

Navigate360: Advising Early Outreach Appointment Campaigns

Appointment Campaigns let staff reach out to specific student populations and encourage them to schedule appointments. The metrics in this guide are set up for launching an Early Outreach campaign.

1. Create campaign availabilities before creating an appointment campaign

- See the [Create Availabilities](#) Navigate guide to create a new availability for the [Early Outreach Service](#) at the [Academic Advising Location](#) during the early outreach initiative timeframe. To create campaign availability:
 - Click the checkbox next to an availability which already contains your [URL](#), and [Special Instructions to the Student](#)
 - Use the [Copy Time](#) feature in the [Actions](#) menu to create an availability which retains [Meeting Types](#), [URL/Phone Number](#), [Special Instructions for Student](#)
 - Edit [How long is this availability active?](#) From the drop-down menu, select [A Range of Dates](#). In the [Starting on](#) box, select [Monday, August 29, 2022](#) from the calendar. In the [Ending on](#) box, select [Friday, September 9, 2022](#) from the calendar
 - Under [What Type of Availability is This?](#) click [Campaigns](#) and unclick [Appointments](#)
 - Under [Care Unit](#) select [Outreach Initiatives](#) from the drop-down menu
 - Under [Location](#) select [Academic Advisement](#) from the drop-down menu
 - Review the [URL](#) And [Special Instructions for Student](#) boxes to ensure Zoom link, phone number, and physical location are all present.

COPY AND ADD AVAILABILITY

How long is this availability active?
A Range of Dates

Starting on 4/2/2024 Ending on 4/2/2024

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?
Appointments Drop-ins **Campaigns**

Meeting Type
 In Person Virtual


Care Unit
Outreach Initiatives

Location
Academic Advisement

Services
 Early Outreach

Cancel Save

2. Initiate a new appointment campaign

- Click the Campaigns  icon from the navigation menu on the left side of the screen.
- In the [Student Campaigns](#) box, click [Add New](#) under [Appointment Campaigns](#)

3. Define the appointment campaign parameters

- Under [Campaign Configurations](#), enter:

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Campaign Name	EX: Fall 2022 Early Outreach Advisor Name First Last
Instruction Notes for Landing Page	N/A
Care Unit	Advising
Location	Academic Advisement
Service	Early Outreach

- Under *Appointment Configurations*, enter:

Appointment Limit	2
Appointment Length	30 minutes
Slots Per Time	1

- Under *Scheduling Window*, enter:

Start Date	Monday, August 29th, 2022
End Date	Friday, September 9th, 2022

- Click *Continue*

Appointment Campaign Parameters

Campaign Configurations

Campaign Name: Instructions or Notes for Landing Page:

Care Unit: *Location:

Service:

Appointment Configurations

Appointment Limit: *Appointment Length:

Slots Per Time:

Allow Scheduling Over Courses

Staff Reminders: Email Text Recipient Reminders: Email Text

Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

Start Date: *End Date:

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4. Select recipients for (add students to) the campaign

- On the [Add Recipients to Campaign](#) page, input filters:
 - Open the [Student Information](#) drawer and under [Transfer Student](#), select [No](#) from the drop-down menu. **NOTE:** If your unit *only* works with transfer students, select [Yes](#).


The screenshot shows the 'Student Information' filter drawer. The 'Transfer Student' dropdown menu is highlighted with a red box and set to 'No'. Other filters include First Name, Last Name, From Last Name, To Last Name, Student ID, Gender, Race or Ethnicity, Student List (In Any of These), Email(s), Category (In Any of these), and Tag (In Any of these).

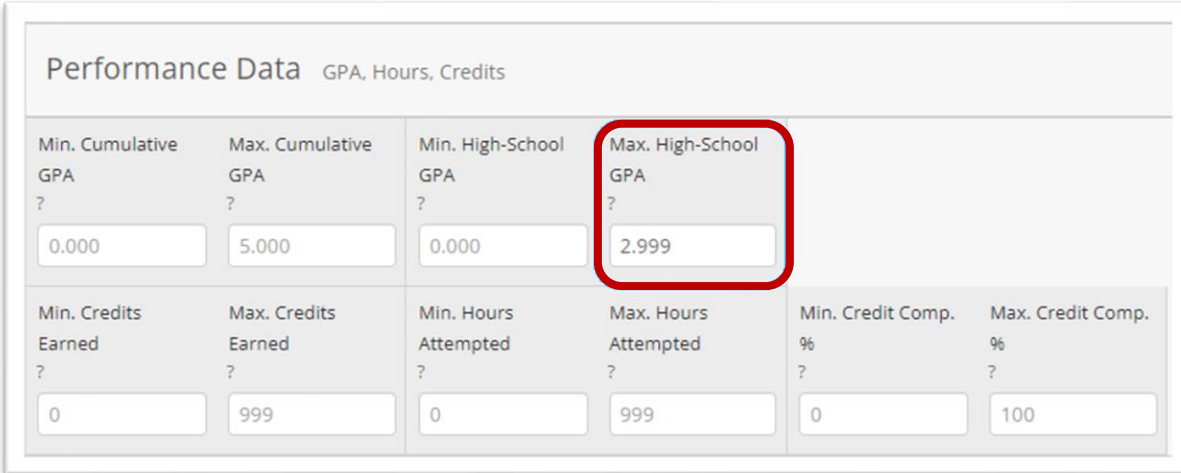
- Open the [Enrollment History](#) drawer
 - Under [Enrollment Terms \(In Any of These\)](#) select [Fall 2022](#)

The screenshot shows the 'Enrollment History' filter drawer. The 'Enrollment Terms (In Any of these)' dropdown menu is highlighted with a red box and set to 'Fall 2022'. The 'Enrollment Terms (In None of these)' dropdown menu is also highlighted with a red box and contains a list of terms from Spring 2022 to Fall 2010, plus '9999'. Other filters include 'Enrollment Terms (In All of these)'.

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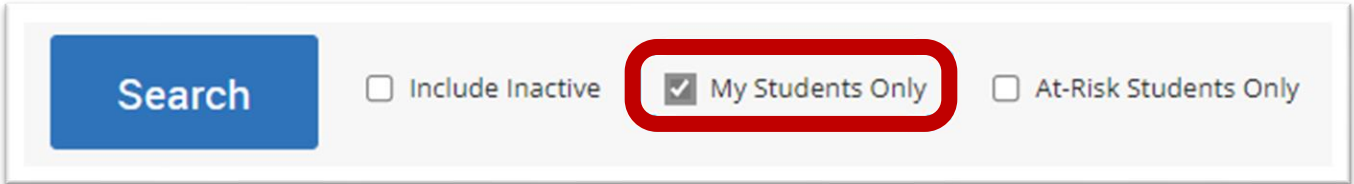
Appointment Campaigns let staff reach out to specific student populations and encourage them to schedule appointments. The metrics in this guide are set up for launching an Early Outreach campaign.

- Click the expansion button . Under *Enrollment Terms (In None of These)* select every term except for *Summer 2022* and *Fall 2022*. HINT: Click inside the *Enrollment Terms (In None of These)* and press the *Enter* button on your keyboard repeatedly to more quickly enter every term. Then click the *X* on the boxes for *Summer 2022* and *Fall 2022*
- Open the *Performance Data* drawer and under *Max. High-School GPA* enter *2.999*



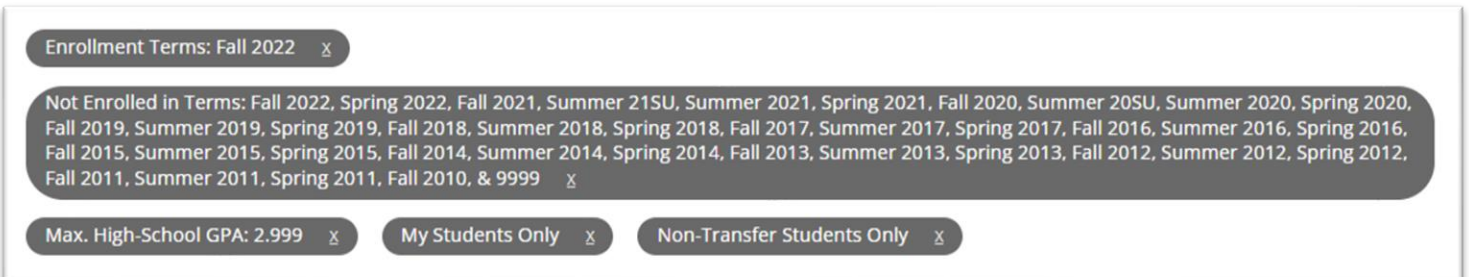
Performance Data GPA, Hours, Credits					
Min. Cumulative GPA ?	Max. Cumulative GPA ?	Min. High-School GPA ?	Max. High-School GPA ?		
0.000	5.000	0.000	2.999		
Min. Credits Earned ?	Max. Credits Earned ?	Min. Hours Attempted ?	Max. Hours Attempted ?	Min. Credit Comp. % ?	Max. Credit Comp. % ?
0	999	0	999	0	100


- At the bottom of the filters click the checkbox for *My Students Only*.
- Click *Search*.







Include Inactive My Students Only At-Risk Students Only

- Review the search parameters at the top of the returned result page. If needed, click *Modify Search* to add, remove, or edit search parameters.



Enrollment Terms: Fall 2022 

Not Enrolled in Terms: Fall 2022, Spring 2022, Fall 2021, Summer 21SU, Summer 2021, Spring 2021, Fall 2020, Summer 20SU, Summer 2020, Spring 2020, Fall 2019, Summer 2019, Spring 2019, Fall 2018, Summer 2018, Spring 2018, Fall 2017, Summer 2017, Spring 2017, Fall 2016, Summer 2016, Spring 2016, Fall 2015, Summer 2015, Spring 2015, Fall 2014, Summer 2014, Spring 2014, Fall 2013, Summer 2013, Spring 2013, Fall 2012, Summer 2012, Spring 2012, Fall 2011, Summer 2011, Spring 2011, Fall 2010, & 9999 

Max. High-School GPA: 2.999  My Students Only  Non-Transfer Students Only 

- Review the returned student list. Select students by clicking the boxes next to individual students' names or by clicking the *ALL* checkbox at the top of the list.
- Click *Continue*.
- In the *Review Students In Campaign* box, double check the recipient list.

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To delete students, click the check box next to their name, click [Actions](#) at the top left of the list, and click [Remove Selected Users](#).

To add more students to the campaign, click [Add More Students](#) at the bottom left of the page.

- Click [Continue](#)

5. Select staff for the campaign

- The [Select Staff for the Campaign](#) page will list all advisors who have created campaign availability for campaign the [Academic Advisement](#) Location. Select the appropriate advisor(s) by clicking the checkbox next to their name
- Click [Continue](#).

6. Compose email messages for the campaign

- Under [Nudges](#), click [Add Nudge](#).
- On the new page that loads, under [Compose Message](#) enter:
 - [Subject](#): {\$student_first_name}, Plan for Success with Your Advisor
 - [Message](#): Edit the message based on the [Nudge 1 Draft](#) on the accompanying process document.
 - [Send Date](#): August 18, 2022
- Under [Preview Email](#), review the email as it will appear to students. Edit for formatting in the [Compose Message](#) pane as desired.
- Click [Save Nudge](#).
- Schedule three additional nudges for [August 22](#), [August 29](#), and [September 6](#) by clicking [Add Nudge](#). Edit Nudges 2 through 4 based on the nudge drafts on the accompanying process document
- From the [Compose Nudges](#) page, click [Add Success Message](#)
 - [Subject](#): Thank You for Scheduling with Your Advisor
 - [Message](#): Edit the message based on the [Success Message Draft](#) on the accompanying process document.
 - [Attachment](#): Attach the Success Plan enterable pdf
- Click [Save Success Message](#).

7. Verify and start the campaign

- Review the defined campaign, recipients, staff, scheduled nudges, and success message
- To initiate the campaign (with the first Nudge to be sent on August 18), click [Send](#).