CardSmart Training

How to Cancel or Delete an Appointment from the Advising Center Mode

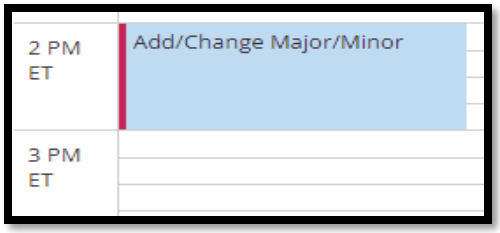
1. Select the **Appointment Center** mode from the bottom right of your CardSmart home screen. Select your Appointment Center location.

Tips for Best Practice

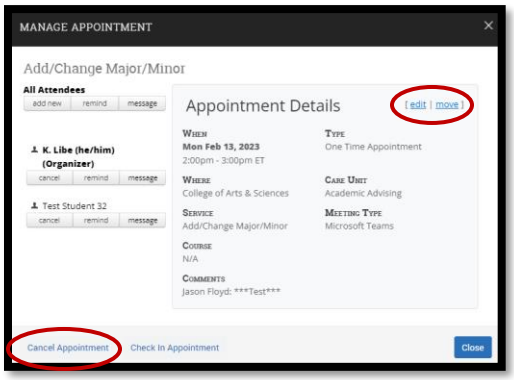
Cancelling an advising appintment allows you the option to track the reason WHY the appintment was cancelled and it keeps a record that can beused for reporting purposes later.

Deleting an appointment does not allow this option.

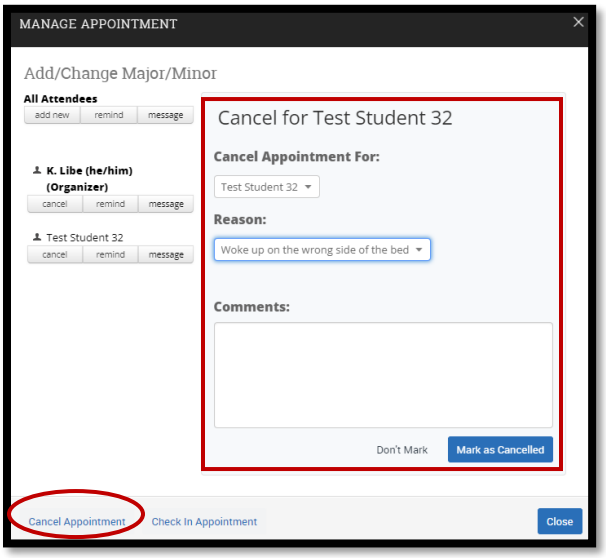
2. Locate the appointment on the calendar and click the blue appointment box to open it up.



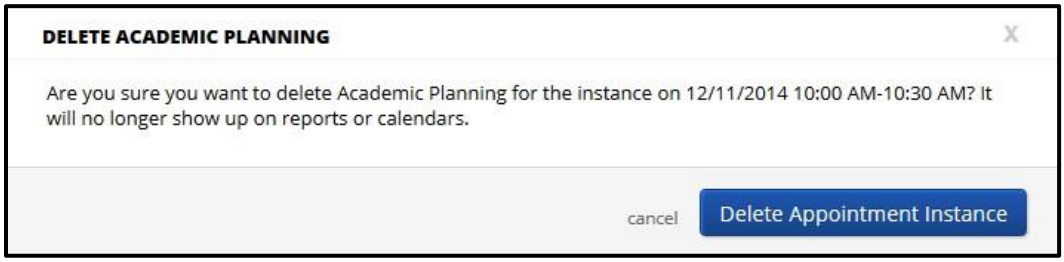
3. This opens the **Manage Appointment** dialog box and allows you to either cancel, edit, or move the appointment.



4. If you choose to **Cancel Appointment**, you will select responses in the drop-down boxes for the person who is cancelling the appointment and the reason it is being cancelled. There is a space provided to include comments. If you select **Mark as Cancelled**, this entry will appear on your calendar. (Note that you can take other steps from this screen such as send a reminder or message.)



If you choose to **Move Appointment**, the appointment will no longer appear on reports or calendars. In choosing this option, you will not be able to track **why** the appointment was cancelled.



Whether you **cancel** or **delete** the appointment, the student and advisor will get an email confirming the removal of the appointment.