

CardSmart Training

Adding an Advising Report to a Student's Profile (For a Student without an Appointment)

ADVISOR REPORT FOR TEST STUDENT

Appointment Details

- 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 dropdown; that value is there for recording tutoring visits.*
- 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.

Adviso	dvisor Reports 🝷					
DATE	REPORT FILED ON	COURSE	FOLLOW-UP	MEETING TYPES	SUMMARY	
07/27/2017 12:30 PM	07/27/2017			Face-to-Face	Details of the appointment	Details



An appointment will be created after you submit this report.	Developed a plan to get back on track with FP (Appointment Summary	∋Yes ⊖ No ⊖ N/A		
× AA Career Planning	B I ﷺ ■ ¬ ★ →			
😠 AA Add/Change Major/Minor				
Meeting Type:	Details of the appointment go here.			
× Face-to-Face				
Course:				
Date of visit:	UofL Best Practice			
07/27/2017				
Location:	Advisor Time (Arrived & Departed) should	d		
Business	match the scheduled time for the appoint	tment.		
Attendees				
Katie Etheridge	Student Time (Arrived & Departed) should	d		
Advisor, Student	Student Time (Arrived & Departed) shoul	a		
Attended	reflect the actual appointment length.			
Arrived: 12:30 PM Departed: 1:00 PM				
Test Student - 1248241 Mathematics - BS (MATHBS)				
Attended				
Arrived: 12:32 PM Departed: 12:55 PM				
Suggested Followup				
This will be saved on the report as a suggestion. No appointment will be created.				
Date: Time:				
		Save this Report		

Report Details For Test Student