LibCal Appointments Best Practices

Appointment Form Questions

LibCal automatically requires a Name and Email question. We also recommend adding the following **required** questions to your form:

Edit Question

Text: ℹ️   What is your campus affiliation?:

Type: ℹ️   Radio Buttons

Required: ℹ️   ● Patrons must provide an answer to this question.
           ○ This is an optional question.

Selections: ℹ️
- Undergraduate Student 🗑️
- Graduate Student 🗑️
- Faculty/Staff 🗑️
- Community/Public User 🗑️
- Other 🗑️

*This will help facilitate accurate data entry into Desk Tracker after your consultation.

Edit Question

Text: ℹ️   What is your research question or topic?:

Type: ℹ️   Multi-line text

Required: ℹ️   ● Patrons must provide an answer to this question.
           ○ This is an optional question.

*This will encourage patrons to provide details so that you can prep as needed.

Edit Question

Text: ℹ️   All meetings will occur virtually. How would you prefer to meet?

Type: ℹ️   Radio Buttons

Required: ℹ️   ● Patrons must provide an answer to this question.
           ○ This is an optional question.

Selections: ℹ️
- Zoom 🗑️
- Skype 🗑️
- Phone 🗑️
- No preference, it's up to you! 🗑️
- Other 🗑️

*We also strongly recommend adding a question that will inform the patron this is a **virtual** consultation.

Other possible questions include:

- Campus Department/Subject Area
- Course number (if applicable)
- If you have started your research, please describe your search strategy and any sources you have used?
- Are there certain kinds of materials you want or need to use? What are the requirements of this assignment?

Confirmation Email to Patron

This automated text can be personalized as needed. We recommend adding instructions for where the patron should meet you.

Reminder Email to Patron

This automated text can be personalized as needed and will only be sent if you selected a reminder time under "Appointment Settings". We recommend adding instructions for how a patron can reschedule (e.g. send a direct email).

Follow Up Email to Patron

This automated text can be personalized as needed and will only be sent if you selected a follow up time under "Appointment Settings". We recommend adding your contact information, should the patron have questions.