

CardSmart Training

How to Create an Appointment from the Advising Center Mode

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



2. Enter the student's ID number or and click the student's name from the drop down results.

			Test Stude	ent	
Enter Stud	ient Name ervices		1	Test Student ID: 1248241 ttstud01@louisville.edu Mathematics - BS (MATHBS) Advisors: none Tutors: none	
Appointment	Drop-In Appointments	Scheduled Appointment List		Send Message Schedule General Event	

3. The calendar will show the current day and the list of advisors with availability that day. You can select either **First Available** to the left or a particular day and time frame. Click **Reload** to update the view each time you change the date or other parameters.

lelo	oad Reload	ded at	: 11:02	AM		
0		Ju	ly 201	7		0
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2	з	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					



4. From this screen, you can see open appointment possibilities (times that aren't gray for that advisor or have other meetings shown) and can select an option that corresponds with the student's availability.

· · · · · · · · ·	
	General Event

5. Click the desired advisor and time slot and the **Create an Advisor Appointment** dialog box will open. Confirm that the information is correct and select a **Service** for the appointment.

<u>Click here to learn the UofL best practice for services</u>

CREATE AN AL	DVISING APPOINTMENT	×
Service:	•	*
	Show All Services for this location	
Organizer:	Khotso Libe	
Student:	Test Student	
When:	Thu Jul 27, 2017	
	10:00 AM - 10:30 AM	
Save Appointme	ent Edit Details	
4		



6. Click Edit Details to add information to the appointment or change the date or time.

Service:			•		
	Show All Services	for this locati	on		
Organizer:	Khotso Libe				
Student:	Test Student				
When:	07/27/2017	0:00 AM	10:30 AM		
Comments:	UND, student wa	ants to discus	s a Humanities or Philoso	phy major	
52 (8)					
Options:	Student has ch	ecked in for	appointment		
Options:	Student has ch	ecked in for	appointment		
Options:	Student has ch Send E-mail Re Send Text Rem	ecked in for minder inder	appointment		
Options: Save Appointme	Student has ch Send E-mail Re Send Text Rem	ecked in for minder inder	appointment		

7. As soon as you hit **Save Appointment**, the appointment will appear on the advisor's calendar and the student will get an email. The student will also get an email reminder the evening before the appointment. A sample of the student email appears below:

ppointment Reminder
s to remind you that an appointment has been scheduled for 06/30/2017 10:00a-11:00a. Details are included below.
nizer: Katie Etheridge
3
reer Planning
nents:
Etheridge: test
tion:
ess
of Appointment
/2017 10:00a-11:00a
a-11:00a