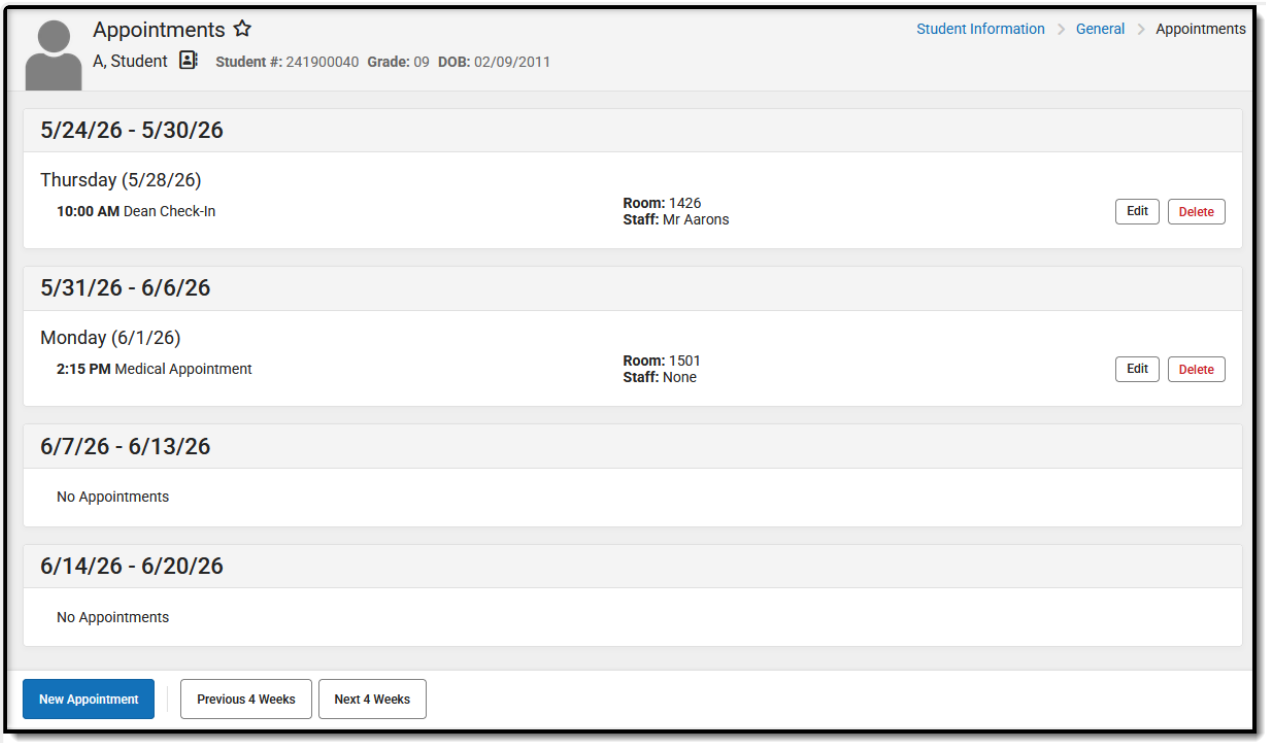
Appointments

Last Modified on 10/27/2026 9:08 am CDT

The Appointments tool is available with 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 Tool

View scheduled Appointments

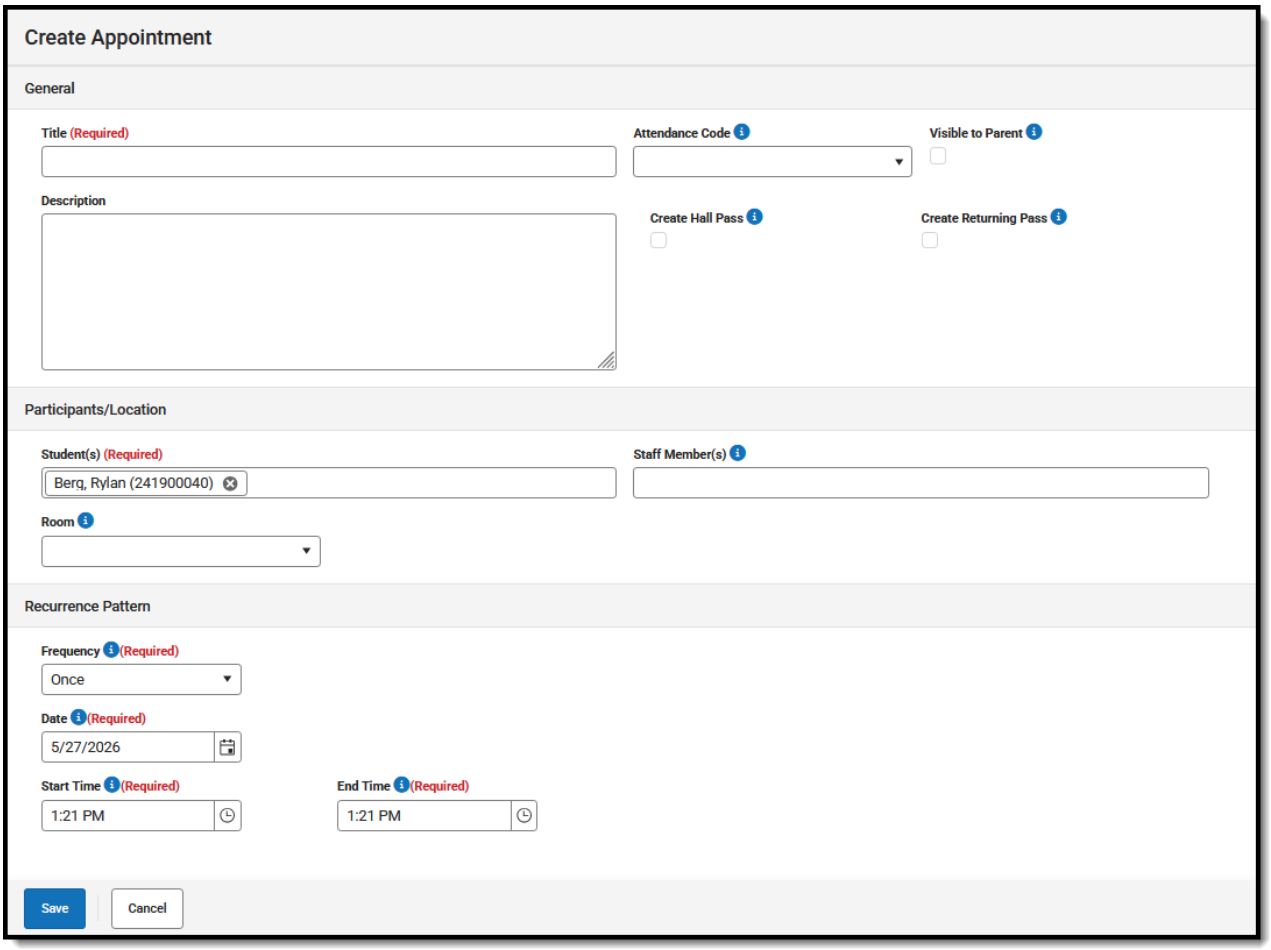
Users can view scheduled student appointments in four-week increments: the current week and the next three upcoming weeks. Users may also view student appointments from previous and upcoming weeks.

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

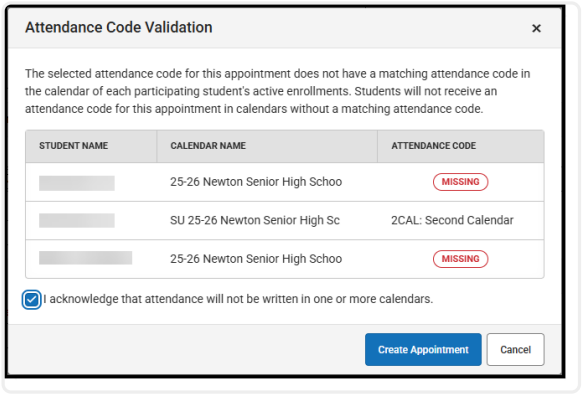
Users may create scheduled appointments for students.



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.



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.

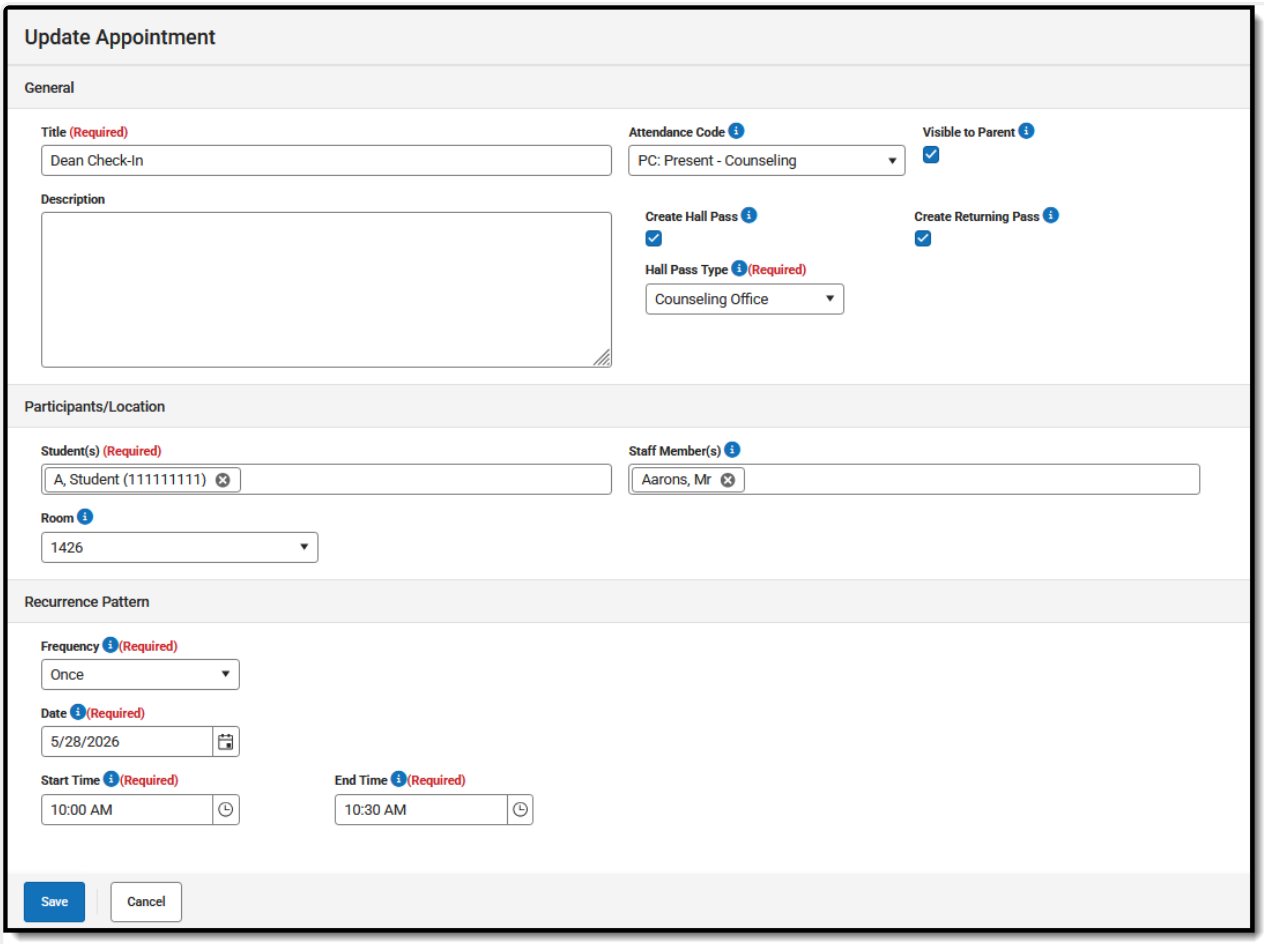
Notification Template fields available

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 Editor

Edit an existing single-occurrence Appointment

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

Edit an Appointment series

1. 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

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.

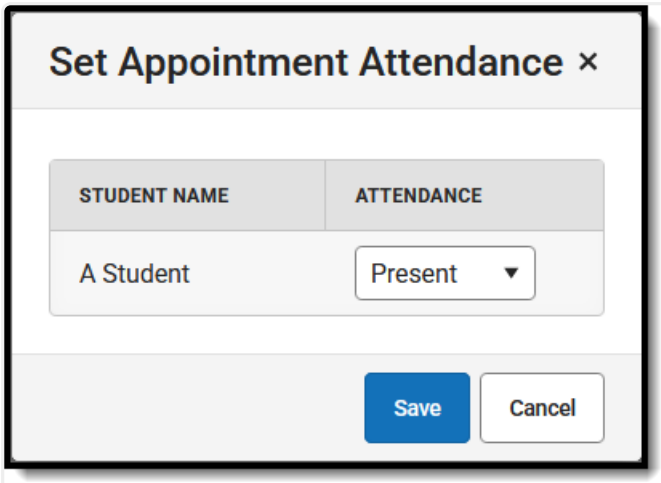
2. Make the appropriate changes to the appointment.
3. Press **Save** to save the changes to the appointment or **Cancel** to exit without saving the changes.

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.



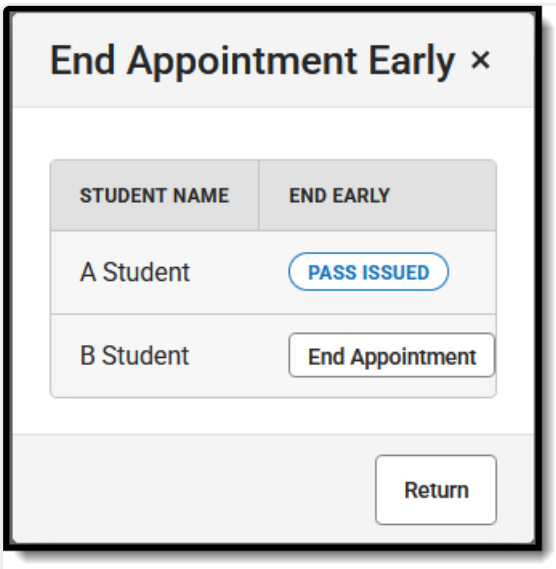
Set Appointment Attendance Editor

2. A list of all students assigned to the appointment displays. You can take attendance for each student.
3. 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.
4. 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.

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



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

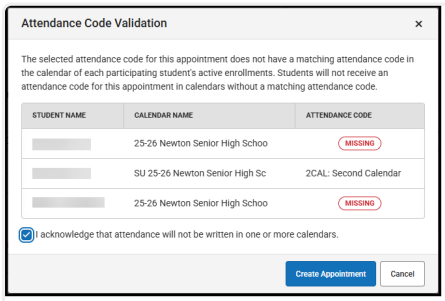
1. Find the appointment series you want to delete. Press **Delete.** From the drop-list, select **This Event, This and all of following events,** or **All events in the series**.

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.

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

Appointment fields

Field	Definition
General	
Title *Required*	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.  *Attendance Code Validation*
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 ***Required (only available for appointment for which the Create Hall Pass option is marked)***	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) ***Required***	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	

<table>
<tr><th>Field</th><th>Definition</th></tr>
<tr><td>Frequency

Required</td><td>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 x 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 x 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></td></tr>
<tr><td>Date
Required (only available for appointments set to a Frequency of Once)</td><td>The Date field indicates the appointment date. Appointments may not be back-dated.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Definition</th></tr>
<tr><td>End Date Options
Required (not available for appointments set to a Frequency of Once)</td><td>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></td></tr>
<tr><td>Start Date
Required (not available for appointments set to a Frequency of Once)</td><td>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.</td></tr>
<tr><td>End by Date

Required (only available for appointments set to an End Date Option of End by Date)</td><td>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.</td></tr>
<tr><td>End After # of Occurrences

Required (only available for appointments set to an End Date Option of End After # of Occurrences)</td><td>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.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Definition</th></tr>
<tr><td>Start Time
Required</td><td>The time at which the appointment begins. The Start Time, by default, is 5 minutes from the current time.</td></tr>
<tr><td>End Time
Required</td><td>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.</td></tr>
<tr><td>Every X Week
Required (only available for appointments set to a Frequency of Weekly)</td><td>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></td></tr>
<tr><td>Day(s) of the Week
Required (only required for appointments set to a Frequency of Weekly)</td><td>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.</td></tr>
<tr><td>Monthly Options
Required (only available for appointments set to a Frequency of Monthly)</td><td>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></td></tr>
</table>

<table>
<tr><th>Field</th><th>Definition</th></tr>
<tr><td>On The
Required (only available for appointments set to a Monthly Option of Ordinal)</td><td>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></td></tr>
<tr><td>Every X Month
Required (only available for appointments set to a Monthly Option of Date)</td><td>Use the Every X Month field to determine the number of months between appointments.<table><tr><th>X Month</th><th>Definition</th></tr><tr><td>Single</td><td>The appointment series occurs every month.</td></tr><tr><td>Second</td><td>The appointment series occurs every other month.</td></tr><tr><td>Third</td><td>The appointment series occurs every third month.</td></tr><tr><td>Fourth</td><td>The appointment series occurs every fourth month.</td></tr></table></td></tr>
<tr><td>Day of the Week
Required (only available for appointments set to a Monthly Option of Ordinal)</td><td>Use the drop-list to select the day on which the appointment series occurs.</td></tr>
<tr><td>Day of the Month
Required (only available for appointments set to a Monthly Option of Date)</td><td>Day of the month on which the appointment series occurs.</td></tr>
</table>