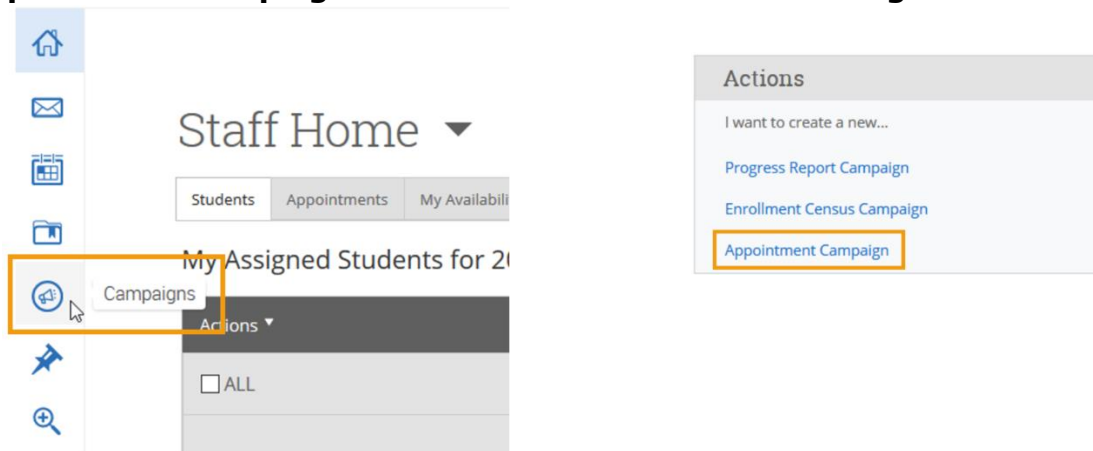


# Create an Advising Campaign

The **appointment campaign functionality** is the backbone of targeted outreach in Run4Success/Navigate. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication. *Appointment campaign functionality automatically tracks and reports on which students in your targeted population have received communication, scheduled appointments, and completed those appointments*, allowing for effective outreach and efficient follow-up.

Questions? Contact Olivia Polkuzio or Anne Van Der Karr at [student.success@newark.rutgers.edu](mailto:student.success@newark.rutgers.edu).

1. Use the left-hand side bar to navigate to the Campaigns page, and then select 'Appointment Campaign' from the Actions table on the right side of the screen



2. You will be prompted to define the campaign

Fill in each field to name and set the parameters and goals of your campaign

## Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

The 'Define Campaign' form includes the following fields and annotations:

- Campaign Name:** A text input field with an annotation: *WHEN, WHY, WHO* (with an arrow pointing to the field).
- Care Unit:** A dropdown menu.
- Location:** A dropdown menu with an annotation: *How long is each appointment?* (with an arrow pointing to the field).
- Service:** A dropdown menu.
- Begin Date:** A date picker set to 01/20/2021.
- End Date:** A date picker set to 02/03/2021.
- Appointment Limit:** A dropdown menu set to 1 with an annotation: *How many appointments should the student schedule?* (with an arrow pointing to the field).
- Appointment Length:** A dropdown menu set to 5 min.
- Slots Per Time:** A text input field set to 1 with an annotation: *How many students can sign up for a time slot at one time?* (with an arrow pointing to the field).
- Allow scheduling over courses:** A checkbox with an annotation: *Students will be able to schedule over their own classes, within the campaign date range* (with an arrow pointing to the checkbox).

### 3. Continue to Add Students to Campaign page and use the Advanced Search to identify the students you want to receive the campaign outreach

Advanced Search ▼

Saved Searches ▼

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Student List ▼

Enrollment History Enrollment Terms ▼

Area of Study College/School, Degree, Concentration, Major ▼

Term Data Classification, Term GPA ▼

Performance Data GPA, Hours, Credits ▼

Course Data Course, Status ▼

Assigned To ▼

Academic Plan Planned Terms, Plan Warnings ▼

Success Indicators Predicted Support Level, Success Markers ▼

Search

My Students Only
  Include Inactive

You can choose to limit the search to only students that are assigned to you

Step 1: Select your filtering criteria

Step 2: Click 'Search'

💡

You have several options for choosing the right students to include in your campaign once you have selected the **enrollment status** and **term**:

- **Student Information** – Filter students by name, gender, race, or a pre-existing watch list
- **Area of Study** – Filter students by college, concentration, degree, or major
- **Performance Data** – Filter by min. or max. credits earned
- **Semester Data** – Filter by semester-specific data, such as term GPA or professor and section assignment
- **Course Data** – Filter by course
- **Assigned To** – Filter by advisor, tutor, coach, or team member assignment

**Example:** Craft your targeted student population by filtering for students majoring in Nursing who have completed between 30 and 45 credits

Area of Study College/School, Degree, Concentration, Major

College/School (In Any of These)?

Concentration (In Any of These)?

Major (In Any of these)?  

✕ Pre-Nursing +

Performance Data Hours, Credits

Min. Credits Earned?

Max. Credits Earned?

Min. Hours Attempted?

Max. Hours Attempted?

#### 4. Review the invite list and add students to your campaign

Advanced Search

Enrolled in Spring Semester 2017 Standard User Type: Majoring In: Pre-Nursing x Min. Credits Earned 30 x Max. Credits Earned 45 x *Your applied filters here*

Search Modify Search *Check this box to import all students returned into your campaign roster*

STUDENT NAME	ID
Abdelwahed, Cecil	596437606
Abramovitz, Radha	428362883
Accardi, Gwen	921725358
Ackley, Lillian	525081749
Arguljo, Ahava	010
Baczewski, Claire	995
Benike, Hide	9957
Berentson, Varana	352

**Review Students In Campaign**

Actions

Remove Selected Users

- Aardema, Klarika
- Alberro, Athena
- Archut, Lynette
- Avery, Max
- Bachtel, Nasira
- Bamberg, Livvy

*You can also use the Actions menu to remove selected students if you would like to exclude them from the campaign*

#### 5. Add Advisors to your campaign

You need to choose which Advisors are available for appointments. You must select yourself. You can also select additional staff.

Add Advisors To Campaign

Include Appointment Availabilities

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	LaToya White	Mon-Fri 8:00am-5:00pm (Fall Semester 2016)
<input type="checkbox"/>	Gina Schorr	Mon-Fri 8:00am-5:00pm (Fall Semester 2016) Mon-Fri 12:45pm-5:00pm
<input type="checkbox"/>	Emily Sentz	Tue, Thu 3:00pm-5:00pm
<input type="checkbox"/>	Griha Singla	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Maanie Hamzaee	Mon-Fri 8:00am-5:00pm

**If Advisors haven't set up Availability for Campaigns, you can select Include Appointment Availabilities**

Students can schedule with any Advisor in the campaign. Appointment campaigns override any restriction that students can only meet with their assigned Advisor.

## 6. Compose the message you want students to receive

You have the ability to customize both the subject line and the messaging of the email you will send to students. The invitation to schedule an appointment through the campaign appears in a preview panel below the message.

Compose Your Message

Use Merge Tags like this to include each student's name in their message

{student\_first\_name}, Schedule an Advising Appointment

**B I** | [Link] [Image] [Video] [Code] | [Undo] [Redo] | Format

Please schedule your advising appointment.

Hello {student\_first\_name}:

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{schedule\_link}

Thank you!

A link to schedule the appointment is directly embedded in the email the student receives

**Warning.** Do not remove the schedule link from the email body.

## 7. Confirm and Send

Review your campaign details, invitees, and advisors on this page. Select how your organizers and attendees get reminders about appointments.

### S21 Planning Check

Confirm & Send

<b>Care Unit:</b> Academic Services	<b>Start Date:</b> 12/09/2020	<b>End Date:</b> 01/22/2021
<b>Location:</b> 2420 M Street	<b>Appt Length:</b> 15 minutes	<b>Slots Per Time:</b> 1
<b>Service:</b> Academic Advising	<b>Appt Limit:</b> 1	<b>Organizer Attendee Reminders:</b> <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS
		<b>Non Organizer Attendee Reminders:</b> <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS

**Subject** {student\_first\_name}, Schedule an Academic Services appointment

**Email Preview** [View](#)      **Invitees:** [View All \(1000\)](#)      **Included organizers** [View All \(2\)](#)

[< Back](#)      [Save and Exit](#)      [Send](#)

Click **Send** when you are ready to email the invites to the selected students.



Once you have sent out the campaign, you will be able to **track appointments made as a result of the campaign** at any time by revisiting the Campaigns page and selecting the 'Appointment Campaigns' tab.