

Inspire May 22, 2020 Update (Walk-In Appointments and Calendar Improvements)

May 26, 2020 – Civitas released an update to Inspire on Friday, May 22, 2020. As a result, there were some interface changes to Inspire. Review the changes below. We will update our Inspire protocol to include the update and provide those to everyone by May 29, 2020.

What you need to know:

1. Scheduling Appointments

- Appointment Modality
 - i. The Appointment Modality is to record how the appointment was conducted.
 - ii. You will notice there are more options to choose from. *Continue to use as you did prior to the update until we provide protocol of how we will use the other options.*
 - In person – *should not* be selected while we are telecommuting.
 - On Call
 - Email
 - Phone
 - Virtual Meeting
 - iii. You will be required to enter the location. If the Academic Advisor included this information when building their calendar it will automatically populate.
 - iv. @Academic Advisors – if the Appointment Modality changes during your appointment, make sure you change it to how the appointment actually occurred in the student's Advising Note.

The screenshot displays the Inspire scheduling interface for an appointment on Tuesday, May 26, 2020, from 09:30 AM to 10:30 AM. The 'Appointment Modality *' dropdown menu is highlighted with a red box and has a red arrow pointing to it. The selected option is 'Virtual Meeting'. To the right, the 'Virtual Meeting *' field is also highlighted with a red box and has a red arrow pointing to it. The 'Virtual Meeting *' field contains the text 'Webex'. Below these fields are the 'Session Topics *' dropdown menu (set to 'Select'), the 'Intake Note' field (with the placeholder text 'record intake note here'), and the 'Session Note' field (with the placeholder text 'record session note here'). At the bottom of the form are two buttons: 'CANCEL' and 'SCHEDULE APPOINTMENT'.

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2. Advising Notes

- Interaction Type
 - i. The Interaction Type is intended to document the interaction that led to the Advising Note to be created.
 - ii. Located in a new Advising Note.
 - iii. The options for Interaction Types are listed below.
 - Appointment – *only to be used for scheduled appointments.*
 - Email
 - Phone
 - Text – *ignore this option. There is not a texting option yet.*
 - Other – if there is another form of interaction (e.g., virtual) and/or if there was not an interaction with the student and the Advising Note was only for documentation purposes (e.g., graduation audits).

The screenshot shows the 'New Advising Note' form in the Inspire system. The form is titled 'New Advising Note' and includes a note that '* Indicates a required field'. The form contains several fields and sections:

- Student ***: A search box with the placeholder text 'search students by name or student ID'. A red arrow points to this field.
- Interaction Type ***: A dropdown menu with the text 'Select'. This field is highlighted with a red box.
- Appointment Type**: A dropdown menu with the text 'Select'.
- Appointment Modality**: A dropdown menu with the text 'Select'.
- Session Topics ***: A dropdown menu with the text 'Select'.
- Advising Note Subject ***: A text input field with the placeholder text 'subject'.

On the right side of the form, there are two sections:

- Student Information**: A box with a person icon and the text 'Enter a student name to display student information.'
- Note Privacy**: A section with two radio buttons: 'Private' (unchecked) and 'Shared' (checked).

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3. Building Calendar/Appointment Availability

- More information will be provided about this section soon and how to build your appointment availability
- **Appointment Type**
 - i. Appointment Type – is intended to record whether a scheduled appointment or an on-call.
- **Walk-in** – this is not UTSA terminology. We will use this function for on-call purposes.

The screenshot displays the 'Appointment Slots' configuration page in the UTSA Academic Advising system. At the top, there is a search bar labeled 'search by students first/last name or id'. The left sidebar shows a navigation menu with 'Calendar' selected, and 'Appointment Slots' highlighted with a red box and a red arrow. The main content area is titled 'Appointment Slots' and contains several configuration options:

- Calendar:** A dropdown menu currently set to 'My Calendar'.
- Scheduling available to:** A box containing 'All students Academic Advising' with a close button.
- Display on student's calendar as:** A dropdown menu set to 'SCHEDULE ADVISING APPOINTMENT (Acade...'
- Scheduling deadline for students:** A dropdown menu set to '5:00PM Previous Day'.
- Appointment Modality *:** A dropdown menu set to 'Select'.
- Start Date*:** A text input field with the placeholder 'mm-dd-yyyy'.
- Start Time*:** A text input field with the placeholder 'HH:MM AM/PM'.
- End Time*:** A text input field with the placeholder 'HH:MM AM/PM'.

A light blue box on the right side of the page contains the text 'Choose open slots to block off for:'.