

Appointment Scheduling Documentation

Advisors and mentors can manually schedule, edit or cancel appointments with students. This documentation shows how to do this within the platform.

Note that you may not be able to edit or cancel appointments if you are not the organizer of the appointment or if you do not have access to manage appointments in the specific Care Unit that the appointment is scheduled in.

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Schedule an Appointment from the Student's Page

From the student's page, select the **Schedule an Appointment** link from the Options container.

Pitt Student

Overview Success Progress History Courses Checklist Calendar Study Hall Appointments Conversations Staff

Overview

Student Summary

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
1	1	0	0	2.404
Total Credits Earned	Credit Completion % at this Institution			
30.00	77%			

Options

I want to...

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Create Request for Appointment](#)
- [Schedule an Appointment](#)**
- [Add to Student List](#)
- [Issue a Referral](#)

Then follow steps on the next section to select the Appointment Scheduling Options.

Schedule an Appointment from Your Assigned Student List, or an Advanced Search or Report

Select the student(s) you would like to schedule an appointment for and using the Actions drop down menu, select the **Schedule Appointment** option.

Students Appointments My Availability Appointment Queues Appointment Requests

Assigned Students

List Type: Assigned Students Term: Spring Term 2025-20... Relationship Type: All Relationship Types

Actions

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment**

STUDENT LIST	EARNED CREDITS
	48
	24
	21

Actions

I want to...

- [Issue a Referral](#)
- [Upload Profile Picture](#)

Quick Links

Take me to...

- [Schedule an Appointment](#)
- [Create an Event](#)

Report Results

Actions Search in Results

- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment**

CLASSIFICATION	CUMULATIVE GPA	STUDENT IS ACTIVE	DATE SUBMITTED	TIME SUBMITTED	COLLEGE
Senior (Spring Term 2024-2...	3.4530	Yes	12/14/2023	01:03 PM ET	Education at UPB

Then follow steps in the next section to select the Appointment Scheduling Options.

Appointment Scheduling Options

Select the **Care Unit**, **Location**, **Service** and **Meeting Type** for the appointment. And select the **Radio Button** beside the organizer's name.

pathways

Schedule Appointment

Filters

- Care Unit**: Student Services
- Location**: Student Success Hub
- Service**: SSH Academic Success Appointment
- Course**: [Search]
- Meeting Type**: Select meeting type

People Attending (1)

- Student, Pitt (Student)
- Available Slots Left in Appointment (0)

Add an Attendee [Search] **Additional Slots** [-] [+]

Select An Organizer

SELECT	ORGANIZER	AVAILABLE TIMES
☒	Advisor, Pitt	For: Appointments Tue, Fri 8:00am - 5:00pm ET

Next, add any **Comments**. Use the **Calendar to Select a Date**. Then **Select the checkbox** for the specific block of time for the appointment.

Comments

Select a Date

February 2026

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Reminders

- ☒ Send E-mail Reminder to the organizer attendee?
- ☒ Send E-mail Reminder to non organizer attendees?
- ☒ Send a text reminder to the organizer attendee?
- ☒ Send a text reminder to non organizer attendees?

Choose A Time To Meet

Length: [Dropdown]

Availabilities: [Dropdown] Show Availabilities for This Course/Service

TIME SLOT	02/15 (SUN)	02/16 (MON)	02/17 (TUE)	02/18 (WED)	02/19 (THU)	02/20 (FRI)	02/21 (SAT)
2:00pm - 3:00pm ET	CONFLICTS	CONFLICTS	CONFLICTS	CONFLICTS	☒ 0/1		
3:00pm - 3:30pm ET	CONFLICTS	CONFLICTS	CONFLICTS	CONFLICTS	☐ 0/1		
3:30pm - 4:00pm ET	CONFLICTS	CONFLICTS	CONFLICTS	CONFLICTS	☐ 0/1		
4:00pm - 4:30pm ET			CONFLICTS		☐ 0/1		
4:30pm - 5:00pm ET			CONFLICTS		☐ 0/1		

Use the **Availabilities** dropdown menu to see additional options if default times do not display any checkboxes and available time.

Select a Date

February 2026

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Choose A Time To Meet

Length: [Dropdown]

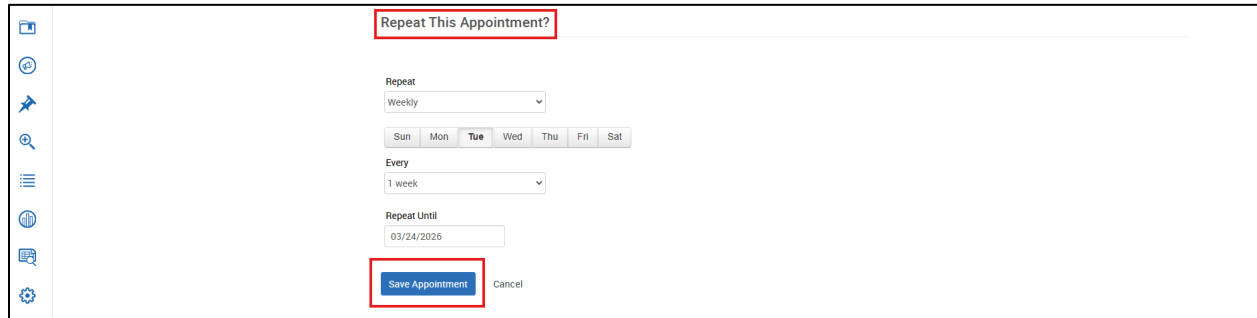
Availabilities: [Dropdown] Show Availabilities for This Course/Service

TIME SLOT	02/15 (SUN)	02/16 (MON)	02/17 (TUE)	02/18 (WED)	02/19 (THU)
8:00am - 8:30am ET					

Availabilities:

- Show Availabilities for This Course/Service
- Show All Availabilities
- Unlock Non-Available Times
- Unlock Times With Conflicts

If the appointment is a reoccurring appointment, select the appropriate options Repeating Appointment options. Next, press the blue **Save Appointment** button.



The screenshot shows a web interface for scheduling a repeating appointment. On the left is a vertical sidebar with icons for calendar, appointment, location, search, list, chart, chat, and settings. The main content area has a title "Repeat This Appointment?" in a red box. Below it are several settings: a "Repeat" dropdown menu set to "Weekly", a day-of-the-week selector with "Tue" highlighted, an "Every" dropdown menu set to "1 week", and a "Repeat Until" date field showing "03/24/2026". At the bottom, there is a blue "Save Appointment" button in a red box and a "Cancel" link.

Repeat This Appointment?

Repeat
Weekly

Sun Mon **Tue** Wed Thu Fri Sat

Every
1 week

Repeat Until
03/24/2026

Save Appointment Cancel

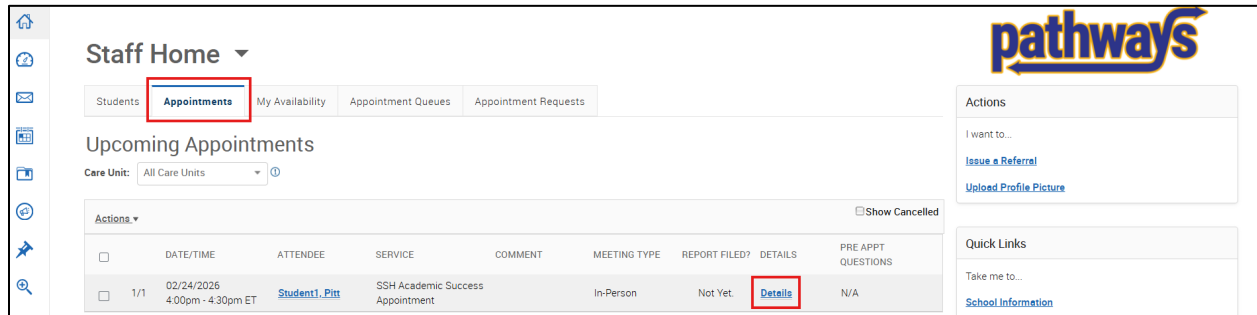
You and the student will receive the relevant **Appointment Notification** emails, confirming the details of the appointment that you scheduled.

How to Edit an Appointment

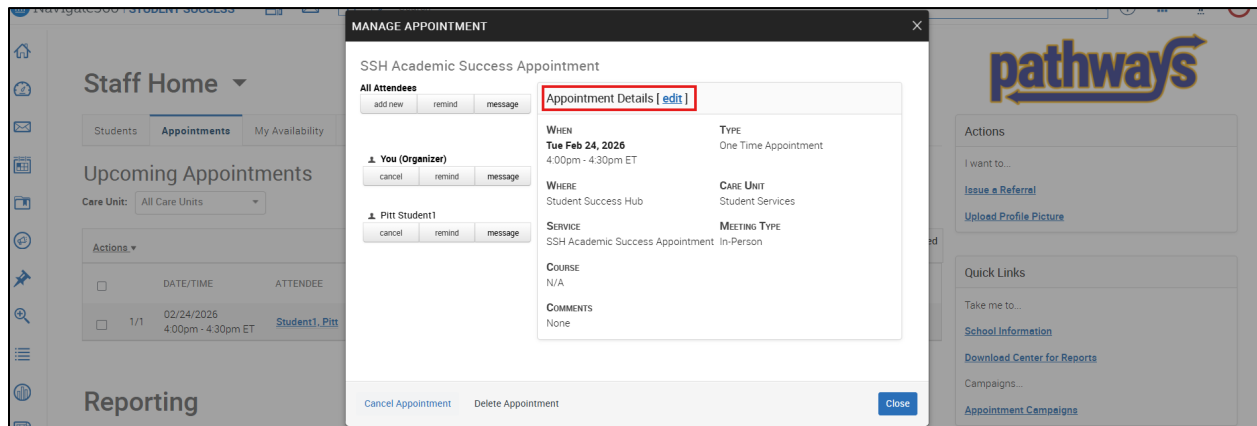
Appointments can be edited from either your calendar or the Upcoming Appointments section. This documentation shows how to edit an appointment from the Upcoming Appointments section, however if selecting an appointment from your calendar, the steps to edit will be the same.

Go to the **Appointments** tab on your **Staff Home** page.

Next, select the **Details** hyperlink for the student/appointment that you would like to edit.



The Manage Appointment window will appear. Select the **Edit** hyperlink.



Continue editing the appointment in the same manner that it was originally scheduled.

How to Cancel an Appointment

Appointments can be cancelled from your Upcoming Appointments section or from your calendar.

FROM YOUR UPCOMING APPOINTMENTS TAB

Go to the **Appointments** tab on your **Staff Home** page.

Next, **select the checkbox** beside the student/appointment you would like to cancel.

Use the **Actions** drop down button and select **Cancel Appointment**.

Staff Home

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

Upcoming Appointments

Care Unit: All Care Units

Actions

- Send Message
- Add Appointment Summary
- Issue Referral
- Cancel Appointment**

ATTENDEE	SERVICE	COMMENT	MEETING TYPE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
Student1_Pitt	SSH Academic Success Appointment		In-Person	Not Yet	Details	N/A
Student1_Pitt	SSH Academic Success Appointment		In-Person	Not Yet	Details	N/A

The Cancel Upcoming Appointment window will appear. Select whom to cancel the appointment for - **Entire Appointment** should be selected unless it is a group appointment. Then select the Reason. Add any **Comments** and press the blue **Cancel Appointment** button.

CANCEL UPCOMING APPOINTMENT

Cancel Appointment For:
Entire Appointment

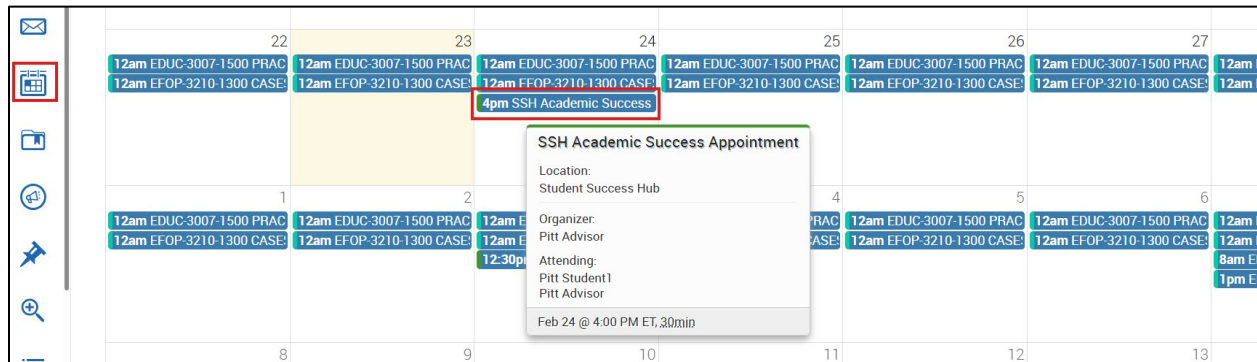
Reason:
Cancelled by Student

Comments:

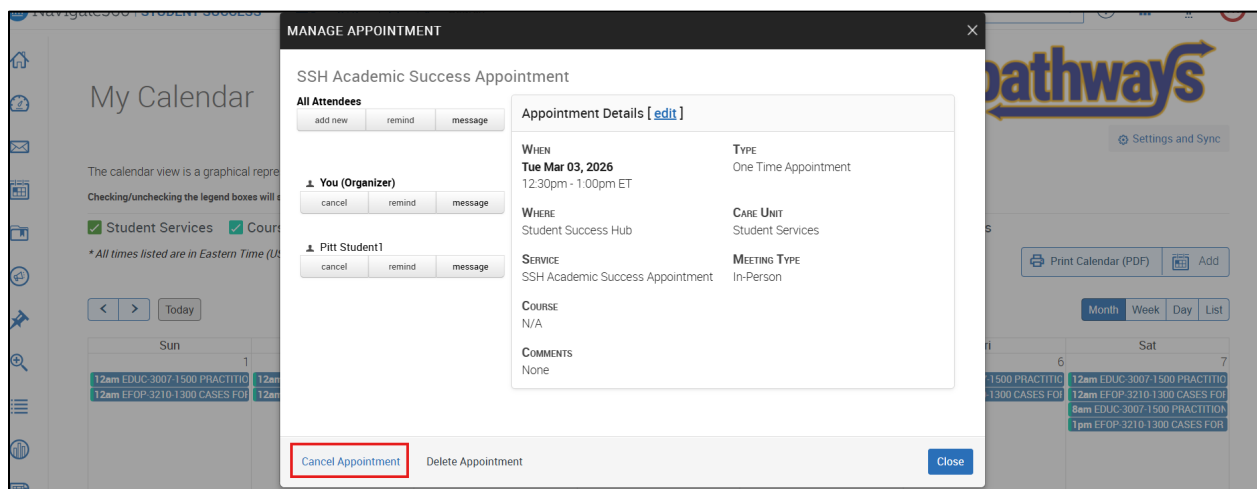
Close **Cancel Appointment**

FROM YOUR CALENDAR

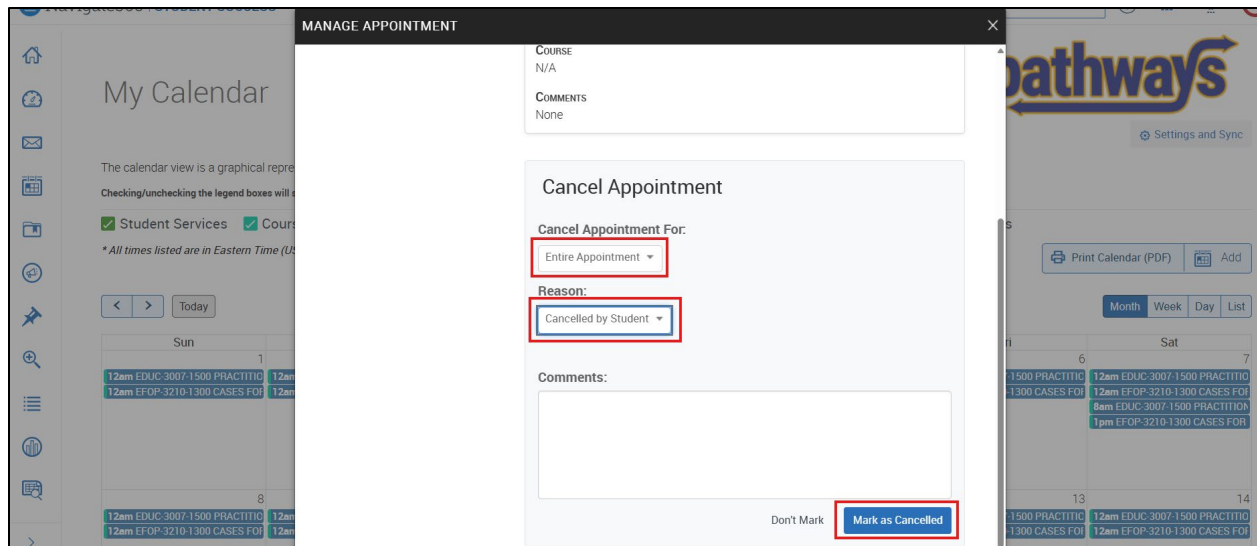
Your calendar can be accessed from the **Calendar tab** in the left-hand navigation menu.



Click the appointment you would like to cancel, and the Manage Appointment pop up window will appear.



The Cancel Appointment section will appear. Select whom to cancel the appointment for - **Entire Appointment** should be selected unless it is a group appointment. Then select the Reason. Add any **Comments** and press the blue **Mark as Cancelled** button.



The Manage Appointment window will update, confirming the appointment cancellation. Click the blue **Close** button.

