DISABILITY SERVICES

ClockWork Training Manual (Calendar & Student Data)

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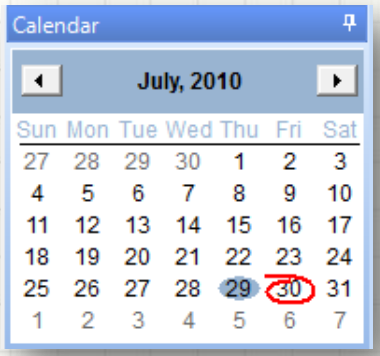
ClockWork Training
Basic Calendar

Learning Objectives

Become familiar with the calendar
Book an appointment with a student
Schedule a recurring appointment
Re-schedule an appointment
Find a free spot in the calendar
View another staff members calendar
View a group calendar
Cancel / delete an appointment
Mark a student as a no-show

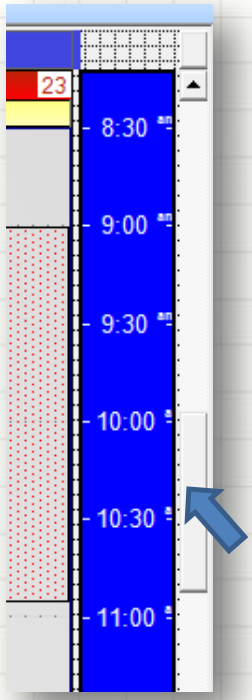
Navigating the calendar

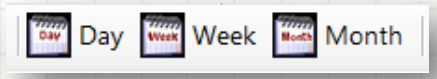
- Use the arrow buttons to move back and forth through the weeks
- Use the month calendar to jump to a date
- Use **<CTRL+G>** to jump to a date
- Use the **<page-up>** and **<page-down>** keys to move through the weeks
- Use the **<home>** key to go to today's date



Navigating the Calendar

- Use the scroll-bar on the right to see times not visible on your calendar
- Use the calendar view buttons (day, week, month) to change the number of days showing
- Clicking the week button repeatedly will toggle weekends on / off

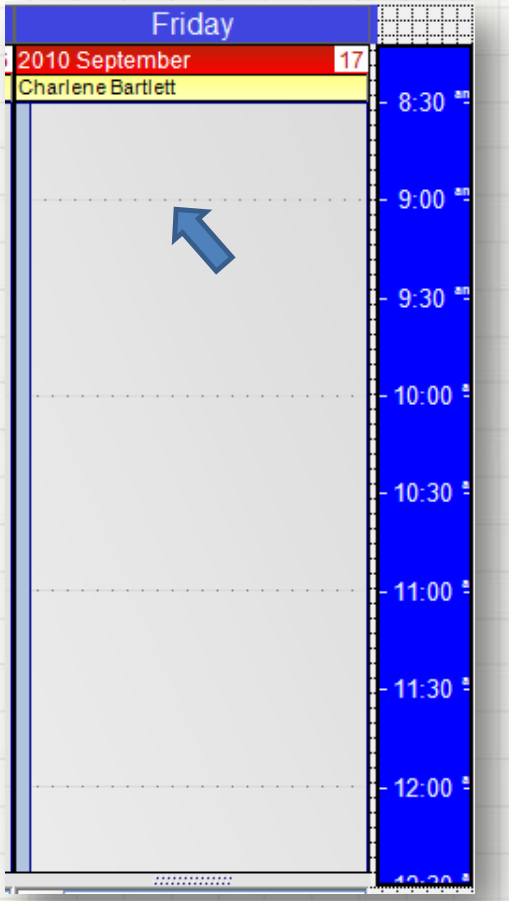




Booking a Basic Appointment

(Date, time, duration, appointment type, attendees)

- Line your mouse up on the day you want to book, and at the time you want the appointment to start, then double-click



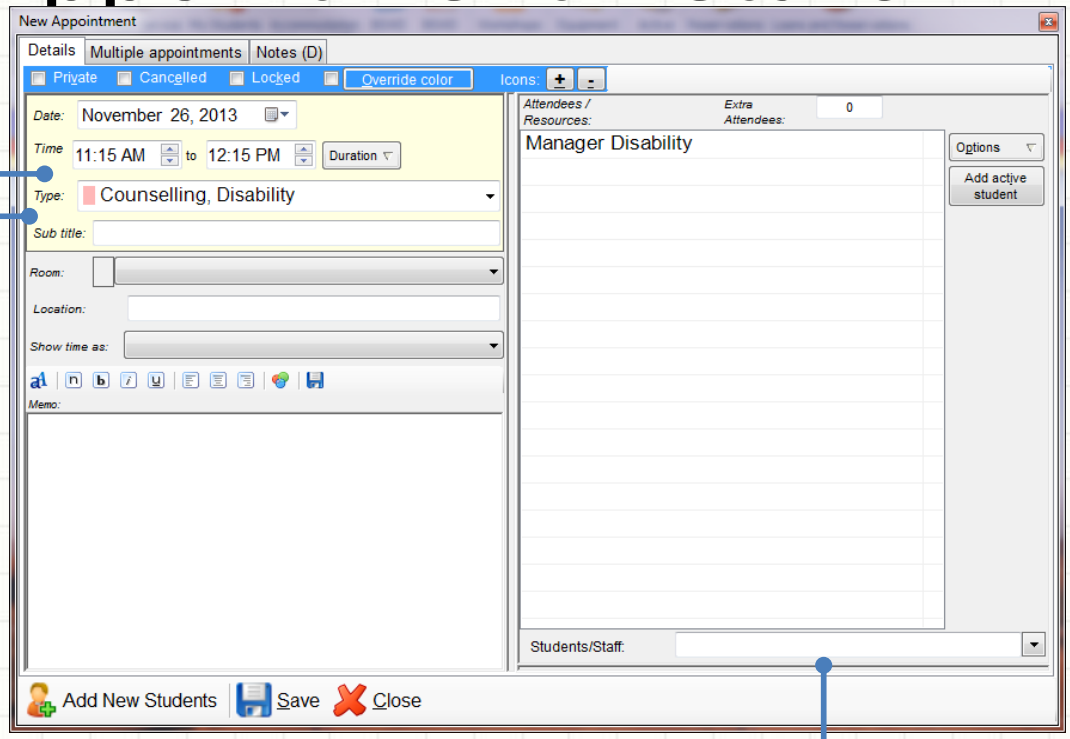
Enter New Appointment Details

1. Verify date & time

This should have gone in automatically based on where you double-clicked

2. Select a Type

Choose the appropriate item from the appointment-type drop down list



3. Select a Student

Start typing the student's last name in the 'Student (by name)' drop list at the bottom right, then hit <enter> when the student's name appears

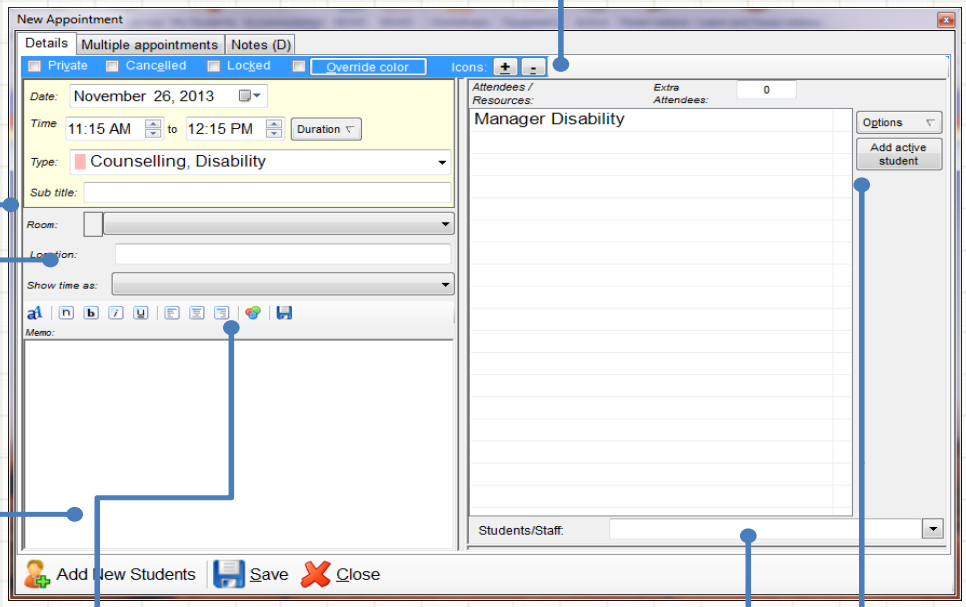
4. Click 'Save'

Click the 'Save' button at the bottom to create the new appointment and complete the booking process

Editing an appointment & Extended Appointment Fields

Icons
Click + to add an icon. Multiple icons can be added to an appointment and act as flags.

Private, cancelled, locked
Only the appointment creator and attendees can see any detail on private appointments, and edit locked appointments



Sub title
Optionally used to provide additional information about the type of appointment (will display on the appointment with the title)

Room & location
Select the room from the drop-list, or enter a location description

Memo
Enter a note about the appointment. Anyone authorized to see the advisor's schedule can see this note, session notes go in a different location.

Show time as
Mark an appointment as tentative, or as delivered by phone or email. An appointment is considered face-to-face by default.

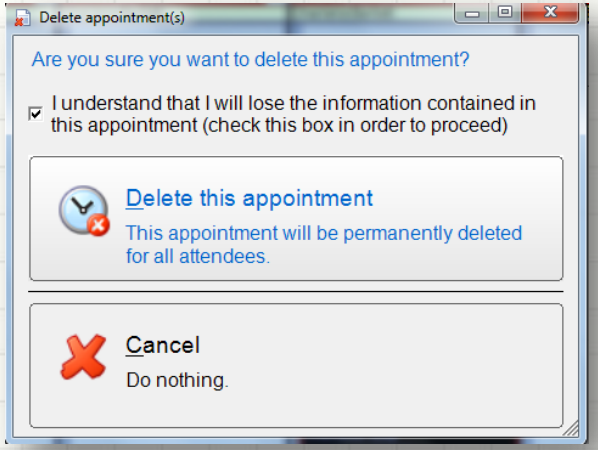
Staff
Add a staff member to the appointment

Options
Don't automatically add my name when booking a new appointment

Deleting & Cancelling Appointments

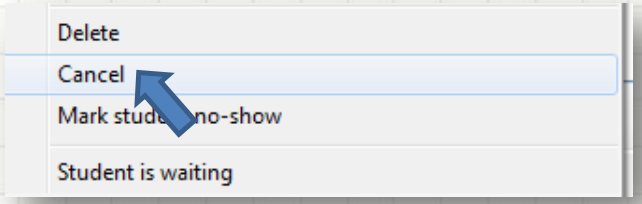
Deleting

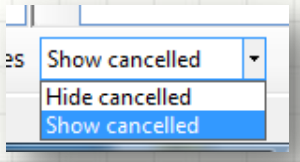
- right-click on the appointment and choose “Delete”, or click once on the appointment and hit the <delete> key
- you must accept the warning
- deleted appointments are not available for statistics



Cancelling

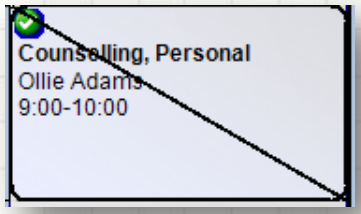
- right-click on the appointment and choose “Cancel”
- to reverse, repeat the right-click and choose “cancel” procedure

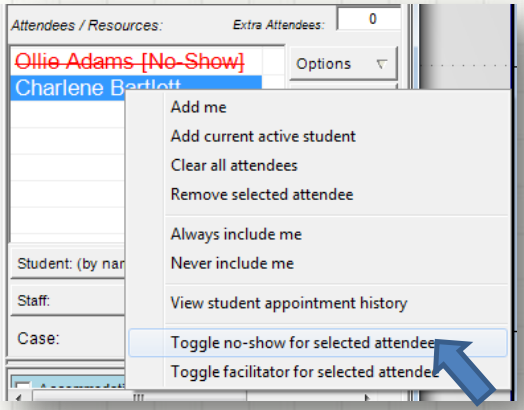




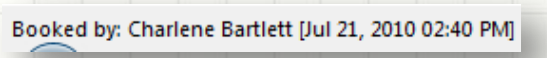
Marking a student no-show

- Right-click on the appointment and choose “Mark student no-show”
- Alternatively, double-click on an appointment, then right-click on the student’s name and choose “Toggle no-show for selected attendee”
- A no-show appointment is identified by a single diagonal line
- The next time the student comes in you will receive a warning that their last appointment was a no-show

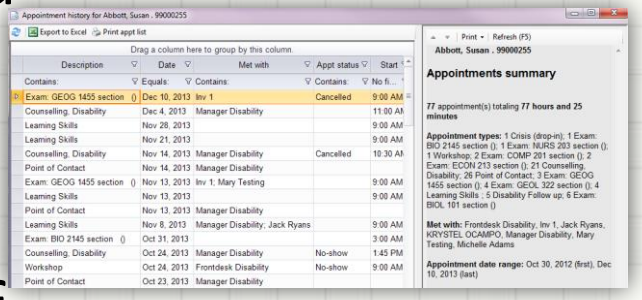




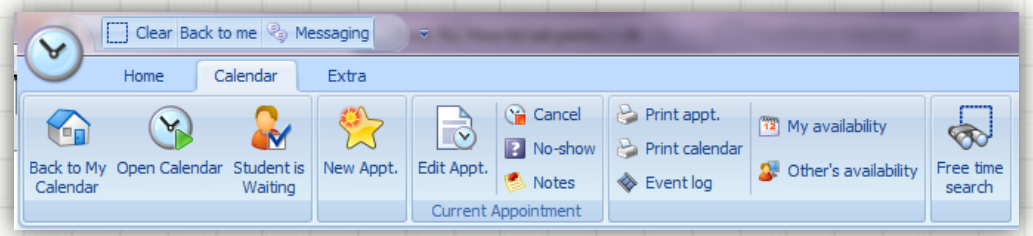
Appointment History



- To view who originally created the appointment and when, hold the <shift> key on the keyboard and click once on the appointment. The information will appear on the bottom left of the screen

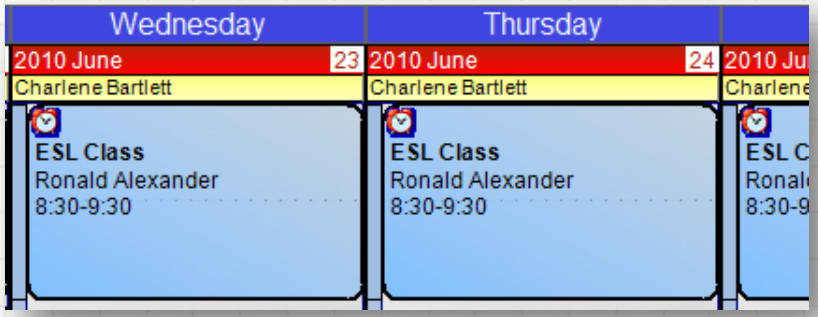


- To view extended history information, hold the <alt> key on the keyboard and click once on the appointment



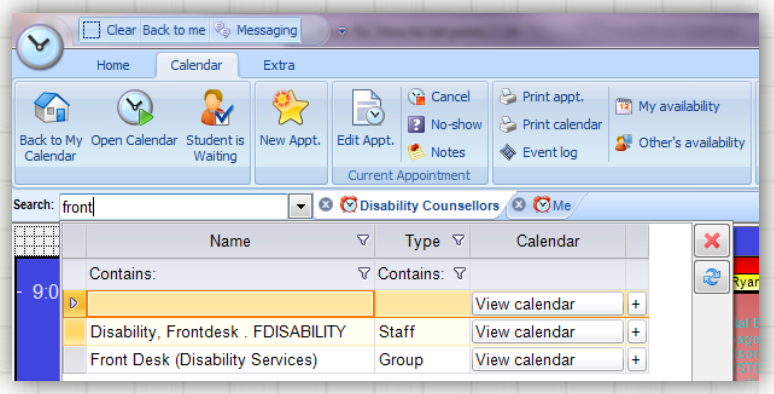
Recurring Appointments

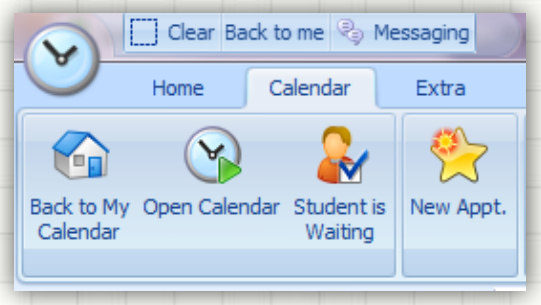
- Book the first appointment in the set like a normal appointment
- Before saving, click on the “Multiple bookings” tab at the top
- Check “This is a recurring appointment”
- Double-click on dates to add them to the list, or use the “advanced” tab



Viewing other's calendars

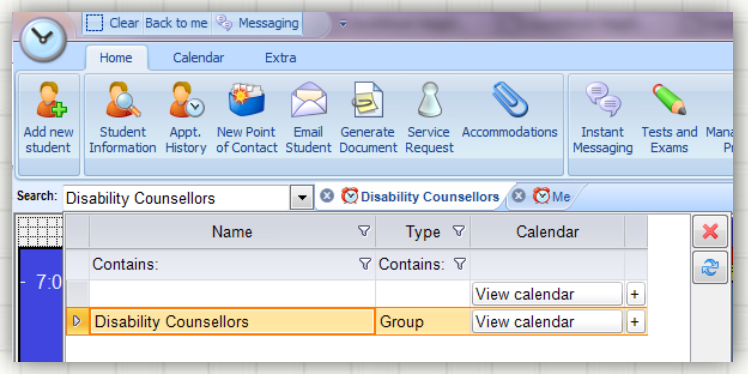
- Type in all or part of the staff members first or last name in the "Find student, staff, room or group" text area in the "Home" ribbon tab at the top.
- Click the "View calendar" button beside the staff members name
- Click "Back to me" on the "Calendar" tab at the top to go back to your own calendar
- To add the staff's calendar to your calendar, click the "+" button instead of "View calendar"





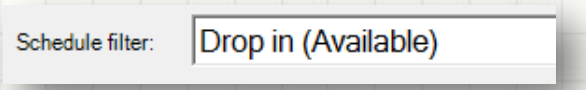
Viewing group calendars

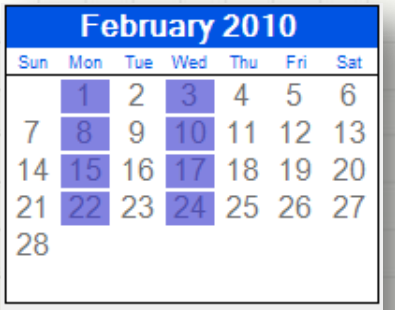
- If you know the name of the group you would like to view, type the group name into the “Find student, staff, room or group” text area at the top in the “Home” tab. If you would like to browse the list of available groups, click the “View someone else’s calendar” button in the “Calendar” tab, and then choose “View a group calendar”.
- Click the “View schedule” button beside the group you would like to view.
- Click “Personal options-Set current view as the default view” in the main menu at the top to save the group calendar view so that it will be the default view when ClockWork opens
- When booking on a group view, your mouse should be in the column of the staff you would like to book the appointment for when you double-click to create a new appointment.

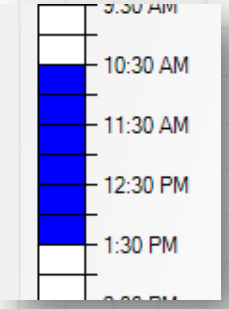


Availability Schedule

- Use the availability schedule to mark times that you are available, or not available, for others to schedule you in an appointment
- Examples include making yourself available for drop-in appointments, or making yourself un-available for lunch
- Click “Personal options-Availability schedule” in the main menu at the top
- Select a reason from the “Schedule filter” drop-list
- Highlight the days you want to set availability for (use the <ctrl> key to set multiple days
- Highlight the times you will be available or unavailable in the time bar on the right
- Click the “Save” button







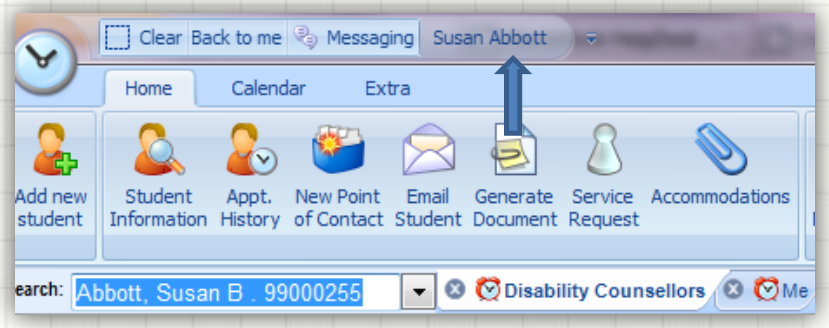
ClockWork Training
Student Data

Learning Objectives

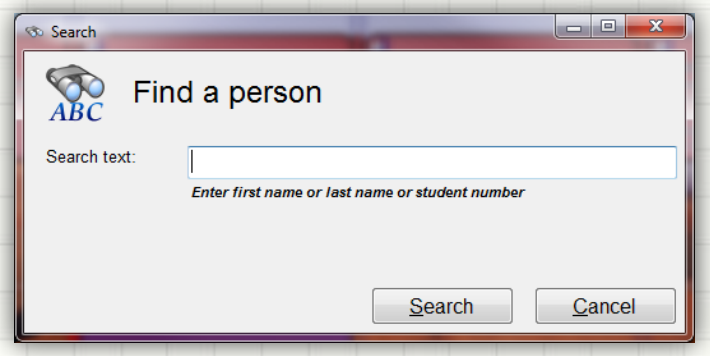
Find a student in ClockWork
Create a new student account in ClockWork
Lookup intake information for a student
Lookup course information for a student
Entering disability information
Entering accommodations
Generating an accommodation letter
Enter session notes and point of contact
Printing session notes

Finding / selecting a student

- There are several ways of selecting a student:
  - F11 – search by part of a student first name, last name or student number



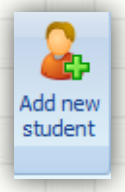
  - F12 – lookup the student by last name or student number from a sorted list
  - "Find student, staff, room or group" text area in the "Home" tab at the top
  - Click once on the student's appointment

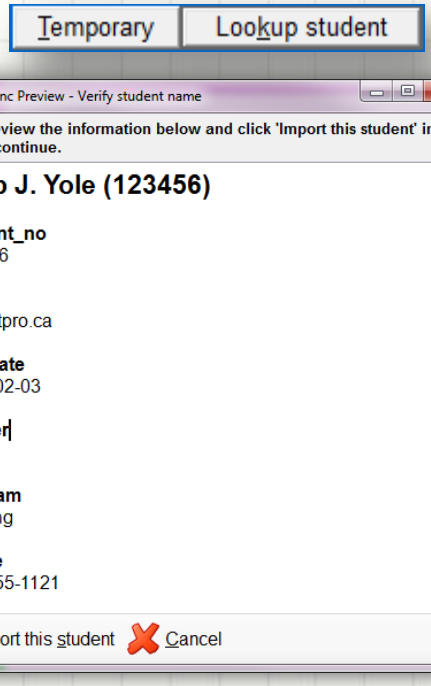


- Once a student is selected their name will appear at the top of your screen. This is now the "Active student".
- All operations will take the context of the current "Active student".

Creating a New Student Account

- If the student is not already in ClockWork an account will have to be created in order to schedule an appointment for them
- Click the “New student” button at the top left
- Enter the student’s student number (if the student does not have a student number you can click the “Temporary” button to assign a temporary student number)
- Click the “Lookup student” button to find the student in your school’s system
- Verify the student’s name in the popup and click “Yes, import this student”
- Click “Save” at the bottom



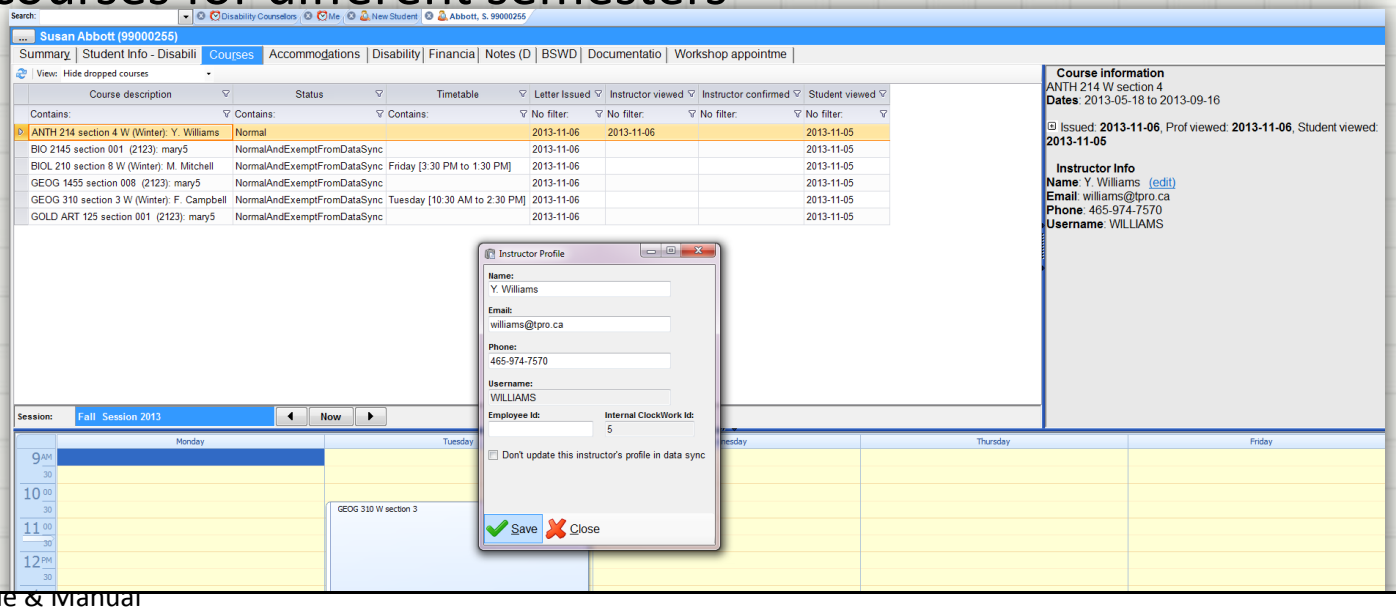


Looking up a Student's Information

- Select the student you would like to lookup (using F11 for example)
- Click the active student's name at the top of your screen, and then choose "Appointment history" from the drop down to view the student's complete appointment history. Note that the newest appointment will appear at the top of the list

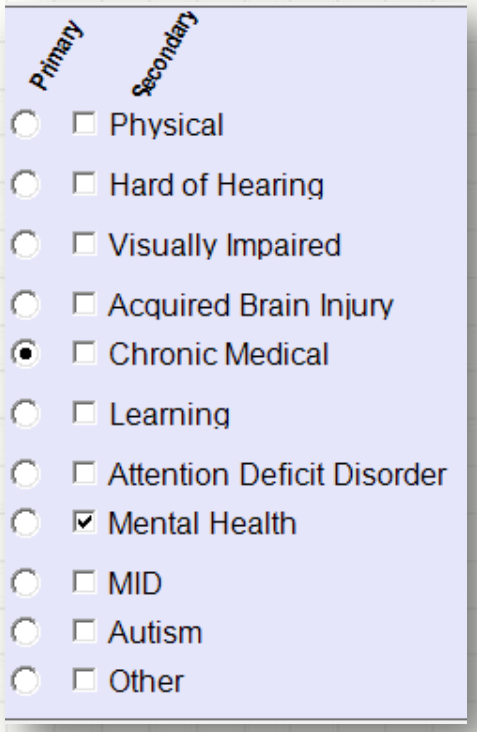
Viewing a Student's Courses

- Select the student and click the "Student Information" button in the "Home" tab at the top in order to view the student's electronic file.
- Click the "Courses" tab. Click once on a course in the list to view the details
- Use the session chooser control located at the bottom to view courses for different semesters



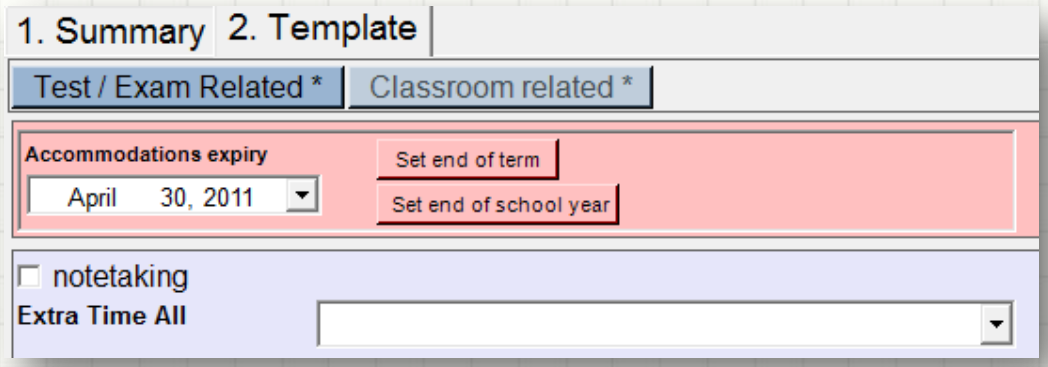
Entering a Students Disability Info

- Select the student and click the “Student info” button in the “Home” tab at the top in order to view the student’s electronic file.
- Click the “Disability” tab at the top
- Enter the appropriate disability information and click the “Save” button at the bottom to commit your changes
- You must choose at least one primary disability
- You may choose any number of secondary disabilities

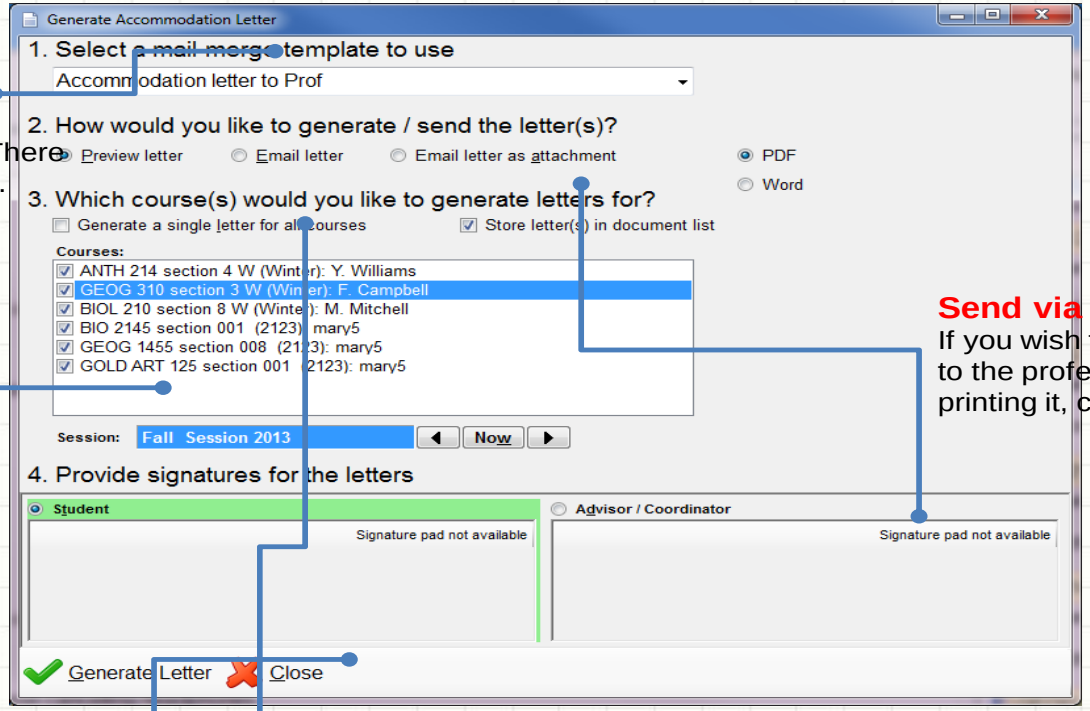


Entering a Student's Accommodations

- Select the student
- Click the "Accommodations" button at the top
- Click the "Template" tab to enter accommodations that will apply to all of the student's courses
- Optionally click a course tab to enter course-specific accommodations that will override the template
- Update the accommodations expiry to the end of the current semester or school year, or to any other date



Generating an Accommodation Letter (LOA)



Template
Select the appropriate template from the list. There may only be one choice.

Course selection
Letters will only be generated for checked courses

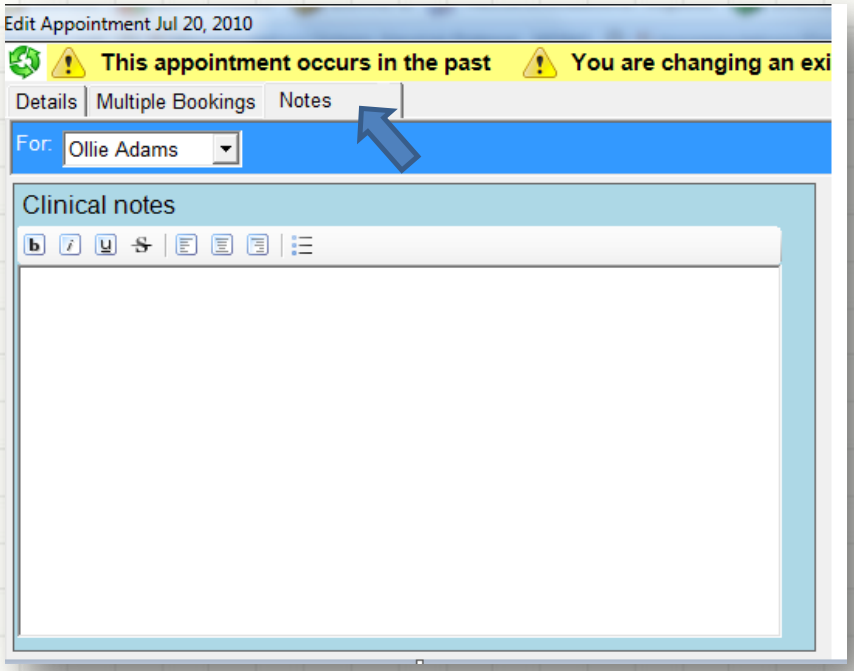
Send via email
If you wish to email the letter to the professor instead of printing it, check this box.

Generate
Click the 'Generate' button to create the letter

Single letter
If checked, a single letter will be generated that you can print multiple times. No course specific information can appear on the single letter.

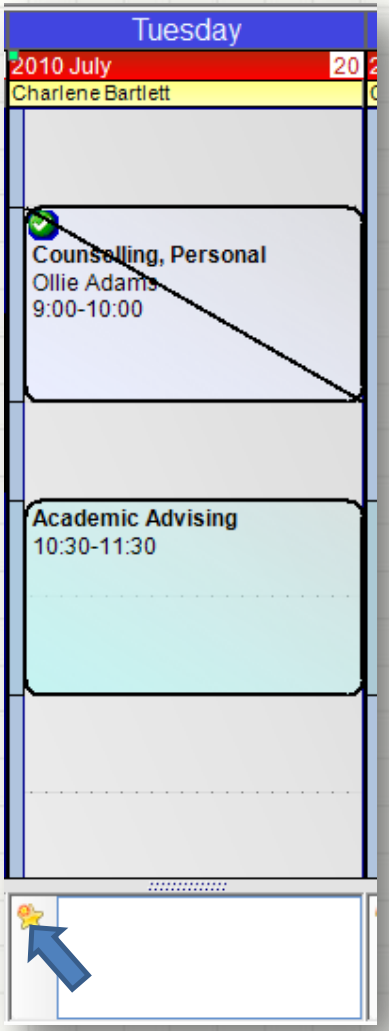
Entering Appointment Notes

- Double-click on the student's appointment
- Click the "Notes" tab
- Enter your notes and save



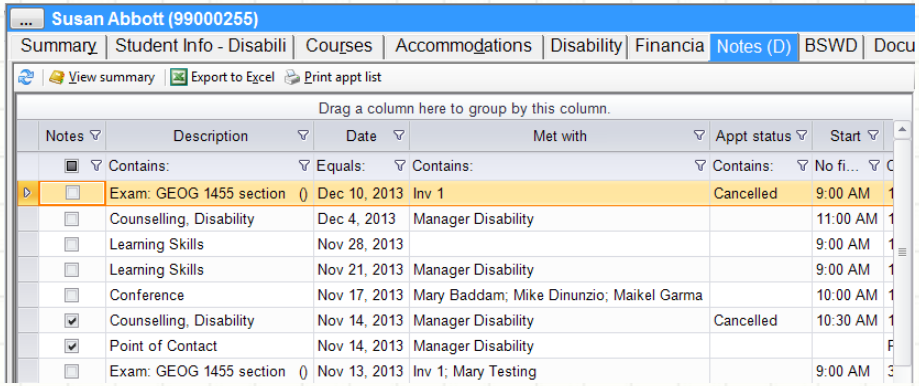
Entering a Point of Contact

- A point of contact is a note about a student where there was no scheduled appointment. For example, a phone call or meeting in the hall. A point of contact indicates service delivery.
- Click the yellow start on the day of the point of contact with the student (at the bottom of the calendar)
- Select the student from the student drop list and enter your notes
- Click “Save” to commit your changes



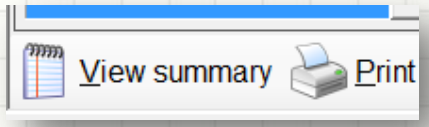
Viewing Session Notes & Point of Contacts

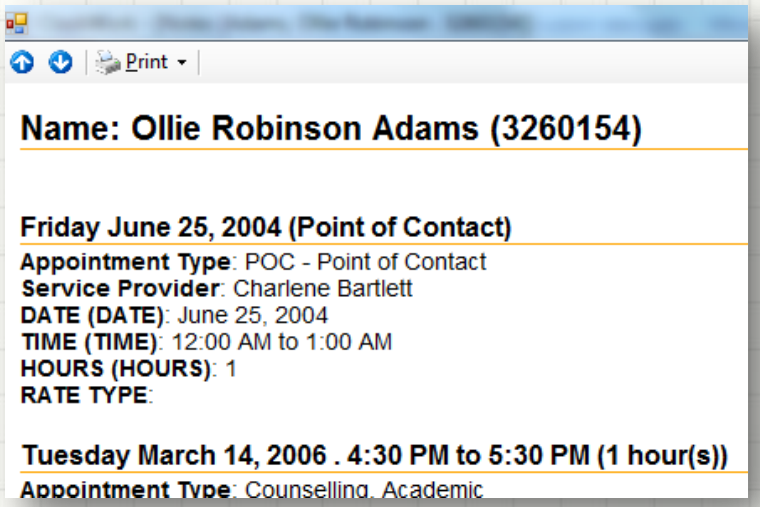
- Select the student and click the “Student Info” button in the “Home” tab at the top, in order to view the student’s electronic file.
- Click the “Notes” tab at the top
- You will see a list of all the students appointments and point of contacts on the left, click one to view the notes on the right pane
- You may enter notes in this view as well.



Printing Notes

- Select the student
- Click the “Notes” button at the top
- Click the “View summary” button at the bottom left
- Click the “Select all” button, then “Ok”





CLOCKWORK

Workbook

Work Sheet: Viewing Schedules

1) How to view another person's schedule
   - Type in the name of the staff member or student whose schedule you'd like to view in the " Search Box" text area under the tool bar, then click the "View Calendar" button beside the name
2) How to view a group of people's schedules
   - Type in the name of the group whose schedule you'd like to view in the "Search Box" text area under the tool bar, then click the "View Calendar" button beside the name
3) How to add a person's schedule to your view
   - Type in the name of the staff member or student whose schedule you'd like to view in "Search Box" text area under the tool bar at the top, then click the + button beside the "View calendar" button
4) How to return to your own schedule
   - Click the Back to my Calendar button located in the "Calendar" tab at the top

Work Sheet: Booking

5) How to book a counselling appointment
   - Call up the schedule view of the counselor or group of counselors, if they're not already on your screen (see #1 and #2 above) and find an available spot for the booking
   - Line up your mouse in the counselor's column at the appropriate date & time, and double-click. Note that if you are booking over top of an existing appointment (i.e. double-booking) you may alternatively right-click where you line up your mouse and choose New Appointment so that you are not editing the existing appointment)
   - Change the duration if necessary (use the duration button to the right of the time)
   - Change the appointment type by selecting the appropriate item from the Type drop list
   - Find the student in the drop list at the lower right & press the <enter> key or click the add button
   - Click the Save button located on the bottom toolbar
6) How to book a meeting
   - Call up the schedule view of the people who will be attending the meeting, if they're not already on your screen (see #1 and #2 above) and find an available spot for the meeting
   - Line up your mouse in any person's column at the appropriate date and time and double-click. Note that if you are booking over top of an existing appointment (i.e. double-booking) you may alternatively right-click where you line up your mouse and choose New Appointment so that you are not editing the existing appointment)
   - Select an appropriate appointment type from the Type drop list near the top left
   - Ensure all attendees are in the attendees listing on the right by using the staff drop list and add button
   - Click the Save button located on the bottom toolbar
7) How to cancel or delete an appointment
   - Find the appointment that you would like to cancel or delete and right-click on it
   - Click on Cancel or Delete in the popup menu. Note that you should only delete an appointment if it was a mistaken entry, otherwise you should cancel it.
   - If you are cancelling, you'll be prompted for an optional reason why the appointment was cancelled
8) How to mark a student no-show
   - Find the appointment that the student no-showed for and right-click on it
   - Click on Mark student as no-show from the popup menu

Work Sheet: Students

9) How to select a student
   - You can select a student in any one of four ways:
     ⇒ Start typing in the student's last name into the "Search box" text area under tool box at the top
     ⇒ Left-click once on an appointment that has your student in it
     ⇒ Hit F11 on your keyboard and type in part of a student name or number

10) How to add a student
   - You can add a student in two ways:
     ⇒ Click the Add Student button located at the top-left of your screen
     ⇒ If you have already started booking a new appointment you can find an alternative Add Student button located in the bottom right corner of the popup appointment box. Click this button and follow the previous steps – after clicking "Save" your new student will automatically be added into the attendees listing.
   - If the student does not have or remember their student number, or if they have not yet been assigned a student number, click on the Temporary button in the New Student Screen (located to the right of the student number text field) to assign a number. This field should be updated with the proper student number the next time the student comes in if possible.

11) How to change a student's phone number
   - Select the student (see #9), then click on the Student Info button located in the top-left of your screen
   - Click the "Student info" tab, and then change the student number and click the Save button

12) How to lookup a student's next appt.
   - Select the student (see #9)
   - Click on the active student's name at the top of your screen, and then choose "Appointment history" from the drop down list. The student's newest appointment will be at the top of the list.

Work Sheet: Miscellaneous

13) Changing your password
   - Launch ClockWork (you will find the ClockWork icon on your desktop)
   - Click the Change my password button on the login dialog box
   - Enter the requested items into the appropriate fields on the popup box

14) Find out who booked an appointment and when it was booked
   - Click once on the appointment while holding the <SHIFT> key on your keyboard

15) Find keyboard shortcuts for the screen you are on
   - Hit <CTRL+o> on your keyboard

16) How to edit your session notes in a full screen window
   - Click once in the notes area and Hit <F10> on your keyboard

17) I've forgotten my username and/or password
   - Contact your administrative / IT support to have your password reset

18) I've run into a problem, I have a question, suggestion, or request
   - Contact your administrative / IT support

Exercise 1: Create an appointment

1. Double-click on the day and start time where you would like to create a new appointment
2. Select an item from the "Type" drop-list, located at the top left of the popup window
3. Select a student to schedule in the appointment from the drop list titled "Student (by name)", located at the bottom right of the popup window. Start typing the student's last name in the drop list and hit the <ENTER> key on your keyboard when the correct name appears.
4. Click the "Save" button at the bottom of the popup window

Exercise 2: Update an appointment

1. Double-click on the appointment you would like to edit
2. Optionally change the date and/or time at the top left of the popup window
3. Optionally change the selection in the "Type" drop-list
4. Optionally enter a quick note in the "Memo" box at the bottom left of the popup window
5. Optionally remove an attendee from the attendee list in the top right, by clicking once on the attendee name and hitting the <DELETE> key on your keyboard
6. Optionally add a student or staff by using the "Student (by name)" or "Staff" drop-lists at the bottom right of the popup window.

Exercise 3: Cancel an appointment

1. Right-click on the appointment you would like to cancel
2. Click on "Cancel" from the popup menu
3. Optionally enter a reason in the "Note" box
4. Click the "Save" button at the bottom, or click <ALT+s> on your keyboard
5. To un-cancel the appointment:
    a. Ensure cancelled appointments are visible by changing the drop-list located at the bottom right of your calendar to "Show cancelled".
    b. Right-click on the appointment you would like to cancel and choose "Cancel"
    c. Click the "Save" button at the bottom of the popup window

Exercise 4: Mark a student as a no-show

1. Right-click on the appointment that you would like to mark the student a no-show for
2. Select "Mark student no-show" from the popup menu
3. To remove the no-show status:
    a. Right-click on the appointment and choose "Mark student no-show"
    or, Double-click on the appointment, then right-click on the student in the attendees list and choose "Toggle no-show for selected attendee"

Exercise 5: Delete an appointment

1. Right-click on the appointment you would like to delete
2. Click on "Delete" from the popup menu
3. Check the "I understand …" checkbox, and click the "Delete the appointment" button

Exercise 6: Enter appointment notes

1. Double-click on the appointment you would like to enter session notes for
2. Click the “Notes” tab (or equivalent)
3. Enter your notes
4. Click the “Save” button
5. Note that a student must be in the appointment, the appointment must have a proper “Type” selected from the corresponding drop-list, and you must be in the appointment.

Exercise 7: Enter a point-of-contact note

1. Click on the yellow star at the bottom of the day you are entering the notes for
2. Select a student from the “Students by name” drop-list. Start typing the student’s last name, and hit the <ENTER> key on your keyboard when the correct name appears.
3. Enter your notes in the lower area of the popup window
4. Click “Save”

Exercise 8: Print appointment notes

1. Click once on the appointment with the student you want to print notes for, or select the student using F11
2. Click on the “Student Info” button located at the top in the “Home” tab
3. Click the “Notes” tab, and then click the “View summary” button
4. Click the “Select all” button
5. Click the “Ok” button
6. Click the “Print” button at the top to print the notes

Exercise 9: Lookup when an appointment was booked

1. Click once on the appointment while holding the <SHIFT> key on your keyboard
2. The information will appear in the bottom left of your screen
3. To view additional information, hold the <ALT> key on your keyboard instead of <SHIFT> when clicking on the appointment

Exercise 10: View another person’s calendar

1. Type the first or last name of the person you would like to view the calendar for in the “Search Box” text area under the tool bar at the top left
2. Click the “View calendar” button located to the right of the name in the results listing
3. Click “Back to my Calendar” (located in the “Calendar” tab at the top) to return to your calendar
4. Repeat step 1 and click the “+” button (located to the right of the “View calendar” button) to add the staff member’s calendar to your calendar and see both side-by-side. You can return to your Calendar view by clicking on “Back to my Calendar”

Exercise 11: Lookup a student's appointment history

1. Select the student (use F11 or search box)
2. In the main menu at the top, click "Student", then "Student appointment history"

Exercise 12: Re-schedule an appointment

1. Right-click on the appointment and choose "Cut", then right-click on the desired day and time and click "Paste"
2. or, double-click on the appointment and update the date and time and save
3. or, Right-click on the appointment and choose "Copy", then right-click on the desired day and time and click "Paste", then right-click on the original appointment and choose "Cancel"; optionally provide a note that says "rescheduled".

Exercise 13: Lookup a student's phone number and email

1. Select the student (use F11 or Search Box)
2. Click on the "Student info" button located at the top

Exercise 14: Enter a student's disability information

1. Select the student (use F11 or Search Box)
2. Click on the "Student Info" button in the "Home" tab at the top, then click the "Disability" tab
3. Enter the disability-related information and click the "Save" button

Exercise 15: Enter a student's accommodations

1. Select the student (use F11 or Search Box)
2. Click on the "Accommodations" button located at the top
3. Click the "Template" tab to enter accommodations that will apply to all of the student's courses
4. Optionally click on a tab with a course name on it to override the template accommodations list for that specific course. Any accommodations you enter here will only apply to that course.
5. Click the "Summary" tab to review the accommodations you have entered
6. Click the "Save" button at the bottom

Exercise 16: Generate an accommodation letter

1. Perform the steps from Exercise 15, and instead of clicking "Save" in step 15.6, click "Generate letters and save"
2. Select the appropriate template from the drop-list
3. If you are emailing the letter, ensure that "Send via email" is checked
4. If the instructor will be viewing the letter online, ensure that "Send letter as attachment" is un-checked
5. If your letter has specific course information on it, like instructor name or course description, ensure that the "Generate single letter for all courses" checkbox is un-checked
6. Click "Generate"

Exercise 17: Lookup a student's registered courses

1. Select the student (use F11 or Search Box)
2. Click the "Student Info" button located in the "Home" tab at the top, then click the "Courses" tab
3. Note the session chooser located at the bottom

Exercise 18: Create a new student account

1. Click on the "New student" button located at the top (or hit <F8> on your keyboard)
2. If the student has a student number, type in the student number and click the "Lookup student" button to locate the student information in your school's data system.
3. If the student does not have a student number, click the "Temporary" button to assign a temporary student number, type in the student's first and last name, and enter their phone number and/or email address. Note that you should update the student number as soon as the student brings in their actual student number, and they should be told to do so unless they are a pre-admission student.