

Create an Appointment Campaign

User Guide – August 2024

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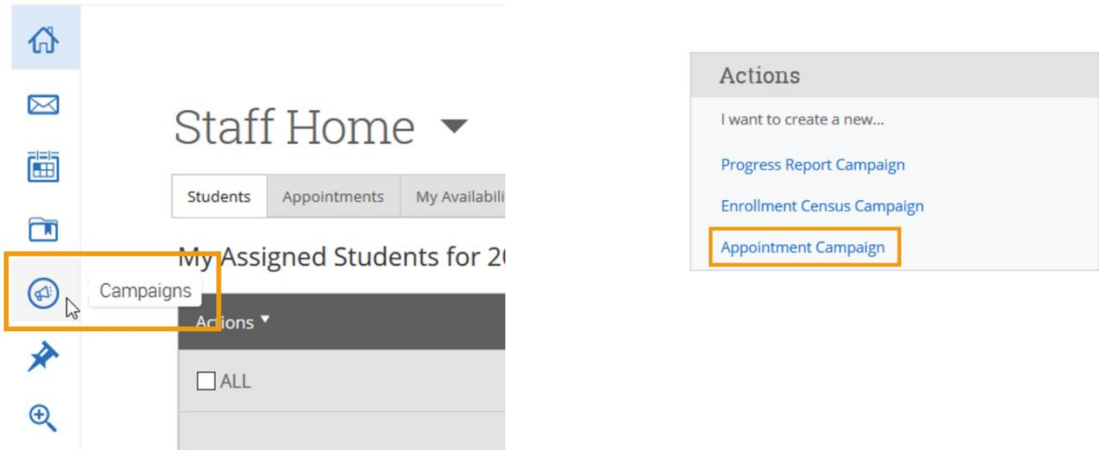
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The **appointment campaign functionality** is the backbone of targeted outreach in Navigate/RU-N4Success. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication.

Appointment campaign functionality in Run4Success 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.

Appointment Campaigns may be especially useful for staff members who do not have students assigned to them and don't want all students to see their appointment availability.

1. Use the left-hand side bar to navigate to the Campaigns page, **or** 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 contains the following fields and annotations:

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

- 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 ▾

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

Search

My Students Only
 Include Inactive

Step 1: Select your filtering criteria

Step 2: Click 'Search'

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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)?

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 | Min. Credits Earned 30 | Max. Credits Earned 45

Your applied filters here

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

Actions

STUDENT NAME	ID
Abdelwahed, Cecil	596437606
Abramovitz, Radha	428362883
Accardi, Gwen	921725358
Ackley, Lilian	325081749
Arguljo, Ahava	010
Baczewski, Claire	995
Benike, Hide	937
Berentson, Varana	352

Review Students In Campaign

Actions

Remove Selected Users

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 | [List] | [Link] | [Image] | [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. Compose 'Nudges' (reminder messages), specifying a fixed 'Send Date' or a relative date, such as 2 days after a student is added to the campaign. For campaigns that may have students added periodically throughout the semester or year, add a Relative Date so that students get the reminder X days after they have received their Welcome Message.

Send Date * ⓘ

Specific Date

Relative Date

Send Offset *

3

Number of days after a Recipient is added to the campaign

8. Optional - Add a Success Message that will be sent to students as soon as they make an appointment.

9. Verify and Start

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

[Define Campaign](#) — [Verify Recipients](#) — [Select Staff](#) — [Compose Nudges](#) — [Verify and Start](#)

Verify & Start

Campaign Summary

Define Campaign	Name:	Anne test
	Care Unit:	Advising
	Location:	* Ice Cream Shop
	Service:	! food
	Appointment Limit:	1
	Appointment Length:	30 mins
	Slots Per Time:	1
	Scheduling Window:	08/26/2024 - 09/09/2024
	Allow Scheduling Over Courses:	No
	Staff Reminders:	Email - Yes Text - No
	Recipient Reminders:	Email - Yes Text - No

Recipients	View 2 recipients
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Staff	View 1 staff
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Welcome Message	Send Date:	Day added
	Subject:	{Sstudent_first_name}, schedule an appointment
	Email Preview:	View Email

Relative Nudge	Send Date:	+2 Days
	Subject:	Reminder - schedule an appointment
	Email Preview:	View Email

[Save and Exit](#) [Start Campaign](#)



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.