

## HOW TO CHANGE THE ADVISOR OF AN APPOINTMENT (ON THE FLY CHANGES)

Step 1: Go to the appointment tab on the person account of the student you need to reschedule

The screenshot shows the 'Person Account' page for Sandy TESTER Sanderson. The 'Appointments' tab is highlighted with a red box. The page displays various account details, including contact information, address, and system information.

Person Account  
**Sandy TESTER Sanderson**

University ID  
12341234

Details Schedule Appointments **Appointments** Advising Notes Success Plans Service Indicators Related Files

Account Name Sandy TESTER Sanderson Account Record Type Externally Mastered

Legal First Name University ID 12341234

Legal Last Name

▼ Contact Information

Email milanglavan@boisestate.edu Phone (604) 123-1234

Term Activated Student  Mobile

▼ Address Information

Mailing Address

> Additional Information

▼ System Information

Created By CJ Salen, 9/20/2023, 3:51 PM Last Modified By Milan Glavan, 11/10/2023, 8:40 AM

Account Owner CJ Salen External ID 12341234

Step 2: Click the appointment link on the appointment that needs changed

The screenshot shows the 'Person Account' page for Sandy TESTER Sanderson, with the 'Appointments' tab selected. A list of 10 service appointments is displayed, with the second appointment, SA-0079, highlighted in red.

Person Account  
**Sandy TESTER Sanderson**

University ID  
12341234

Details Schedule Appointments **Appointments** Advising Notes Success Plans Service Indicators Related Files

**Service Appointments (10)**

10 items • Sorted by Scheduled Start • Updated a few seconds ago

Appointment ...	Subject	Scheduled Start	Scheduled End	Created Date
1 SA-0071	Finish in Four program - AASC: Sandy Sanderson	12/13/2023, 10:00 AM	12/13/2023, 11:00 AM	11/30/2023, 10:46 AM
2 SA-0079	Major Exploration - AASC: Sandy Sanderson	12/11/2023, 9:00 AM	12/11/2023, 10:00 AM	12/6/2023, 8:59 AM
3 SA-0063	Finish in Four program - AASC: Sandy Sanderson	12/7/2023, 3:30 PM	12/7/2023, 4:30 PM	11/27/2023, 12:21 PM
4 SA-0058	Finish in Four program - AASC: Sandy Sanderson	11/29/2023, 10:00 AM	11/29/2023, 11:00 AM	11/15/2023, 4:18 PM
5 SA-0064	Finish in Four program - AASC: Sandy Sanderson	11/28/2023, 12:45 PM	11/28/2023, 1:45 PM	11/27/2023, 12:37 PM
6 SA-0052	Finish in Four program - AASC: Sandy Sanderson	11/28/2023, 9:30 AM	11/28/2023, 10:30 AM	11/14/2023, 4:23 PM
7 SA-0025	Academic Appeal - COAS: Sandy Sanderson	11/20/2023, 2:00 PM	11/20/2023, 2:45 PM	11/8/2023, 3:00 PM
8 SA-0047	Finish in Four program - AASC: Sandy Sanderson	11/20/2023, 9:45 AM	11/20/2023, 10:45 AM	11/14/2023, 3:57 PM
9 SA-0044	Finish in Four program - AASC: Sandy Sanderson	11/16/2023, 9:00 AM	11/16/2023, 10:00 AM	11/14/2023, 1:33 PM
10 SA-0017	Academic Appeal - AASC: Sandy Sanderson	11/6/2023, 8:00 AM	11/6/2023, 8:45 AM	11/3/2023, 10:47 AM

[View All](#)

Step 3: Click the Assigned Resource Number link on the right side under the Assigned Resources Header

The screenshot shows a software interface with a top navigation bar containing buttons for "Check In Student", "Create Advising Note", and "Modify Service Appointment". Below this, a sidebar on the left lists items like "TER Sanderson" and "Major Exploration - AASC". The main content area features a section titled "Assigned Resources (1)" with a dropdown arrow. Under this section, the name "Maria Paluzzi" is listed, followed by "Assigned Resource ID: 03:7:000001wVndAAE" and "Assigned Resource Number: AR-0078", where "AR-0078" is highlighted with a red box. A "View All" link is positioned below the resource information. Further down, there are filter options: "Filters: All time • All activities • All types" with a gear icon, and a "Refresh • Expand All • View All" link. A section titled "Upcoming & Overdue" contains the text "No activities to show. Get started by sending an email, scheduling a task, and more." and "No past activity. Past meetings and tasks marked as done show up here."

Step 4: Click the pencil icon next to the service resource name

The screenshot displays the "Assigned Resource" details page for "SA-0079". The page header includes "Assigned Resource SA-0079" and "Service Resource Maria Paluzzi". Below the header, there are two tabs: "Related" and "Details", with "Details" being the active tab. The "Information" section contains a table with the following data:

Service Appointment	SA-0079	Service Resource	Maria Paluzzi
Role		Required Resource	<input checked="" type="checkbox"/>
Event	Major Exploration - AASC: Sandy Sanderson		

The pencil icon next to the "Service Resource" name "Maria Paluzzi" is highlighted with a red box. Below the "Information" section is the "System Information" section, which includes "Created By: Tim Squires, 12/6/2023, 8:59 AM" and "Last Modified By: Tim Squires, 12/6/2023, 8:59 AM".

Step 5: Click the magnifying glass and search for the new advisor (who you need to move the appointment to). Click their name and then click save

Assigned Resource  
SA-0079

Service Resource  
Maria Paluzzi

Related **Details**

\* = Required Information

Information

Service Appointment SA-0079

Role --None--

Event Major Exploration - AASC: Sandy Sanderson

System Information

Created By Tim Squires, 12/6/2023, 8:59 AM

Last Modified By

Cancel Save

Search Service Resources...

Recent Service Resources

- Tim Squires
- Brigitte Cammack
- Noe Sanchez
- Megan Lindbeck
- Shawn Moak

## HOW TO CHANGE THE DAY AND TIME OF AN APPOINTMENT (ON THE FLY)

Step 1: Go to the appointment tab on the person account of the student you need to change

Person Account  
Sandy TESTER Sanderson

+ Follow Edit Create Advising Note Historical Advising Notes

University ID  
12341234

Details Schedule Appointments **Appointments** Advising Notes Success Plans Service Indicators Related Files

Account Name Sandy TESTER Sanderson

Legal First Name

Legal Last Name

Contact Information

Email milanglavan@boisestate.edu

Phone (604) 123-1234

Term Activated Student

Mobile

Address Information

Mailing Address

Additional Information

System Information

Created By CJ Salen, 9/20/2023, 3:51 PM

Last Modified By Milan Glavan, 11/10/2023, 8:40 AM

Account Owner CJ Salen

External ID 12341234

Step 2: Click the link of the appointment that needs changed

Person Account  
**Sandy TESTER Sanderson**

University ID  
12341234

Details Schedule Appointments **Appointments** Advising Notes Success Plans Service Indicators Related Files

**Service Appointments (10)**

10 items • Sorted by Scheduled Start • Updated a few seconds ago

	Appointment ...	Subject	Scheduled Start	Scheduled End	Created Date	
1	<a href="#">SA-0071</a>	Finish in Four program - AASC: Sandy Sanderson	12/13/2023, 10:00 AM	12/13/2023, 11:00 AM	11/30/2023, 10:46 AM	▼
2	<a href="#">SA-0079</a>	Major Exploration - AASC: Sandy Sanderson	12/11/2023, 9:00 AM	12/11/2023, 10:00 AM	12/6/2023, 8:59 AM	▼
3	<a href="#">SA-0063</a>	Finish in Four program - AASC: Sandy Sanderson	12/7/2023, 3:30 PM	12/7/2023, 4:30 PM	11/27/2023, 12:21 PM	▼
4	<a href="#">SA-0058</a>	Finish in Four program - AASC: Sandy Sanderson	11/29/2023, 10:00 AM	11/29/2023, 11:00 AM	11/15/2023, 4:18 PM	▼
5	<a href="#">SA-0064</a>	Finish in Four program - AASC: Sandy Sanderson	11/28/2023, 12:45 PM	11/28/2023, 1:45 PM	11/27/2023, 12:37 PM	▼
6	<a href="#">SA-0052</a>	Finish in Four program - AASC: Sandy Sanderson	11/28/2023, 9:30 AM	11/28/2023, 10:30 AM	11/14/2023, 4:23 PM	▼
7	<a href="#">SA-0025</a>	Academic Appeal - COAS: Sandy Sanderson	11/20/2023, 2:00 PM	11/20/2023, 2:45 PM	11/8/2023, 3:00 PM	▼
8	<a href="#">SA-0047</a>	Finish in Four program - AASC: Sandy Sanderson	11/20/2023, 9:45 AM	11/20/2023, 10:45 AM	11/14/2023, 3:57 PM	▼
9	<a href="#">SA-0044</a>	Finish in Four program - AASC: Sandy Sanderson	11/16/2023, 9:00 AM	11/16/2023, 10:00 AM	11/14/2023, 1:33 PM	▼
10	<a href="#">SA-0017</a>	Academic Appeal - AASC: Sandy Sanderson	11/6/2023, 8:00 AM	11/6/2023, 8:45 AM	11/3/2023, 10:47 AM	▼

[View All](#)

Step 3. Click the pencil icon next to the scheduled start time (the pencil is very faint and hard to see, but it's there)

Service Appointment  
**SA-0079**

Subject: Major Exploration - AASC: Sandy Sanderson  
Scheduled Start: 12/11/2023, 9:00 AM  
Scheduled End: 12/11/2023, 10:00 AM  
Status: Scheduled

**Details** Related

General Information

Appointment Number	SA-0079	Account	<a href="#">Sandy TESTER Sanderson</a>
Subject	Major Exploration - AASC: Sandy Sanderson	Work Type	<a href="#">Major Exploration - AASC</a>
Duration	60.00	Status	Scheduled
Duration Type	Minutes	Engagement Channel Type	<a href="#">In Person</a>
Comment	Just a test appointment	Appointment Type	
Building Location			
Advisor Name			
College/Department			

Additional Information

Parent Record	<a href="#">00001385</a>	Cancellation Reason	
Virtual Appointment - Start URL		Appointment Booking URL	

Scheduled Times

Scheduled Start	12/11/2023, 9:00 AM	Scheduled End	12/11/2023, 10:00 AM
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Contact Information

Address		Phone	
		Email	

## Step 6: Change the start dates/times AND the end dates/times. Click save

The screenshot shows the 'Appointment Form' in the Student Success Hub. The 'Scheduled Times' section is highlighted with a red box. The form includes the following fields and values:

- Subject: Major Exploration - AASC: Sandy Sanderson
- Work Type: Major Exploration - AASC
- Duration: 60.00
- Status: Scheduled
- Duration Type: Minutes
- Engagement Channel Type: In Person
- Comment: Just a test appointment
- Appointment Type: --None--
- Building Location: (empty)
- Advisor Name: (empty)
- College/Department: (empty)
- Additional Information:
  - Parent Record: 00001385
  - Cancellation Reason: (empty)
  - Virtual Appointment - Start URL: (empty)
  - Appointment Booking URL: (empty)
- Scheduled Times (highlighted):
  - Scheduled Start: Date: 12/11/2023, Time: 9:00 AM
  - Scheduled End: Date: 12/11/2023, Time: 10:00 AM
- Contact Information:
  - Address: Search Address
  - Phone: (empty)

Buttons: Cancel, Save

**NOTE 1:** You will see you can also change the engagement channel (mode) of the appointment.

If you change the mode to Virtual it will NOT create a zoom link and it will NOT send a new email to the student. If you need to change the mode on the fly, you will need to contact the student and send a zoom link yourself OR cancel the appointment and schedule a new one if it's outside the 24 hour window.

**NOTE 2:** If you change a virtual appointment to a new advisor, the new advisor will need to send a new zoom link to the student. The original zoom link uses the advisor personal zoom link and, unless the original advisor adds the new advisor as a co-host, they will not be able to start the zoom meeting