

Advising Center Success Managing Arrivals with a Round Robin System

Efficiently Managing Walk-ins and Appointments

Student Success Centers; a.k.a. Academic Support Center, Academic Success Centers and other names.

Introduction

To improve advising performance and student outcomes some higher education institutions are implementing Student Success Centers as a platform for academic advising. Student Success Centers are gaining popularity at many higher-education institutions. They are seen as a way to improve student access to advising and related services. Timely access to advising is viewed as the most effective intervention to improve student retention.

This article examines some of the logical issues in operating a Student Success Center. This article is intended for directors of advising, advisors, tutors and those charged with operating a Student Success Center.

The Student Success Center goes by many other names including; Academic Advising Center, Student Advising Center, Academic Advising Center, Academic Support Center, Student Support Center, and other names. What they share in common is a centralized resource focused on providing improved access to advising and associated activities that assist students in achieving their maximum potential. Associate activities can include tutoring, a reading center, testing center as well as other activities.

Throughout this article we will refer to advising services. However, some institutions provide tutoring and other activities using the same method. Therefore, when we refer to advising please realize that other center activities can be managed in the same fashion, often using the same system.

Round Robin Scheduling

Some of the challenges faced in operating a center include managing a wide variety of demand for advising services. Peak times can result in dramatic increases of students accessing the center. Challenges include managing appointments, walk-ins, matching students with the best choice of advisors, and queuing of students when the advisor is available to meet with them.

To deal with the logistical problems some innovative institutions are implementing a Round Robin scheduling system. The Round Robin system is a fairly straight forward in approach. Upon check-in students are determined to be either walk-in students, students with appointments with specific advisors or students with non-specific appointments. Some students are matched with advisors based on an algorithm defined by the institution. Then students are placed in a waiting queue until the assigned advisor is available.

Students with Appointments

Dramatic peak volumes of students can challenge any system.

Rather than struggle with phone calls and emails to negotiate an appointment time the more student friendly method is to offer students online access to view and book available advising appointment times. This is often managed through the student portal. Once the student logs into the student portal they have access to the online appointment scheduling system. This single login ability made possible through technology called single sign on (SSO). Although this technology is not required, it does avoid multiple student logins and provides a higher level of security.

Regardless of method, once the student logs in they may navigate to the appointment scheduling tool. If the advisor has been assigned the student simply views the assigned advisors available schedule and reserves their choice of time. If the student's advisor has not been assigned, it can get a little more challenging. Some approaches allow the student to schedule with an initial advisor that may assign them to a different advisor.

Matching

A typical Student Success Center will have multiple advisors, each with different knowledge bases and backgrounds. In managing online students' appointment scheduling activity the desire is to match the student with the most potentially beneficial advisor.

During the appointment scheduling process the institution will have made a choice; either allow the student to book with an advisor as an introduction or allow the system to select the best advisor for the specific student. One method involves choosing an advisor based on the student's major. Finding the most beneficial advisor may involve matching multiple parameters.

Round Robin systems provide a structure to more easily manage walk-in students and those with appointments

A more specialized method may involve selecting an advisor based on preselected parameters. The selection criteria are set by the individual institution however some common criteria include;

- The student's primary language
- The major
- Status; such as athlete, extracurricular participation
- Academic Status; honors, student at risk
- GPA
- Gender
- Special interest

Today, automated online scheduling tools can use multiple customized criteria to match a student to an available advisor.

Once the advisor is selected, the student chooses an available appointment time and books the appointment. After the booking the student should receive an email confirmation and options to receive email reminders. Some institutions are starting to employ SMS text messages and automated voice reminders.

Walk-in Students

Some centers accept walk-in students for advising. Although it is convenient for students, accepting walk-ins presents some logistical problems for the advising center. In order to adequately manage walk-ins the advising center needs to deal with;

- Current arriving students with appointments
- Unknown volumes of students seeking advising
- Matching the walk-in student with the best currently available advisor
- Monitoring the advisors' schedules
- Monitoring the advisors' live availability (busy or free to meet with a student)
- Managing wait times
- Queuing the appropriate student when a matched advisor is available

Managing all of these issues at once, particularly during peak volume periods may be asking a

lot from the support staff.

Checking In

The check-in process needs to be able to manage walk-in students and those students with appointments. For students with appointments with a specific advisor it is simply a matter of monitoring the specified advisors availability or notifying them that the student has arrived.

Some systems allow the receptionist to monitor instant availability from an arrival “dashboard”. When the advisor has completed a visit and has their availability restored, they may change their status to “Open” signaling that they are ready to take the next student. This change of status shows up on the dashboard. The receptionist may now queue the student via a variety of methods that they are ready to be taken back.

For those students with appointments that do not have an assigned advisor and for walk-in students the processing is slightly different. Once they check-in they may be put through a matching algorithm that severs to match them to what the system determines to be the best matching available advisor. Once they have been matched they then enter the waiting queue. The waiting queue holds the student until the selected advisor is available.

Queuing Students

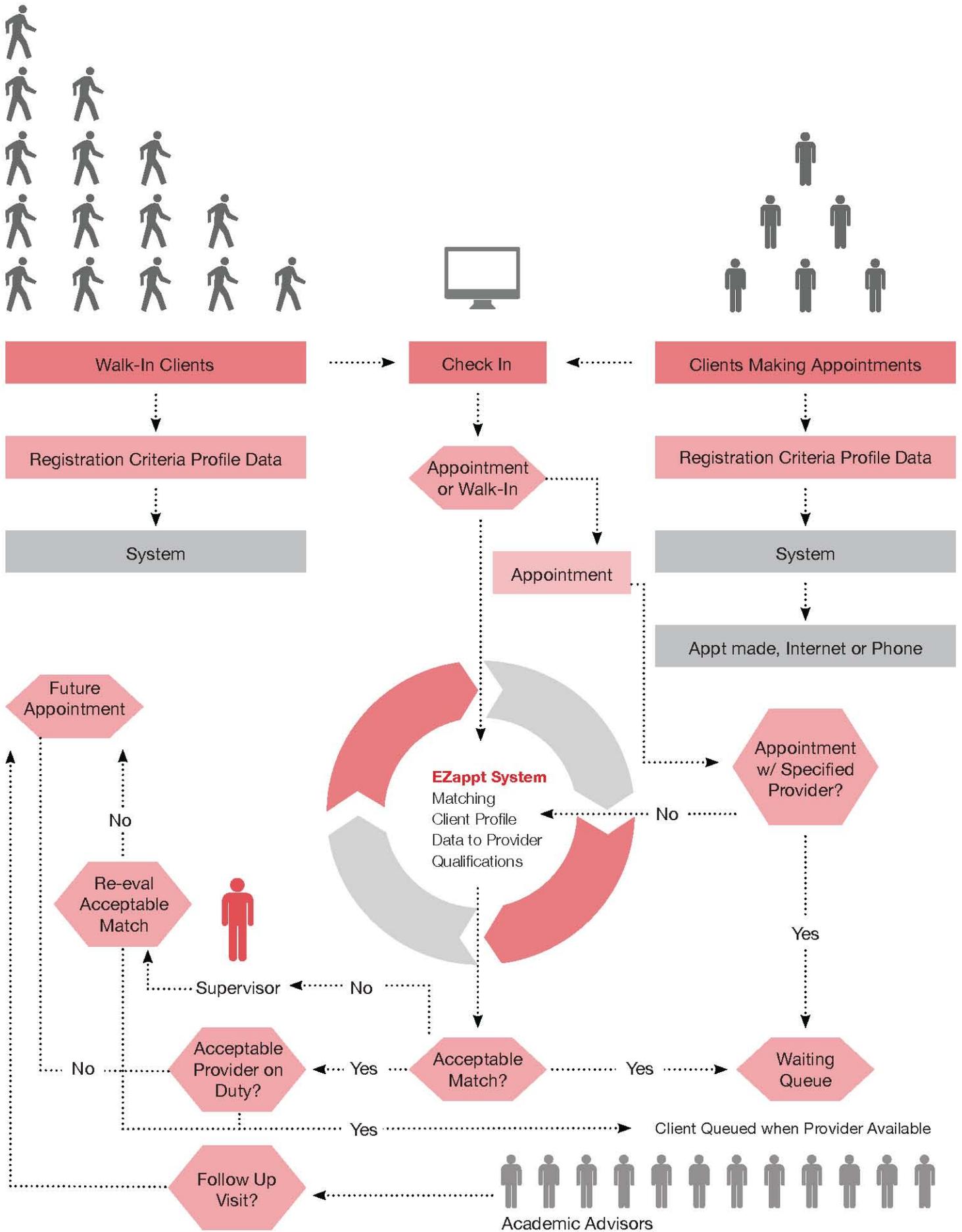
Once the selected advisor becomes available the student needs to be informed that they may now be seen. Several options exist;

From the dashboard the receptionist is alerted that the advisor is available and has a matching student in the waiting queue. The receptionist or the system needs to alert the student that the advisor is ready to see them. There are several options to notify the student. Some of these include;

- Queuing by email
- SMS text message queuing
- Queuing from a video screen
- Queuing by automated phone call.

For a graphical view of the Round Robin system please see the next page.

SMS text messaging offers a convenient and private way to queue students to availability.



Putting it All Together

Timely access to academic advising is known to improve retention and graduation rates. Used in the setting of an academic/student success center. The combination of online appointments, walk-in visits, matching and Round Robin queuing gives students' excellent and timely access to advisors.

Key Benefits

A number of significant benefits exist for all parties involved in making and managing advisor appointments when utilizing an appointment management system.

For Students

If employed completely students will have easier access and lower wait times to access services provided in the Student Success Center. Students have a convenient, online method of viewing an advisors available schedule and booking an appointment. Students are less likely to miss an advising opportunity with confirmations, reminders and queuing may be delivered by email, SMS text or automated voice.

Significant benefits for students, advisors, tutors and staff

For Advisors and Tutors

Advisors have an enterprise system to post and manage their available schedule. During they may post their live availability to the system. When they have opened live availability a student may be queued to see them by the receptionist or fully automatically. Starting a visit the advisor will show as unavailable to the receptionist's dashboard. During the visit the advisor may upload any documents, designate problem types, create progress notes, create follow up instructions, and book future appointments.

For Staff

With the new system the Success Center staff now has a powerful new tool to manage arrivals, accepting appointments, walk-ins, assigning of advisors, monitoring advisors instant availability and queuing the student when the advisor is ready to receive the student. Staff may view a dashboard that shows the day's appointment scheduling and walk-in activity as well as live advisor availability.

Administrators may view the live and historical advising activity, by student or by advisor. They also may access reports on advising activity by department, by advisor and by student. Administrative staff may view historical data and spot trends in advising appointment activity. Staff may also pull standard and customized reports, on demand or on a predefined delivery schedule. Based on role security settings staff may be able to drill down to see advising details.

For Everyone

Responsive academic advising can be a fundamental part of a student-withdrawal-intervention program. If the withdrawal process is lengthened and academic advisors have contact with the student withdrawal rates have dropped.

What to Look for in a Solutions Provider

Experience is Key

When selecting a solutions provider to supply an appointment management system, be sure to consider the following;

Experience

Look for experience in supplying student advisor scheduling in large multi-centered institutions as proof the system can manage your needs. Consider the various integrations that the system has with third party

Arrival Management Module

If your organization utilizes an advising center or takes walk-in appointments having an arrival management module, especially one with Round Robin assignments, can make life easier for students, staff and advisors. The arrival management solution should be able to allow a receptionist to view statuses of all arrivals, scheduled appointments, provide matching, and the monitoring the live availability of each advisor and queuing features.

Queuing

Queuing services should be included as feature that is available via multiple formats such as email, LCD view screen, SMS text and perhaps even voice reminders.

Single Sign On

Single Sign On allows multisystem logon with logging into the student portal. The feature should function to log into the advising and scheduling systems with logging into the portal. This creates a single login point and avoids requiring students or staff to login multiple times.

Flexible platform

SaaS (advanced cloud or dedicated) with SAS 70 type II compliance or installed. Conditions may change; make sure the solutions provider can provide any option you may need, for now and in the future.

Recurring appointments

Advisors or students may wish to establish a regular pattern of repeating appointments. If the system allows recurring appointments students and advisors have a tool to easily manage more complex scheduling tasks.

Role Security

The system should have role based security to allow administrative staff to have full access to view live and historical appointment availability and usage. Administrative staff also should have access to various reports to monitor appointment scheduling activity by student, college and advisor.

Confirmations and Reminders

Keeping students on time; at a set schedule prior to the appointment time the student will receive reminders about the appointment that include the location, a map and some general advising rules. The reminders include a link that can take them back to the system to review the appointment details and allows the ability to cancel or reschedule the appointment based on University rules.

The EZappt Advantage

Experience

EZappt has experience with all types of higher education institutions including large multi-centered organizations. EZappt has integrated with the most common systems to allow single sign on and other features. EZappt clients include; Arizona State University, Boston College, Metro Denver Colleges and others.

Arrival management

EZappt provides a Round Robin based arrival management system. The system includes a “Dashboard” that allows full visibility and control of the arrival process. EZappt includes a queuing feature that is available for queuing via multiple formats including SMS text and voice notification.

Advising Record

The advising record gives advisors and staff a comprehensive record of the advisee. The benefits of creating and maintaining an electronic advising record are significant for the student, advisors and the administrative staff. EZappt’s customizable template based system allows rapid documentation of interactions, follow up instructions and allows uploading of documents.

Confirmations and Reminders

EZappt’s confirmation and reminder system creates automated messages for any change in appointment scheduling. EZappt allows users to accept messages as email, SMS text messages and/or automated voice reminders.

All users may easily load their appointments into Outlook, iCal, Windows Live, Google Calendar and/or Facebook.

Flexible Platform

The EZappt Campus Appointment Management is available as a secure SaaS (Software as a Service) fully hosted solution or as an installed solution on your organization’s infrastructure.

Contact



To take the first step towards managing your student advisor appointments, please call: 888-709-2778 or email edu@ezappt.com

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