

Appointments

Last Modified on 08/03/2026 2:34 pm CDT

The Appointments Module is part of the [Campus Workflow Suite](#).

Tool Search: Appointments

The Appointments tool allows users to view scheduled student appointments in four-week increments: the current week and the upcoming three weeks, as well as appointments from previous and upcoming weeks. This tool also allows users to add, edit, and delete student appointments. Staff members/students can also end an appointment early if the appointment concludes before its scheduled end time.



Appointments ☆

A, Student

Student #: 241900040
Grade: 09
DOB: 02/09/2011

[Student Information](#) > [General](#) > [Appointments](#)

5/24/26 - 5/30/26

Thursday (5/28/26)

10:00 AM Dean Check-In

Room: 1426
Staff: Mr Aarons

Edit
Delete

5/31/26 - 6/6/26

Monday (6/1/26)

2:15 PM Medical Appointment

Room: 1501
Staff: None

Edit
Delete

6/7/26 - 6/13/26

No Appointments

6/14/26 - 6/20/26

No Appointments

New Appointment

Previous 4 Weeks

Next 4 Weeks

Appointments Tool

View scheduled Appointments

Users can view scheduled student appointments in four-week increments: the current week and the next three upcoming weeks. Users may also view student appointments from previous and upcoming weeks.

1. The Appointments screen displays scheduled student appointments for the current week and any appointments scheduled for the next three weeks.

2. To view appointments for the previous four weeks, press **Previous 4 Weeks**. All scheduled appointments for the student in the previous four weeks display. Continue to press the Previous 4 Weeks button to view earlier appointments in four-week increments.
3. To view upcoming appointments for the next four weeks, press **Next 4 Weeks**. All scheduled appointments for the student for the next four weeks display. Continue to press the Next 4 Weeks button to view upcoming appointments in four-week increments.

Create a new Appointment

Users may create scheduled appointments for students.

Create Appointment

General

Title (Required)

Attendance Code ⁱ

Visible to Parent ⁱ

☐

Description

Create Hall Pass ⁱ

☐

Create Returning Pass ⁱ

☐

Participants/Location

Student(s) (Required)

Staff Member(s) ⁱ

Room ⁱ

Recurrence Pattern

Frequency ⁱ (Required)

Date ⁱ (Required)

Start Time ⁱ (Required)

End Time ⁱ (Required)

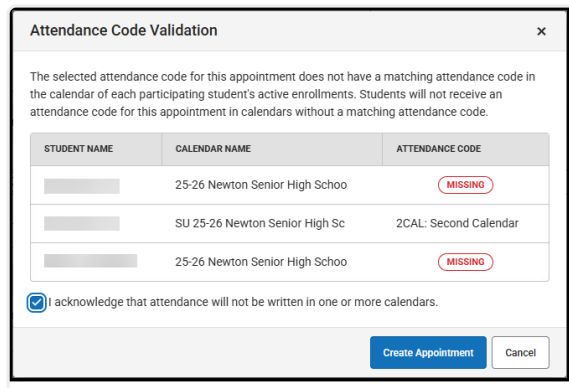
Save

Cancel

1. From the Appointment screen, press **New Appointment**.
2. Enter a **Title** for the appointment.
3. In the **Attendance Code** field, use the drop-list to select the appropriate code to use for this appointment. The Attendance Code selected is assigned to the student's appointment 10 minutes before the appointment begins. Once the appointment start time is within 10 minutes of the start time, this field can no longer be changed.

NOTE: Attendance Codes are only written to calendars with matching attendance codes. Attendance Codes are NOT written to calendars with Attendance Codes that do NOT match.

If attendance codes for the appointment and the student's calendars do not match, a validation window appears, prompting the user to resolve the mismatch.



The selected attendance code for this appointment does not have a matching attendance code in the calendar of each participating student's active enrollments. Students will not receive an attendance code for this appointment in calendars without a matching attendance code.

STUDENT NAME	CALENDAR NAME	ATTENDANCE CODE
	25-26 Newton Senior High School	MISSING
	SU 25-26 Newton Senior High Sc	2CAL: Second Calendar
	25-26 Newton Senior High School	MISSING

☒ I acknowledge that attendance will not be written in one or more calendars.

Create Appointment Cancel

4. Mark the **Visible to Parent** option if the appointment should be visible to parents/guardians on the Parent Portal.
 - Leave this option unmarked if parents/guardians do not need to see the appointment.
5. Use the **Description** field to enter any additional information that is relevant to the appointment.
6. Mark the **Create a Hall Pass** option to create a hall pass for the student 10 minutes before the appointment begins.
 - Leave this option unmarked if the student does not need a hall pass.
 - If the **Create a Hall Pass** option is marked, users **MUST** select a **Hall Pass Type**. Use the drop-list to select the appropriate hall pass.
7. Mark the **Create Returning Pass** option to create a hall pass to return to class when the appointment ends.
 - Leave this option unmarked if the student does not need a returning hall pass.
8. In the **Student(s)** field, enter the student, or students, to assign to the appointment. Users can select students from the drop-list or begin typing in the name(s) to more quickly find the student(s).
9. In the **Staff Member(s)** field, enter the staff member, or members, to assign to the appointment. Users can select staff members from the drop-list or begin typing in the name(s) to more quickly find the staff member(s).

NOTE: Users **MUST** assign at least one Staff Member OR a Room to the appointment. The appointment cannot be saved if either a staff member or a room is not assigned to the appointment.

10. Use the **Room** drop-list to select a room to assign to the appointment.

NOTE: Users **MUST** assign a Room OR at least one Staff Member to the appointment. The appointment cannot be saved if either a room or a staff member is not assigned to the appointment.

11. Use the **Recurrence Pattern** fields to set frequency and recurrence options for the appointment. The options available change depending on the selections made. See the [Recurrence Pattern](#) fields in [Appointment Fields](#) for more information on each of the available Recurrence Pattern fields.

12. When finished, press **Save** to save the appointment or **Cancel** to exit without saving the appointment.

Appointment Email Notifications

NOTE: Appointment Email Notifications are only sent to students.

In order to send email notifications to students, districts must have the following setup:

- Students must have a listed email in Census > Demographics. The General checkbox must also be marked for the student's email.
- Email Templates should be reviewed to ensure proper wording. See [Notification Templates](#) information below.
- Messenger must be set up to allow emails to be sent. See [Email Settings](#) for more information.

Emails are sent at the following times:

- An appointment is created (Template Used: Appointment - Added To)
- An appointment is updated (Template Used: Appointment - Updated)
- Ten minutes before the appointment starts (Template Used: Appointment - Reminder)
- A student has been removed from an appointment (Template Used: Appointment - Removed From)

Notification Templates

A user group named Workflow Administrator is automatically created and available in your site. This user group **MUST** be assigned to users to edit the email notification templates students receive for their appointments. Notification templates can be edited in the [Letter Designer](#).

Within the notification templates, the following fields are available to pull appointment information into the email.

NOTE: When using the following fields, you **MUST** include the **(L)** at the **START** and **END** of each field.

Notification Template fields available

Field	Description
(L)FIRSTNAME(L)	First name of the student.
(L)MIDDLENAME(L)	Middle name of the student.

Field	Description
(L)LASTNAME(L)	Last name of the student.
(L)TITLE(L)	Title of the appointment.
(L)DESCRIPTION(L)	Description of the appointment.
(L)DATE(L)	Date, or date range, of the appointment.
(L)STARTDATE(L)	Start Date of the appointment.
(L)ENDDATE(L)	End Date of the appointment.
(L)STARTTIME(L)	Start time of the appointment.
(L)ENDTIME(L)	End time of the appointment.
(L)STAFF(L)	Staff members assigned to the appointment.
(L)ROOM(L)	Room assigned to the appointment.

Edit Appointments

Users can modify upcoming and past student scheduled appointments. Users can also end an appointment early and assign attendance to in-progress appointments.

Update Appointment

General

Title (Required)

Dean Check-In

Attendance Code

PC: Present - Counseling

Visible to Parent

☒

Description

Create Hall Pass

☒

Create Returning Pass

☒

Hall Pass Type (Required)

Counseling Office

Participants/Location

Student(s) (Required)

A, Student (111111111) ✕

Staff Member(s)

Aarons, Mr ✕

Room

1426

Recurrence Pattern

Frequency (Required)

Once

Date (Required)

5/28/2026

Start Time (Required)

10:00 AM

End Time (Required)

10:30 AM

Save

Cancel

Update Appointment Editor

Edit an existing single-occurrence Appointment

- Find the appointment to which you want to make changes. Press **Edit** and select **Edit Appointment** from the drop-list.
- Make the necessary changes to the appointment. For more information on each field, see [Appointment Fields](#).
- Press **Save** to save the changes to the appointment or **Cancel** to exit without saving the changes.

Edit an Appointment series

- Find the appointment series to which you want to make changes. Press **Edit**. From the drop-list, select **This Event**, **This and all of following events**, or **All events in the series**.

Edit Type	Description
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Edit Type	Description
This Event	After the edits are made to This Event in the appointment, the changes are saved, the edited appointment is removed from the series, and becomes a standalone appointment. The original appointment series remains unchanged (minus the edited appointment) and continues to occur according to its schedule.
This and all of following events	After the edits are made to This and all of following events in the series, the changes are saved, the edited appointment and future appointments are removed from the existing series to become a new standalone series. Events occurring before this edit remain in the original appointment series for historical record. NOTE: If any appointments normally encompassed by this edit are part of a different series (i.e. if an appointment(s) has been edited and therefore removed from the original series), those appointments are not modified.
All events in the series	After the edits are made to All events in the series, the changes are saved, ALL events (past, present, and future) in the appointment series are updated to reflect the changes. NOTE: If any appointments normally encompassed by this edit are part of a different series (i.e. if an appointment(s) has been edited and therefore removed from the original series), those appointments are not modified.

2. Make the appropriate changes to the appointment.
3. Press **Save** to save the changes to the appointment or **Cancel** to exit without saving the changes.

Assign attendance to an Appointment

Users can assign student attendance to an in-progress appointment.

NOTE: Be sure to understand this is NOT the same as marking attendance for the periods the student missed. This only indicates student attendance FOR the appointment.

1. Find the appointment to which you want to assign attendance. Press **Edit** and select **Assign Attendance** from the drop-list.

Set Appointment Attendance ×

STUDENT NAME	ATTENDANCE
A Student	Present ▼

Save
Cancel

Set Appointment Attendance Editor

- A list of all students assigned to the appointment displays. You can take attendance for each student.
- Use the **Attendance** drop-list to assign the student's attendance status for the appointment.
 - Select **Present** if the student is at the appointment.
 - Select **Absent** if the student is not present for the appointment.
- When finished, press **Save** to save the attendance or **Cancel** to exit without saving attendance.

End an Appointment early

Users can assign an early end to in-progress appointments.

- Find the in-progress appointment you want to end early. Press **Edit** and select **End Appointment Early** from the drop-list.

End Appointment Early ×

STUDENT NAME	END EARLY
A Student	PASS ISSUED
B Student	End Appointment

Return

End Appointment Early Editor

2. A list of all students assigned to the appointment displays. You can end the appointment early for the appropriate students.
3. In the **End Early** column, select **End Appointment** for the appropriate student(s). A pass is issued for each affected student.
4. When finished, press **Return** to return to the Appointments screen.

Delete a single-occurrence Appointment

Users can delete upcoming student appointments.

1. To delete an existing appointment, find the appointment you want to delete. Press **Delete**.
2. At the prompt, press **Delete** to remove the appointment. Press **Keep** to cancel the appointment removal.

Delete an Appointment Series

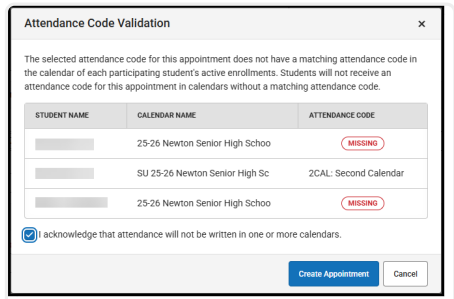
1. Find the appointment series you want to delete. Press **Delete**. From the drop-list, select **This Event**, **This and all of following events**, or **All events in the series**.

Deletion Type	Description
This Event	Select This Event to delete only this event from the appointment series. The original appointment series remains unchanged and continues to occur according to its schedule.
This and all of following events	Select This and all of following events in the series, to remove this event and any future events in the series. Events occurring before this deletion remain in the original appointment series for historical record. NOTE: If any appointments normally encompassed by this edit are part of a different series (i.e. if an appointment(s) has been edited and therefore removed from the original series), those appointments are not deleted.
All events in the series	Select All events in the series, to remove ALL events (past, present, and future) in the appointment series. NOTE: If any appointments normally encompassed by this edit are part of a different series (i.e. if an appointment(s) has been edited and therefore removed from the original series), those appointments are not deleted.

2. Make the appropriate changes to the appointment.

- Press **Save** to save the changes to the appointment or **Cancel** to exit without saving the changes.

Appointment fields

Field	Definition
General	
Title <i>Required</i>	The name of the appointment.
Attendance Code	Use the Attendance Code field to enter the code to apply to the appointment 10 minutes before it begins. This field can no longer be changed after 10 minutes before the appointment begins. NOTE: Attendance Codes are only written to calendars with matching attendance codes. Attendance Codes are NOT written to calendars with Attendance Codes that do NOT match. If attendance codes for the appointment and the student's calendars do not match, a validation window appears, prompting the user to resolve the mismatch.  <i>Attendance Code Validation</i>
Visible to Parent	Mark this option to make the appointment visible to the student's parent/guardian on the Parent Portal. Leave this option unmarked if the appointment should NOT be visible to parents/guardians.
Description	Use the Description field to enter any additional information relevant to the appointment.
Create Hall Pass	To create a hall pass for the student 10 minutes before their appointment, mark this option. Leave the option unmarked if a hall pass is not needed. NOTE: If this option is marked, you MUST select a Hall Pass Type.

Field	Definition
Hall Pass Type <i>Required (only available for appointment for which the Create Hall Pass option is marked)</i>	This field determines the type of hall pass to create for the student 10 minutes before their appointment. NOTE: To assign a hall pass, you MUST have at least one hall pass type set for appointments in Hall Pass Settings.
Create Returning Pass	To create a RETURN hall pass for the student when the appointment reaches its end time OR the Staff Member/Student(s) ends the appointment, mark this option. Leave this option unmarked if a return hall pass is not necessary.
Participants/Location	
Student(s) <i>Required</i>	Use this field to assign a student, or students, to the appointment. Users can select students from the drop-list or begin typing in the name(s) to more quickly find the student(s).
Staff Member(s)	Use this field to assign a staff member to the appointment. Users can select staff members from the drop-list or begin typing in the name to more quickly find the staff member. NOTE: Users MUST assign at least one Staff Member OR a Room to the appointment. The appointment cannot be saved if either a staff member or a room is not assigned to the appointment.
Room	From the drop-list, assign a Room to the appointment. NOTE: Users MUST assign a Room OR at least one Staff Member to the appointment. The appointment cannot be saved if either a room or a staff member is not assigned to the appointment.
Recurrence Pattern	

Field	Definition												
Frequency <i>Required</i>	Use this option to determine the frequency at which the appointment occurs. <table> <tr> <th>Frequency</th><th>Definition</th></tr> <tr> <td>Once</td><td>The appointment occurs only one time and is not repeated.</td></tr> <tr> <td>Daily</td><td>The appointment series occurs every day of the week. This includes weekends, holidays, non-school days, etc.</td></tr> <tr> <td>Weekdays</td><td>The appointment series occurs every week day (Monday - Friday). This includes holidays, non-school days, etc.</td></tr> <tr> <td>Weekly</td><td>The appointment series occurs every <i>x</i> week(s) on a specific day of the week. This includes holidays and non-school days and can include Saturdays and Sundays, if selected.</td></tr> <tr> <td>Monthly</td><td>The appointment series occurs every <i>x</i> month(s) on a specific day of the month OR every month on a specific day. This includes weekends, holidays, and non-school days.</td></tr> </table>	Frequency	Definition	Once	The appointment occurs only one time and is not repeated.	Daily	The appointment series occurs every day of the week. This includes weekends, holidays, non-school days, etc.	Weekdays	The appointment series occurs every week day (Monday - Friday). This includes holidays, non-school days, etc.	Weekly	The appointment series occurs every <i>x</i> week(s) on a specific day of the week. This includes holidays and non-school days and can include Saturdays and Sundays, if selected.	Monthly	The appointment series occurs every <i>x</i> month(s) on a specific day of the month OR every month on a specific day. This includes weekends, holidays, and non-school days.
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Date <i>Required (only available for appointments set to a Frequency of Once)</i>	The Date field indicates the appointment date. Appointments may not be back-dated.												

Field	Definition								
End Date Options <i>Required (not available for appointments set to a Frequency of Once)</i>	This date determines the day on which the appointment series ends. <table> <tr> <th>End Option</th><th>Definition</th></tr> <tr> <td>End by Date</td><td>The appointment series ends on the date indicated in the End by Date field.</td></tr> <tr> <td>End After # of Occurrences</td><td>The appointment series ends once the number of appointment occurrences is complete. The number of occurrences is set in the End After # of Occurrences field.</td></tr> <tr> <td>End of School Year</td><td> The appointment series ends once the school year ends. NOTE: The end date is determined by the End Date for the school year set in School Year Setup. </td></tr> </table>	End Option	Definition	End by Date	The appointment series ends on the date indicated in the End by Date field.	End After # of Occurrences	The appointment series ends once the number of appointment occurrences is complete. The number of occurrences is set in the End After # of Occurrences field.	End of School Year	The appointment series ends once the school year ends. NOTE: The end date is determined by the End Date for the school year set in School Year Setup.
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End of School Year	The appointment series ends once the school year ends. NOTE: The end date is determined by the End Date for the school year set in School Year Setup.								
Start Date <i>Required (not available for appointments set to a Frequency of Once)</i>	The day on which the appointment series begins. Appointments cannot be back-dated. NOTE: Depending on the appointment frequency and other recurrence settings, the true start date may be after the recorded date.								
End by Date <i>Required (only available for appointments set to an End Date Option of End by Date)</i>	The date on which the appointment series ends. NOTE: Depending on the appointment frequency and other recurrence settings, the final appointment date may be prior to the End by Date value.								
End After # of Occurrences <i>Required (only available for appointments set to an End Date Option of End After # of Occurrences)</i>	Use the End After # of Occurrences field to determine the number of appointments necessary to complete the appointment series. The appointment series ends once the number of appointment occurrences is complete.								

Field	Definition										
Start Time <i>Required</i>	The time at which the appointment begins. The Start Time, by default, is 5 minutes from the current time.										
End Time <i>Required</i>	The time at which the appointment ends. The End Time, by default, is 35 minutes from the current time. NOTE: Appointments can end either by time running out OR by a staff member/student ending the appointment early.										
Every X Week <i>Required (only available for appointments set to a Frequency of Weekly)</i>	The weeks on which the appointment series occurs. <table> <tr> <th>Week</th><th>Definition</th></tr> <tr> <td>Single</td><td>The appointment series occurs every week.</td></tr> <tr> <td>Second</td><td>The appointment series occurs every other week.</td></tr> <tr> <td>Third</td><td>The appointment series occurs every third week.</td></tr> <tr> <td>Fourth</td><td>The appointment series occurs every fourth week.</td></tr> </table>	Week	Definition	Single	The appointment series occurs every week.	Second	The appointment series occurs every other week.	Third	The appointment series occurs every third week.	Fourth	The appointment series occurs every fourth week.
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Day(s) of the Week <i>Required (only required for appointments set to a Frequency of Weekly)</i>	Use this field to determine the day(s) of the week on which the appointment series occurs. This is a multi-select field; select as many days as necessary.										
Monthly Options <i>Required (only available for appointments set to a Frequency of Monthly)</i>	In the Monthly Options field, use the drop-list to determine the frequency of the monthly appointments. <table> <tr> <th>Monthly Option</th><th>Definition</th></tr> <tr> <td>Date</td><td>The appointment series occurs every X months on a specific date.</td></tr> <tr> <td>Ordinal</td><td>The appointment series occurs on the first/second/third/fourth/last day of the month.</td></tr> </table>	Monthly Option	Definition	Date	The appointment series occurs every X months on a specific date.	Ordinal	The appointment series occurs on the first/second/third/fourth/last day of the month.				
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Field	Definition												
On The <i>Required (only available for appointments set to a Monthly Option of Ordinal)</i>	Use the drop-list to select the day(s) on which the appointment series occurs. <table> <tr> <th>Day</th><th>Definition</th></tr> <tr> <td>First</td><td>The appointment series occurs on the first occurrence of the selected day each month.</td></tr> <tr> <td>Second</td><td>The appointment series occurs on the second occurrence of the selected day each month.</td></tr> <tr> <td>Third</td><td>The appointment series occurs on the third occurrence of the selected day each month.</td></tr> <tr> <td>Fourth</td><td>The appointment series occurs on the fourth occurrence of the selected day each month.</td></tr> <tr> <td>Last</td><td>The appointment series occurs on the last occurrence of the selected day each month.</td></tr> </table>	Day	Definition	First	The appointment series occurs on the first occurrence of the selected day each month.	Second	The appointment series occurs on the second occurrence of the selected day each month.	Third	The appointment series occurs on the third occurrence of the selected day each month.	Fourth	The appointment series occurs on the fourth occurrence of the selected day each month.	Last	The appointment series occurs on the last occurrence of the selected day each month.
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Day of the Month <i>Required (only available for appointments set to a Monthly Option of Date)</i>	Day of the month on which the appointment series occurs.												

