

UNCW STARFISH

Managing Appointments & Group Sessions

Once your office hours are established in Starfish, your schedule is now available for students to make appointments or for you to schedule appointments on their behalf.

Read the **Getting Started Guide** as a companion to this handout.

Make and Manage Appointments

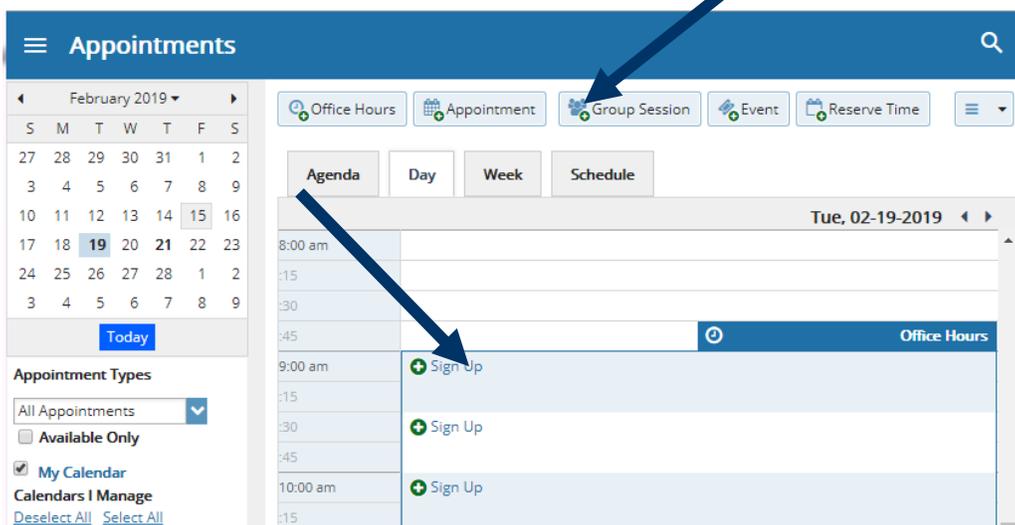
Students may only schedule appointments with you during times you have designated as available, either through your **office hours** or **group sessions**. Think of your Starfish calendar as an “availability” calendar.

Calendar owners and any designated calendar managers can add appointments with the following exceptions:

- **You cannot overlap a reserved time:** If you use the **Reserve Time** feature to block time on your calendar, you will not be able to add an appointment in the time occupied by the reserved time without first removing the reserved time from your calendar.
- **You cannot overlap a group session:** you cannot add an individual appointment that overlaps with a group session previously added to on your calendar.
- **You cannot overlap an external hold:** If your Starfish calendar is integrated with an external calendar via [Exchange](#) or [Google integration](#), you will find “External Holds” on your calendar. These represent items that exist on your other calendar (Outlook or Google). You will not be able to add appointments that conflict with external holds on your Starfish calendar.

How To Add, Edit, or Cancel Appointments

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.



The screenshot displays the 'Appointments' interface. At the top, there is a navigation bar with a search icon and a menu icon. Below this, a calendar for February 2019 is shown on the left, with the 19th highlighted as 'Today'. To the right of the calendar is a toolbar with buttons for 'Office Hours', 'Appointment', 'Group Session', 'Event', and 'Reserve Time'. A blue arrow points to the 'Appointment' button. Below the toolbar are tabs for 'Agenda', 'Day', 'Week', and 'Schedule'. The 'Day' view is selected, showing a timeline for Tuesday, February 19, 2019. A blue arrow points to the 'Sign Up' icon (+) next to the 9:00 am slot, which is currently occupied by an 'Office Hours' event.

- This opens the **Add Appointment** form. 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.

Add Appointment [Never Mind] [Submit]

Scheduling | Outcomes | SpeedNotes

Calendar My Calendar

With

* People in Active terms All terms

* Student Student, Starfish

* When 02-19-2019 9:00 am to 9:30 am

* Where Cameron Hall 121

* Reason Registration / Class Schedule

Course No Course

* Sharing Shared Private

Detailed Description
Enter a detailed description about the appointment. This is viewable by you and the student with whom the appointment is made.

Permissions: People with the following roles may be able to see this appointment if they have a relationship with the student(s):

- Housing Residence Coordinator (RC)
- Primary Academic Advisor
- General Academic Advisor

* Required fields [Never Mind] [Submit]

- 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).
- Select the desired location from the options available in the **When** drop down list.
- Select a **Reason** for the meeting. The reasons available are based on the student you selected and the [appointment types](#) that you have access to in your role/ relationship with that student.

If you have selected a timeslot from a set of existing office hours, the reasons will be further limited to those associated with the [appointment types settings](#) for the office hours.

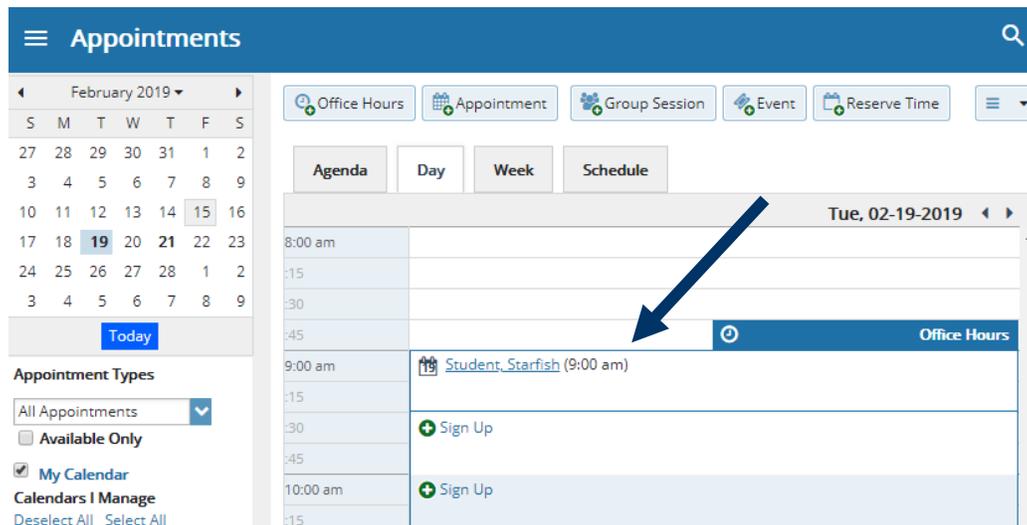
Important Note:

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

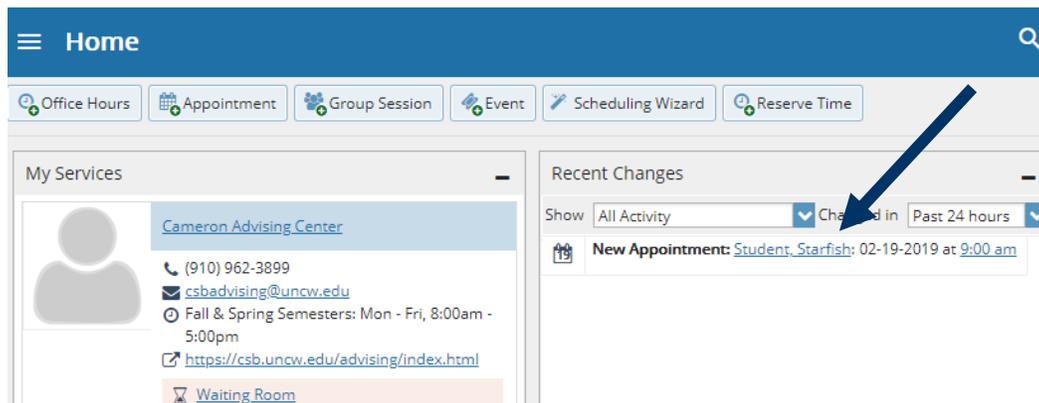
- If relevant to the meeting and permitted by your role, select a **Course** from the list presented.
- Select a radio button for **Sharing** to either make the appointment **Shared** (roles listed in the Permissions area for this student can see the appointment and its outcomes) or **Private** (only 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.
- Click the **Submit** button to schedule the meeting.

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



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



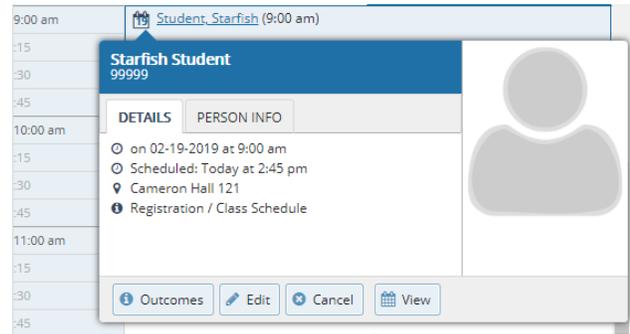
The appointment will also appear on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. If you included a detailed description, it will be listed on the Meetings tab.

Important Notes:

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

Modifying Scheduling Details for an Existing Appointment

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



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

You can also [cancel an appointment](#) from this menu.

2. Select **Edit** from the [Appointment pop up card](#) to bring up the **Scheduling** tab of the **Edit Appointment** form. From here, you can edit appointment scheduling details including:
 - **When** and **Where** the meeting will occur.
 - The **Reason** associated with the meeting.
Note: This may impact who else can view the meeting, and which [SpeedNotes](#) will be available for documenting outcomes.
 - The **Course** associated with the appointment. (optional)
 - The **Sharing** setting for the meeting. Select private if only you, your calendar manager and the student should see this meeting. A shared meeting will be visible to those with a role that has access to the appointment type and a relationship to the student. These roles are noted in the **Permissions** section of the form  [Permissions](#)).
 - **Detailed Description** that is shared with the student and documented on the Meetings tab of the student folder (optional but recommended).
3. Click the **Submit** button to save changes.

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

Cancelling an Appointment

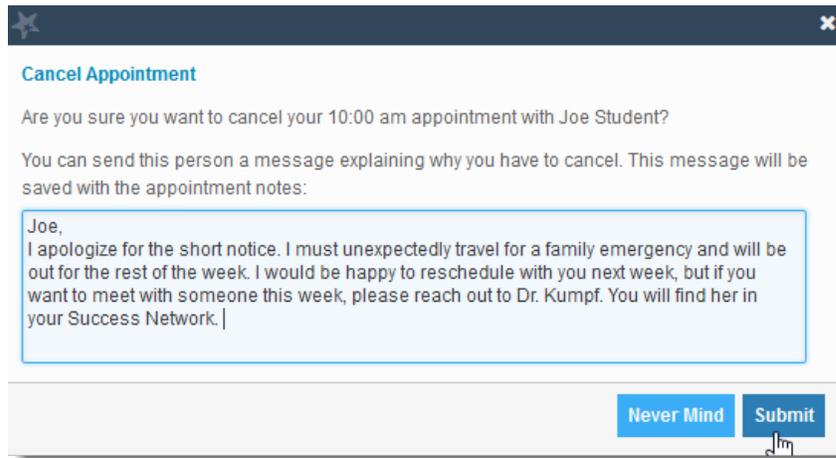
1. Hover over the appointment menu icon  associated with an appointment to bring up the **Appointment** pop up card.

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

You can also [edit an existing appointment](#) from this menu.

2. Select **Cancel** from the Appointment pop up card.
3. The **Cancel Appointment** form is displayed. Type a note explaining the reason for the cancellation (optional but recommended).

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

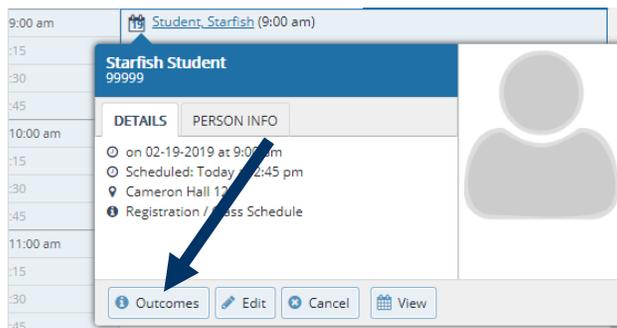


4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

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

Documenting Notes Post-Meeting

1. Hover over the **Appointment** icon  associated with an appointment.
2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form



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

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

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

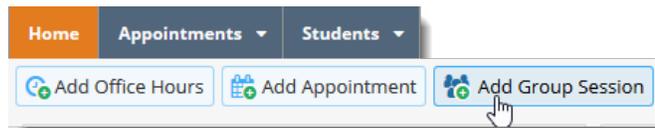


- Check all boxes that are relevant to your meeting.
- Click the **Submit** button to save your updates.

How To Add a Group Advising Session

Group sessions allow you to create blocks of time in which a specified number of students can meet with you as a group.

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



This opens the **Add Group Session** form

2. Enter a **Title** (name) for this group session. Students will see this name when they view your calendar.
3. Select **When?** the group session will occur and select the recurrence (e.g. **Repeats every 1 week**).
4. Use the **What time?** fields to enter the start and end time for the group session.

Important Note:

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

5. Select **Where?** meetings will be held. To add additional locations options, go to the [Appointments Preference](#) page of your profile. Only one location can be selected for a group session
6. Select the **reason** associated with this group session. Reasons listed are those associated with the [Appointment Types](#) your role has permission to add. If you don't find the reason you expected, contact your Starfish administrator.

The screenshot shows a web form for creating an appointment. At the top, there is a 'Reason' dropdown menu with 'supplemental instruction' selected. Below it is a text input field for 'How many students?' containing the number '6'. A note below the input field reads: 'Enter the maximum number of students that can sign up for the session.' There are two checkboxes: the first is checked and labeled 'Allow students to see other students who have signed up'; the second is unchecked and labeled 'Support supplemental instruction'. Below the checkboxes is a note: '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.' There are two tabs: 'INSTRUCTIONS' (selected) and 'START/END DATE'. Below the 'INSTRUCTIONS' tab is a text area containing the text 'Submit your discussion responses by Friday at noon'. At the bottom right of the form are two buttons: 'Never Mind' and 'Submit'.

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 [appointment type](#) associated with your group session reason. Contact your Starfish Admin to learn more about this option.

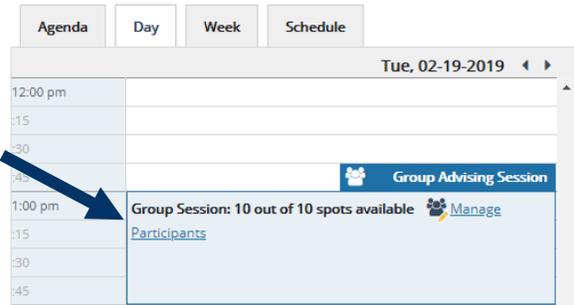
10. Use the **Instructions** box for information that should be shared with students who sign up.
11. Click the **Start/End Date** tab to designate a time frame for the group session if it recurs (as set in step 3 above). For the End Date, you may choose: Never, End of Term, on a specified date, or

after a specified number of occurrences.

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

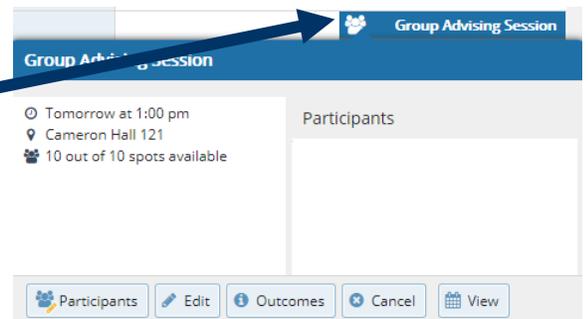
How to Edit or Cancel a Group Session

Existing group sessions will display on your **Agenda** tab within the **Appointments** section of Starfish or as a calendar item on the **Day** tab for the specified date of the event.



Editing a Group Session

1. Hover over the group session icon (👥) to open the group session pop up card.
2. Click **Edit** on the pop up card. You can edit the [frequency](#) of recurrence, [time of day](#), [location](#), [reason](#), [number of participants](#), [visibility of students](#), [instructions](#) and the series [start/end date](#).

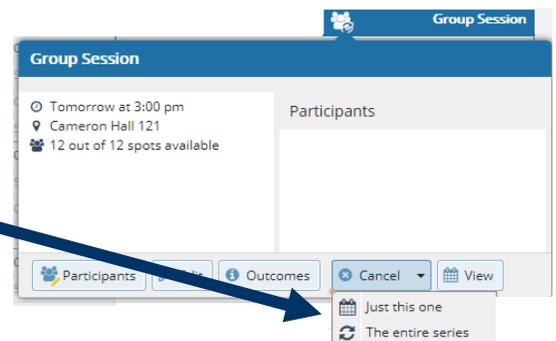


Note: You *cannot* edit the days or the nature of the recurrence (e.g. weekly). Some changes are prevented after students have signed up.

3. Click the **Submit** button to save your **Edit Group Session** form.

Cancelling a Group Session

1. Hover over the group session menu icon (👥) to open the group session pop up card.
2. Select **Cancel**, "The entire series" to cancel all occurrences of the group session. You will be prompted to confirm the date from which to cancel the series, and can add a note that will be included in an email to those whose sessions are canceled.
3. Click the **Submit** button to cancel the group session series.



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

Delete Group Session Never Mind Submit

Do you want to delete this group session occurrence?

You can send a message to people with appointments, explaining why you canceled this Group Session:

Hi, Everyone. My apologies, but this session has been cancelled due to Hurricane Florence. You can reschedule for an alternate group session by logging into Starfish.

Thanks for your patience.

* Required fields Never Mind Submit

Managing Group Session Participants

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

1. Select **Manage Participants**.
2. Search for a student by typing his/her name into the **Add participant** field, then click the **Add** Button. Repeat process for each student.

The screenshot shows the 'Manage Session Participants' interface for a 'Group Advising Session 1:00 pm Tomorrow'. The 'Add participant' field contains the text 'starfish' and the 'Add' button is highlighted with a blue arrow. Below the field, a dropdown menu shows a search result for 'Student, Starfish' with email 'starfishstudent9999@uncw.edu' and ID '99999'. The 'Session Participants' table below is empty, indicating no participants are currently added.

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

The screenshot shows the 'Manage Session Participants' interface after a participant has been added. The 'Add participant' field is empty and the 'Course' dropdown is set to 'Select a Course...'. The 'Session Participants' table now contains one entry for 'Student, Starfish' with email 'starfishstudent9999@uncw.edu' and 'No Course'. A blue arrow points to the delete icon (a blue circle with a white 'x') in the 'Tools' column. A 'Cancel Occurrence' button is visible below the table.

4. When you are finished with your participant updates, click the **Submit** button to save your changes.