Meeting Types for Scheduling

Frequently Asked Questions

What Are Meeting Types?

Meeting Types previously existed as a field selected on an Appointment Summary. This field allowed staff to indicate how they met with students during an appointment. In the next couple of upcoming releases, 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.

What Are the Dates for This Feature Release?

We are releasing Meeting Types in two Phases.

- Phase 1 – Configurations: tentatively scheduled to be released July 14 – 16
- Phase 2 – Student Scheduling Workflow: tentatively scheduled to be released July 28 – 30

Once Enabled, Do Meeting Types Have to be Used in All Care Units?

If Meeting Types are enabled in your site, all staff must associate at least one Meeting Type with their availability to show up in the Student Scheduler. Staff without a Meeting Type configured appear as unavailable.

Once Enabled, Where Are Meeting Types Required?

Meeting Types are now a required to be selected in student and staff scheduling workflows, as well as in the Appointment Center when creating an appointment. Meeting Types are not required when submitting an Appointment Summary for an existing appointment or ad-hoc summary report.

Are Meeting Types Configurable?

On the **Meeting Type Administration** page, Meeting Types can be added or edited. Editing a Meeting Type allows you to update the name, make it active or inactive, and enable or disable the **Include this Meeting Type in Availabilities and Scheduling** configuration.

Can We Have a Default Meeting Type by Care Unit or Location?

There is currently no concept of a default Meeting Type. If the student selects an availability that is associated with multiple Meeting Types, we do not choose a Meeting Type for the student. Students are required to select a Meeting Type on the Appointment Confirmation page before being able to confirm the appointment.

How Do Meeting Types Work with Drop-in Appointments?

Meeting Types will display when phase 2 is released in late July. They will show in the drop-in scheduling workflow, but are not required when a student drops in for an appointment.

How Do Meeting Types Work with Campaigns?

Staff can associate Meeting Types with Campaign availability on the staff's My Availability tab. When students use a Campaign link to enter Student Scheduling, they have the ability to choose Meeting Types for that Campaign appointment.

How Do Meeting Types Work with PALs?

Within the Staff's availability they can associate Meeting Types with appointment availability. When a student enters the student scheduling workflow through the Personal Availability Link they will have the ability to choose Meeting Types for that appointment.

How Do Meeting Types Work with Group Appointments?

The first student that schedules into a group appointment slot selects the Meeting Type for the entire group appointment. Students that schedule into the same group appointment will automatically have the same Meeting Type set for their appointment.

How Do Meeting Types Look in Synced Calendar Events?

Meeting Types are not available in Calendar Sync functionality. We do plan to include Meeting Types into the Calendar Sync functionality for Google and Exchange. This configuration will need to be enabled on the Global Configuration page in the **Appointment Details for Exchange and Google Calendar Integration** section. The configuration is called **Include Meeting Type**.

Are Meeting Types Included in Reminder Emails and Text Messages?

Meeting Types will be added to the appointment confirmation and reminder emails. Meeting Type will not be in text message reminders.

How Can We Transition from a Virtual Location to Meeting Types?

In preparation for this release, our team has created a *Meeting Types Configuration Guide for Application Admins*. Reference this guide while working with your Strategic Leader to determine the best configuration process for your institution.

What Happens to Prior Data from Locations/Services Partners Have Created to Make their Own Multi-Modal System?

Changing Location names or Services updates any historical data tied to that Location or Service, e.g. reports, availabilities, et cetera.

Inactive Locations or Services cannot be used to filter reports. However, appointments with inactive Locations or Services DO return in report results.

Inactive Locations are not immediately removed from Staff Availability. However, availability is removed from the Student Scheduling workflow.

Are These Meeting Types Different than the Meeting Types in Appointment Summary Reports?

Meeting Types in the Student Scheduler and on the Summary Report are separate data elements. When opening an Appointment Summary for the first time, the Meeting Type field is pre-selected with the Meeting Type the student chose during the scheduling process. In reporting, there are two columns, one for scheduled meeting type and one for reported meeting type.

How Do Staff Update Their Availability to Accommodate Meeting Types?

In preparation for this release, we created a *Quick Start Guide for Staff* with instructions for how to add Meeting Types to their availability. This guides staff through the configuration changes that need to be made to add Meeting Types to their availability. Editing or creating new Availabilities cannot be saved without at least one Meeting Type.

What Functionality Have You Added to Reports?

We added the ability to filter search results based on Meeting Types in the Availability Report. Additionally, we added two Meeting Type columns in the Appointment Summary Report: **Scheduled Meeting Type** and **Reported Meeting Type.**

Where Do Meeting Types Show for the Staff Member?

Once an appointment is scheduled, Meeting Types show on the **Upcoming Appointments** grid on the Staff Home. It's also added to the appointment confirmation and reminder email.

When Would It Be Recommended Not to Select *Include This Meeting Type in Availabilities and Scheduling*?

We suggest not selecting this option if you want staff to select a Meeting Type in the Appointment Summary you do not want students to see availability for.

When Does My Institution Need to Use Meeting Types?

EAB has no plans to force Meeting Type functionality in the new Student Scheduler for partners. As we see increased adoption of this feature over the next few months, we may consider a date to enable Meeting Types functionality for all partners.