	gjordan	R

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

Important Note:

Starfish Administrators can also assign calendar Managers. If you are unable to remove a calendar manager from this area, contact your Starfish 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 Starfish 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:

NOTE: If you do not receive Starfish			
	email notifications when ex	pecied, please make sure t	hey are not marked as SPAM.
Appointments Notificat	ions		
Do not send appointment notification	ilions on weekends 🚯		
Planning Reminders 🔘 send me a	separate email reminder to	ceach appointment	
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	imal reminder with all appo me an email reminder	intments	
	Reminders: 11:00 AM	the day of	🔽 the appointments
Appointment Alerts. 📋 Send me a	n email 15	🔜 minutes before t	he start of an appointment
Send me an email with a calendar a	flachment for every:		
I change to my appointments	change to my Office Hours/	Group Sessions	
Read busy times from my extern	al Google calendar		
Paste your Gauge Calendar provin	line nura		

- **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
 chacked (change to my appointments and change to my Office Hours (Group Sections). T

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 Starfish 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 Starfish. 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 Starfish 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.

Name	Category	Description
 Health Counseling Referral 	ACADEMIC: REFERRAL	Referral to the Health Counseling Office
🚖 Strong Engagement	ACADEMIC: KUDOS	A kudo for terrific class participation.
🔎 Academic Concern - Urgent	ACADEMIC: FLAG	HIGH level of academic concern.
Attendance Concern	ACADEMIC: FLAG	Raise this flag for students who have missed 2 or more class sessions in a row or 3 or more total class sessions in a term.
Paying for College	FINANCIAL: FLAG	Do you have a financial concern that might impact your ability to stay at the institution?
Health Concern	SOCIAL: FLAG	This student has been exhibiting signs of a health issue.
Reserve Assistive Technologies	ACADEMIC: TO_DO	Disabled students who require assistive technologies to complete course work or attend classes should reserve the

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 (9) will be sent when raised regardless of your settings.

You can also use a combination of both options.

Tracking Item Notification	5		
Send me a summary email of all tracking i	tem activity:		
🗍 Daily at 8:00 AM			
Seekly on Monday 🔽 a	t 5:00 AM 🔽		
Send me an immediate email whenever	📃 an item is raised	💷 an item is cleared	an item is assigned to me

- 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).
- 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.

CBest 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 <u>group sessions</u>. There are three ways you can add office hours: use the <u>Office Hours Setup Wizard</u> for quick initial setup, use the <u>Add Office Hours</u> button to add additional blocks at any time, or use the <u>Scheduling Wizard</u> 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 Starfish 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.

Office Hours Setup Wizard If your office hours don't repeat weekly, click here. Go ahead and get started by adding one time block for now! You can always add more later. 1. What day(s) do you have office hours? DM DT DW DT DF DS DS 2. What time are your office hours? Enter Start Time to Enter End Time 3. Whore are they? in an office 🛛 💟 Type Details Enter an office location Instructions Knock once and enter Show me this Office Hours Setup Page again next time I login If I don't have any Office Hours Close Set up Office Hours

A confirmation message will display on the screen.

- To personalize your profile, add locations and other preference, click Go to Profile>>
- To <u>add additional office hours</u>, <u>group</u> <u>Got</u> <u>sessions</u>, <u>reserved time</u>, or to start adding appointments, click **Go to Calendar** >>.

Thank you for turning on Office Hours!
You can complete your profile and preferences by going to your Profile.
Go to Profile>>
You can add more blocks or edit your office hours by going to your calendar.
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 <u>Scheduling Wizard</u>.

 Click the Add Office Hours button on your Starfish Home page or Appointments page.

Home Appointments -

This opens the **Add Office Hour** form.

Add Office Hou	Never Mind Submit
Calendar	My Calendar
Title	Dr. Gold's Major Advisor
What day(s)?	Every Tues, and Thurs. Prepeats every: 1 veek(s)
	Repeat on: 🗌 Mon 🗹 Tue 🗌 Wed 🗹 Thu 🗌 Fri 🗌 Sat 🗌 Sun
What time?	9:00 AM to 11:30 AM
Where?	Note: You may select more than one location to give students a choice.
	Advising Center North Rm 118 sign in at the front desk
	✓ Virtual Conference Room Dial 887-000-1444 and use your student ID as the pass code.

- 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.

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 <u>Appointments Preference</u> page of your profile.

Office Hour Type 👔	Scheduled And Walk-ins
	Take either scheduled appointments or walk-ins
How long?	15 minutes 💙 minimum appointment length
	15 minutes 💙 maximum appointment length
Appointment Types	Select the types of meetings you will have in these office hours.
	Advising Departmental Overview

- 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
- 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.
- If your role has permissions to add more than one <u>Appointment Type</u>, 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 (\Im) indicates an **appointment** that recurs on the same date and time for the duration of the term.

 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.

INSTRUCTIONS	START/END DATE	
hese will be sent to a	yone who makes an appointment	

- 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 Starfish.

August 1992 - +	C Darline S Symmet B Sections & Sol 7 Secondaries S	Reason Tree
		Pyt. 06-14-0215 +
	State of the second sec	
****	Gold, Yasmin	
H 1	e	
	Meetings on Today	Acalability
	Today at Abit are Anance Parameter Ana	Come Haves Stat + - COMM State + Come Have Note: - Come Main 1 - Come Party Main 1 - Come Party Main 1 - Come Party
	Techny of 200 pm Stance from transportation disease Bit Area spacetase Concertail Stance transportation	Other Head O

Edit office hours

- 1. Hover over the office hours menu icon ($^{\bigcirc}$) next to an office hour title to open the **Office Hours** pop up card.
- Select Edit Office Hours to modify: the <u>frequency</u> of the office hour block's recurrence, the <u>time of day</u>, <u>locations</u>, <u>office hour</u> <u>types</u>, minimum and maximum <u>duration</u> of appointments, <u>appointment types</u>, <u>instructions</u>, or a <u>start/end date</u> of the series.

Availability	
Office Hours	
08-10-2015 at 2:45 pm Advising Center North Rm 118	
Agin O Canoli + O Walk-in	-

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 <u>reserved time</u> 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 (^(C)) next to an office hour title to open the **Office Hours** pop up card.
- 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

Office Ho	urs :
	015 at 2:45 pm ç Center North Rm 118
🖌 Edit	O Cancel • O Walk-in
🖋 Edit	Cancel • O Walk-m

Ausilability

a message that will be sent to anyone who had time scheduled with you during the office hours you are canceling.

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 Starfish. 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).
- 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.

Delete Office Hours	Never Mind Submit
Do you want to delete this office hours o	courrence?
You can send a message to people with app canceled this Office Hours Block	ointments, explaining why you
I have a family emergency and need to head out a our meeting. Please go to Starfish and pick an ave	

Add less structured office hours (Scheduling Wizard)

Students can only schedule an appointment at times you indicate are available by adding office hours or <u>group sessions</u>. The <u>Add Office Hours</u> 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.

CBest 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 Starfish **Home** page or **Appointments** page.



 Complete the first page of the scheduling wizard by entering the Title, location (Where?), duration (How long?), <u>Appointment Types</u> 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 <u>Add Office Hours</u> section).

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

Intersection The Scheduling Wizard makes it easy for advisors and instructors to schedule multiple office hour blocks for multiple days in a single week. It is useful for serving up your calendar for advising rush periods and other times when you book several blocks of time for seeing students. To get started, specify the title, location, and other stenings for the office hour blocks you are seeing up. Commute to step 2 in the wizard to stell the days and times for the week's office hours. Enter the information that should be applied to the office hour blocks. Note that all blocks created in step 2 of this wizard will use the information you specify here. Title Advising Hours Where? Note: You may talket more than one location to give students a choice. @ Anders Hall, Room 301 Please study in with the front desk. @ Call 203-555-1111 Please cold in with the front desk. @ Local 203-555-1111 Please cold in any appointment length @ hours Immune appointment length @ hours Select the types of appointments that can be made in these office hours. Note: You can select multiple non-recurring appointment type. Note: You can select multiple on-recurring appointment type.	The Scheduling Wizard makes it easy for advisors and instructors to schedule multiple office hour blocks for n is useful for setting up your calendar for advising rush periods and other times when you book several blocks To get started, specify the title, location, and other settings for the office hour blocks you are setting up. Continue to step 2 in the wizard to setup the days and times for the week's office hours. Enter the information that should be applied to the office hour blocks. Note that all blocks created in step 2 of			
a useful for serving up your calendar for advising rush periods and other times when you book several blocks of time for seeing soudents. To get started, specify the title, location, and other settings for the office hour blocks you are setting up. Continue to step 2 in the witzerd to setup the days and times for the week's office hours. Inter the information you specify here. Title Advising Hours Where? Advesting Hours Where? Advesting Hours Call 702-555-1111 Please check in atty biok days. Call 702-555-1111 Please check in atty biok growthere. How long? Is minutes I for advising Mours Select the types of appointments that can be made in these office hours. Note: You can select multiple on popointment types but only one recurring appointment type.	s useful for setting up your calendar for advising rush periods and other times when you book several blocks To get started, specify the title, location, and other settings for the office hour blocks you are setting up. Continue to step 2 in the wizard to setup the days and times for the week's office hours. Inter the information that should be applied to the office hour blocks. Note that all blocks created in step 2 of			
Continue to step 2 in the witard to setup the days and times for the week's office hours. Differentiation you specify here. Title Advising Hours Where? None: You may telect more then one locence to give students a choice. Call 703-555-111 Please choid in with the front desk Call 703-555-111 Please cold in with the front desk Call 703-755-755-755-755 Call 703-755-755-755-755 Call 703-755-755-755-755-755-755 Call 703-755-755-755-755-755-755-755-755-755-75	Continue to step 2 in the wizard to setup the days and times for the week's office hours. Since the information shat should be applied to the office hour blocks. Note that all blocks created in step 2 of			
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Information you specify here. Title Advising Hours Where? None: You may select more than one location to give students a choice. Advising Hours Call 703-555-111 Please and in with the front deak. Call 703-555-111 Please coll me at your scheduled time. How long? 15 minutes 15 minutes 16 hours Please of appointment length Select the types of appointment type.	에 주말했다. 이 나 이 아무는 두 것이 않는 수가 있는 것이다.			
Where? Note: You may select more than one locence to give students a choice. If Anders Hall, Room 301 Plesse should in with the front deak. If Call 703-555-1111 Plesse confirme at your scheduled time. How long? 15 minutes If Anound Image: Scheduled time. Appointment Types Select the types of appointments have can be made in these office hours. Note: You can select multiple non-recurring appointment type.		this witzerd will use the		
Appointment Types Select the types of appointment type. Appointment Types	Title Advastig Hours			
Appointment Types Select the types of appointments that can be made in these office hours. Note: You can select multiple non-recurring appointment types but only one recurring appointment type.	Anders Hell, Room 301 Please check in with the front desk. Call 703-555-1111	Anders Hell, Room 301 Plesse cheol in with the front desk. Ecol 703-555-1111		
Appointment Types Select the types of appointments that can be made in these office hours. Note: You can select multiple non-recurring appointment types but only one recurring appointment type.	How long? 15 minutes 📴 minimum appointment length			
Note: You can select multiple non-recurring appointment types but only one recurring appointment type.	8 Acurs inskinum appointment length			
	Note: You can select multiple non-recurring appointment types but only			
Class Related Meetings Mill General Advising Supplemental Instruction	Class Related Meetings de General Advising			
Instructions				
These will be visible to anyone who makes an appointment	These will be visible to anyone who makes an appointment			

3. Click the **Next** button

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.

							1	tey 5 - May 0. 1	014 6.9
Ma	e 55	1	e 5/6	We	0.5/2	18	45/0		-54
9:00 AM	9:30 AVI:	12:00 PM	200 810	10.00 AM	11.00 AM	2.00 PM	0.05 PM	SortTime	fired Terrie
10x00.444	11,00 AM	Start Time	End Trees	1-05 PM	2/80 PM	502.7%	7:00 PM	Stars Time	EndTime
Start Time	End Time	StartTime	Ensi Time	Start Time	Ind Time	Stare Time	End Time	Start Time	End Time
0 A014	mittler, Räsch	· Ant.6	norther Block	O :601 6	nother Brish	O :401.6	And in the section	O Add A	Autorit, Bisan

- 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.

*
Finish

 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 <u>adding office hours</u> but include selections that are specific to group sessions.

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

Home	Appointme	nts 🔻	Students 🔻	
Co Add (Office Hours	de Ad	ld Appointment	Right Group Session
				2

This opens the Add Group Session form

¥.	×
Add Group S	ession Never Mind Submit
Title	Calculus Workgroup
When?	Weekly Pepeats every: 1 week(s)
	Repeat on: 🗹 Mon 🗌 Tue 🗌 Wed 🗌 Thu 🗌 Fri 🗌 Sat 🗌 Sun
What time?	11:00 AM to 12:00 PM
Where?	Advising Center North Rm 118 sign in at the front desk
	Virtual Conference Room Dial 887-000-1444 and use your student ID as the pass code.

- 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.

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

Reason supplemental instruction	
How many students? 6	
Enter the maximum number of students that can sign up for the session.	
Allow students to see other students who have signed up	
Support supplemental instruction	
Restrict the session to students in the same section or course. Note that the selected reason controls whether restriction is limited to the same course or section.	
INSTRUCTIONS START/END DATE	
These will be sent to anyone who makes an appointment	
Submit your discussion responses by Friday at noon	
	¥
Never Mind Subm	it L

- Select the reason associated with this group session. Reasons listed are those associated with the <u>Appointment Types</u> your role has permission to add. If you don't find the reason you expected, contact your Starfish 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 Starfish administrator set for the <u>appointment type</u> associated with your group session reason. Contact your Starfish 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 Starfish.

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4 3 4 1 10 10 11 12 11 14 16 14 10 16 14 20 15 13 13 14 15 16 37 16 16 16	Gold, Yasmin	Max, 09-21-3218 + +
Appartitioners Types Advantationers Types Analysis Cody Billing Tomas Codecations I Managan	Meetings on 09-21-2015 michairs at 685 an O tearrest tree result	Availability
Static II And A Cyclic And C	Contract Program Contract Cont	Constantian Management Monitoring menu Monitoring Menu

Edit a group session

- Hover over the group session icon (¹⁰) to open the group session pop up card.
- Click Edit on the pop up card You can edit the <u>frequency</u> of recurrence, <u>time of day</u>, <u>location</u>, <u>reason</u>, <u>number of participants</u>, <u>visibility of students</u>, <u>instructions</u> and the series <u>start/end date</u>.



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

- 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.

Calculus Workgroup		
 99-21-2015 at 11:00 am Advising Center North Rm Grat of 6 spets eveloble Submit your discussion reb by Friday at noon 	118	cipants
📽 Participants 💉 Edit	0 Outcomes	O Cancel + 🗮 View
		The entry 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 Starfish. 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 (😂).

Group Session: 5 out of 5 spots available . 🔮 Marage Performance	Calculus Workgroup		
	05-21-2015 at 1100 km 4xivning Center North Rn 118 4xivning Center North Rn 118 6 Just of Spoth evaluation Fullent automation responses by friday at noon	Participants	
	Rentagarta / Esta O Date	orres O Canal + 🚍 Hew	-
	<u>b</u>	The sector series	8

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

έr.	*
Delete Group Session	Never Mind Submit
Do you want to delete this group session occur	rence?
You can send a message to people with appointme canceled this Group Session:	ents, explaining why you
Our regular meeting room was flooded overnight so we w	III not be able to meet this
Required fields	Nover Mind Submit

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.

Group Session: 6 out of 6 spots available

- 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.

here are 6 of 6 spot	a available		
Add participant	amaa jaama	Mad .	
Course:	Barnes, Jamie Journee@startienaolutions.com SF0303141		
Session Participan	ts + Email	Course	Tools
Then are no pad	opents currently		
			Never Mind Submit

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.

Participants	Dutcomes	Spendenes		
ere are 5 of 6 sp	ots available.			
uld participant:			9 Not	
Course:				
Seasion Factorian	····	Ernal	Course	Toda
Somes. Jamie		naomi@starfiatsolutions.com	No course	8

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.



- 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.

*	×
Reserve Tin	ne
	tart and end time to block off time in your calendar as being for appointments.
Calendar	My Calendar
Description	Class Prep
When	08-25-2014 🗰 9:00 AM to 9:30 AM
Repea	t Weekly Until 12-15-2014
	Never Mind Submit

Make and manage Appointments

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

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

- You cannot overlap a reserved time: If you use the <u>Reserve Time</u> 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 <u>external hold</u>: If your Starfish calendar is integrated with an external calendar via <u>Exchange or Google integration</u>, 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 Starfish calendar.

Add, edit, or cancel appointments on your Starfish 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.

Ho	me	A	nioqe	tmen	ts +		Students 🝷				
App	point	ment	Too	IS		«	😪 Add Offic	e Hours	Add Ap	pointment	
•		Augu	ist 20	14 🕶		•			-	-	
s	М	т	W	т	F	S	AGENDA	DAY	WEEK	SCHEDULI	E)
27	28	29	30	31	1	2				Tu	e, 08-26-2014 < >
3	4	5	6	7	8	9	09:00 AM	1			c, oo zo zo i v /
10	11	12	13	14	15	16	15			0	Dr. Gold's Advising
17	18	19	20	21	22	23		-			Chi Condis Mayishig
24	25	26	27	28	29	30	30	- Sho	sk to sign up		
31	1	2	3		5	6	345 -	Cli	Click to sig	a un	
			-				10:00 AM	O CI.	Click to sig	n up	
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411.4	Appoi	ntme	nte		~		11:00 AM	O Cito	ik to sign up		
	waila	1001112.0	Constraint of the second		M		15	O Cik	k to sign up		
-								-			2

This opens the Add Appointment form

SCHEDULIN	IG OUTCOMES	SPEEDNOTES	
alendar	My Calendar		
With When Where		ayeennaa dige	Search: Addwo tarma Add tarma Detailed Description
Reason	(Sendarmann		
Sharing	Shared O Private		Enter a detailed description about the appointment. This is viewab by you and the student with whom the appointment is made.
- Permise	rigon. Please select a re	ason to see who else can	view this shared appointment.
Require	d ñelds		

2. Begin typing the name of the desired student into the **With** drop down list box. Starfish 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 "<u>appointment types</u>" 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 <u>appointment types</u> 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 <u>appointment types settings</u> 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 <u>SpeedNotes</u> 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).

- 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.

SCHEDULIN	G OUTCOMES	SPEEDNOTES				
abendar	Ny Calendar					
WW	Routerk, Joe		Skarct: 🛞 Active terms 📿 All ferme			
When	08-05-2014	20 MV 10 9.45 MV	Detailed Description			
Where	ftere Advang Cartler North Res TTB		Lafa take a toos al your plans for the corring term and make avery you avoid some coding with courses that all reports here or percent regularments.			
Restor						
Course	No Course					
Sharing	. Shand OPing		Enter a detailed description about the appointment. This is a by you and the student with whom the appointment is made.			
_	nary Advisor	tollowing coles may be able to p	see this appointment if they have a relationship with the obstant(a)			

The appointment will appear on the calendar owner's calendar in the selected date and time.

во	me	A	poin	tinen	ts +	2						
App	ointi	ment	Too	ls		*	G Add Offic	e Hours	📸 Add Ap	pointment		
4		Aug	ust 20	914 +		÷						
s	· M.	т	W	Ŧ	F	s	AGENDA	DAY	WEEK	SCHEDULE	1	
27	28	20	30	-31	1	2	1				Tue, 08-26-2014 <>	a.
3	4	5	6	7	8	9	09:00 AM				100,00-20-2014()	
10	11	12	13	14	15	16.	15			0	Br. Gold's Advising Hours	ſ
17	18	19	20	21	22	23	56	82.5	Student, Joe (9:30 am)		
24	25	26	27	28	29	30	28	1000	icit to sign up			t.
31	- 5.	2	3	4	5	6	10.00 AM	- 1423 13	ick to sign up			h
			Totta	¥.			15		ick to sign up			ľ
Cal	enda	ar Ma	влао	er				-	ick to sign up			
						~	45	0 0	ick to sign up			Ľ
App	ointm	ient i	ypes	٤	_		11:88 AM	-	ick to sign up			ł
	4ppol				~		10	in the second	ice to sign up			
	waila	ble C	inly			Ý		- u	on as piller nty			19

The appointment is also available from the calendar owner's **Home** page on the **Appointments** and **Recent Changes** channel.

Colleg Heart	C Appendiant	B-O-tag Services	6.Dex	# Scheming Morth	
C System Arrent					_
Welcome B	acki				
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				and the second s	
Shere (41 Articles)				Sharget in Party	1995
Shere (41 Articles)		1 TH 24 3114 41 1 114	e.	Charget in July 3	1995
State As Actually New Appen	street Scort is	to Werkers at 25-14-2			Litys .

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.

& Owner	Date / Time	Reaco	Scheduled By	With	Listation
D late	田 💼 (2-54-2015 & 8 (0) pm (Calcol)	Conplete Withdrawai	Yaurvin Geiz	Vannin Gold	Advising Center Storth Rm 1.
114	12-17-2514 at 6:00 pm (Appoin	Deneral Advance Visit	Yearon there	Vasmen Goold	New Bluckert Hall
A Buzzen Plana	09-02-2018 at 11:30 am (Appel	Pra-reportation	Yaunm Celd	Yasirki Gold	Virtual Conference Room
D American	100 29 2914 of 5 50 am Vopers	Diet Success Team	Vasnin Gold	lia Satin	Gilbert Hall, Room 202 (My
U. PLANETL PARA	1 m 00-20-2014 at 8.30 em (Apport	Pre-registration	Yearwidere	Yearwo Goog	Advising Center North Rvi 1.
# Counter	1.2				
There	Description, Lat's take a look of pr person requirements	our pare for the corning	lern and have oure y	to per 1 overleading with	courses that at require heavy in
-	Comment Discound Juri's (halo going to investigate a more flexible	nges with boing an samp	ue more than 2 days a	week, and how this beg	acts photoes for courses. He is

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 <u>Email Notification</u> settings.

100	Minn &/25/2014 9:53 AM	
P~1	Starfish Calendar <calendar-ea@dostarfish.com></calendar-ea@dostarfish.com>	
	You have an appointment with Yasmin Gold on 8/26/2014 9:30 AM EDT	
Required	joestar@starfishcollege.edu	
When	Tuesday, August 26, 2014 9:30 AM-9:45 AM	
Location	Advising Center North Rm 118	
Hi Joe,		(:
Please	find below details to the appointment that has been scheduled:	Γ
Sched	aled By: Yasmin Gold	
Meetin	g With: Yasmin Gold and Joe Student	
Date:	8/26/2014 9:30 AM EDT	
Locati	on: Advising Center North Rm 118 (sign in at the front desk)	
Reason	a for Meeting: Pre-registration	1
Instru	ctions: Walk-ins should sign in to the Kiosk and wait to be called.	
	ption: Let's take a look at your plans for the coming term and make sure you werloading with courses that all require heavy in person requirements	

Modify scheduling details of an appointment

 Hover over the Appointment icon (²⁶) 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 <u>Home</u> page, or from the student folder <u>Meetings</u> tab.



From the Appointments pop up card you can edit the

<u>scheduling details</u> of an upcoming appointment and <u>add or edit outcome details</u>. If configured on your Starfish system, you may be able to use <u>SpeedNotes</u> to document common outcomes.

You can also <u>cancel an appointment</u> from this menu.

- Select Edit from the <u>Appointment pop up card</u> 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 <u>SpeedNotes</u> 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).

SCHEDULING	OUTCOMES	SPEEDNOTES				
alendar M	y Calendar					
With	Student, Joe					
When	8-26-2014 10	00 AM to 10 15 AM	Detailed Description			
Where A	dvising Center North	Rm 118	Lef's take a look of your plans for the coming term and make sure you aren't eventoading with courses that all require heavy in person requirements			
Reason P	re-registration					
Course N	lo Course					
Sharing @	Shared O Private	8	Enter a detailed description about the appointment. This is viewable by you and the student with whom the appointment is made			
Permission Primar		Bowing roles may be able	o see this appointment if they have a relationship with the student(s)			
Required fi	elds					

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 <u>email notifications preferences</u> are set to notify when changes are made to an existing appointment (recommended).

Document outcomes from a meeting

- 1. Hover over the **Appointment** icon $\binom{26}{26}$ associated with an appointment.
- 2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form.

2								
Edit App	ointment		Never Mind Submit					
SCHEDULIN	G OUTCOMES	SPEEDNOTE 5						
Date Atlendance	08-26-2014 🕤 👖	0.30 AM	to 10.49 AM					
Comments	Discussed Jogg challenges with being on campus more than 2 days a week, and how this impacts choices for courses. He is going to investigate a more flexible work actiencies with his boss to see if he could take morning classes on Thursdays.							
	Comments are notes about the appointment, viewable only by you and other people with whom the appointment is shared. These notes can be edited only by you before or after the appointment for record-keeping purposes.							
	Send a copy of ne ions: People with the hary Advisor		be able to see this appointment if they have a relationship with the student(s)					
			Never Mind Salamit					

- 3. Capture the meeting's *actual* start and end time next to the **Date**.
- 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.
- 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 <u>Meetings</u> 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 Starfish system, the **SpeedNotes** tab is available whenever the **Edit Appointment** form is open.

Edit Appoint	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 Starfish administrator.

- 1. Hover over the **Appointment** icon (²⁶) associated with an appointment.
- Select <u>Outcomes</u> or <u>Edit</u> 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.

				1
Edit Appoin	itment			Nover Mind Submit
SCHEDULING	OUTCOMES	SPEEDNOTES		
Check off the top	pics discussed and	activities complet	ed in this meeting.	
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Change Majo	r		Complete Intake Form	
Complete Aca	ademic Plan		Major Selection	
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Graduation Plann	ung			
🗌 Degree Audit	Review		Graduation Plan	
Registration				
Drop Classes	1		Planning Registration Planning	
Euli Withdraw	al for Term			
				Never Mind Submit
				Submit

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

Cancel an appointment

1. Hover over the appointment menu icon (²⁶) associated with an appointment to bring up the **Appointment** pop up card.

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

CBest Practice: include an explanation for the cancellation, and provide guidance on how to reschedule or connect to other available resources.

K :
Cancel Appointment
Are you sure you want to cancel your 10:00 am appointment with Joe Student?
You can send this person a message explaining why you have to cancel. This message will be saved with the appointment notes:
Joe, I apologize for the short notice. I must unexpectedly travel for a family emergency and will be out for the rest of the week. I would be happy to reschedule with you next week, but if you want to meet with someone this week, please reach out to Dr. Kumpf. You will find her in your Success Network.
Never Mind Submit

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 <u>email</u> <u>notifications preferences</u> 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 Starfish.

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



Or from the appointment on your calendar

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Click on the **Meetings** tab of the student folder to review information about upcoming and past meetings for this student.

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The **Meetings** tab of the student folder includes upcoming appointment information as well as meeting notes captured in Starfish. 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 <u>appointment</u>icon to update the appointment.

If the student was marked as a no show on the <u>Outcomes</u> 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.

 Click on the My Students tab from within your Students area in Starfish. 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.
- 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.

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Additional Filters				Clear Ad Filters Rever Min	of Some	1111
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		Dates	08-11-2014	Closer All Fillners Rever 18	ind set	

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

Your student list will be displayed showing only those students who matched your Meetings filter criteria.

Home	Appointments	Students 👻	Services 🔻	Admin	Search for Students	Q
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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 Starfish calendar.

You can designate other users to be your calendar manager through <u>Appointment Preferences</u> in your profile.

Institutions can create calendar managers via SIS import or administrator upload. You must contact your Starfish 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 Starfish 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, Starfish 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.

¥	
Add App	ointment
SCHEDULIN	G OUTCOMES SPEEDNOTES
Calendar	
* With	My Calendar
	Starfish, Sue

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.

Appointment Types	
All Appointments	-
Available Only	
My Calendar	
Calendars I Manage	
Deselect All Select All	

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' Starfish calendar.

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

With Starfish's adapter installed, Starfish will poll your external calendaring system for shared calendars, and then display the free/busy information from those shared calendars on the corresponding Starfish user's calendar.



Figure 2: External Calendar Integration

In order for your external calendar's information to be available to the Starfish 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 Starfish system, just above the **Tracking Item Notifications** heading you will find a check box labeled:

C Manaralas finds	4- -
Institutional Pre	Click to view or edit your profile.
Appointment Pr	

"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

Read busy times from my external Google calendar	
Paste your Google Calendar private link here	
Important: In order for this setting to take effect, you must share your private calendar link with Starfish. Click here for further	er instructions.

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:

- 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

Calendar	Display only this Calendar
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	Create event on this calendar
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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.

ase use the following address to acc calendar product that supports the	ess your calendar from other applications. You can copy a	ind paste this in
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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



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 starfish 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 Starfish calendar

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

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

- 1. The title on the calendar does not include the hyperlink to the student folder.
- When you hover over the appointment menu icon (20) the External Hold card is displayed rather than the Starfish Appointment card.

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 Starfish.

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

he 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