

CardSmart Training

How to Cancel or Delete an Appointment from the Advising Center Mode

1. Select the **Advising Center** mode from the bottom right of your CardSmart home screen. Select your Advising Center location.

2. Locate the appointment on the calendar and click the blue appointment box to open it up.

Tips for Best Practice

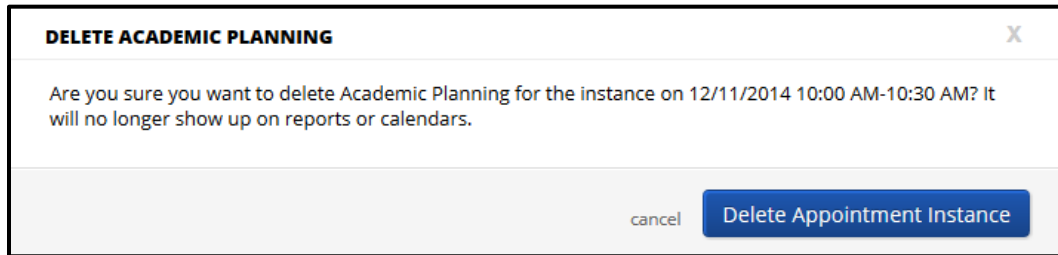
Canceling an advising appointment allows you the option to track the reason WHY the appointment was cancelled, and it keeps a record that can be used for reporting purposes later.

Deleting an appointment does not allow this option.

3. This opens the **Manage Appointment** dialog box and allows you to either cancel or delete the appointment. (You can also move or edit the appointment from this screen.)

If you choose to **Cancel Appointment**, you will select responses in the drop-down boxes for the person who is cancelling the appointment and the reason it is being cancelled. You can include comments. If you select **Mark as Cancelled**, this entry will appear on your calendar. (Note that you can take other steps from this screen such as to delete the appointment or check the student in.)

If you choose to **Delete Appointment**, the appointment will no longer appear on reports or calendars. In choosing this option, you will not be able to track **why** the appointment was cancelled.



4. Whether you **cancel** or **delete** the appointment, the student and advisor will get an email confirming the removal of the appointment.