

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.

Quick Links

Take me to...

- [Schedule a General Event](#)
- [Record Class Attendance](#)
- [Manage Assignments](#)
- [School Information](#)
- [Download Center for Reports](#)
- Campaigns...**
 - [Appointment Campaigns](#)
 - [Travel Letters](#)

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.

Fall 2020 Campaigns

[Progress Report Campaigns](#) |
 [Enrollment Censuses](#) |
 [Appointment Campaigns](#) |
 [Travel Letters](#)

Filter by care unit: All care units View only my campaigns

NAME	STATS
You have not created any appointment campaigns. Click the link to the right to get started.	

Actions

I want to create a new...

- [Progress Report Campaign](#)
- [Enrollment Censuses](#)
- [Appointment Campaign](#)
- [Travel Letters](#)

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.

New Invitation 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.

<p>Campaign Name: <input style="width: 90%;" type="text"/></p> <p>Care Unit: <input style="width: 90%;" type="text"/></p> <p>Location: <input style="width: 90%;" type="text"/></p> <p>Service: <input style="width: 90%;" type="text"/></p>	<p>Begin Date: <input style="width: 80%;" type="text" value="11/24/2020"/> <input style="width: 20%;" type="text" value="PM"/></p> <p>End Date: <input style="width: 80%;" type="text" value="12/08/2020"/> <input style="width: 20%;" type="text" value="PM"/></p> <p>Appointment Limit: <input style="width: 90%;" type="text" value="1"/></p> <p>Appointment Length: <input style="width: 90%;" type="text" value="5 min"/></p> <p>Slots Per Time: <input style="width: 90%;" type="text" value="1"/></p>
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- **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.

Financial Insecurities Self-Report 202080

Add Students To Campaign

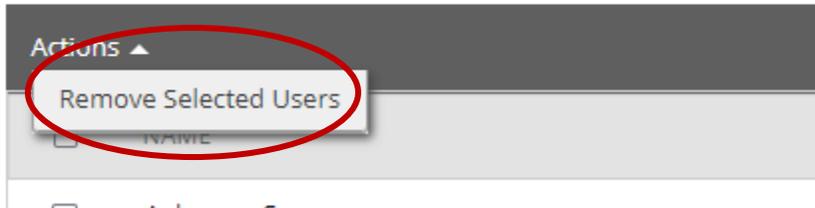
Add My Assigned Students to Campaign

Advanced Search

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.

Review Students In Campaign



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.

Add Organizers To Campaign

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Halley Rothrock	For: Campaigns Tue, Thu 8:30am-4:00pm CT (Fall 2020)
<input checked="" type="checkbox"/>	Guadalupe Hernandez	For: Campaigns Mon-Fri 8:30am-4:30pm CT (Fall 2020)
<input checked="" type="checkbox"/>	Ace Thomas	For: Campaigns Mon-Fri 8:30am-4:30pm CT (Fall 2020)

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.

Compose Your Message

Compose your message area with a text input field containing a merge tag: `{student_first_name}`, Schedule a Financial Wellness appointment

Rich text editor toolbar: Bold (B), Italic (I), Bulleted List, Numbered List, Link, Paragraph, Merge Tags, Undo, Redo

Please schedule your Financial Wellness appointment.

Hello {student_first_name}:

Thank you for completing the Student Support Form for financial assistance. Please schedule an appointment with the Student Money Management Center for financial wellness coaching. Dates are available throughout the semester. To schedule a time, please click the link below and select a date that works with your schedule. **In the comments section please indicate if you would like the appointment to be conducted in person, over zoom, or over phone.** After commenting your appointment preference, click save. You will receive an email confirming the appointment time and details.

{schedule_link}

Available Merge Tags:

<code>{student_first_name}</code> Inserts the student's first name	<code>{student_last_name}</code> Inserts the student's last name	<code>{schedule_link}</code> Inserts a link to schedule the appointment
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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.

Confirm & Send

Care Unit: Student Resources	Start Date: 10/12/2020	End Date: 12/04/2020
Location: Student Money Management Center	Appt Length: 30 minutes	Slots Per Time: 1
Service: SMMC - Financial Insecurities	Appt Limit: 2	Organizer Attendee Reminders: <input type="checkbox"/> E-mail <input type="checkbox"/> SMS
		Non Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS

Subject {student_first_name}, Schedule a Financial Wellness appointment

Email Preview [View](#) **Invites:** [View All \(707\)](#) **Included organizers** [View All \(3\)](#)

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.

Fall 2020 Campaigns

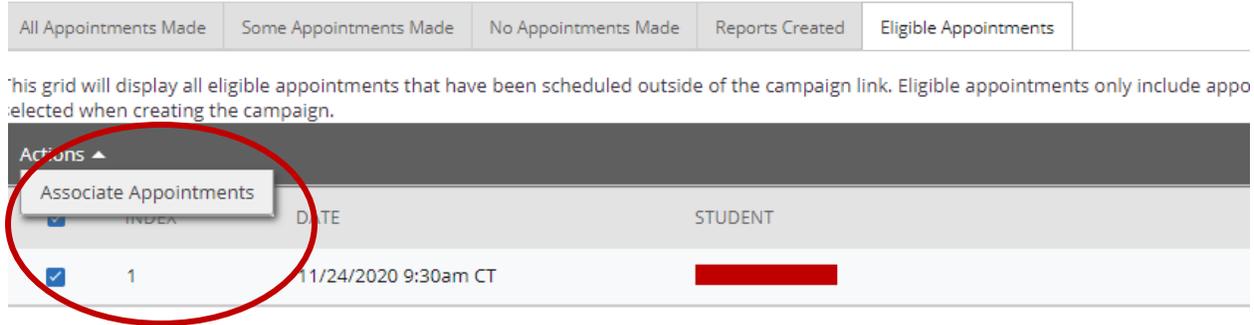
Progress Report Campaigns | Enrollment Censuses | **Appointment Campaigns** | Travel Letters

Filter by care unit: Student Resources View only my campaigns

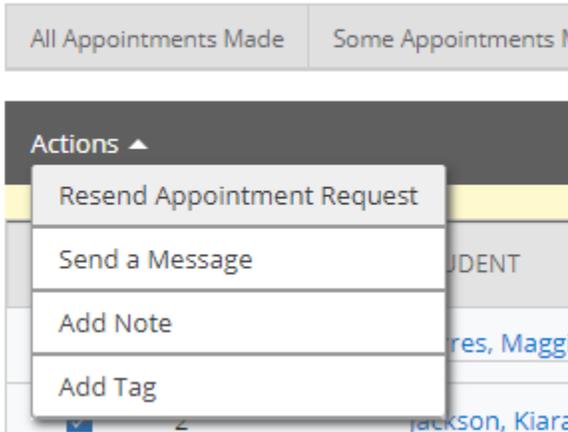
NAME	STATS
Installment Plan Campaign STUDENT RESOURCES [Expired] 10/20/2020 - 11/06/2020	Appots. Made (7%) Reports Created (100%) Attend. Rate (7%)

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.

10/12/2020 - 12/04/2020



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.

