

CardSmart Training

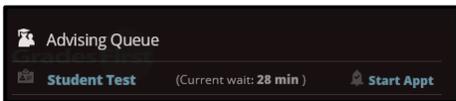
How to File an Advising Report

From the Advising Queue

- Once the student has checked-in at the front desk, he/she will appear in your **Advising Queue**.



- Check the student in by clicking **Start Appt** in the Advising Queue. This will open the Advising Report and *Time Arrived* will be recorded automatically in the report.



Follow Best Practice

When you use this method, you don't need to enter time arrived or departed.

Advisor Time (arrived and departed) will reflect the scheduled appointment time.

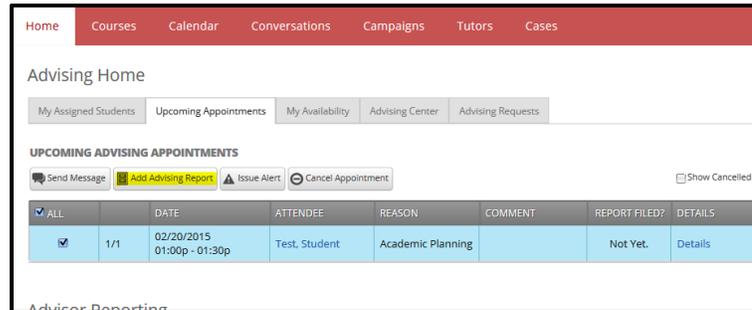
Student Time (arrived and departed) will reflect the actual time spent with the student.

Actual appointment time includes not only the time spent with the student but also the time spent preparing and the time spent entering the notes into the report.

- File the Advising Report.
 - Arrival Time** is recorded automatically when you click the *Start Appointment* button.
 - The **Reason** for the appointment will match the reason provided through the campaign or when the appointment was set. However, you can and should add other reasons if the course of the conversation dictates it. See the [guidelines](#) and [vimeo](#) for "How to Select Reason Codes" for further information. *This only applies to FP Reason Codes (for now)
 - Enter your notes for the appointment in the Summary section. Save the report when you are finished.
 - Once you save the report, the student will be checked out of the appointment and the **Departure Time** will be logged. Again, you do not need to enter any time data into the report. It will enter automatically. If the appointment is not saved when the appointment is complete, please adjust the times to reflect the time of the appointment.

From the Home screen/Upcoming Appointments

1. If you do not have front-desk staff, you can begin your appointments from your home screen. Select the **Upcoming Appointments** tab. Click in the box next to the appropriate appointment and select **Add Advising Report**.



2. When the **Advising Report** opens, you will see that the time has already populated in both sections, and it reflects the scheduled appointment time. Because this student didn't enter through the front-desk mode, you will need to enter the actual time spent with the student. Leave the scheduled time (the first set of arrived and departed times) as-is; this is the scheduled appointment time. You will change the time in the second time block (highlighted below). Record the arrived time to indicate the time the appointment begins, and the departed time reflects the end of the appointment (including the time that you spend entering your notes.)

