CardSmart Training

How to Assign a Different Advisor to a Scheduled Appointment

Opening the Appointment

(As described below, you can open appointments from either the Upcoming Appointments tab (if they are your appointments) or from the Advising Center.)

From the Upcoming Appointments tab on your Home screen

Go to the **Upcoming Appointments** tab on your home screen.

Click **Details** and follow the editing steps as outlined below to make the necessary changes to assigned advisor, date/time, and reason for the appointment.
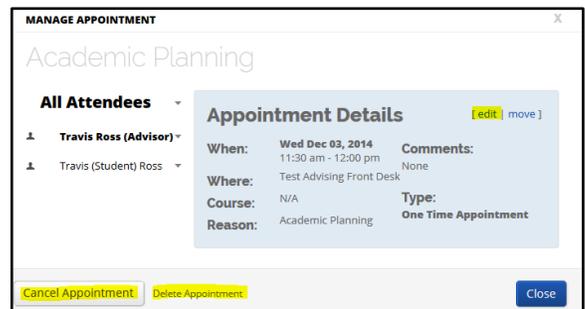
From the Front-Desk Mode/Advising Center

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

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

Editing the Appointment

Both of the options described above opens the **Manage Appointment** dialog box and allows you to edit the appointment. (You can also delete or cancel the appointment from this screen.) Select **edit**. This will open the screen that allows you to make changes to the appointment.

Assigning a Different Advisor

1. First, click the "x" at the end of the line with the previously assigned advisor's name. Then, you can select the advisor that you would like to assign. That advisor's schedule will populate below, and you can then select an appropriate appointment time. This calendar displays an advisor's availabilities a week at a time. Once you make the necessary changes, click **Save Appointment** at the bottom of the page.

2. Keep in mind that in addition to changing the assigned advisor, you can also use this process to change the date/time for the appointment if needed.

Changing the Date

Select the new date and confirm on the calendar that the time is available. Check the box for the new appointment time slot. Click **Save**. You can verify the move by checking the appointment center calendar for the new time slot.

Keep this in Mind…
When you select a different date on the calendar in the appointment center, you always need to click RELOAD so the calendar will update to the new date.

Changing/Adding Reasons

Most appointments made from the front desk will indicate one reason for an appointment. Additional reasons are often added to the report later by the advisor. However, if multiple reasons are provided at the time the appointment is made, those reasons can be selected. **Edit** the appointment after saving the date, time, and advisor (using the same process as above) and then select the additional reasons provided. Click in the box where the reasons are listed and a drop down will appear. Select all of the applicable reasons. **Save Appointment** to reflect the changes.