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.
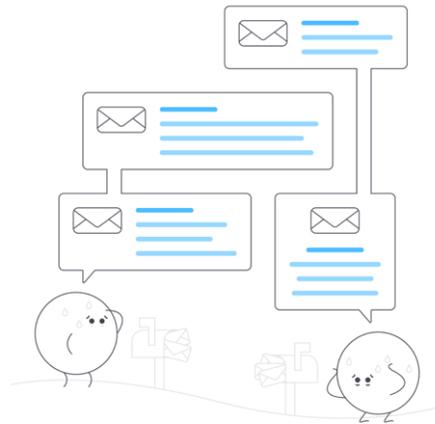
Click on **Integrations** in the top navigation bar if you'd like your appointments to be automatically set up as Zoom meetings. You'll need to enable the Zoom integration. Click on the **Zoom** icon.
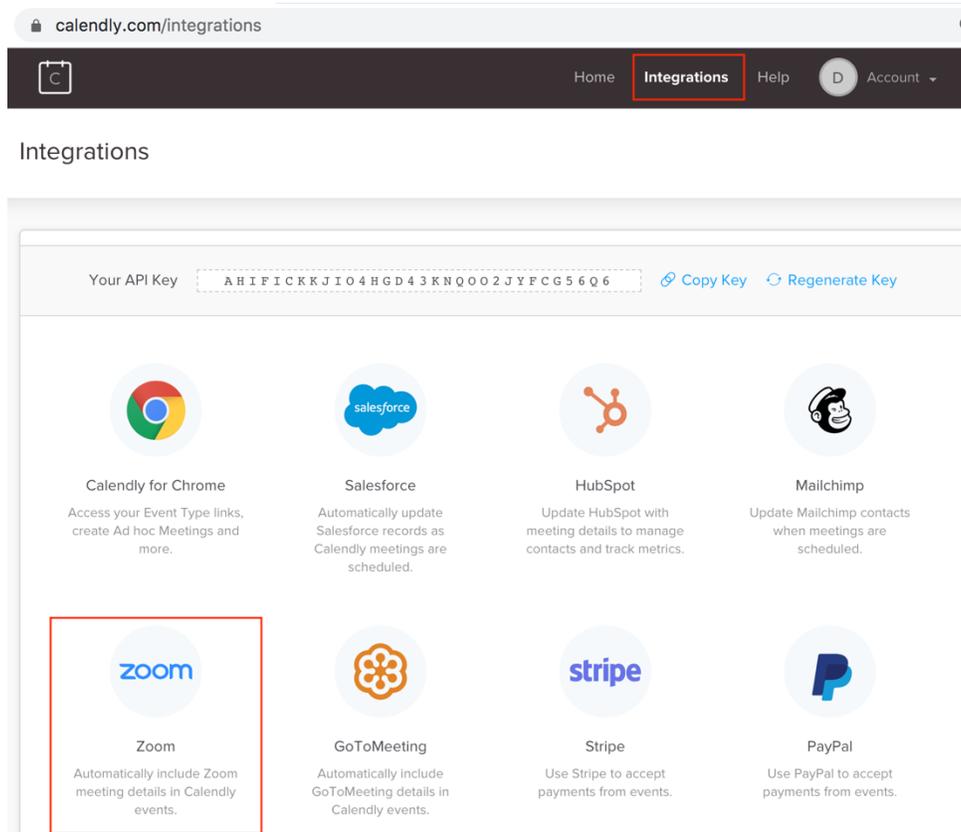
Click the **Connect Zoom** button.
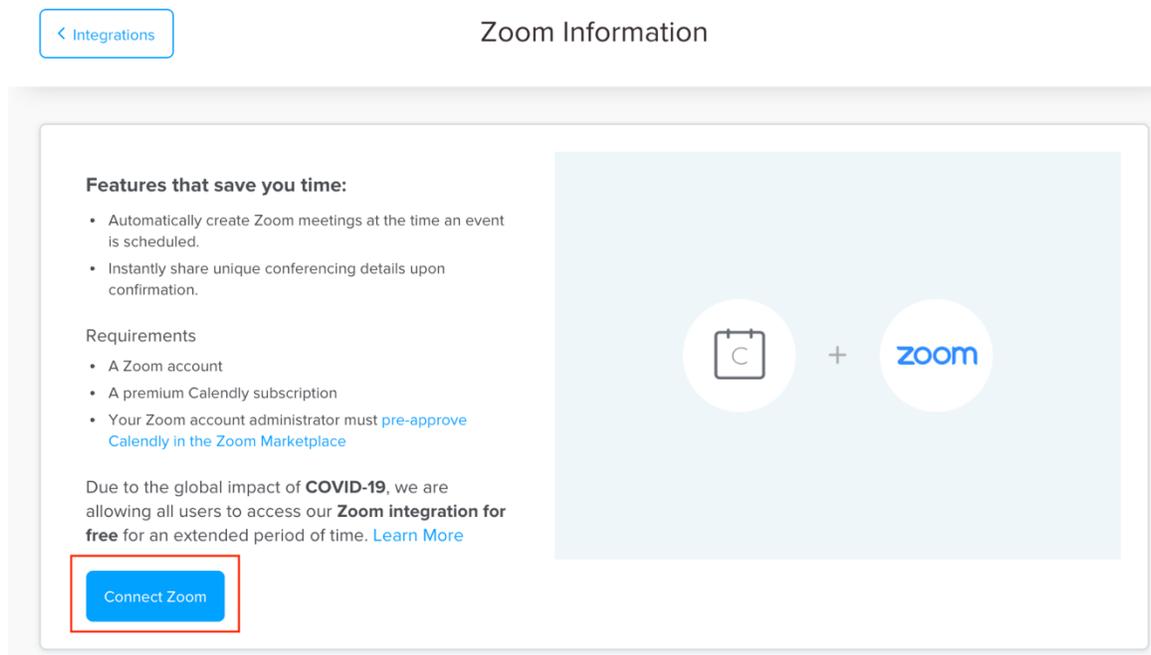
Click the **Sign in with SSO** button. This will allow you to integrate with USD's single sign on (SSO).

Sign In

Email		🔑 Sign in with SSO
Password	or	G Sign in with Google
Sign In		f Sign in with Facebook

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

Sign in with SSO

sandiego   .zoom.us

This could be your company's name. e.g.
abc.zoom.us

I don't know the company domain   Continue

This will then send you to USD's sign on screen. Enter in your **USD username** and **password**.
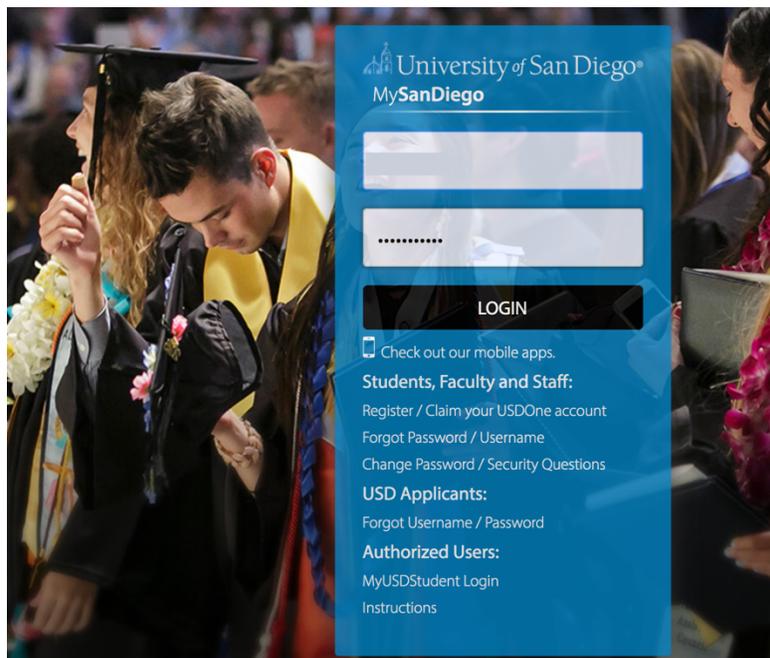
Click **Authorize** to authorize the Calendly-Zoom integration.
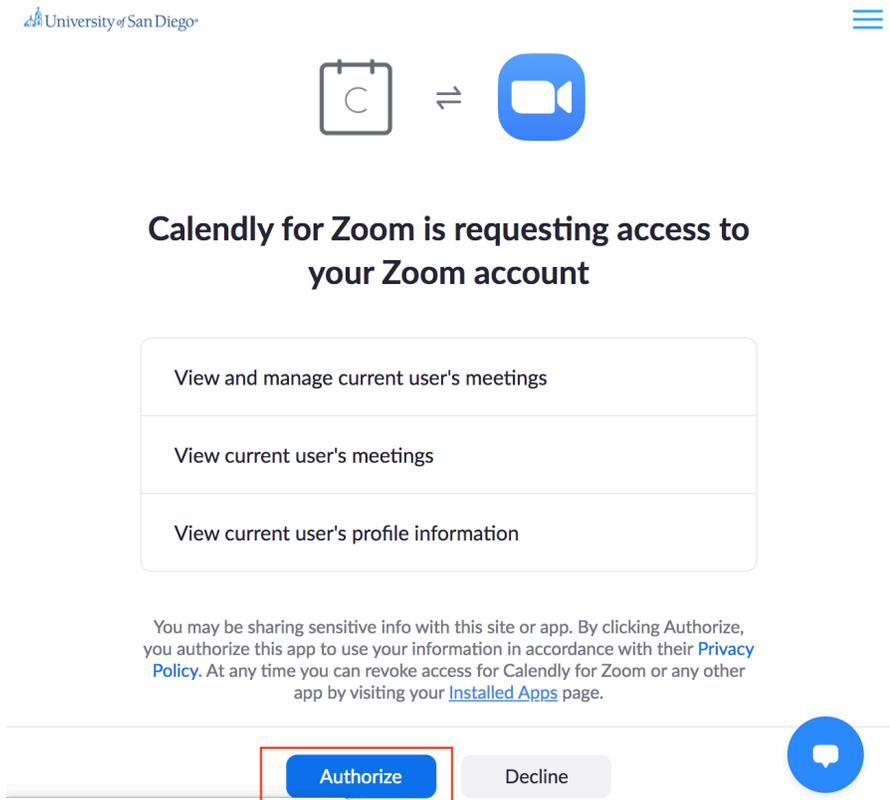
University of San Diego

Calendly for Zoom is requesting access to your Zoom account

View and manage current user's meetings

View current user's meetings

View current user's profile information

You may be sharing sensitive info with this site or app. By clicking Authorize, you authorize this app to use your information in accordance with their Privacy Policy. At any time you can revoke access for Calendly for Zoom or any other app by visiting your Installed Apps page.

Authorize   Decline

Event Set-Up

From the Home screen, create a **New Event Type**.
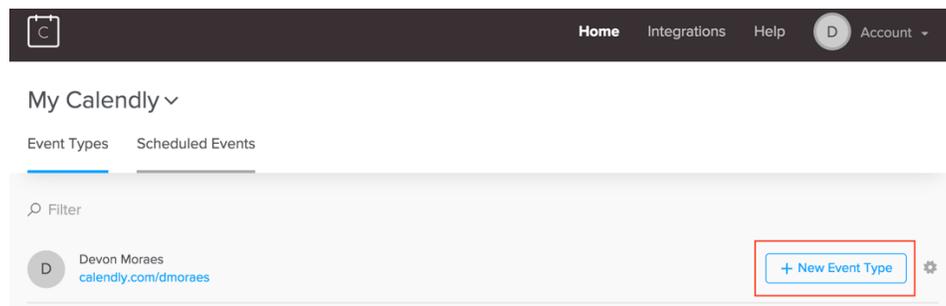
Home   Integrations   Help   D   Account

My Calendly ∨

Event Types   Scheduled Events

Filter

D   Devon Moraes
calendly.com/dmoraes   + New Event Type

Select the **One-on-One** option.
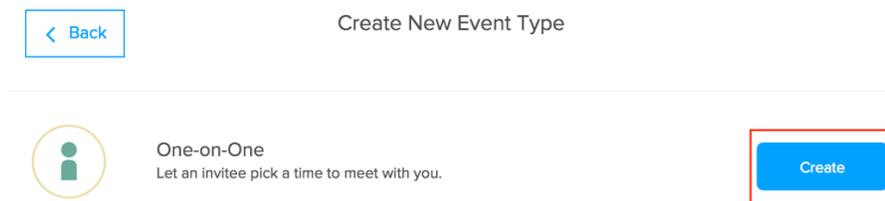
< Back   Create New Event Type

One-on-One
Let an invitee pick a time to meet with you.   Create

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.
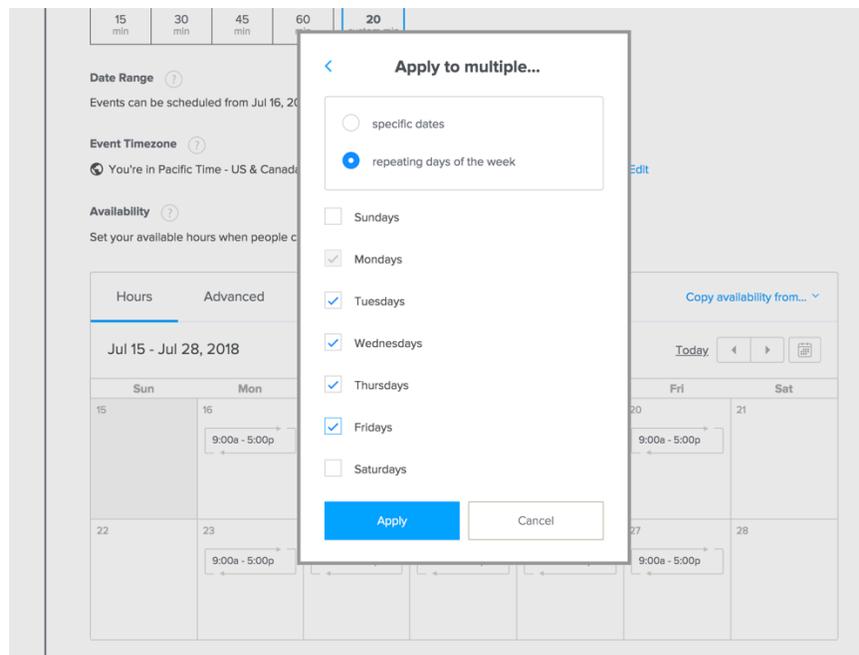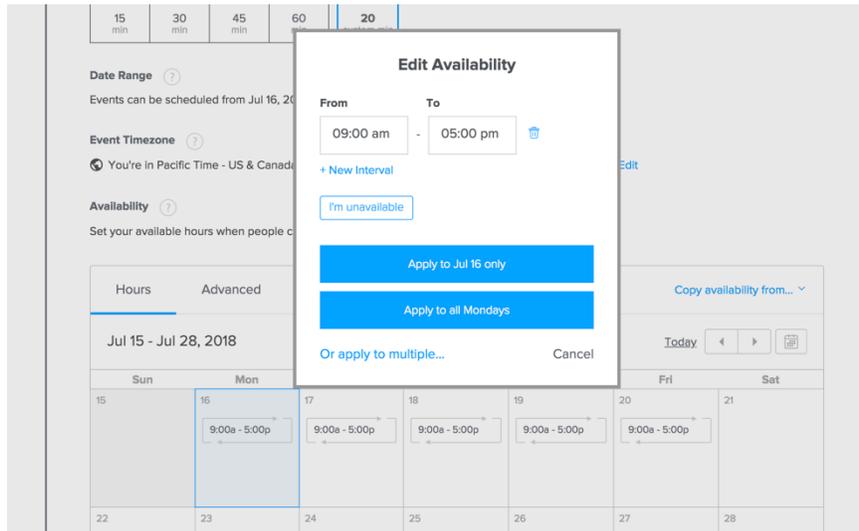
If you plan to be available during the same time(s) for certain or all days of the week, you can click on the **Apply to multiple…** option and select the days accordingly.

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.
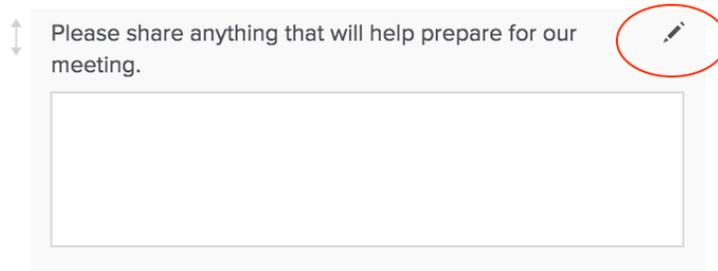
Reorder your questions using the arrows on the left-hand side of each question and dragging them up or down.
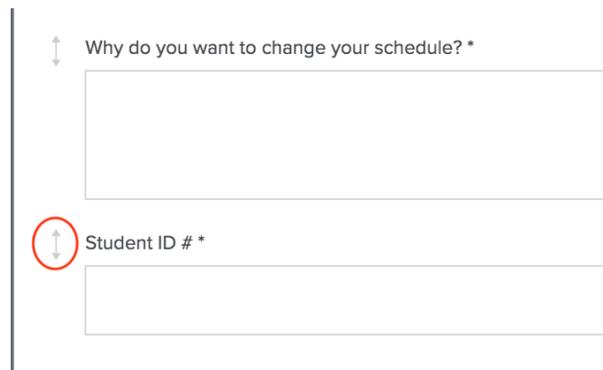
Once you have all your questions set up, click **Save and Close**.

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.
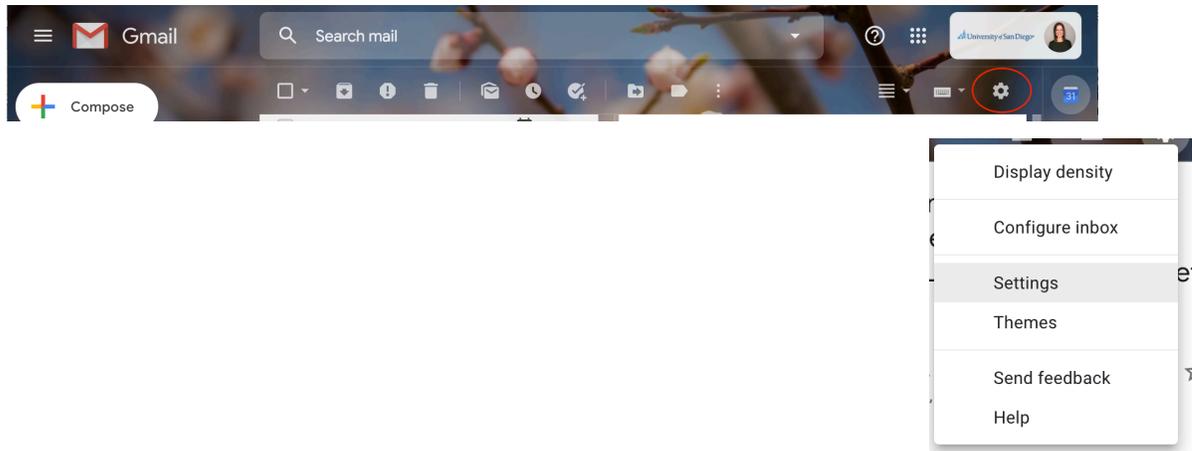
Scroll down to the **Signature** section. Then add your link to your signature with the appropriate text.
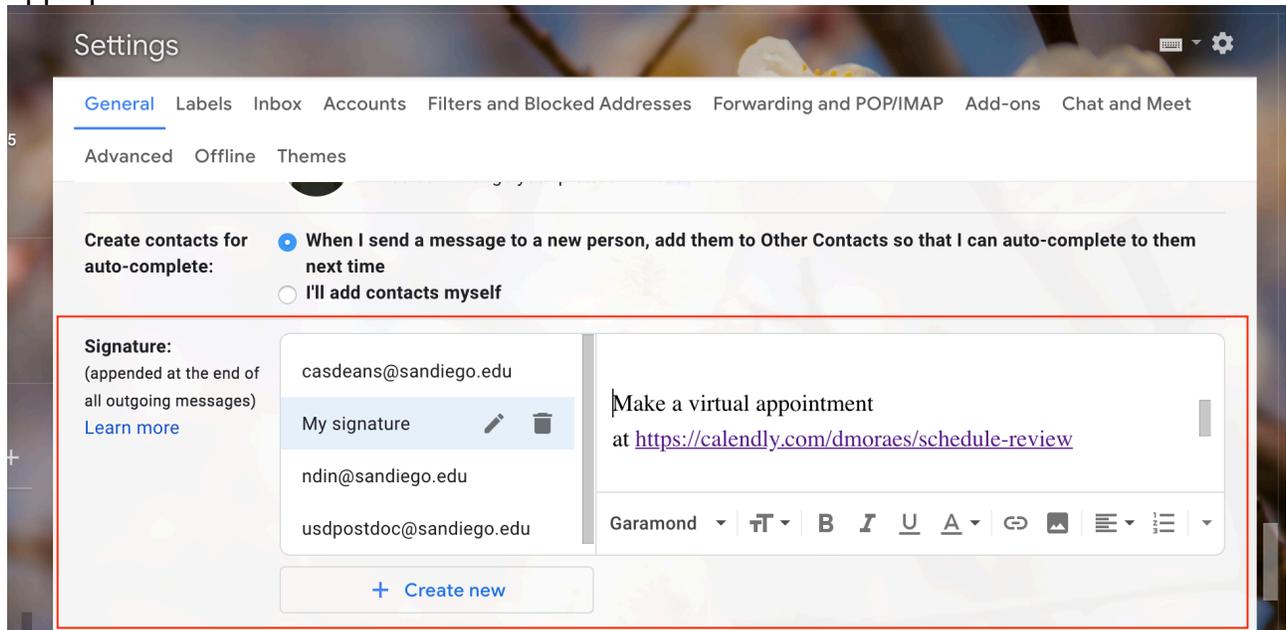
Then scroll down to the bottom of the page and **Save Changes**.

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