PANTHER SUCCESS NETWORK (PSN)
FRONT DESK STAFF MANUAL
TABLE OF CONTENTS

Accessing the Panther Success Network
The Front Desk Staff Homepage
Opening the Appointment Center
The Scheduling Grid
Viewing Scheduled Appointments
Searching for a Student’s Information
Viewing an Appointment’s Details
Checking-In a Student with a Scheduled Appointment
Checking-In a Student for a Drop-In Appointment
Scheduling Same Day Appointments
Scheduling Future Appointments
“Editing” an Advising Appointment
“Moving” an Advising Appointment
Cancelling an Advising Appointment
Navigating Upcoming Appointments’ Functions
Sending a Message to the Student
Sending a Message to the Advisor
Marking an Appointment as a No-Show
Checking Out an Appointment
Maintaining the Advisor Kiosk
Checking-In a Student on the Advisor Kiosk- Scheduled Appointment
Checking-In a Student on the Advisor Kiosk- Drop-In Appointment
To sign into PSN, go to https://go.fiu.edu/psn and sign in using your FIU Panther ID# or username and password.

Upon successful sign-in, you will be redirected to your home page.

Should you possess more than one role, this page will default to one of them. Select the study hall monitor role to access Appointment Center.

To open the Appointment Center, select from the Additional Modes menu located at the bottom of the page.
After opening the Appointment Center, you will be presented with a list of Appointment Center Locations. Select from the list the applicable advising center location.

Following your selection, you will be redirected to the location's Scheduling Grid. The Scheduling Grid allows you to view the availability and appointment schedule for all advisors that assist students at this particular site.
Scheduling Same Day Appointments

In addition to Calendar view, front desk staff can make advising appointments on behalf of the student and advisor by using the Appointment Schedule grid.

Enter the student’s name into the search bar and select the type of appointment in the Services dropdown menu. This will generate the student’s availability and add it to the Appointment Schedule grid.

Note: In addition to the student’s availability, you will be presented with the student’s summary, e.g. Panther ID, email, major, and assigned advisor.

The Appointment Schedule grid now reflects the availability of both the student and the assigned advisor.

To select the time of appointment, click on an available time period in the advisor’s schedule column.
When you make this selection, the *Create An Advising Appointment* window will open.

Select *General Advising* from the *Service* dropdown menu.

Verify the appointment detail, e.g. organizer (advisor), student and date/time.

Click *Save Appointment* to confirm or *Edit* to change appointment details.

Once the appointment has been confirmed, the appointment will appear on the scheduling grid. It will reflect in both the student and advisor’s calendar.

Note: The student and advisor will both receive email notifications that the advising appointment was made.
Scheduling Future Appointments

To schedule an advising appointment that will occur at a future date, enter the student’s name into the search bar and press *Enter*.

Next, select the type of appointment in the Services dropdown menu. This will generate the student’s availability and add it to the Appointment Schedule grid.

To designate the future date of the appointment, click on the date box to open a calendar. Select the date.

Refresh to show applicable availability of the student and advisor.

Note: In addition to the student’s availability, you will be presented with the student’s summary, e.g. Panther ID, email, major, and assigned advisor.
The **Appointment Schedule** grid now reflects the availability of both the student and the assigned advisor.

To select the time of appointment, click on an available time period in the advisor's schedule column.

When you make this selection, the **Create An Advising Appointment** window will open.

Select **General Advising** from the **Service** dropdown menu.

Verify the appointment detail, e.g. organizer (advisor), student and date/time.

Click **Save Appointment** to confirm or **Edit** to change appointment details.
Once the appointment has been confirmed, the appointment will appear on the scheduling grid. It will reflect in both the student and advisor's calendar.

Note: The student and advisor will both receive email notifications that the advising appointment was made.

Cancelling an Advising Appointment on Behalf of the Student

There are two manners to cancelling an advising appointment. You can choose to cancel the appointment utilizing the student summary or the appointment schedule grid.

Enter the student’s name in the search bar. This will pull up the student’s summary and appointment information.
Option 1

In the student’s summary, you will find a dropdown menu labeled Actions. Click on the menu to open and select Cancel.

The Cancel Appointment pop-up window will open.

Select Entire Appointment from the Cancel Appointment dropdown menu.

Select Need to Cancel from the Reason dropdown menu.

Click on Cancel Appointment button.
Option 2

Enter the student’s name in the search bar. This will pull up the student’s summary and appointment information.

Click on the applicable appointment box on the Appointment Schedule grid.

The Manage Appointment window will open.

Select Cancel Appointment.
You will be redirected to the Cancel Appointment window.

Select Entire Appointment for and Need to Cancel from the Reason dropdown menu.

Click on Mark as Cancelled button.

You will receive a confirmation once the appointment is cancelled.
Editing (Rescheduling) an Advising Appointment

Option 1

To edit a previously made advising appointment, enter the student’s name into the search bar. This will pull up the appointment information.

To edit, select Edit from the Actions dropdown menu located in the General Advising summary box that appears below the search bar.

You will be redirected to the Edit an Event page.

Select the new date that you would like to move the advising appointment to.
Select the advisor that the student will meet with.

Note: If the new appointment takes place on the same day as originally scheduled for, you will not be required to select the advisor.

You can now see the available appointments for this advisor. Select the new time for the advising appointment.

Click on Save Appointment.

Option 2
To edit a previously made advising appointment, hover over the appointment on the schedule grid. Doing so will show you the appointment details.

Click on Edit in the Appointment Details box.

You will be redirected to the Edit an Event page.
Select the new date that you would like to move the advising appointment to.

Select the advisor that the student will meet with.

Note: If the new appointment takes place on the same day as originally scheduled for, you will not be required to select the advisor.

You can now see the available appointments for this advisor. Select the new time for the advising appointment.

Click on Save Appointment.
Checking In Drop-In Appointments

When checking in a student as a drop-in appointment, enter their name in the search bar. You will see a summary box with the student’s information including his/her assigned advisor.

Make sure to switch to Drop-In Appointments from the Scheduling Grid option in the dropdown menu.

Select General Advising from the All Services dropdown menu.

Select the advisor who will be meeting with the student.

Note: In the case that the student’s assigned advisor is not available, you can select another available advisor.

An advisor with drop-in availability will have the +Queue link to the right of their name. Click on +Queue.

Note: If the student’s advisor is not available, you may assign the student to the First Available Advisor queue.
The “Please Choose an Advising Student Service for this Visit” pop-up box will open.

Select the service that applies to the student’s appointment (e.g. General Advising).

The student has been placed in the advisor’s queue.

**Viewing Upcoming Scheduled Appointments**

To view your center location’s upcoming appointments, switch from the Scheduling Grid page to the Scheduled Appointments page. You will see upcoming, In Progress and recent scheduled appointments. Each appointment status is separated into its own table.
Searching your Upcoming Scheduled Appointments

You can filter these appointments by isolating different criteria:

- Student Name
- Service type
- Staff Name
- Date

Navigating Upcoming Appointments’ Functions
The **Actions Menu** of the **Upcoming Appointments** table allows you to perform various functions.

To perform these functions, select the student from the table by clicking on the box to the left of the column labeled "**Beginning In.**"

Open the Actions Menu and select the action that you wish to perform.

**Sending a Message to the Attendee/Organizer**

Click on the box to the left of the appointment whose attendee you wish to message.

Select **Send Message to Attendee (or Send Message to Organizer)** from the **Actions** dropdown menu.

A pop-up window will open. Fill out all applicable boxes.

Attach any documentation (if needed).

Click on **Send Message**.
**Viewing Appointment Details**

Click on the box to the left of the appointment whose details you wish to view.

Select **View Appointment Details** from the **Actions** dropdown menu.

A pop-up labeled **Manage Appointment** will open.

Here you will be able to **Edit or Cancel** this appointment.

---

**Checking In a Scheduled Appointment**

Click on the box to the left of the appointment whose attendee you wish to check in.

Select **Check In** from the **Actions** dropdown menu.

A pop-up window will open. Select **Check In**.
The student will be automatically placed in the applicable advisor’s queue. You will see the notification (at right) confirming.

Marking an Appointment a No-Show

Click on the box to the left of the appointment whose attendee you wish to mark as a no show.

Select *Mark No-Show* from the *Actions* dropdown menu.

A pop-up window will open. Select *Mark No-Show*.

The Advisor Report window will open. Fill out all applicable information.
Click on **Save this Report** to confirm.

The student’s appointment will be automatically canceled. You will see the notification (at right) confirming.

---

**Checking Out an Appointment**

Once a student has been checked in, you will also be able to check them out.

In the **In Progress Appointments** table, click on the box to the left of the appointment whose attendee you wish to message.

Select **Check Out** from the **Actions** dropdown menu.
A pop-up window will open. Click on the Check Out link.

The student’s appointment will be automatically concluded. You will see the notification (at right) confirming.

Maintaining the Advising Kiosk

The Advising Kiosk should be set up at a location that is readily accessible to students in your center.

To take advantage of this mode, a laptop, desktop computer or iPad can be utilized.

The front desk supporting staff will open the Advising Kiosk through their own SSC home page.
To open the *Advising Kiosk* select from the *Additional Modes* menu located at the bottom of the home page.

A pop-up window will open prompting you to choose the appropriate office location where this kiosk is located.

Select the location from the list of available options.

Note: Once the *Advising Kiosk* is open, the staff member will be signed out and will need to sign in on their personal computer to continue using the *Appointment Center*.

---

**Checking In A Student With An Appointment**

When a student is checking him/herself in, the student will be presented with the advising center’s welcome page.
Have the student swipe their OneCard or type in their Panther ID.

Press Submit.

The student is now logged into the advising kiosk. If they have already scheduled an appointment with their advisor, the screen will reflect the appointment time and advisor’s name. To check-in to their appointment, they will click on the green Check In box.

Once the student is checked in, the student will receive the message at right confirming the student’s placement in the advisor’s queue.

To exit, the student will click on the I’m done. Exit the kiosk button.

Checking In A Student As A Drop-In Appointment

When a student is checking him/herself in, the student will be presented with the advising center’s welcome page.
Have the student swipe their OneCard or type in their Panther ID.

Press Submit.

The student will be redirected to the next page. To be placed in the waitlist, he/she must click on Add yourself to the current waiting list button.

Next, the student will select the name of the advisor he/she wishes to meet with.

A message confirming his/her placement in the waitlist will spear.
To exit the kiosk, press the *I'm done. Exit the Kiosk* button.

If you have questions after reviewing this tutorial, please contact Advising Technology at advtech@fiu.edu.