November 12th, 2024

Resolution Request: Counseling Department Scheduling Software

Following the ransomware attack, the Counseling Department was directed to use SetMore as our scheduling platform. Although we received a demonstration, we were not consulted on whether this system met our department's needs. SetMore, a tool designed for small businesses, such as barber shops, proved inadequate for our scheduling and case management requirements. Despite this, we were not permitted to switch until we independently opted for a temporary solution, Calendly.

Calendly helped us through the pandemic, but it still lacks essential features for counseling. The platform doesn't allow us to collect data, write notes, see fill rates, track demographics, or conduct any form of case management. If a student enters an incorrect email address, they don't receive a calendar invitation, and the front desk often struggles to verify appointment details when students forget them. Additionally, Calendly does not guide students on whether they need a 30-minute or one-hour appointment, resulting in scheduling inefficiencies and wasted time when students mistakenly book shorter sessions.

This system has forced us into a reactive stance, which impacts student service quality and reflects poorly on our department. Now that we're beyond the pandemic and the ransomware incident, we have the opportunity to implement a more effective scheduling system.

Our Need for a Dedicated Counseling Scheduling Software

To serve our students effectively, the Counseling Department requires a robust scheduling and case management solution with specific capabilities:

1. **Single Sign-On Integration**: Students should log in using their student ID, automatically directing them to the appropriate service type and appointment duration.
2. **Data Collection and Messaging**: We need tools to collect data, message students about missing information, and reserve appointment spots with a simple link, eliminating additional logins.
3. **Appointment and History Tracking**: The system should track "no-shows," show fill rates, record student history, and allow for internal notes.
4. **Real-Time Data and Service Visibility**: A dashboard view of online vs. in-person appointments across various centers, with real-time updates.
5. **Automated Communication and Queuing**: The ability to send reminders, queue students for same-day appointments, and automate check-in/check-out processes.

Recommendation: Reinstating SARS Anywhere as Our Scheduling Solution

Many community colleges in our area use SARS Anywhere, a proven scheduling and case management software. We were an early adopter of SARS and used it until IT proposed the

switch to Civitas in November 2022—a change driven by IT rather than counseling needs. The five-year contract for Civitas, at an annual cost of $130,941, includes a waiver for implementation and support fees and totals over $650,000. Despite nearly reaching the halfway point of this contract, we have not yet been able to test if Civitas works for counseling.

In contrast, SARS Anywhere cost us approximately $5,000 annually in 2022 and offered a suite of relevant features particular to California Community College counseling, including:

- Grid-based appointment scheduling and reporting,
- Zoom integration for remote appointments,
- Remote queuing with same-day text notifications,
- Automated appointment reminders and batch messaging,
- Self-serve check-in/check-out,
- Calendar planning and real-time data integration with SIS,
- Capturing AB928 Auto-ADT enrollment/ exemptions.

We have been vocal about our need for SARS Anywhere or an equivalent system. However, we have been asked to wait for the completion of ideal mapping with Swim Digital, with potential guidance from ATD. Counseling data and services are invaluable in student recruitment, retention and success and a platform that facilitates this needs to be a priority, now.

Request for Action

We respectfully request a reconsideration of the scheduling system for Counseling, with SARS Anywhere or a comparable scheduling platform as a priority. This system would allow us to serve our students effectively, with proactive scheduling and case management that reflects our commitment to student success.