Appointment Campaigns

Appointment Campaigns enable student success personnel to request a specific group of students to schedule an appointment for a specific intervention (e.g. advising, math tutoring) during a set time frame. This feature allows for departments to track appointment scheduling rates for campaigns, attendance rates, and allows for a measurement of intervention effectiveness.

To begin, view the Quick Link box and select Appointment Campaigns. The only campaigns that will appear on the new page are ones that you are involved in. In the Actions box, you will then select Appointment Campaign to begin the set-up process.

Step 1: Define Campaign

The new page will ask you to define your appointment campaign. At any point in time, you can Save and Exit if you need to continue building your campaign at a later time.
➢ **Enter the Name of the Campaign** – The name of the campaign only appears to employees involved in the campaign and Navigate Administrators. This name needs to be clear. The following naming convention will be used:
   - Semester – Service – Department – Your SHSU username
   - E.g. 202080-Academic Coaching-SST-baf041

➢ **Care Unit** – Choose the appropriate Care Unit from the list for your campaign.

➢ **Location** – Select the location of where the appointment(s) will be held.

➢ **Service** – Select the service you are conducting for your appointment campaign.
   - **Note**: You can only do one service per campaign and this service must be listed in the availability for the personnel who will be accepting appointments from this campaign.

➢ **Choose the Begin and End Date** – This will be the date range for which you want the students to make their appointments.
   - **Note**: Navigate will automatically recognize and block the time(s) you are not available based on your calendar.

➢ **Appointment Limit** – This will determine how many appointments you wish for the student to schedule. It is advised to allow for at least two to allow for any appointment a student may schedule and not show for.

➢ **Appointment Length** – This is where you define exactly how long the appointment will be. Durations range from 5 to 90 minutes.

➢ **Slots Per Time** – This will determine how many students you wish to see in that time slot (e.g. group advisement).

➢ **Continue** – This will save your parameters and move to the next portion of the Appointment Campaign.

**Step 2: Select Recipients of Campaign**

Once the campaign details are created and the selections are defined, the next step is adding recipients. On the next page, you can use the tabs to search for recipients in several ways.

- **Add my Assigned Students** – If you have assigned students in the platform, you can use this feature to add them to the campaign.

- **Advanced Search** – Provides users with advanced search filters to find and select students.
Step 3: Review Students in Campaign

Once you have compiled the list of students you would like to send an appointment campaign to, the next step is to review the list of students. Here you can add/remove students as needed.

If the students in your campaign are who you want to reach, you can select the Continue button to move on to the next step in the appointment campaign.

Step 4: Add Staff to Campaign

You will need to select yourself as the staff for the campaign. You may also have the option to select additional staff to make them available for appointments based on the campaign. Staff will need to have their availability defined before they can be added to an appointment campaign. You can also select the Include Appointment Availabilities if you want students to be able to make appointments with the staff’s general appointment availability from this campaign.

Step 5: Compose your Message

On this page you will compose the message that you want the students to receive as an invitation to schedule an appointment through the campaign. You can change any of the text that pre-populates to fit the mold of what you are trying to accomplish. It is suggested that you keep the message concise and clear with a direct Call to Action.

*Note* any messaging within {curly brackets} indicates a merged field of information. If you scroll to the bottom of this page, you will be able to see a preview of what the final message will look like, inclusive of merged fields.
Step 6: Confirm and Send

Please make sure that you review your selected options before you send the campaign. After you review the details, select the **Send** button and the email invites will be sent to the students’ mySAM account. They will also be prompted to schedule an appointment for your campaign anytime they login to their Campus Connect account, as a yellow bar will populate across their homepage.

Managing your Campaign

Navigate gives you several tools to help manage your Appointment Campaign after you create and send it. Start by clicking on the **Campaigns** icon on the left menu bar, then select the **Appointment Campaigns** tab. You will see a list of current and expired campaigns with a quick stats section including appointments made to the right.
If you click the title of the campaign, you are able to view the appointments made, not yet made, reports created and the eligible appointments. If there are appointments listed in the Eligible Appointments section, you will need to select those appointments and associate them with the campaign to ensure data accuracy.

The Appointments Made tab will show you what students have made an appointment through the campaign. If you allowed students to make more than one appointment, you will see a Some Appointments Made tab showing how many remaining appointments the student has.

The No Appointments Made tab shows which students have not scheduled an appointment for this campaign, yet. On this page, you can choose to Resend Appointment Request or Send a Message (email or text) reminding the student to schedule an appointment.

The Options box allows for you to Edit Campaign Details if you need to add/remove students, add/remove staff, or make other changes to the campaign as necessary.

You can also Delete This Campaign. However, deleting the campaign will not remove any student appointments that have already been scheduled.