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:

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

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

*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.