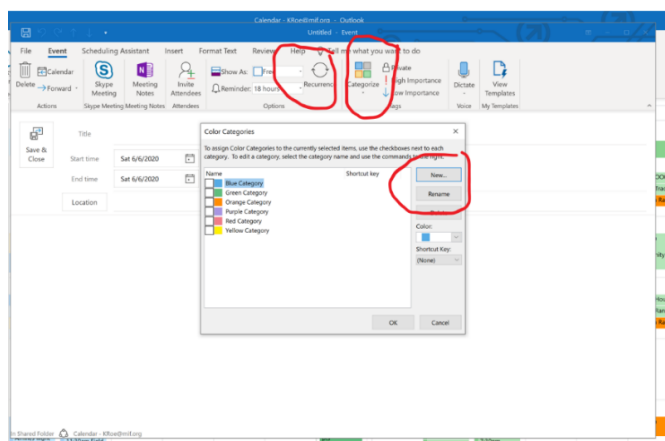


Mi

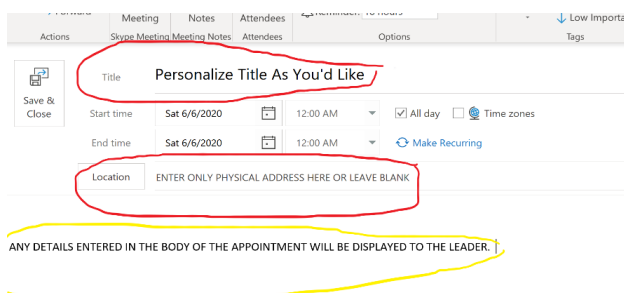
Coaching Calendar Process Guide

To take advantage of this automated approach, Begin in Outlook:

- AD begins to create an appointment – first, select the *Categorize* feature in the menu bar. **Create 2 NEW categories** (or rename a category). You must name them EXACTLY as below to communicate properly with MI Admin; choose any color. *If you have already have the "Consulting Available" category, do not create this again.*
 - Consulting Available**
 - In-Person Only**



- Each calendar appointment is created separately in Outlook, with the option to repeat regularly using the *Recurrence* feature.



- When creating ALL appointments, **you MUST select the Consulting Available box.**
 - **Select the In-Person Only box ALSO** if the appointment is *in-person only* (does not apply if appointment is Remote Only or Either/Or type - descriptions below)
- Additional Important Reminders:
 - The **TITLE** you enter in the Outlook appointment Title field will display as the title leaders see in your Admin calendar and in subsequent emails. Personalize as you like.
 - Enter a physical location/address only in **LOCATION** field. Leave Location empty if not meeting in a physical location. **Do NOT enter Zoom links in this field** (will interfere with code).
 - Any details entered into the body of the appointment at the time it is initially created will be visible to the leader.
 - Remember, you have the option to create 30 min appointments or longer.

5. Ministry Portal Side
 - Will function the same to leaders – will additional helpful details and options available.
 - Tod updated some of the suggested verbiage changes on the site as well.
6. MI Admin Side
 - Will function the same, with added and updated details displaying.
 - Recording your appointments will happen automatically as in the past from Outlook, or you can record by "Manually Create Session".
 - Keep in mind the new option in "meeting class" to record a "teaching level intro" appointment (30 min with a teaching account).

Description of 3 appointment types

1. **In-Person Only** (select BOTH **Consulting Available** and **In-Person Only** boxes when creating)
 - Enter address in **Location** field in Outlook appointment
2. **Remote only** (select **Consulting Available** box)
 - No Location is entered, which indicates remote only appointment.
 - Leader can choose from these call options:
 1. Phone call
 2. Video call - Video information can be shared w/ leader in 3 ways:
 - Enter info in the body of the appointment at the time of creating the Outlook appointment.
 - In Consulting Management, add "notes to ministry" in appointment.
 - Send a personalized email prior to the appointment.
 3. Conference call (this displays only if you have conference call info entered in Chapter Management – ask Karla)
3. **Either/Or** (select **Consulting Available** box)
 - Enter address in **Location** field in Outlook
 - AD is sitting in a meeting space and allows for leader to choose from the following options of calls *OR* in-person meeting when scheduling:
 1. In-Person: Meet me at **Location** entered
 2. Phone call
 3. Video call - Video information can be shared w/ leader in 3 ways:
 - Enter info in the body of the appointment at the time of creating the Outlook appointment.
 - In Consulting Management, add "notes to ministry" in appointment.
 - Send a personalized email prior to the appointment.
 4. Conference call (this displays only if you have conference call info entered in Chapter Management - ask Karla)