

Navigate - Advising Early Outreach Appointment Campaigns

Seamlessly create an advising early outreach appointment campaign that reminds students to book their advisement appointment within Navigate.

1. Create campaign availabilities before creating an appointment campaign

- See the [Create Availability](#) 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:
 - 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 the start date. In the [Ending on](#) box, select the end date
 - Under [What Type of Availability is This?](#) click [Campaigns](#) and un-click [Appointments](#)
 - Under [Care Unit](#) select [Outreach Initiatives](#) from the drop-down menu
 - Under [Location](#) select [Academic Advisement](#) from the drop-down menu
 - Under [Services](#) select [Early Outreach](#) 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 08/29/2022
Ending on 09/09/2022

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 Phone 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](#)

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

[Appointment Campaigns](#)

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New

3. Define the appointment campaign parameters

- Under *Campaign Configurations*, enter:

Campaign Name	<i>Fall Early Outreach Advisor Name First Last</i>
Instruction Notes for Landing Page	N/A
Care Unit	<i>Advising</i>
Location	<i>Academic Advisement</i>
Service	<i>Early Outreach</i>

- Under *Appointment Configurations*, enter:

Appointment Limit	2
Appointment Length	30 minutes
Slots Per Time	1

- Under *Scheduling Window*, enter:

Start Date	<i>Enter start date</i>
End Date	<i>Enter end date</i>

- 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:

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. It contains several input fields and dropdown menus for filtering students. The 'Transfer Student' dropdown menu is highlighted with a blue box and is currently set to 'No'. Other fields include First Name, Last Name, From Last Name, To Last Name, Student ID, Gender, Race or Ethnicity, Student List (In Any of These), E-mail(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 the correct [Fall term](#)
- Click the expansion button . Under [Enrollment Terms \(In None of These\)](#) select every term except for [Summer 2023](#) and [Fall 2023](#). 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 2023](#) and [Fall 2023](#)

The screenshot shows the 'Enrollment History' drawer. It has three sections for selecting enrollment terms: 'Enrollment Terms (In Any of these)', 'Enrollment Terms (In All of these)', and 'Enrollment Terms (In None of these)'. The 'Enrollment Terms (In Any of these)' section has 'Fall 2022' selected. The 'Enrollment Terms (In None of these)' section is expanded, showing a list of terms with checkboxes. The 'Fall 2022' term is selected in the 'Enrollment Terms (In Any of these)' section.

The screenshot shows the filter summary bar. It displays 'Enrollment Terms: Fall 2022' and a list of terms that are 'Not Enrolled in Terms'. Below the list are three filter buttons: 'Max. High-School GPA: 2.999', 'My Students Only', and 'Non-Transfer Students Only'.

- 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*.

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.
- 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.
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:
- 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), click [Send](#).