

Meeting Types

Configuration Guide for Staff

What Are Meeting Types?

Meeting Types previously existed as a post-appointment field selected on the appointment summary. This field allowed staff to indicate how they met with students during an appointment. In the upcoming release, we are integrating Meeting Types into Staff Availability configuration and the student scheduling workflow. This allows students to indicate how they want to meet with Staff for appointments.

How Do I Add a Meeting Type to My Availability?

Go to **Staff Home** → **My Availability** tab.

Staff Home

Students
Appointments
My Availability
Appointment Queues
Appointment Requests

Available Times

Actions ▾

<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE	
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	8:00am - 5:00pm	Forever	Academic Advising Center	Academic Planning For: Drop-Ins	Advising	Yes	In-person, Phone, Virtual/Zoom	Edit

* All times listed are in Eastern Time (US & Canada)

You can edit the availability by selecting the **Edit** button.

✕
MODIFY AVAILABILITY

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments
Drop-ins
Campaigns

Meeting Type

✕ In-person
✕ Phone
✕ Virtual/Zoom

Off Campus

Advising

Location

Academic Advising Center

Services

✕ Academic Planning

URL / Phone Number

Special Instructions for Student

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e.g. room 23, please bring name

Cancel
Save

Once you've updated your availability, select **Save**.

Who Can Set Up Meeting Types for Me to Use in My Availability?

Application Administrators can configure Meeting Types within your institution's platform. Meeting Types can be used by any staff within the platform once they are configured.

Where Do I See Meeting Types After the Appointment Is Scheduled?

Once an appointment is scheduled, Meeting Types show on the Upcoming Appointment grid on the Staff Home and will be added to the Appointment Confirmation and Reminder emails.

Staff Home

Students | **Appointments** | My Availability | Appointment Queues | Appointment Requests

Upcoming Appointments

Care Unit:

Actions ▾ Show Cancelled

<input type="checkbox"/>	DATE	ATTENDEE	TIME	SERVICE	COMMENT	MEETING TYPE	URL/PHONE NUMBER	REPORT FILED?	DETAILS
<input type="checkbox"/>	07/06/2021 4:30pm - 5:15pm ET	Aaron, Kimberly	4:30pm - 5:15pm ET	Academic Planning		In-person	434-434-4343	Not Yet.	Details