# CardSmart Training

# Adding an Advising Report to a Student's Profile

### (For a Student without an Appointment)

1. When a student meets with you and does not have an appointment, the appropriate way to add an advising report is by visiting the student's profile and selecting **Report on Advising Appointment**.

2. Enter the **Reason(s)** for the appointment. You may list multiple reasons - your unit should help you understand how to use reasons.

3. Enter the **Meeting Type** and **Location**. *You can ignore the **Course** drop-down; that value is there for recording tutoring visits*.
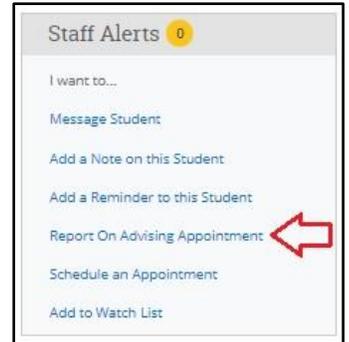
4. If you open the Advising Report when the appointment begins, the **Arrived** time will record for you; similarly, if you complete and save the note upon the end of the appointment, the **Departed** time will record automatically as well. Otherwise you must enter these manually.
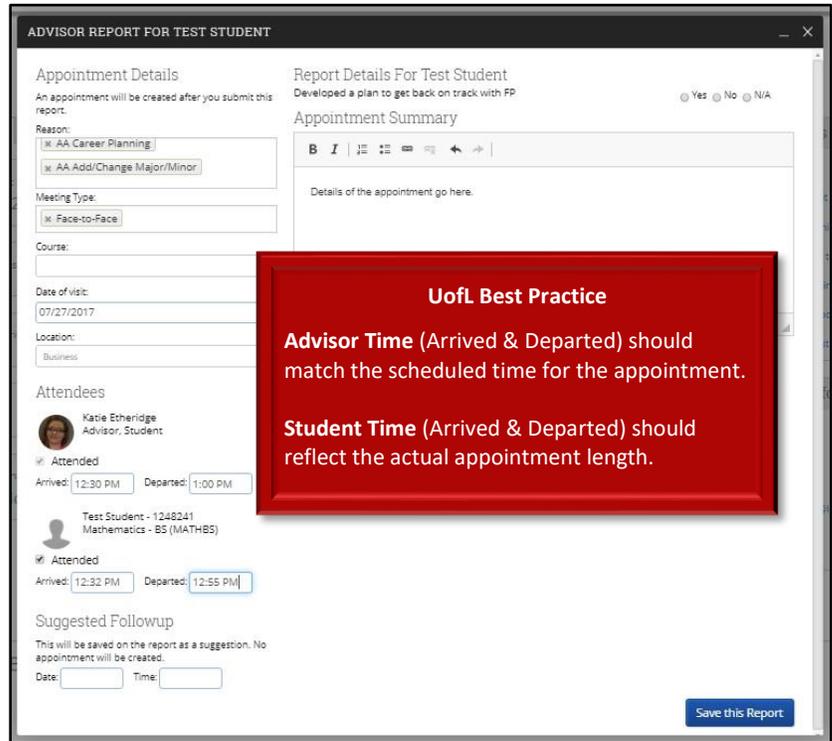
5. Within the **Appointment Summary** field, enter your visit notes.

6. **Save the Report** when finished; this will log the student's departed time. If you are new to saving reports, then check the time arrived and departed for accuracy.

7. The report will now be entered on the student's **Reports/Notes** tab for future reference. **Advisor Reports** are all documented together further down the page under this tab.