

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:

Type: Radio Buttons

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

Selections:

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:

Type: Multi-line text

Required: 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:

Type: Radio Buttons

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

Selections:

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.

Confirmation Email to Patron

This email is sent to the patron with the confirmed booking details.

Subject Your appointment with {{MY_NAME}} has been confirmed

Body

Hi {{NAME}},

This email confirms your appointment:

When: {{TIME_DATE}}

With: {{MY_NAME}} {{MY_EMAIL}}

Please meet me in my office, 1312 Music Building (located in the Music & Performing Arts Library).

To cancel this appointment visit: {{{CANCEL_URL}}}

Preview

Hi John Doe,

This email confirms your appointment:

When: 4:42pm Thursday, November 14, 2019

With: Kate Lambaria (lambari1@illinois.edu)

Please meet me in my office, 1312 Music Building (located in the Music & Performing Arts Library).

To cancel this appointment visit: <https://uiuc.libcal.com/appointment/cancel/123?c=abcdef>

Available Email tags:

- {{{NAME}}} = Full Name of User
- {{{FIRST_NAME}}} = First Name
- {{{LAST_NAME}}} = Last Name
- {{EMAIL}} = Users Email
- {{TIME_DATE}} = Time & Date of Booking
- {{TIME_DATE_DIRECTIONS}} = Time, Date & Directions for Booking
- {{LOCATION}} = Location of Booking
- {{DIRECTIONS}} = Directions
- {{CATEGORY}} = Appointment Category of Booking (if enabled)
- {{CANCEL_LINK}} = The cancel URL
- {{NOTES}} = Optional Admin note when Editing appointment
- {{MY_NAME}} = Kate Lambaria
- {{MY_EMAIL}} = lambari1@illinois.edu
- {{CANCEL_ADVANCE_TIME}} = The cancellation time allotted before appointment starts
- {{FORM_FIELDS}} = Booking Form Fields

Note: Tags are CaSe Sensitive!

Save **Restore Default Template**

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.