CardSmart Training

Adding Individual Appointments to Calendar

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

1. 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.”

2. 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.
3. 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.”

4. 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.