

CardSmart Training

How to Edit an Appointment from the Advising Center Mode

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

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

10 AM		
	AA Career Planning	
11 AM		

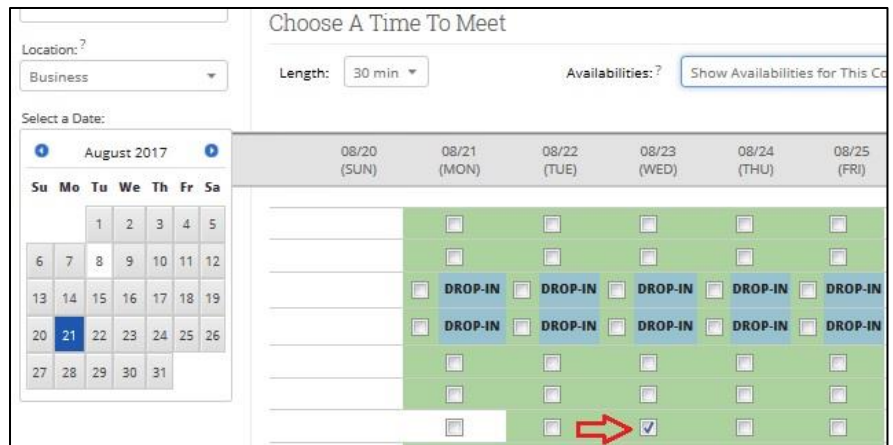
3. This opens the **Manage Appointment** dialog box and allows you to edit the appointment. (You can also move, delete, or cancel the appointment from this screen.)

Select **edit**. You will be returned to the scheduling screen where you can change the date for the appointment, add or remove attendees, change the location, and change/add the reasons for the appointment. If you click another date, you may have to reselect the advisor for the appointment. Once you make the necessary changes, click **Save Appointment** at the bottom of the screen.

Changing the Date

Select the new date on the small calendar to the left and confirm on the schedule to the right that the new time is available. Make sure that the appropriate advisor is still selected. Check the box for the new appointment day/time slot and click **Save**.

You can verify the move by checking the calendar in the Appointment Center for the new time slot.



Most likely, the front desk may only have a need to change the date and time for an appointment; however, the following changes can be also made from the Appointment Center:

Adding or Removing Attendees

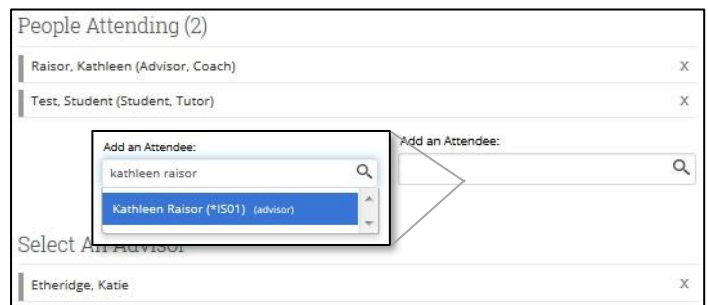
In some cases, you may need to assign a different advisor. To do so, you will first need to remove the current advisor by clicking the “X” at the end of the line with their name.



This will bring up the “Select An Advisor” box where you will find the appropriate advisor. Selecting them will update the schedule to that advisor’s availability. Once you verify a time on the newly added advisor’s schedule, click **Save Appointment** at the bottom of the screen to be sure your changes are made. That change can be verified by checking the new advisor’s calendar. The added individuals should also receive an appointment confirmation email.

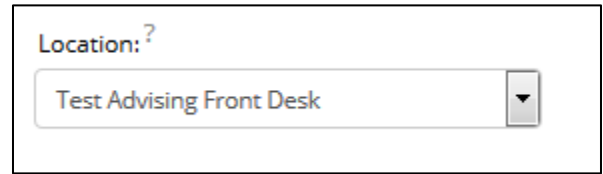


If you wish to have two advisors in the appointment, the other advisor will have to be added as an “attendee” rather than the assigned advisor for the appointment.



Changing the Location

Although this change is not likely to be needed, it is possible to move the appointment from one location to another. Simply select the new location from the drop-down box and then **Save Appointment**.



Changing/Adding Reasons

Most appointments made from the front desk will indicate one reason for an appointment. Additional reasons are added by the advisor through discussion with the student. However, if multiple reasons are provided at the time the appointment is made, those reasons can be selected from the Appointment Center by editing the appointment. In the “Reasons” section on the left of the editing page, click the white space in the box around the already selected reason. This will bring up a drop down menu of other reasons, which can then be selected one at a time. To remove a reason, click the “X” to the left of the reason text. When all reasons have been added, click **Save Appointment**.

