Handshake: Appointment Management

Making Appointments

In Handshake, students can arrange to meet with Career Services staff. Handshake makes it easy for staff members to indicate availability, and for students to sign up for an open appointment.

This job aid will walk you through the process of using Handshake to manage your appointments. It covers the following topics:

- Overview of Appointments – Categories and Types
- Identifying the Types of Appointments You Offer
- Setting up an Appointment Block
- Reviewing Upcoming Student Appointments
- Adding an appointment with a known student
- Launching an Appointment Kiosk
- Starting the appointment and Adding Student Notes
- Completing an Appointment and Post-Appointment Surveys
- Frequently Asked Questions
- Appointments Troubleshooting Guide

Overview of Appointments – Categories and Types

To make appointments easier to manage, they are organized by “category” and “type.” When students use Handshake to request an appointment, they need to select the category and type of appointment that they are interested in scheduling.

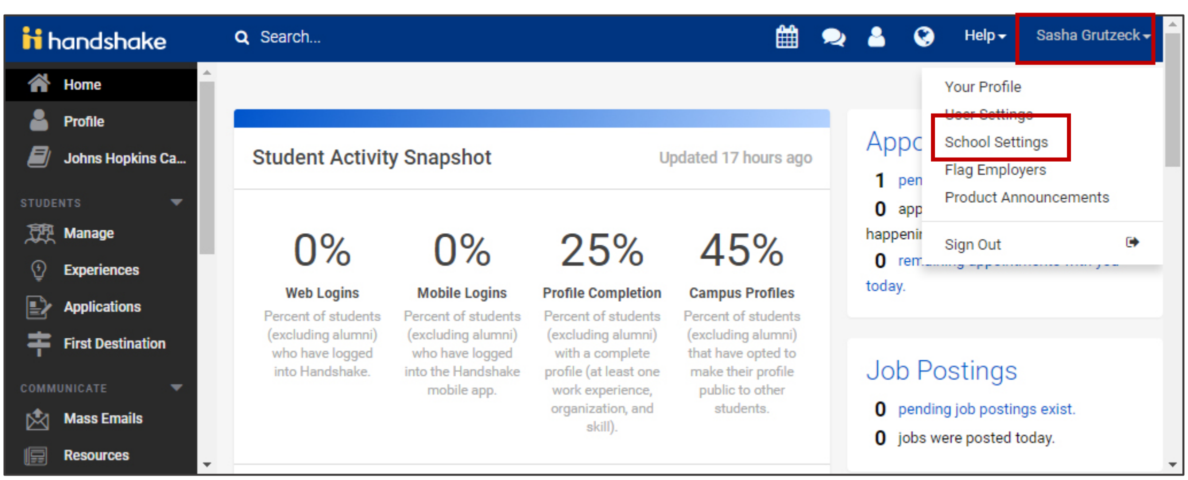
<u>Do not</u> make any changes to the *appointment mediums, preferences, or categories*! If updates are necessary, send an email to handshake@jhu.edu and the item will be added to the Handshake User Groups agenda.

Before making updates (i.e. adding labels) to the *Appointment Types*, send the intended changes to handshake@jhu.edu. This will ensure that the benchmarking data aligns with the current configuration.

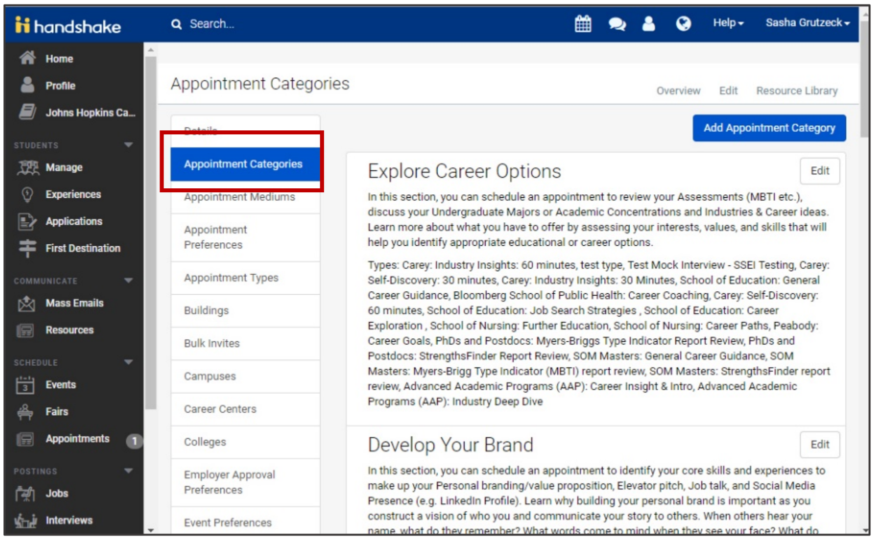
Appointment Categories provide a broad overview of the appointment. In Handshake, there are six categories:

1. Explore Career Options
2. Develop Your Brand
3. Create Documents
4. Find Jobs/Internships/Opportunities
5. Prepare to Interview
6. Advance Your Career

To view more information about each of these categories, begin by clicking your name in the upper-right corner of the screen, and then selecting **School Settings**.



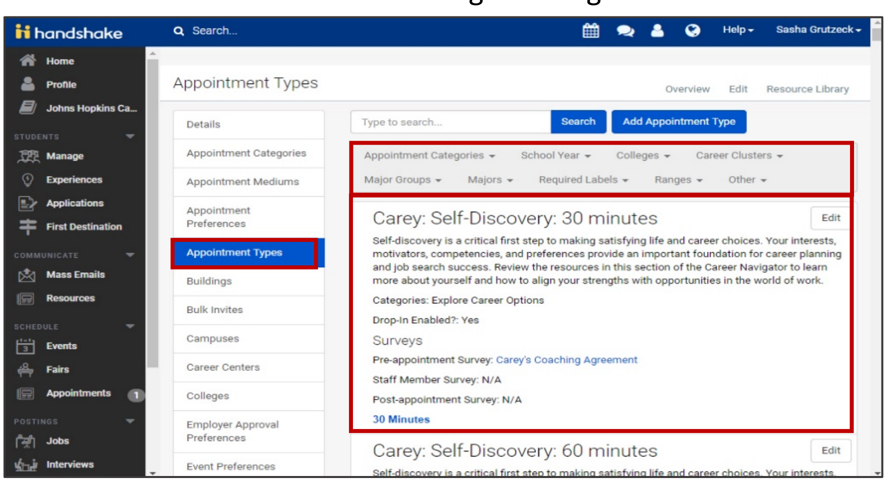
Next, click the **Appointment Categories** tab. You will see a detailed list of the six categories:



Appointment categories are organized into appointment types. Appointment types provide more specific information, including which career center is offering the appointment, duration, etc.).

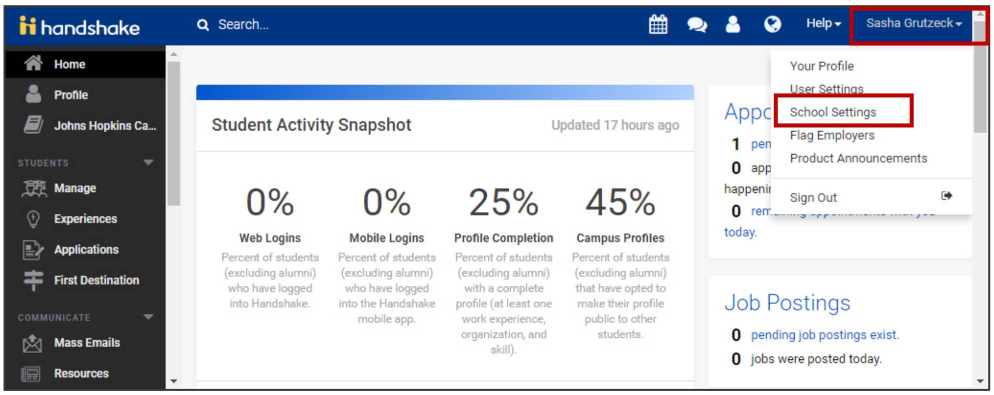
To view more information about the different appointment types, simply click the **Appointment Types** tab. You can search through this information by typing a keyword in the Search field or by using the drop-down menus.

Before making updates to the ***Appointment Types***, send the intended changes to handshake@jhu.edu or reach out to the Handshake super user at your school. This will ensure that the benchmarking data aligns with the current configuration.



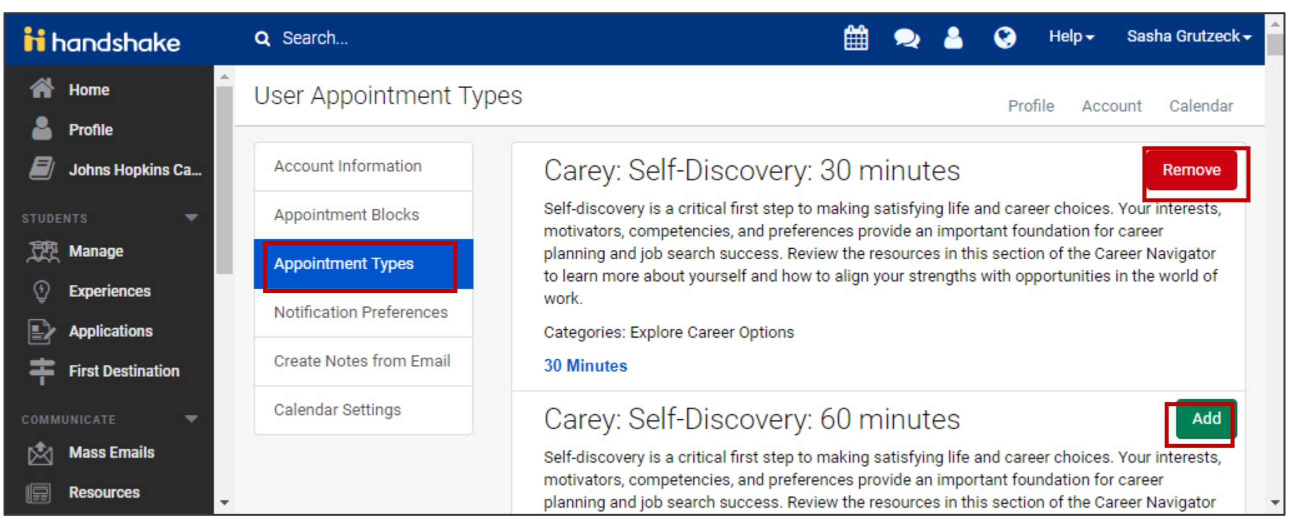
Identifying the Types of Appointments You Offer

Before you start setting up appointment times, you need to indicate the types of appointments that students can book with you. To begin, click your name in the upper-right corner of the screen, and then selecting **User Settings**.



Admin function only: Click the **Appointment Types** tab. Then scroll through the appointment types and indicate which ones you offer by clicking the **Add** button. To remove an appointment type from your list of options, click the **Remove** button. Click all that you may offer at any time- you can select the type for each appointment block.

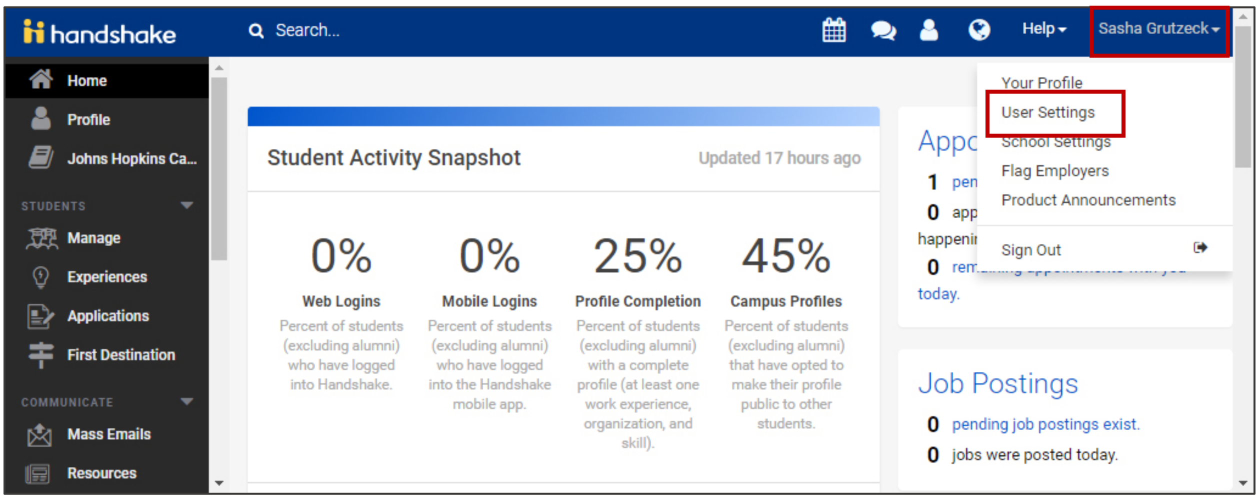
Before making updates to the *Appointment Types*, send the intended changes to handshake@jhu.edu or reach out to the Handshake super user at your school. This will ensure that the benchmarking data aligns with the current configuration.



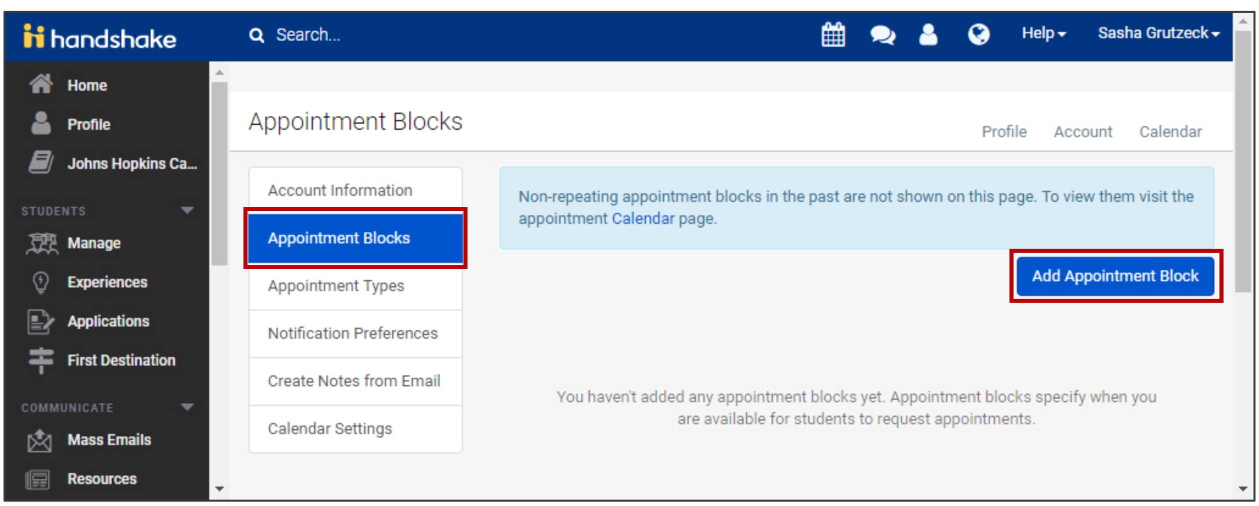
Setting up an Appointment Block

Use Appointment Blocks to indicate to students when you are available for scheduled or drop-in appointments. There are two ways to create appointment blocks.

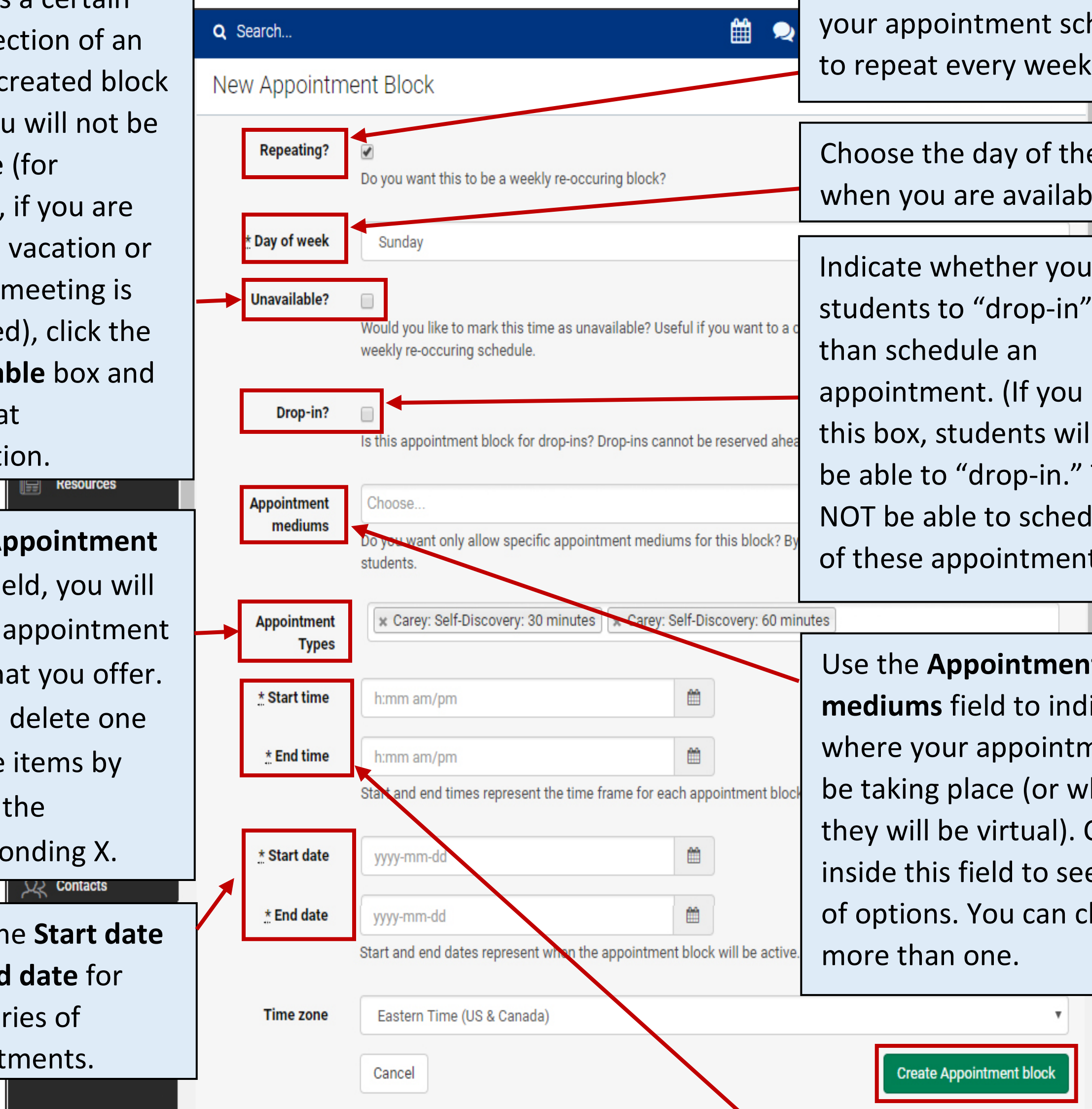
1) To set up a new appointment block through the **Home page**, begin by clicking your name in the upper-right corner of the screen, and then selecting **User Settings**.



Click the **Appointment Blocks** tab, and then click the **Add Appointment Block** button.



Fill out the information and then click the **Create Appointment block** button.



If there is a certain day or section of an already-created block when you will not be available (for instance, if you are going on vacation or another meeting is scheduled), click the **Unavailable** box and enter that information.

In the **Appointment Types** field, you will see the appointment types that you offer. You can delete one of these items by clicking the corresponding X.

Enter the **Start date** and **End date** for your series of appointments.

Indicate whether you want your appointment schedule to repeat every week.

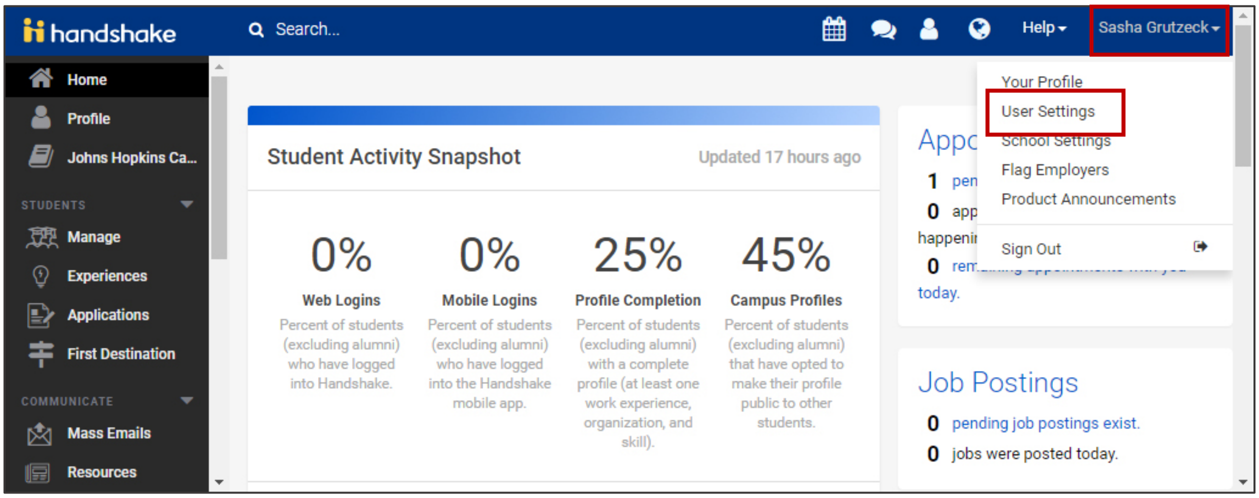
Choose the day of the week when you are available.

Indicate whether you want students to "drop-in" rather than schedule an appointment. (If you check this box, students will ONLY be able to "drop-in." They will NOT be able to schedule one of these appointments.)

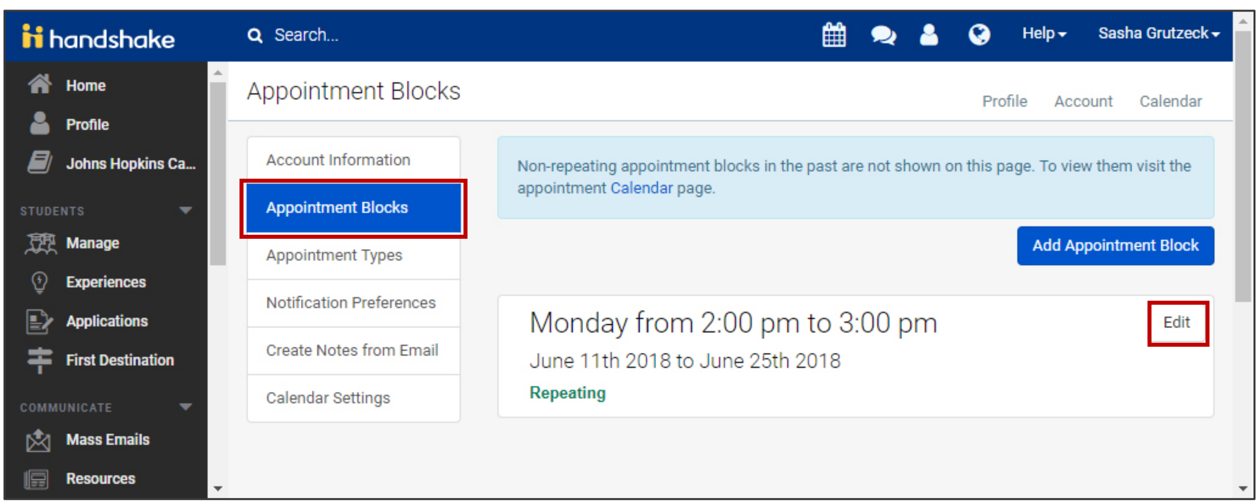
Use the **Appointment mediums** field to indicate where your appointments will be taking place (or whether they will be virtual). Click inside this field to see your list of options. You can choose more than one.

Enter the **Start time** and **End time** for each of your blocks. The number of appointments possible is derived from the appointment type. For example, selecting a three hour block could make six 30-minute appointments available.

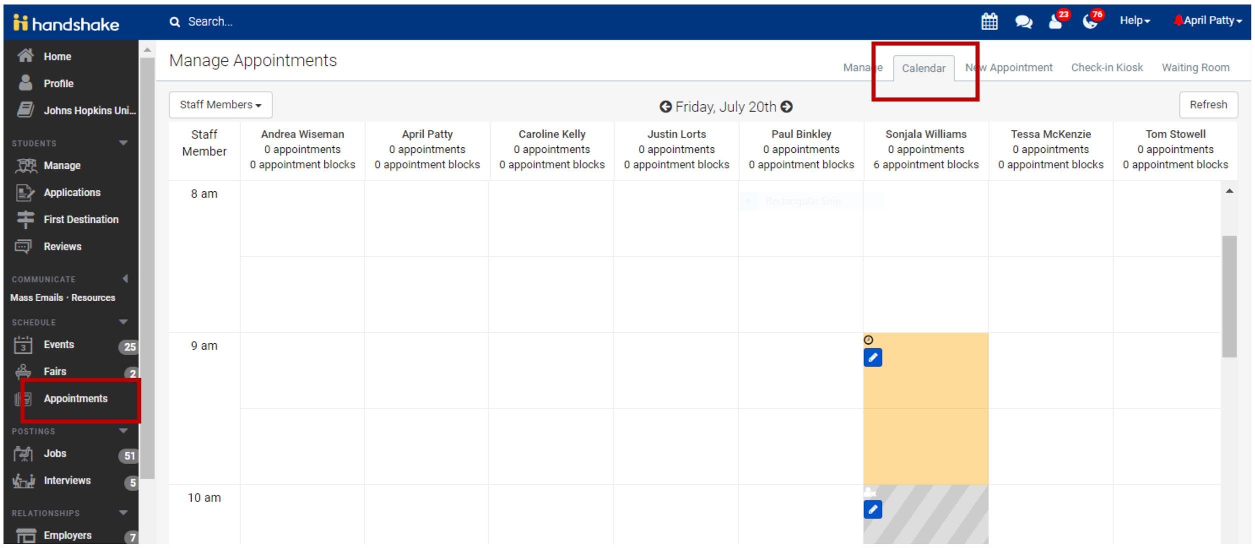
Once you have created an appointment block, you can review it and edit it (if necessary) by clicking your name in the upper-right corner of the screen and selecting **User Settings**.



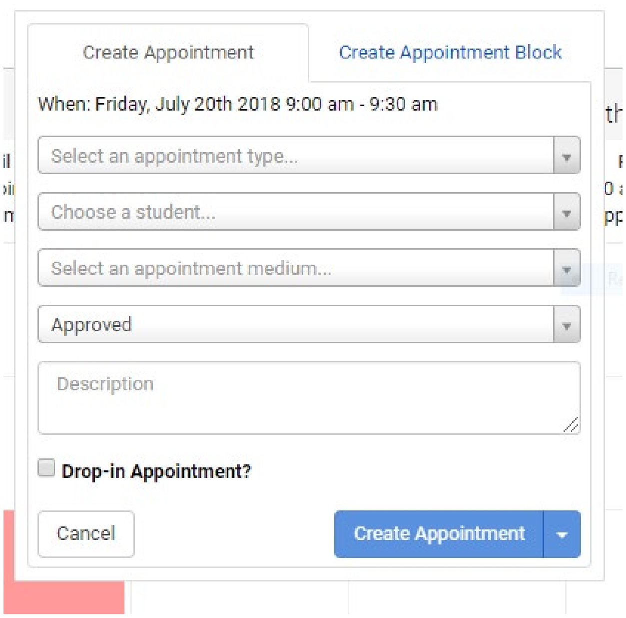
Click the **Appointment Blocks** tab. And you'll see your appointment block listed on the screen. Click the **Edit** button to review and update this information.



To set up a new appointment block through the **Calendar** page, begin by clicking **Appointments**, then the **Calendar** tab at the top left of page

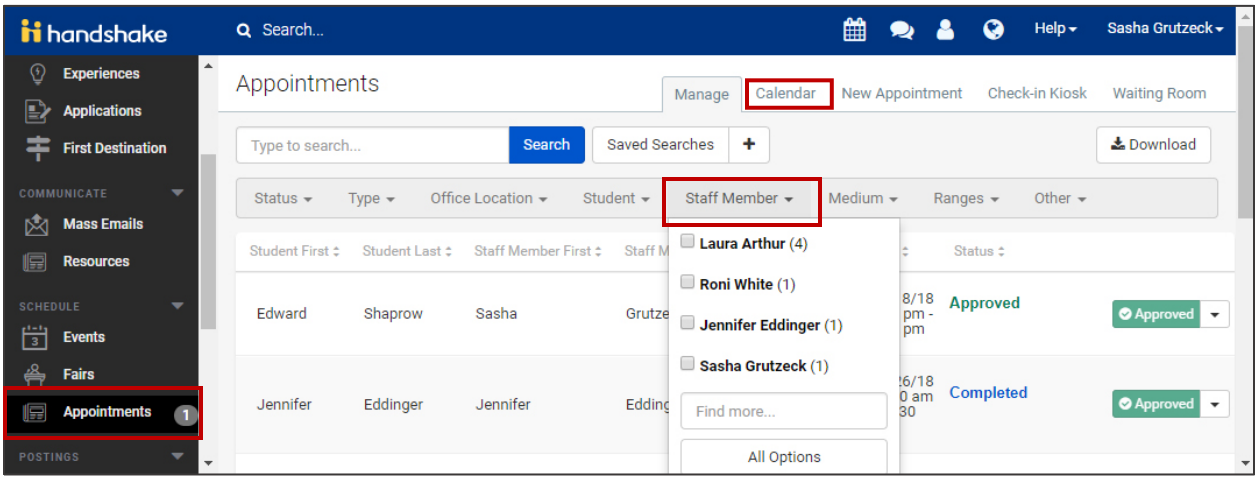


Then click in the calendar at the time you would like to make the appointment, and fill in the following screen:

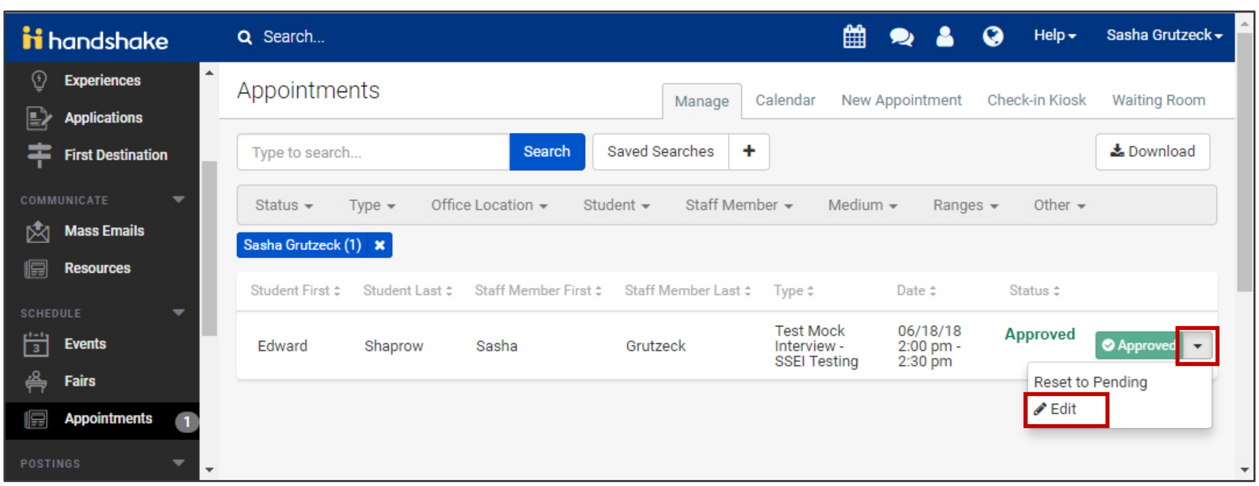


Reviewing Upcoming Student Appointments

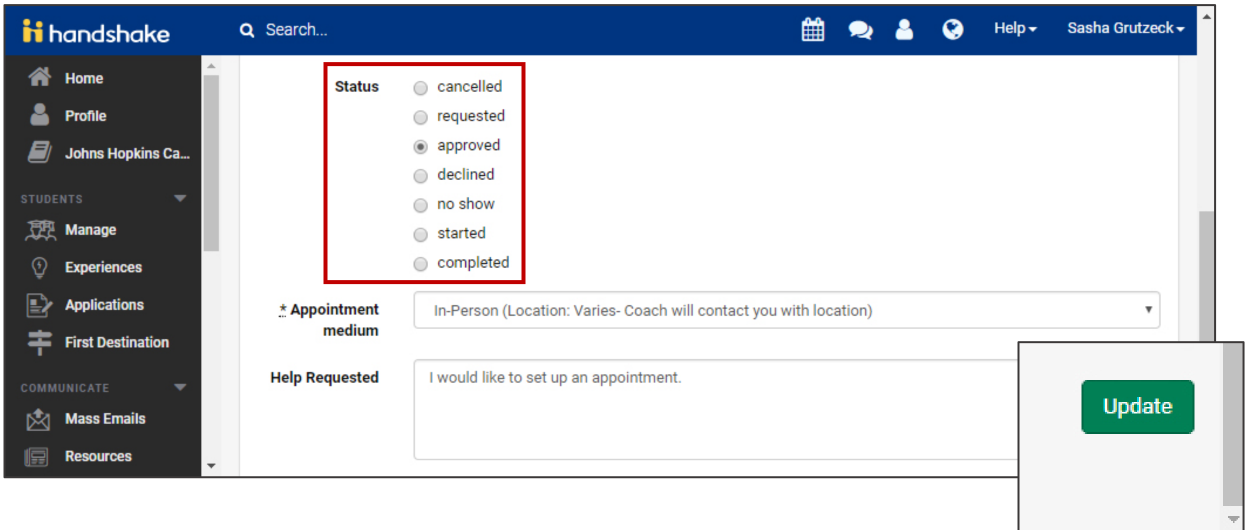
To see your upcoming student appointments, begin by clicking **Appointments** on the side menu. Then click the **Staff Member** drop-down menu and select your name to filter your results and see only your appointments.   You can also click on Calendar and see a day view.



Appointments are automatically approved. If you need to change the status of a certain appointment, click the **arrow** next to the Approved button. Then select **Edit**.



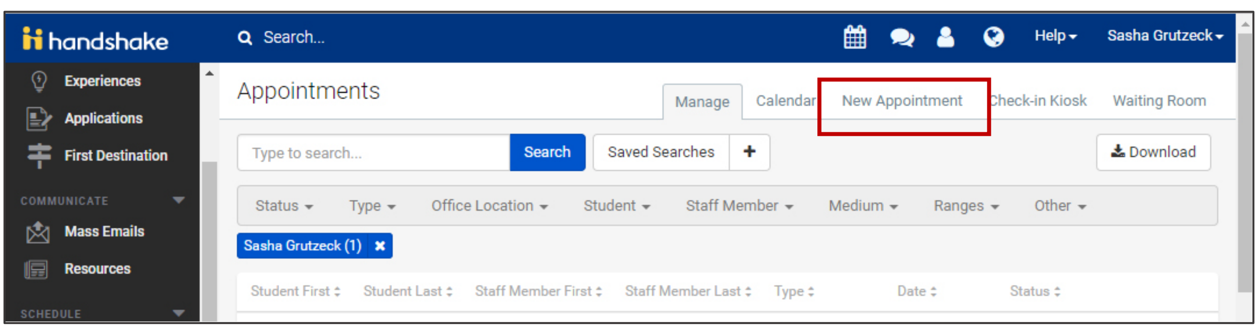
You will then see more information about the appointment request. Scroll down until you see the **Status** section. Here, you can change the status of the appointment. Then click the **Update** button at the bottom of the screen.



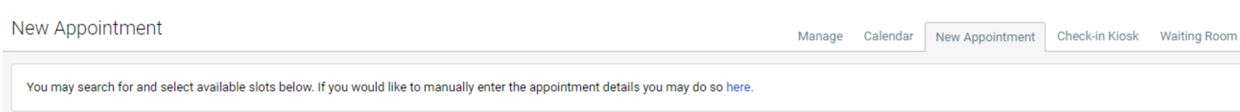
Adding an appointment with a known student

If you have agreed on a time to meet with a particular student, you may create that appointment without creating an open block.

Click **Appointments,** then **New Appointment.** Choose the **category**, then **type** of appointment**.**



Click the **Here** link, and fill in appointment details.



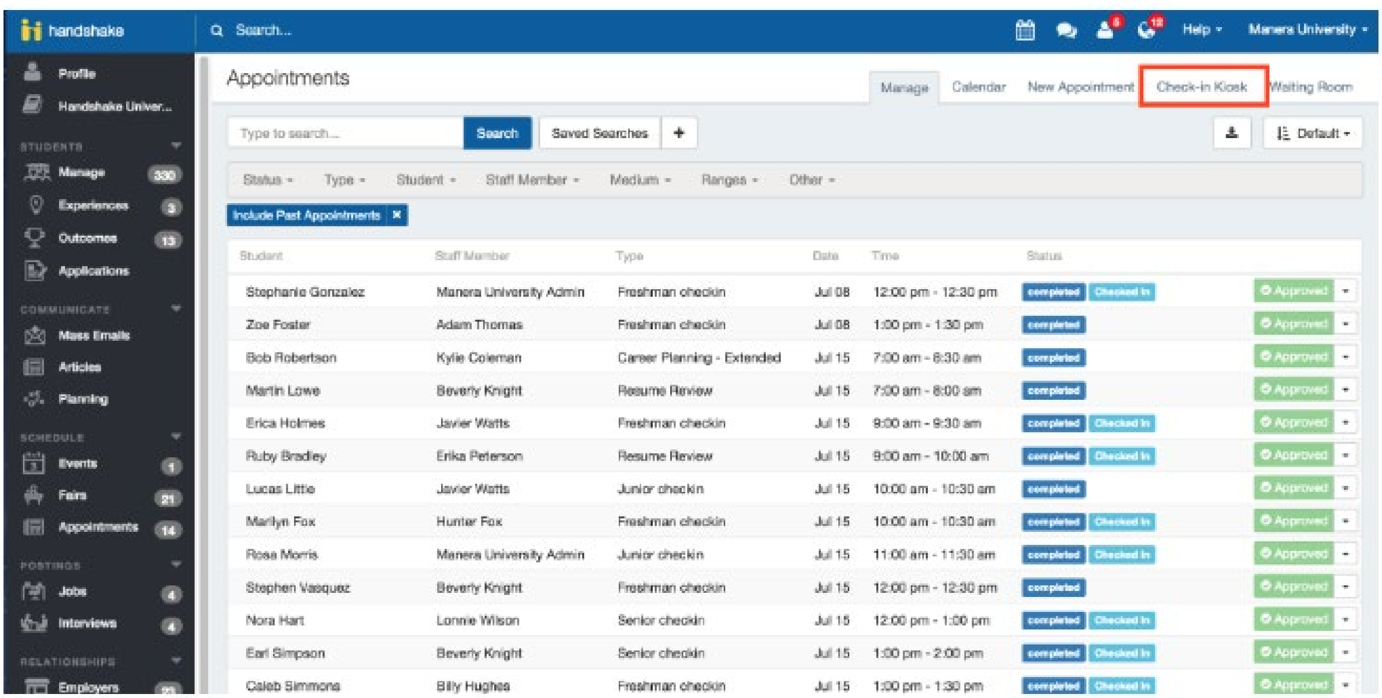
Launching an Appointment Kiosk

The appointment kiosk is used for tracking students who check in for appointments. You can be notified as a career services staff member when a student arrives for an appointment, which will reduce waiting room confusion.

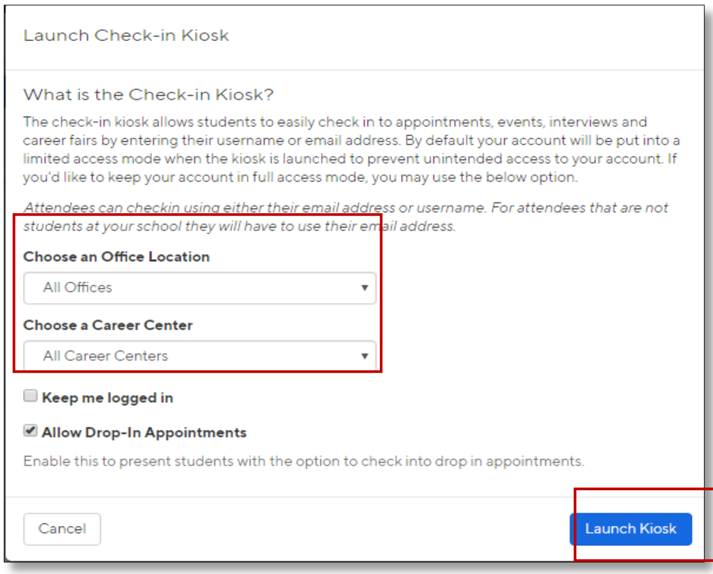
Tip: The appointment kiosk is for drop in appointments only.

For more information on how to manage, drop in appointments, the check in kiosk and the waiting room review this video tutorial: https://support.joinhandshake.com/hc/en-us/articles/115003431807

Click Check-in Kiosk from the tabs in the top right of the screen.



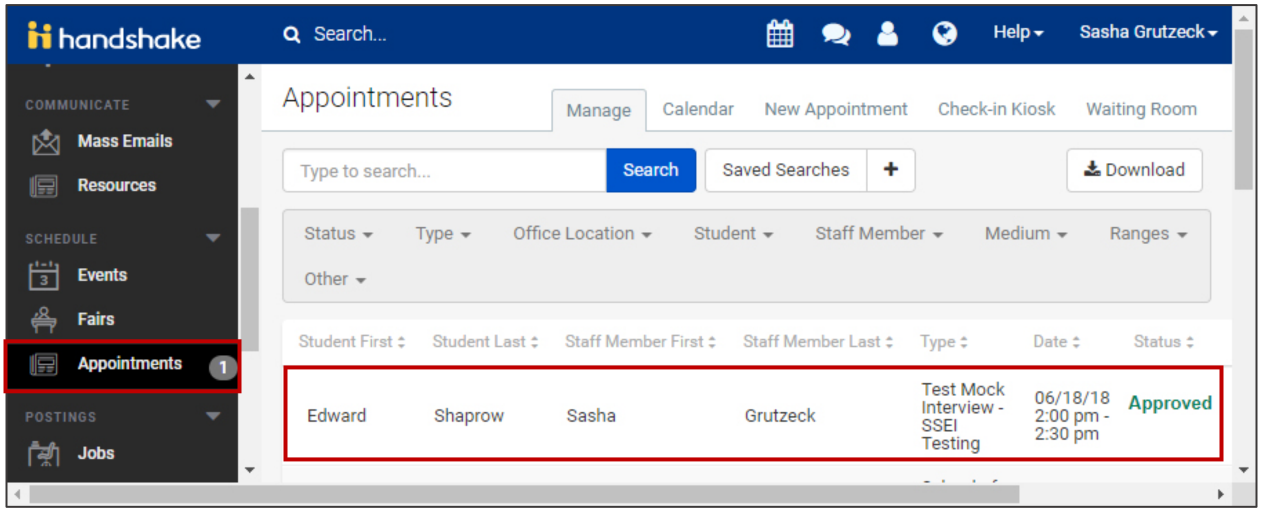
This will open a general check in kiosk pop up window. Select the office location and career center and click the Launch Kiosk button



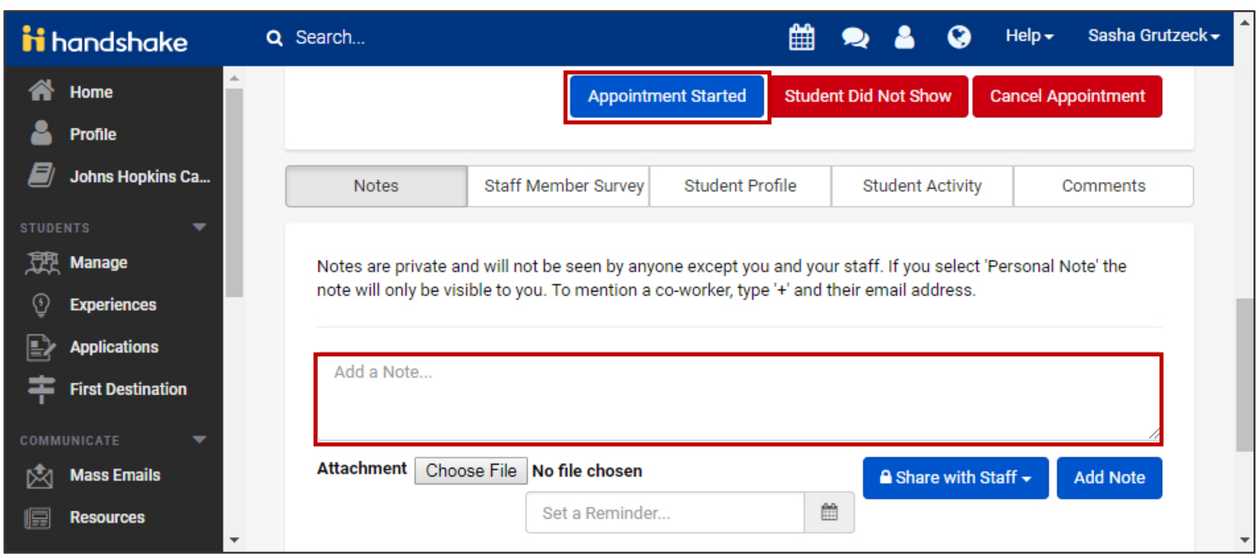
Note: To manage which career center choices a student can view, select the drop down listings under the "Choose the correct office location" and "Choose a Career Center" headings.

Starting the Appointment and Adding Student Notes

Begin by clicking **Appointments** on the side menu. Then locate the appointment and click it.



Click the **Appointment Started** button. Then at the conclusion of the appointment, type your note in the **Add a Note** field.

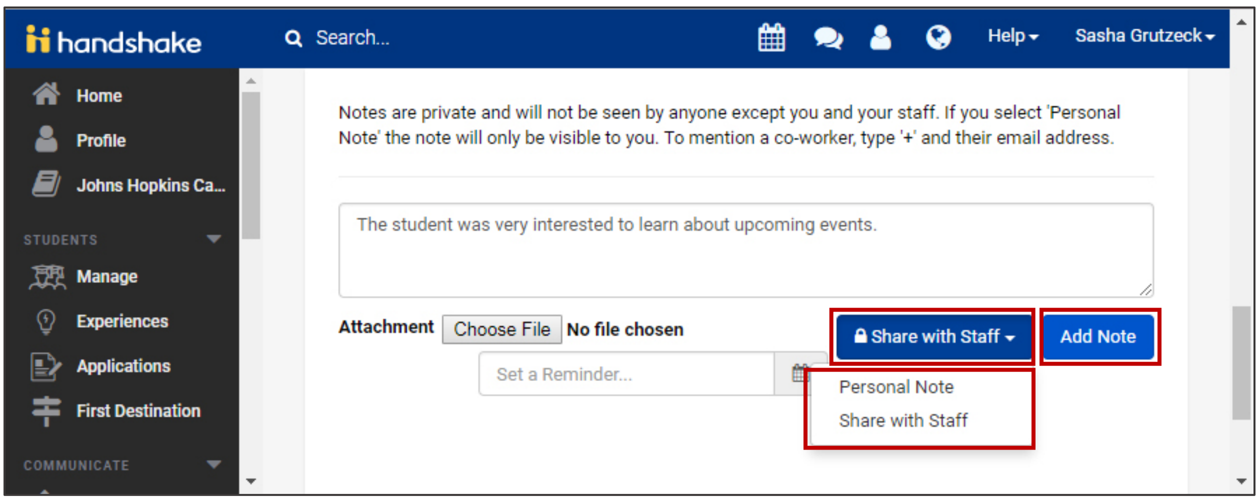


Click the **Share with Staff** button to see your privacy options.

- Personal note – The note will only be visible to you.
- Default setting: Share with Staff – The note will be visible to all staff members who have the ability to view shared notes.

Tip: the best practice is to leave the note at the default setting. The system permissions are used to prevent unauthorized users from viewing the notes.

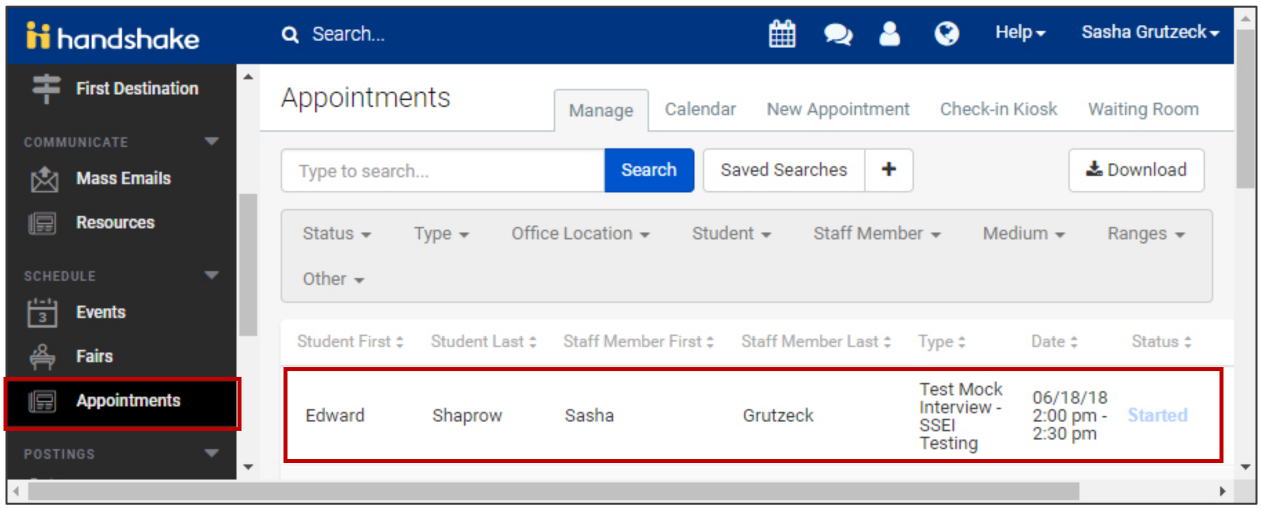
Then click **Add Note** to save your work.



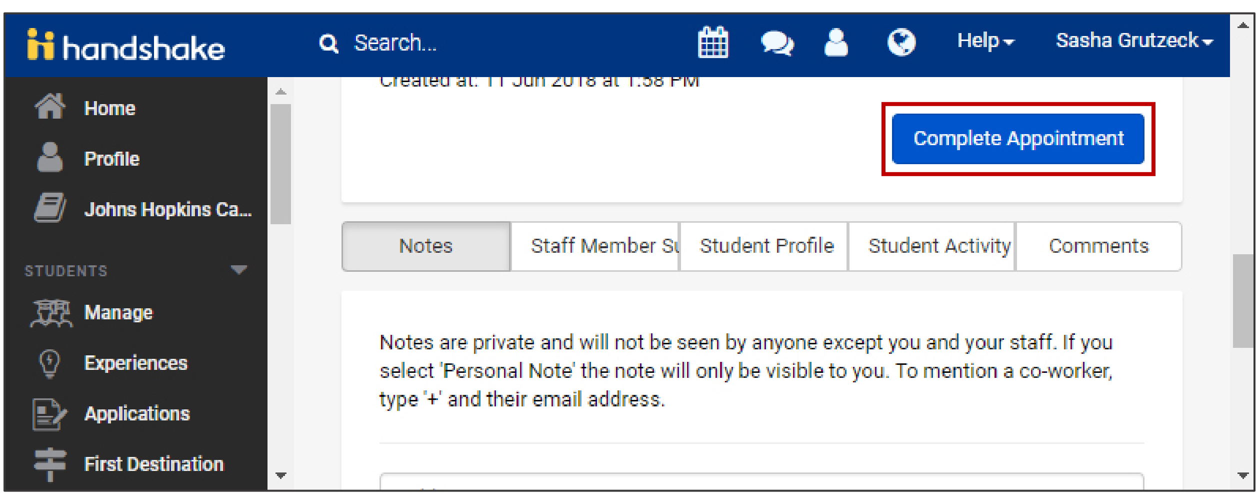
Completing an Appointment and Post-Appointment Surveys

Once you have completed a student appointment, you MUST mark it as complete, as not completing appointments will skew data. A post-appointment survey *may* be sent to the student, if a survey was attached to that particular appointment type.

To mark an appointment as complete, click **Appointments** on the side menu. Locate the appointment and click it.



Then click the **Complete Appointment** button.



Frequently Asked Questions

Do appointments have to start at the top of the hour or half hour?
No. All appointment slots are based on the start time of the availability block. If the block starts at 11:00 a.m., and your appointment type is 30 minutes long, then the available slots will be 11 a.m. – 11:30 a.m., 11:30 a.m. – 12 p.m., etc. If, however, the block starts at a weird time like 2:11 p.m., then the available slots will be 2:11 p.m. – 2:41 p.m., 2:41 p.m. – 3:11 p.m., etc.

Can students book appointments far in advance?
Yes. I booked a test appointment in 2020 without issue.

Can you sync your Outlook calendar with Handshake?
Yes. Directions for setting up and using Handshake's two-way calendar sync are available here: https://support.joinhandshake.com/hc/en-us/articles/115011864208

> ⚠ **Tip:** The two-way sync is provided by a third-party vendor. The documentation is limited and there have been many reports of the function not working as intended.

If you do sync your Outlook calendar with Handshake, will Outlook conflicts prevent students from booking appointments during those time?
Yes. You will see unavailable blocks from your Outlook calendar automatically populated as unavailable in Handshake and students will not be able to book during those times.

If you change the "type" of an appointment after starting the appointment but before clicking the "Complete Appointment" button, which post-appointment survey will be sent out?
It depends on the type of appointment it was *at the time of completion*. If you talk about something other than what the initial type indicates, you can change it and the survey will reflect that.

When does the student receive the pre-appointment messaging and/or survey?
Whether or not a student receives, a pre-appointment survey is dependent upon the configuration of the appointment type. If a message is attached to an appointment type, the student will receive the message before submitting the appointment request. If a survey is attached, the student must complete the survey questions before they can submit the appointment request (because drop in's do not make appointments, they are excluded from receiving the precursory messaging or survey).

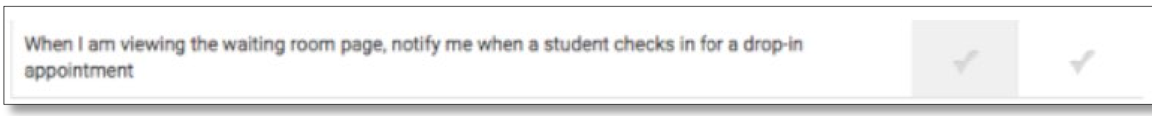
When are students notified about an upcoming scheduled appointment?

Students receive two notifications:

- 24 hrs before the appointment
- 1 hour before the appointment

How are notifications sent for Drop-In appointments?

Career services will only receive notifications if they have the waiting room open (usually we recommend in another window) and if they have one of these options checked in their Notification Preferences:



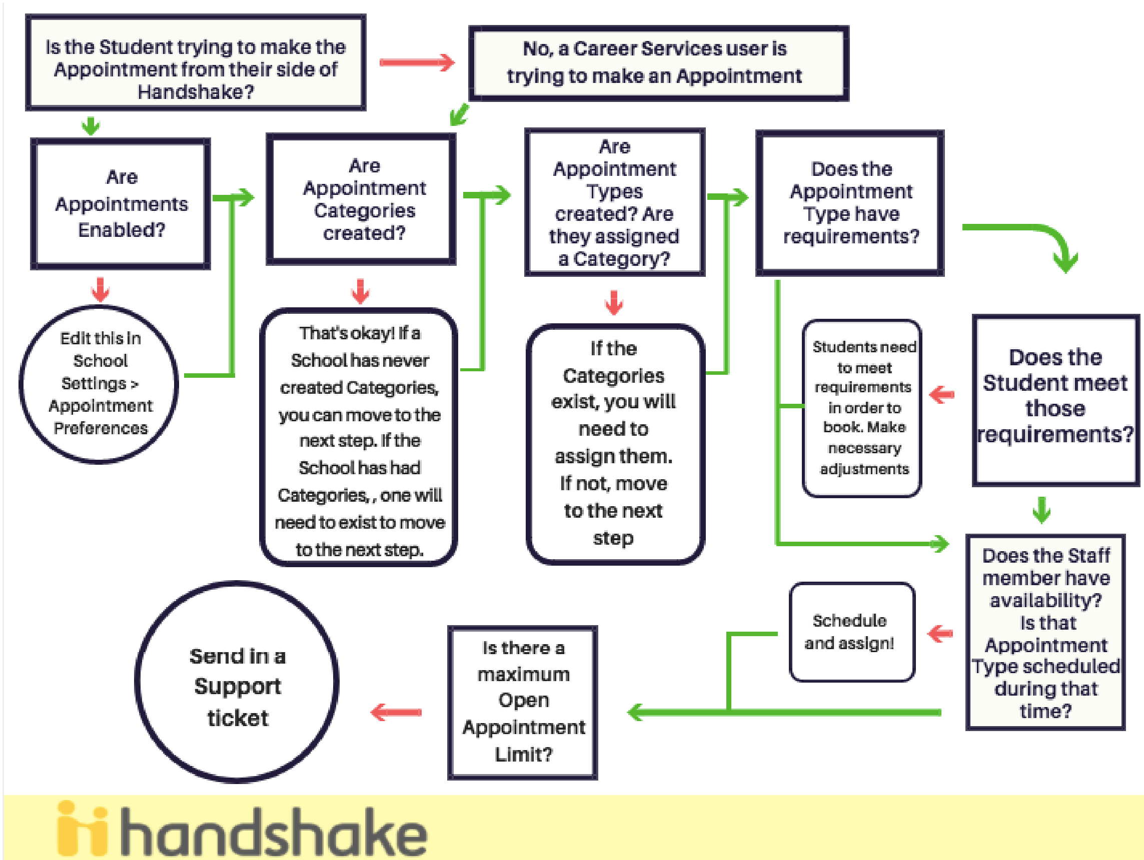
Students will not receive a notification, as they are usually checking into a kiosk at the time of the drop-in appointment.

How do I manage drop in appointments, the check in kiosk and the waiting room?

Video Tutorial: https://support.joinhandshake.com/hc/en-us/articles/115003431807

Appointments Troubleshooting Guide

This flowchart can help clarify any issues you may encounter while you or a student attempts to book an appointment:



If you have completed those troubleshooting steps and are still running into issues, please, send an email to Handshake@jhu.edu with the following information:

1. The student who is scheduling the appointment (double checking they have permission to access appointments, and their profile details)
2. The specific Appointment Type and Category the student is scheduling (double checking to make sure the type is connected to the category)
3. The student requirements set on the Appointment Type (double checking that the student meets these requirements)
4. The time the student is requesting the appointment (double checking that a staff member has added it to their available appointment blocks)
5. The staff member (if applicable) associated with the appointment