

# ClockWork Configuration: Core Software

## General information

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School /University Name:

Department Name:

## Department contact

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There should be one department contact that will liaise with ClockWork. Please provide the name, email and phone number of the departmental contact:

Name:

Email:

Phone:

## IT contact

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There should be one primary IT contact who will liaise with ClockWork. Please provide the name, email and phone number of the IT contact who will be responsible for assisting with the installation:

Name:

Email:

Phone:



## Appointment types

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Please list the different types of appointments you would like to book in ClockWork. Appointment types are good ways of organizing information for day-to-day viewing, as well as for statistical reports.

- Counselling / advising appointment
- Crisis / Drop-in appointment
- Group session
- Intake appointment
- Meeting
- Staff meeting
- Professional development
- Sick day
- Vacation day
- Not in the office
- Conference
- Personal
- Preparation time
- Administrative time

## Intake form

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This is the form that shows basic student information, including contact and academic info. Please list the fields to include, or attach a copy of your form.

- First name, middle name, lastname, student number
- Gender
- Birthdate
- How student heard about your department (high school counsellor, friend, instructor, poster, website)
- School email
- Alternate email
- Ok to email?
- Phone number
- Cell number
- Preferred contact method (email,phone,cell,none)
- Leave phone message?
- Mailing address (street address, province/state,city,postal/zip)
- Permanent address (street address, province/state,city,postal/zip,country)
- Emergency contact (name, relationship, phone, cell)
- Academic info (faculty, program, full-time/part-time status,level)

## Session notes

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Session notes provide a way for you to enter information about your session with a student. Normally a notes box is available for free-form text, but you can also have checkboxes / drop lists for common things that you might discuss with the student (these can be used for statistical reports). Please list the fields you would like on your session notes form, or attach copy of your form:

- Clinical Notes Box (list names of staff allowed to view/edit the contents)
- General Notes Box
- List any checkboxes that you would like (ex. Inquiry? Relationship problems? Emotional concerns? Academic performance? Academic skills? Writing skills?, etc.)

## Automatic appointment reminder email (2 day)

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The reminder emails go out 2 days ahead of the student's scheduled appointment (please indicate if you would like a different number of days before). Please provide the text for the email (remember to specify the from email address):

From: **XXXX**  
To: #<student email>#  
Subject: Appointment reminder  
Hello #<firstname>#,

This is an automatic reminder that you have an appointment scheduled on:

#<appointment date># #<starttime># to #<endtime>#

If you are unable to attend please call our office at **XXXX** during business hours to cancel or reschedule in a timely manner. Failure to do so could result in cancellation fees to be charged.

Thank you.

## Workshop lists

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If your department offers any workshops or events please list them here (list title and description):

- List any workshops that your department offers

## Data sync: Student data fields

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Please list the data fields you would like to have access to from your school's system (note: you should discuss the fields you would like to get from your school's database system with your IT to make sure all fields selected are available to you, and that you are permitted to access them):

- Student number
- first name
- middle name
- last name
- birthdate
- gender
- phone number (home)
- phone number (cell)
- email address
- permanent address (address, city, postal, province/state, country)
- local address (address, city, postal, province)
- Emergency contact name
- Emergency contact phone
- Expected graduation date
- Academic information (session, program, faculty, level, full-time/part-time)

## Data sync: Student courses

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Please indicate if you would like to have access to student course registrations from your Registrar's system:

Yes  No

If Yes, ClockWork will require the following course fields (all information listed below is for information only and you are not required to fill anything in):

- Start date
- End date
- Term
- Subject
- Course code
- Section
- Instructor name
- Instructor email

The following course fields are optional fields (all information listed below is for information only and you are not required to fill anything in):

- Instructor phone
- Timetable information
- Location
- Course id number

## Data migration

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Data migration is a one-time move of data from another system into ClockWork, and it is intended to help with ClockWork integration in your department by starting where you left off in your old system. If you do not require data migration then please skip this section.

Please indicate the type of source data you have:

- Microsoft Access
- Microsoft Excel
- Sql Server
- Other (please specify)

Please indicate which type(s) of data you are looking to migrate into ClockWork

- Student names/numbers
- Contact information (phone, email, address, emergency contact)
- Academic information (faculty, program, level, full-time/part-time status)
- Disability information
- Accommodations
- Appointments
- Appointment notes
- Other (please specify)