CalJOBSSM Appointment Feature

**USER GUIDE**

**Employment Development Department**

**Workforce Services Branch**

**2021**

Setting Up Staff Visit Reason ……………..………………………………..…..I

Setting up Staff Availability.………………………..……………...…………..II

Requesting an Appointment in Event Calendar or Message..….III

Approving a Requested Appointment…………………..………..………IV

|  Setting Up Visit Reason |
| --- |
| Example ImageExample ImageExample Image | Use the following path to create an appointment visit reason:**Manage Visitors** *🡪* **System Configuration** *🡪* **Add New Reason**. |
| Example Image | For the Visit Reason Type, select the **Appointment check box.**Complete the remaining items, and then select **Save** when done. |
| Example Image | You can now filter and see all **Visit Reasons,** including the Appointment visit reasons.  |

| Setting Up Staff Availability |
| --- |
|  | Select **Menu** and then **Staff Availability** located under the Schedules section. |
| Example Image | Select **Add Schedule** to enter desired appointment schedule. |
| Example Image | Select the reoccurring **Schedule Type**, the **Display From**and**Until** range, the **Start**and**End Time**, and the occurring days of the week.*\****Reoccurring Daily** allows to select multiple days of the week.*\****Reoccurring Weekly** only allows to select one day of the week. |
| Example Image | Select the **Available** box.The**Region**and**Office** will only allow you to select the region and office that your staff account is associated with.Choose **Reason for Appointment**:\*Staff can select Unavailable if an appointment is requested outside of staff hours.\*If the visit reason is associated with the VOS Greeter Module, staff can select to exclude their name for the reason “I am here to see a specific staff member” Only. |
| Example ImageExample ImageExample Image | To view the appointment availability, select the type of **VOS Module** .Select **View** in the action column to modify your schedule.**False** will indicate there is an unavailable or out of office reply when an appointment is requested outside of schedule. |

| Requesting an Appointment in Event Calendar or Message |
| --- |
| Example ImageExample Image | Using the left hand navigation select **Other Services**, then**Appointment Center**, and then**Request Appointment**. |
| Example Image | Select appropriate **Reason for Appointment** and the desired **Date** of appointment request. |
| cid:image003.png@01D73114.1E484A40 | Individuals will see the available staff within the selected date \*If multiple staff are selected, the individual can filter by staff using the **Staff Resource** dropdown.The individual can select the preferred staff and time they would like to request  |
| Example Image | Individuals can enter an optional comment, and then select **Confirm Appointment** to send the request to staff. |

| Approving a Requested Appointment |
| --- |
|  | Staff can view requested appointments by navigating to the **Appointment Calendar**. |
| **Example Image** | Staff will select the appointment they wish to review. |
| **Example Image** | Staff can edit the **Appointment Subject** and add a **Description,** if needed. |
| **Example ImageExample ImageExample Image** | Staff will indicate the required **Appointment Type.**If the appointment is in office, then staff can select the desired **Office Location**based on the staff office privileges. |
| **Example Image** | Staff can modify the schedule and set a reminder up to 4 days prior.Time can be adjusted in 15 minute increments. |
| **Example Image** | Staff have the ability to include other **Staff***,* **Individuals***,* or **Employer Attendees.** |
| Example Image | Staff will select the notification option to notify the attendees of the confirmed appointment.Once all entries are completed, staff will select **Save** to confirm the appointment. |