Calendly

A scheduling tool that seamlessly integrates with Google Calendar and allows you to share a unique link with students so they can schedule appointments with you. Calendly also offers integration with Zoom so meetings can automatically be scheduled as Zoom calls and easy rescheduling or canceling of meetings.

Calendly Account Set-Up

Go to calendly.com to set up your account. This is free (limited to one active scheduling event at a time).

Make sure you use your USD email to set it up so it will sync with your Google Calendar. It will ask you for permission to access your calendar – it is important that you grant such permission.
Click on **Integrations** in the top navigation bar if you’d like your appointments to be automatically set up as Zoom meetings. You’ll need to enable the Zoom integration. Click on the **Zoom** icon.

Click the **Connect Zoom** button.
Click the **Sign in with SSO** button. This will allow you to integrate with USD’s single sign on (SSO).

![Sign In](image)

Type “sandiego” (one word, no spaces, all lower case) into the field and click **Continue**.

![Sign in with SSO](image)

This will then send you to USD’s sign on screen. Enter in your **USD username** and **password**.

![USD sign in](image)
Click **Authorize** to authorize the Calendly-Zoom integration.

**Event Set-Up**

From the Home screen, create a **New Event Type**.

Select the **One-on-One** option.
Suggestions (modify these options accordingly)

Event Name: Example: Advising Appointment or Office Hours

Location: Select Zoom in the dropdown menu

Event link will auto-generate based on your Event Name

Click Next
The recommendation is to set 20-minute events. Use the “Event Duration” custom minute option to set **20-minute** appointments.

Under “Date Range” you can edit the date range you will be holding your appointments (i.e., from October 1 – November 30).

You can easily set your availability using this calendar by clicking on a day and editing the times for that day.
If you plan to be available during the same time(s) for certain or all days of the week, you can click on the **Apply to multiple...** option and select the days accordingly.

Once the general structure of your appointment schedule is set, click **Next**.

**Note:** Once the event set-up is complete, Calendly will automatically sync with your current Google Calendar and make you unavailable during previously scheduled appointments during those ranges meaning students will not be able to schedule an appointment with you if you are already busy.
On the **Advanced** tab at the top of the calendar, you can set event buffers (for example 5 minutes before and 5 minutes after) and other helpful scheduling preferences such as setting a Minimum scheduling notice (i.e., you can set this so you don’t receive any same-day appointments).
On the next screen, you can edit the **Invitee Questions** and add your own questions that students have to respond to when setting up an appointment with you. This will give you key information you may need to prepare for the appointment or allow you to reach out to the student ahead of time if an appointment is not necessary and their concerns can be solved in other ways.
Recommendation to make **Student ID** a required field.

Make sure you check the **Required** box on the right-hand side. Then click **Apply**.

Recommendation to add a question asking students to detail the **reason they are setting up an appointment**. (Ex. Why do you want to change your schedule? or What’s your biggest concern with your schedule?). For that you will want to allow them to type more than one line in for their answer. You can modify this by selecting **Answer Type**.
The question “Please share anything that will help prepare for our meeting” is a default question. You can edit this to your liking or delete it by hovering over the question and clicking on the pencil icon.

Reorder your questions using the arrows on the left-hand side of each question and dragging them up or down.

Once you have all your questions set up, click **Save and Close**.

Your account and advising event are set-up!

Your personalized link will default to calendly.com/your USD username/advising-appointment. You can also copy your unique event link from your home page.
You can also click **view live page** to see what your student’s will see.

You can always go back to edit your event settings options (gear icon) within your event from your Home page.
Advertising Your Link

An easy way for students to get your scheduling link is to include it in your email signature block. To do so, copy the link. When logged into your USD email, access your **Settings** in the top right-hand corner.

Scroll down to the **Signature** section. Then add your link to your signature with the appropriate text.

Then scroll down to the bottom of the page and **Save Changes**.

Each time you reply to or compose a new email, this will appear at the bottom of your message.