"Appointment booking – how does your institution do it?"

Charlotte Barton, University of Surrey, and David Bowers, sigma Network.

At the end of March 2015, a request was put out simultaneously via the LDHEN and the sigma-network Jiscmail lists, asking for advice on what systems were being used for taking appointment bookings within HE academic support centres (to include maths support centres, library & learning development centres, student support centres). Were people using online systems, or relying on email or personal contact, and how effective were the various methods considered to be?

21 responses were received, including two from overseas. Four relied on email, while 17 used some kind of online booking system. This does not necessarily mean that online booking prevails among maths support and learning development centres – this was not a scientific survey, and possibly those who "only" use straightforward email or person-to-person booking might have thought they had nothing to offer the survey, whereas those using various technology-based solutions might have been more keen to share their experience. The point of the survey was to identify ideas and experiences, which we are pleased to share more widely.

What appointment booking systems are used?

One centre (a large, widening participation institution) explained that they offered primarily open-access drop-in advice where no appointment was needed. However, students were able to contact tutors directly. *"If a student wants to make an appointment outside these hours they are expected to email that person to arrange an alternative time."* Another centre (a smaller specialist institution) posted contact details of the staff on their VLE and expected students to contact them directly to arrange an appointment. This centre acknowledged that *"I'm sure we would have better take up if there was a central booking system!"*

The other centres that used primarily email deployed either a generic shared email address for the service, or had an arrangement where all the academic support staff could access each others' diaries and book people in on their behalf. It should be pointed out that these centres are within institutions with a mature and well-established academic support provision, since these approaches rely on a good understanding among the staff involved to receive, act upon and refer requests appropriately.

Of the 17 centres that used online booking, five had a bespoke system that had been developed in-house and linked to the student record system. Two used an appointment booking facility available within their VLE (Blackboard or Moodle). The rest used third party applications, either free or subscription based.

The free online tools used included:

- Google Forms (www.google.com/forms) . *"It allows you to create an online form (with various templates) and the data entered by the student transfers into a Google Docs*

spreadsheet which you can download. Apparently you can set up to be alerted when somebody fills in the form but I never managed to get it to work." The flexibility of the Google suite of applications mean that you can set up whatever fields you want in the online form, so that all relevant information from the student is captured (eg prompting the student to say what the particular issues are that they are looking for help with). It is best suited for taking bookings onto workshops or open group meetings – individually timed 1-1 appointments are not easily implemented. There is also no formal confirmation or reminder feature.

- EventBrite (www.eventbrite.com). This online event booking system can also be used for 1-1 appointments if these appointments are set up as timed events with a maximum audience of 1! This takes time to set up ("*rather clunky*"), but the benefit is a system that can track numbers and issue bespoke reminders. However, the centre noted that: "*With Eventbrite a person with absolutely no connection with the college found us online and was able to book a session with us!*" The centre is planning now to switch to a paid-for alternative.

- Doodle (http://doodle.com/en_GB/appointment-booking). Doodle is well known for its polls for scheduling meetings, but it also has an appointment booking feature. The centre that pointed this out did not give any evaluation of its use.

- YouCanBookMe (https://ga.youcanbook.me/). This has a free version as well as paid-for premium plans. The centre using it noted: "*We used the free service to set up a very basic page, and we posted the link on our VLE (Moodle) page and we email it to students….. It is entirely automated - students just click on an available time, fill in the booking form and then we, and the student, get an automatic email about the appointment. It automatically syncs with our Google calendar (this is really the only downside of the system - if you don't have a Google mail account it won't work. Fortunately, our university mail and calendar are run by Google.*"

The commercial tools used included:

- Libcal (http://springshare.com/libcal/). This is marketed as a "complete calendaring solution for libraries". Many university academic support services are located within (or managed by) the Library, and so it makes sense to share this tool if it exists. Three centres responding said that they use Libcal – all large post-92 institutions. "*We are part of Library services and by chance there was some free spare capacity on the system. The advantages are that students book directly with an advisor and both receive email confirmations. You can change the wording/settings etc to suit and can also set up reminders to be sent to the students and there is a cancellation link. We have also used the system for workshop*

bookings, with calendars appearing on our web pages via which the students can book – we did need some IT help to embed them."

Connect2 (http://www.lorensbergs.co.uk/). This commercial package was mentioned by two centres. One was a large Russell Group university that had found that Google applications were no longer sufficient to meet their growing demands, and were investigating Connect2 on advice from other institutions. The second respondent – also a research-intensive university – are planning to implement Connect2 imminently: *"From this summer on we will begin using a system called Connect2. This has been built for us in consultation with our institution's IT team and has been tailored more to our needs, e.g. we can include or exclude certain groups from signing up to certain provision and can show a clickable online a 'timetable' of events, rather than simply listing our provision. So far the working relationship with Connect2 has been good, and most of the functions we want the system to perform are available, with others being on request, hopefully to be delivered soon. It just remains to be seen how it will work in practice. A number of other academic institutions in the UK apparently use Connect2 for resource and additional sessions booking which is why we decided on this option."*

Target Connect (http://targetconnect.net/). This was mentioned by one respondent as a possibility they were investigating. It is a CRM (Customer Relationship Management) software apparently used by some university Careers Services, and includes appointments booking. If your institution already subscribes to this, it may be an option to "piggy back" onto it.

Appointments Pro (http://spectrasoft.com/solutions/appointmentspro/). Marketed as "the world's leading appointment software". "*We use a system called "AppointmentsPro" which is one used by many doctors surgeries. We are based in student services and our one to one appointments are handled through a reception desk. It works well as it is connected to our student database (as it needs to be for our role) which means we can know something about our appointments in advance allowing for some prep.*"

SimplyBookMe (https://simplybook.me/) was mentioned by one established research-led university, who "*paid a small fee*" to use it, but did not comment on its use. This tool apparently gives you a webpage that you can design according to your need, and embed the booking tool within it.

Parents Evening System (http://www.parenteveningsystem.co.uk/). *"We use Parents Evening System for lots of events other than parents evenings,"* said one respondent.

- WCOnline (https://mywconline.com/). This was used by a respondent from the United States, but no evaluation was given.

Reflections on the use of the various appointment booking methods.

In addition to simply finding out what booking systems were used, we were interested in peoples' views on their effectiveness.

Using email:

- Direct contact with the student via email to make an appointment means that the tutor is in control of who (s)he sees and when, compared with an online system. However, responding to emails and negotiating with students about dates can be time-consuming: *"It does get a bit hectic and it does take up a lot of time replying to emails. In short, while it gives my colleague and me full control over which students we see when, I don't completely recommend it!!"*

- In a similar vein, another reply saw email as inferior to an online booking system they had recently started to use: *"I don't know much about where it came from, just that we use it in the library and other services (careers etc) and it's totally changed my life. Ok, slight exaggeration but is saved all that back and forth with e-mails trying to set dates up."*

Phone or face-to-face:

- Only a few centres had a reception desk or similar through which appointments could be made. The advantage of giving preliminary advice and guidance to a student prior to an appointment with a specialist tutor was recognised: *"I've worked with a reception before, which was invaluable in disambiguating with the student exactly what and who was needed and giving a quick response, but sadly that isn't the set up in my current role!"*

- Booking direct with students rather than via an online system: *"Although this system can be time-consuming, it seems to us to still give the best results for the students. It gives us an opportunity to mediate expectations (e.g. make sure they are not expecting proof-reading or subject-specific help) and to ask them to bring in anything that might be appropriate for the particular topic they want to discuss. It also helps us to have a clearer idea of what to expect - that's a valuable time-saver when every meeting can be so different."*

Online system:

- Online booking systems can provide a structure that ensures users are prompted to provide all relevant information: *"It is so much easier to have a booking system because it ensures*

the information you need gets entered and you don't have to keep going back to the user to ask for their telephone number, job title etc." However, this needs to be planned properly: "*We've got a drop-down menu for what the student would like to discuss, which students are actually using - they can also leave notes if they want, but when we had an earlier version with just a free-text box, they were very often simply writing 'check my essay'.*"

Regardless of booking system, one centre complained about: "*students who habitually book appointments and then don't turn up*". However, a different centre pointed out that some online systems include an automatic reminder, which can improve student attendance: "*We think it's a good system and easy to run. Students can cancel online and we send a reminder email (automatic) and hour before appointments. Since these systems were brought in with recent upgrades we've had far fewer no shows.*"

More than one respondent highlighted that a disadvantage of an online system might be seen to be the possible loss of confidentiality if information is shared: "*Unfortunately our Information Governance team then decided Google Docs posed a threat to patient data and pulled the plug on it so we have gone back to a manual system.*"

An online system for a larger or more complex support service needs to ensure students choose the correct option, since there is no face-to-face contact to explain the various options: "*The challenge we've had is having the right staff in place (with the appropriate experience) for when students book appointments. We have a drop down menu for several different types of appointment (IT, study skills, information search skills) and even have a holding page telling them which type of appointment addresses which type of support need. However, students often just select the first one and have turned up to see a member of staff who may not be most appropriate to help them - and/or the notes they leave don't explain what they need help with. We've switched to leaving the default option blank so they have to at least consciously select a type of appointment but not sure that makes much difference at the moment.*"

More than one centre reported that students used the freedom they had to book at will might encourage dependency on the support being available: "*I have taken the decision that we shouldn't have named colleagues available for appointments as we have found that some students become dependent on them. They will then only want to make appointments when that colleague is on appointment duty.*" A different respondent had similar views: "*We feel that it's essential to have some stage of 'moderating' appointment bookings…. We find that otherwise a whole host of issues arise, with students booking too many appointments and becoming dependent (and not offering the possibility of selecting a tutor was also desirable for this reason).*"

Online booking systems are subject to user input error: "*It works remarkably well. The only times that students have a problem is when they don't fill out their information correctly (i.e., they type their email address incorrectly so they don't get a confirmation email).*"

Simpler online systems that don't provide real-time updating of bookings and availability can be frustrating for students: "*The difficulty currently is managing student expectations- very often they want an appointment the next day, and if it's very busy at peak times, there is no way to make them aware of the availability (or lack thereof) of our appointments.*"

Centres that had a bespoke online system created in-house were generally pleased: "*The system has also been tailored to work alongside the University's databases, allowing us to report on student usage, disability, basically create any reports on who is or is not using our service. This term we have just launched a drop in app as well, this allows students to join the drop in queue, it also allows staff to call students in without leaving their tutorial room. Both the app and the appointment system are accessible on any device. The app is currently being linked to the appointment system for reporting purposes. By creating a system in house we were and are able to adapt it to our changing needs.*"

We are grateful for the responses received to our call for information via the Jiscmail lists. We believe there is now scope to carry out a more detailed survey, since it is apparent that there is a lot of rich and varied experience to be tapped.