

BOILERCONNECT FEATURE SPOTLIGHT SERIES

January 2024

Setting and Maintaining Availability

Feature Spotlights

Spring 2024

- *January – Setting and Maintaining Availability*
- February – Alerts and Cases (referral system)
- April – V3 Reports
- May – Topic to be determined

Today

Setting and Maintaining Availability

- What, Why, & How
- Availability Deep Dive
- Personal Availability Link Deep Dive

What, Why, & How

Availability lets staff indicate the days, times, locations, and services they offer when they meet with students.

Can be used
whether or not you
sync your calendar
to BoilerConnect

Required for
students to be able
to schedule an
appointment with
you

What, Why, & How

Availabilities are set from the staff home screen. Users can create multiple availabilities. It is recommended that you create in person and virtual availabilities separately.

Staff Home ▼

Students

Appointments

My Availability

Appointment Queues

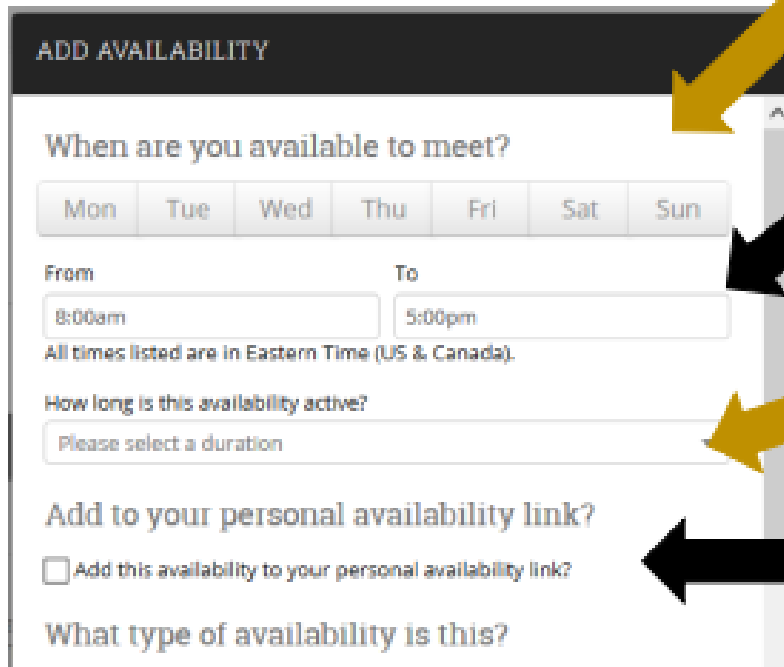
Assigned Students

What, Why, & How

Use the Actions menu to add a new Availability or copy or delete an existing one.



Availability Details



ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 8:00am To 5:00pm
All times listed are in Eastern Time (US & Canada).

How long is this availability active?
Please select a duration

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?

1. Select the days of the week you want to be available for appointments.

2. Choose the time frame you want to be available for appointments. The systems "talks" to Outlook, so appointments will not be able to be made at the same time as something already scheduled on your calendar.

3. Select your availability duration. We recommend "forever" for basic appointment availability.

4. Check the box if you want this specific availability to be accessible via your personal availability link (PAL).

Availability Details

The screenshot shows a web form titled 'Availability Details' with several sections. At the top, there are three tabs: 'Appointments', 'Drop-ins', and 'Campaigns'. Below these are several input fields and a text area, each with a corresponding instruction and arrow:

- 5.** Select the type of availability you are creating. (Arrow points to the 'Campaigns' tab)
- 6.** Select a Meeting Type (Arrow points to the 'Meeting Type' dropdown menu)
- 7.** Select the appropriate Care Unit and Location for you. (Arrows point to the 'Care Unit' and 'Location' dropdown menus)
- 8.** Select the service(s) students will be receiving in this appointment (example: non-major advising, registration). (Arrow points to the 'Services' dropdown menu)
- 9.** Include the URL or Phone Number if you are creating availability with the Virtual Meeting Type. (Arrow points to the 'URL / Phone Number' text input field)
- 10.** Include any special instructions (example: Allison's office is located in YONG 517. Please swipe in on the kiosk in the lobby upon arrival.). (Arrow points to the 'Special Instructions for Student' text area)
- 11.** Click "Save". (Arrow points to the 'Save' button)

The form includes a 'Cancel' button and a 'Save' button at the bottom right. The 'Special Instructions for Student' area has a rich text editor with bold (B), italic (I), bulleted list (≡), numbered list (≡), undo (↶), and redo (↷) icons. An example instruction is provided: 'e.g. room 23, please bring paper'.

Availability Deep Dive

Overview

- If you sync your calendar, let it do the work!
- Create separate availabilities for in person and virtual – use the Special Instructions for Student box to add information specific to that type of appointment.
- Consider setting the Date to “forever” – then you can set it and forget it!

Personal Availability Link Deep Dive

Overview

- Personal Availability Links (PALs) act as a shortcut through the student self scheduling process. They allow students to navigate directly to your available services and available appointment dates/times.
- Each PAL is unique to a staff member in BoilerConnect. The link does not change over time.
- When you include a PAL in a URL field, website, email, or text message and students click the link, they are taken to the New Appointment page in student scheduling similar to when you send them an Appointment Campaign Link.
- Staff can add multiple availabilities to their PAL.

Personal Availability Link Deep Dive

Overview

- If students who are not assigned to you cannot normally schedule by logging into BoilerConnect and clicking the Make an Appointment button, they will not be able to schedule with you using your Personal Availability Link (PAL).
- Personal Availability Links (PALs) will not show Campaign availability. To use the appointment campaign feature, a campaign still needs to be created and sent.

THANK YOU

Join us February 1st for our next feature spotlight – Alerts and Cases (referral system)!