Pre-Health Advising Appointments with Dr. McNelis using Workday - Quick Guide

1. Sign into your account (Bucky is the example account).
2. Enter <u>Request Student Appointment</u>

Request Student Appointment

Search for Appointment Availability

Student	*	Bucky Bronco
Category	*	
Primary Reason	*	
Additional Reasons		
Start Date	*	01/11/2025
End Date	*	02/09/2025
Start Time		08:00 AM
End Time		06:00 PM
Appointment Format		
Staff		

Search

Submit   Cancel

3. Select Category – through Recommended Categories The only option is the Drahmann Center….

Request Student Appointment

Search for Appointment Availability

Student	*	Bucky Bronco
Category	*	Search
Primary Reason	*	← Recommended Categories
Additional Reasons		● Drahmann Center Advising Category - Undergraduate (Santa Clara University)
Start Date	*	01/11/2025
End Date	*	02/09/2025

4. Select Primary Reason, ==Pre-Health== <u>is an option and you must select that to see me when you Search</u>

Category	*	× Drahmann Center Advising Category - Undergraduate (Santa Clara University) ⋯
Primary Reason	*	Search
Additional Reasons		← All Reasons
		○ General Advising (Santa Clara University/Undergraduate) ⋯
Start Date	*	● Pre-Health Advising (Santa Clara University/Undergraduate) ⋯
End Date	*	02/20/2025
Start Time		08:00 AM
End Time		06:00 PM
Appointment Format		
Staff		

Search

5. **Set the Start Date and End Date to find appointments in that date range. Use Search to find available advisors (me).**
Do not change the Start Time or End Time. Do Not Enter Info in Appointment Format or Staff fields

Request Student Appointment

Search for Appointment Availability

Student	* Bucky Bronco
Category	* ✕ Drahmann Center Advising Category - Undergraduate (Santa Clara University)
Primary Reason	* ✕ Pre-Health Advising (Santa Clara University/Undergraduate)
Additional Reasons	
Start Date	* 01/22/2025
End Date	* 01/31/2025
Start Time	08:00 AM
End Time	06:00 PM
Appointment Format	
Staff	

Search

Staff Available 0 items

	*Staff	*Appointment Date
☐		

6. Select me from list of advisors to meet with:

Category	* ✕ Drahmann Center Advising Category - Undergraduate (Santa Clara University)
Primary Reason	* ✕ Pre-Health Advising (Santa Clara University/Undergraduate)
Additional Reasons	
Start Date	* 01/22/2025
End Date	* 01/31/2025
Start Time	08:00 AM
End Time	06:00 PM
Appointment Format	
Staff	

Search

Staff Available 1 item

	*Staff	*Appointment Date
☐	Brian McNelis	

7. **After you select me, the Appointment Date and Time fields will appear. Select a date and time for our meeting; only times that I am available will be visible when you click on the drop-down boxes for those fields. Do not touch the Appointment Format or Location Detail fields:**

Category	*	× Drahmann Center Advising Category - Undergraduate (Santa Clara University)
Primary Reason	*	× Pre-Health Advising (Santa Clara University/Undergraduate)
Additional Reasons		
Start Date	*	01/23/2025
End Date	*	01/31/2025
Start Time		08:00 AM
End Time		06:00 PM
Appointment Format		
Staff		

Search

Staff Available   1 item | 1 selected

	*Staff	*Appointment Date	*Appointment Time	*Appointment Format	*Location Details
☑	Brian McNelis				

8. **Submit the appointment request after you have selected day and time. All meetings will be virtual.**

Staff Available   3 items | 1 selected, max allowed: 1

	*Staff	*Appointment Date	*Appointment Time	*Appointment Format	*Location Details
☐	Ayah Refai-Ahmed				
☑	Brian McNelis	× Wednesday, January 15, 2025	× 11:30 AM to 12:00 PM PST	× Virtual	https://scu.zoom.us/j/94790527903?pwd=MDR5bFNSTjdDSV dwQkUrNERRQXllQT09
☐	Juan Peralta				

9. **Want to review your student appointment? Enter <u>View My Student Appointments</u>. Look in unconfirmed appointments, that is where it will show up until I approve it (<u>if you could select a time to meet, I will approve the appointment!</u> I usually do this the evening before our appointments so I can approve all appointments for the next day)**

Once confirmed, the appointment will show up under Upcoming Appointments and the Virtual Link is given in this table. If you need to cancel the appointment, you can use the Cancel button to the right (see below) and it is my hope that we can set it up so that you can Cancel Upcoming and Unconfirmed Appointments. If you need to Cancel, email me if you can not cancel the appointment in Workday.

10. You will receive email notifications from SCU WD… that your appointment request has been submitted and then approved:

Your Request for an Advising Appointment has been Submitted. ➤ ▮ Inbox ✕

S **SCU WD_NotifTest** <wd_notif_test@scu.edu> (sent by blfrank@scu.edu)
to Juan, me, Garrison, Aleksandra ▾

Dear Bucky ,

Your request for an advising appointment with Brian McNelis has been submitted. Please see details below. Once your advisor has reviewed the request, you will received a notification regarding the status.

For your appointment information go to View My Student Appointments. If you have any questions, please contact the appropriate department.

Drahmann Center: drahmanncenter@scu.edu or (408) 554-4318

Business Process: Request Santa Clara University Appointment 01/24/2025, 11:00:00 AM: Bucky Bronco
Subject: General Advising Appointment: Bucky Bronco

| I am confirming my appointment. | Thank you for your help! | I am no longer interested. |

↩ Reply   ↩ Reply all   ➔ Forward

Your Request for an Advising Appointment has been Approved ➤ ▮ Inbox ✕

S **SCU WD_NotifTest** <wd_notif_test@scu.edu> (sent by blfrank@scu.edu)
to Juan, me, Garrison, Aleksandra ▾

Dear Bucky ,

Your request for an advising appointment with Brian McNelis has been Approved . Please see below for details.

For your appointment information go to View My Student Appointments. If you have any questions, please contact the appropriate department.

Drahmann Center: drahmanncenter@scu.edu or (408) 554-4318

Business Process: Request Santa Clara University Appointment 01/22/2025, 2:00:00 PM: Bucky Bronco
Subject: General Advising Appointment: Bucky Bronco

↩ Reply   ↩ Reply all   ➔ Forward

11. If the appointment is for some reason cancelled, you will receive an email notification from SCU WD...

Your Advising Appointment has been Canceled. 📤 Inbox ×

S

SCU WD_NotifTest <wd_notif_test@scu.edu> (sent by blfrank@scu.edu)
to Juan, me, Garrison, Aleksandra ▾

The advising appointment for Bucky Bronco and Brian McNelis has been canceled. Please see below for additional information.

<<Comments>>

For your appointment information go to View My Student Appointments. If you have any questions, please contact the appropriate department.

Drahmann Center: drahmanncenter@scu.edu or (408) 554-4318

Business Process: Cancel Santa Clara University Appointment 01/22/2025, 2:00:00 PM: Bucky Bronco
Subject: General Advising Appointment: Bucky Bronco - Canceled

| Thank you for letting me know. | Thank you for informing me. | Bummer! |

↩ Reply   ↩ Reply all   ↪ Forward