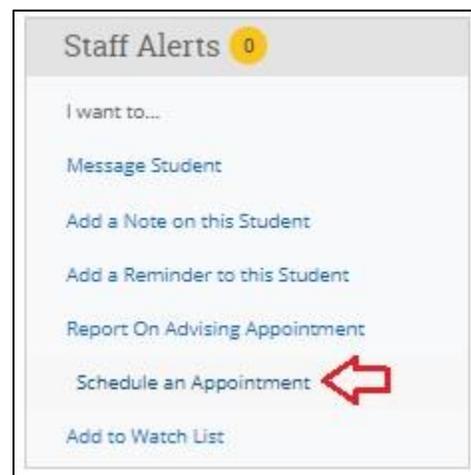
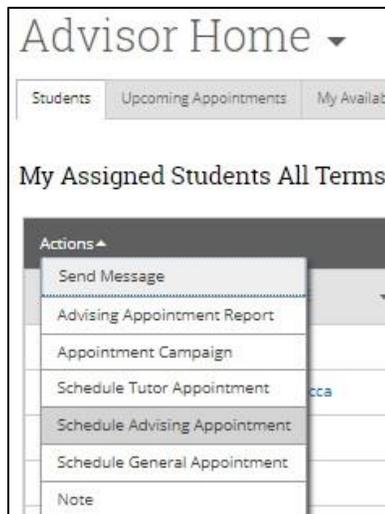


CardSmart Training

Adding Individual Appointments to Calendar

This exercise is used to make individual appointments that are not part of a campaign.

- To make an Advising Appointment with a student, you can either select the student's name from your Assigned Students list or do a **Quick Search** for the student's profile. (1) The image on the left comes from your home screen. Select a student from the **My Assigned Students All Terms** list and select "Schedule an Advising Appointment" from the **Actions** drop down menu. (2) The image on the right comes from the student profile page. Do a Quick Search for the student. Go to the **Staff Alerts** dialog box on the right side of the screen and select "Schedule an Appointment."



- Once you click to schedule an appointment, you need to fill out the details and select the advisor (yourself) for that individual appointment. For **Type**, you should select "Advising Appointment" This will enable you to add an Advising Report for the meeting. Select the **Reason(s)** from the available choices, add any **Comments**, and enter the meeting **Location**. Be sure to select yourself as the Advisor, even though your name already appears as one of the people attending.

Schedule Appointment

Filters

Type:
Advising Appointment

Reason(s):
 AA Career Planning
 AA Acad. Planning/Registration

Comments:
test appointment

Location:
Business

People Attending (2)

- Test, Student (Student) x
- Etheridge, Katie (Advisor, Student) x

Add an Attendee:

| SELECT | ADVISOR | AVAILABLE TIMES |
|----------------------------------|------------------|--|
| <input type="radio"/> | Bell, Jane | |
| <input type="radio"/> | Burch, Terri | |
| <input type="radio"/> | Calebs, Dolores | |
| <input checked="" type="radio"/> | Etheridge, Katie | Mon-Fri 11:30am-12:00pm Drop-In Availability: Mon-Fri 9:00am-9:30am Drop-In Availability: Mon-Fri 9:30am-10:00am |
| <input type="radio"/> | Gibbs, Neil | |

- Choose the date and time for the appointment. You can choose the date from the calendar on the left. Once you find an open time, check the box to select that time. Note that you can change the view in the **Availabilities** drop-down box in order to open up more availability. You can also change the **Length** of the appointment if desired. Once everything is completed, click “Save Appointment.”

Select a Date:

August 2017

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

Reminders

Send an email reminder?

Send a text reminder?

Choose A Time To Meet

Length: 30 min

Availabilities: Show Availabilities for This Course/Reason

| TIME SLOT | 08/06 (SUN) | 08/07 (MON) | 08/08 (TUE) | 08/09 (WED) | 08/10 (THU) | 08/11 (FRI) | 08/12 (SAT) |
|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 9:00a-9:30a | | DROP-IN | DROP-IN | DROP-IN | DROP-IN | DROP-IN | |
| 9:30a-10:00a | | DROP-IN | DROP-IN | DROP-IN | DROP-IN | DROP-IN | |
| 10:00a-10:30a | | | | | | | |
| 10:30a-11:00a | | | | | | | |
| 11:00a-11:30a | | | | | | | |
| 11:30a-12:00p | | ☐ | ☐ | ☑ | ☐ | ☐ | |
| 12:00p-12:30p | | | | | | | |

- The advisor (you) and the student will receive an email with the details of the appointment as soon as it is saved and a reminder email the morning of the appointment.