

ASU Chooses EZappt Enterprise Appointment Management System to Manage Student Advising Appointments



The Student Advising Problem

New and continuing students need to meet with academic advisors. Students were complaining to administrative staff of difficulty in contacting and scheduling advising appointments. They struggled to contact advisors with phone calls and emails and voiced difficulty in access to advisors and scheduling appointments. Advisors used disparate systems in order to track their own appointments; they wrestled with technology issues such as access to the schedule, visibility and backing up of the data. University administrative staff had no visibility into the process, no visibility into the current and historical advising schedule and no access to usable reports about advising performance. Simply put; students had no access to an advisor's available schedule, advisors struggled with different systems to accept and track appointments and administration had no tool to provide accountability for advisors.

Background

With some 65,000 students, Arizona State University is one of the largest universities in the United States. The university has been pursuing multiple technology initiatives in order to put ASU at the cutting edge of higher education technology innovation.

The Solution

ASU looked to provide a comprehensive solution to provide student visibility and accessibility to available advising appointments. The system should allow advisors to post their available schedule online through the ASU portal for easy student access. The student should be able to access advising pages in the portal, view an available appointment schedule and book an appointment. The booking should be seamless; the available slot should be instantly removed and the advisor should be able to see with whom they have an appointment. The system should have role based security to allow ASU administrative staff to have full access to view live and historical appointment availability and usage. ASU administrative staff also should have access to various reports to monitor appointment scheduling activity by student, college and advisor.

ASU in combination with EZappt came up with a solution that has worked remarkably well. The system allows ASU advisors to post and manage their available appointment schedule online, securely through the ASU portal. ASU students may find their appropriate advisor through the system and view their available schedule. The student then selects a convenient time and books an appointment online. Once they book an appointment that time slot is removed from the available schedule. The advisor's view of the system allows them to see who has booked an appointment with them and any associated notes that the student may care to make while booking the appointment. The student will receive an email confirmation of an appointment booking and the advisor may opt in to receive email confirmations as well. These confirmations can be quickly loaded into the student and advisors Outlook or Google Calendar.

At a set schedule prior to the appointment time the student will receive reminders about the appointment that include the location, a map and some general advising rules. The reminders include a link that can take them back to the system to review the appointment details and allows the ability to cancel or reschedule the appointment based on University rules.

Once the student arrives for the appointment the advisor has the option of checking the student into the system and creating advising notes during the actual visit. The advisor may also assign follow up instructions for the student. The notes may be quickly printed for the student to take with. In order to facilitate the generation of notes the advisor may create and store templates for the advising notes and follow up instructions. Once the visit is complete if the advisor and student agree on a follow up appointment time the advisor may book the next appointment.

With the new system the administrative staff now has a powerful new tool to view live and historical appointment scheduling activity throughout the university. Administrators may view the live schedule by department, by student or by advisor. They also may access reports on advising activity by department, by advisor and by student. Administrative staff may view historical data and spot trends in advising appointment activity.

ASU had a choice to have the system fully hosted by the vendor or to host the software on their own infrastructure. ASU preferred to have a system that was turnkey and fully hosted, requiring minimal, if any, ASU I.T. resources. ASU validated that the vendor's hosting platform was acceptable. It is biometrically secured, offers SAS 70 compliant servers in 2 locations, high bandwidth, and provides multiple backups. The decision has proven to work well for ASU, the system reliability is excellent and ASU has not had to invest in additional infrastructure to provide this online advising service to their students and staff.

Single Sign On & PARE

EZappt employed different versions of the appointment scheduling tool for booking time in the Technology Studio and conference rooms for the University. Adding appointment scheduling for advisors was planned as the next phase. ASU students access all the schedulers by logging in to the ASU portal, MyASU, just once. Having students login again would conflict with the seamless look and feel and functional goals of the portal. In short, it would be an annoyance. ASU desired a service called Single Sign On that allows multisystem logon with logging into the student portal. The system should function to log into all scheduling systems with logging into the portal, a single login point.

ASU utilizes Oracle's PeopleSoft Enterprise applications to manage student systems, human resources and payroll systems. In order to create a Single Sign On (SSO) solution ASU, in collaboration with EZappt, created a product called the PeopleSoft Advising Rules Engine (PARE). This product meshes the Oracle system with the EZappt scheduling system. When a user logs into the ASU portal they are simultaneously logging into all the EZappt appointment schedulers assigned to ASU.

Challenges

Refractory Period; When students look to book the available time with an advisor it is not practical to show appointment times that have not been booked that are only a few hours away. For example; if a student logs in at 8 am to view an advisors available schedule a decision had to be made as to when is the first available open slot to be shown, If our student logs in at 8 am and the 9 am slot was not filled should the student be able to book the 8 am appointment? It was determined that in order to allow the advisor an appropriate amount of time to prepare for the appointment the first available time would be 24 hours away; i.e. the first available time for booking by the student in our example the first available time shown to the student would be 8 am the next day. We call this rolling black out period the refractory period. The refractory period may be set to any number of hours.

Arrival Management; if the student is coming to a busy advising center the receptionist can make use of an arrival management tool called the Dashboard. This module in the system allows the receptionist to view all the booked appointments scheduled for the day and the live status of who has arrived, which advisor is busy, the current students waiting, and allows for walk-ins. When the advisor is busy they simply choose busy within the system and the status will appear on the receptionists Dashboard. When the advising appointment is completed the advisor may indicate within the system that

they are available the result appears on the Dashboard. The receptionist now knows that they may direct the student back to the advisor.

Tracking; some advisors may wish to take notes during any advising interview. They may also recommend specific follow up instructions. With the current system, when the student arrives at the appointed time the advisor may convert the appointment into a visit. During a visit the advisor may take notes, use templates, assign products and utilize follow up plans that may also be in editable template form. Follow up plans and instructions may be rapidly printed for the student. The entire encounter may be accessed later as part of the student's advising history or printed.

Rescheduling; if the student or instructor must reschedule an appointment they simply log into the system and reschedule the appointment. Student and advisors may have rapid email notifications or confirmations of the rescheduled appointment. Again a refractory time may be employed to not allow students to cancel or reschedule within a certain rolling timeframe prior to the appointment.

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