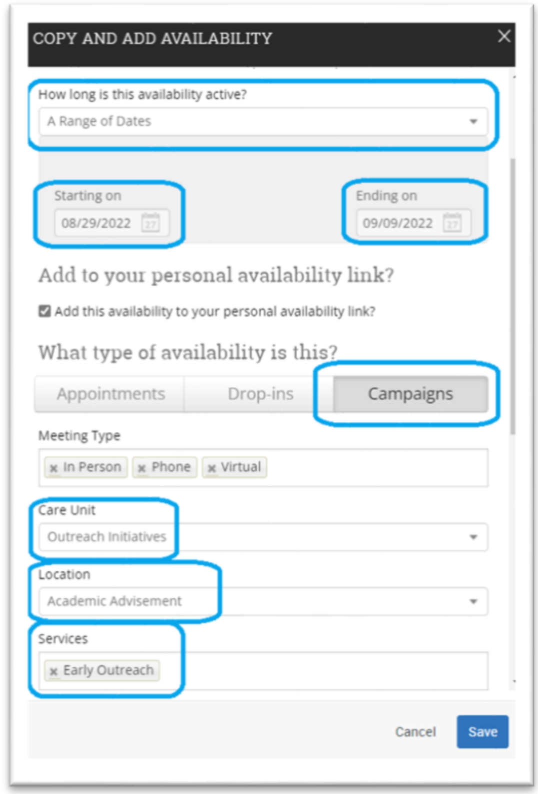
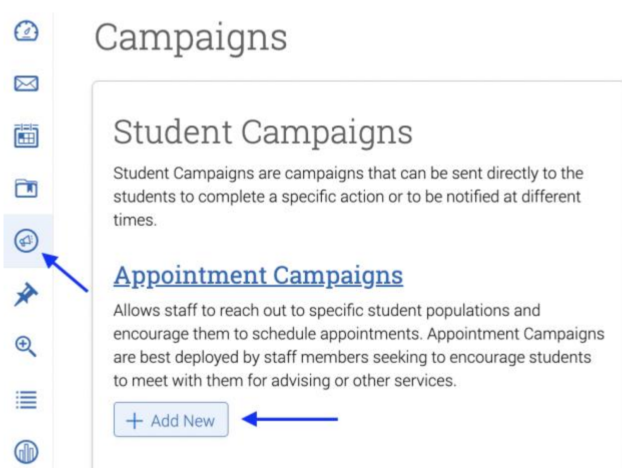
Navigate - Advising Early Outreach Appointment Campaigns

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.



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*



3. Define the appointment campaign parameters
   - Under *Campaign Configurations*, enter:

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

   - Under *Appointment Configurations*, enter:

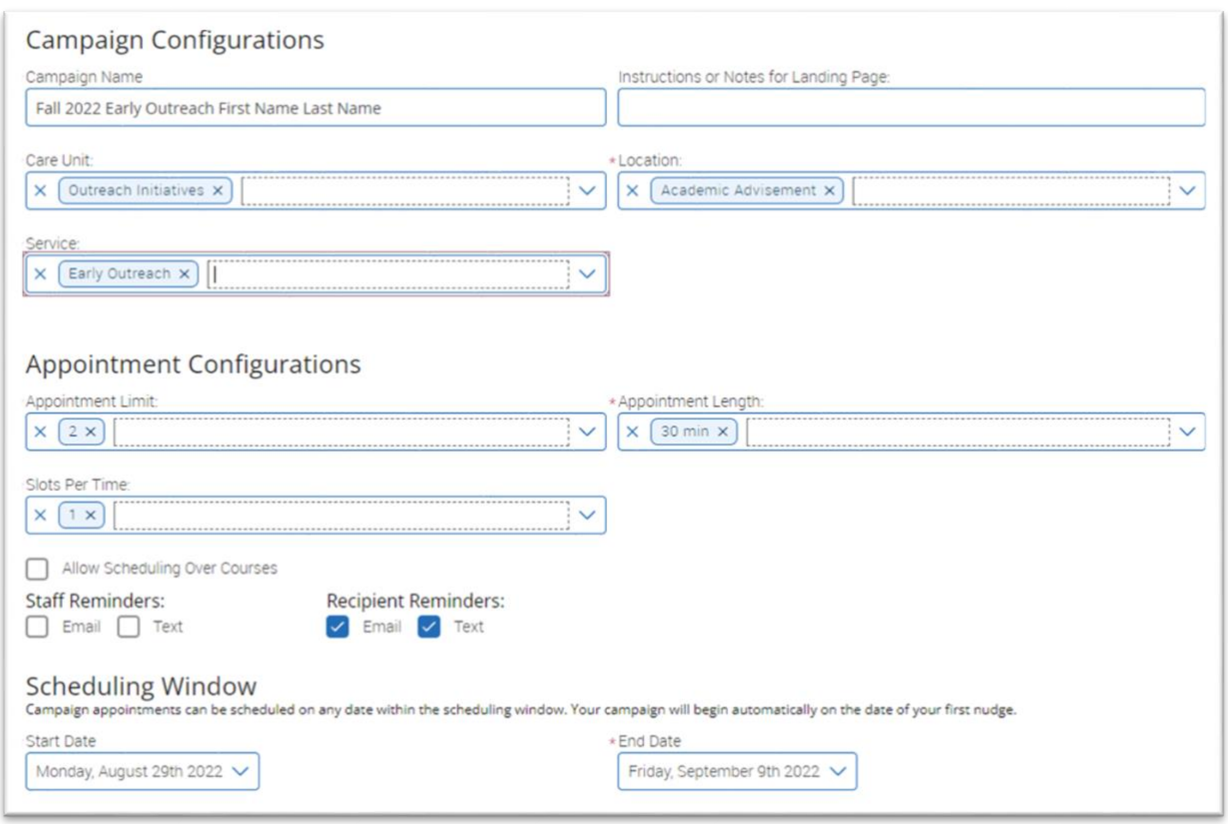
Appointment Limit	*2*
Appointment Length	*30 minutes*
Slots Per Time	*1*

   - Under *Scheduling Window*, enter:

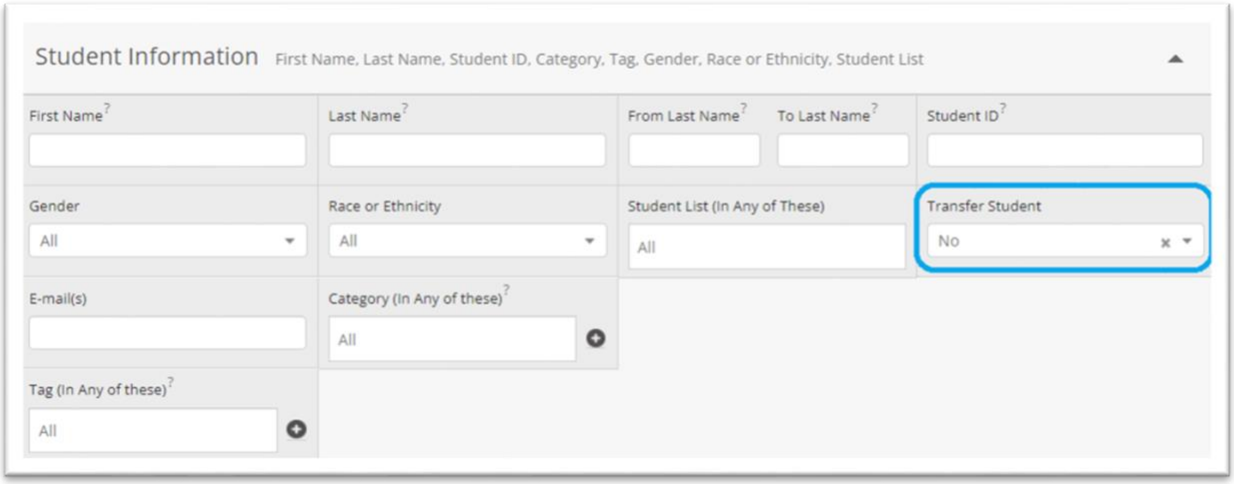
Start Date	*Enter start date*
End Date	*Enter end date*

   - Click *Continue*

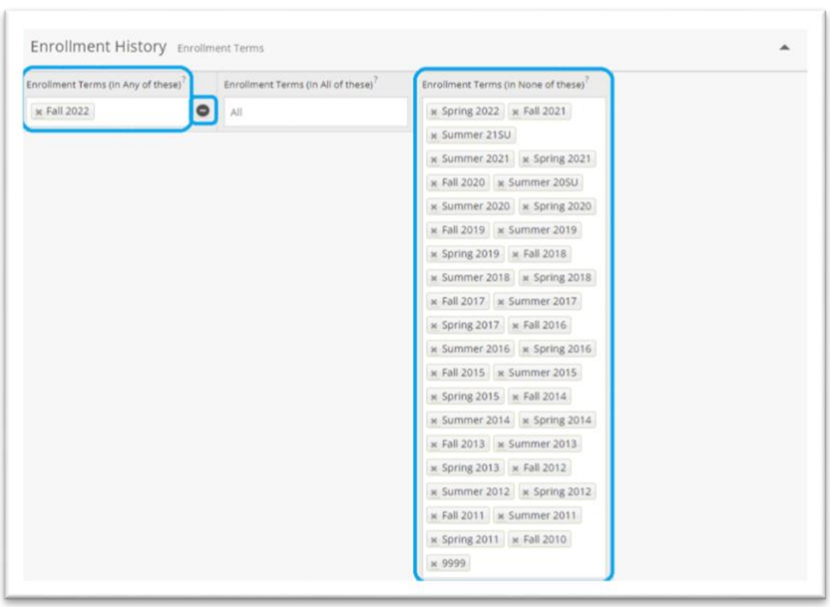
Appointment Campaign Parameters

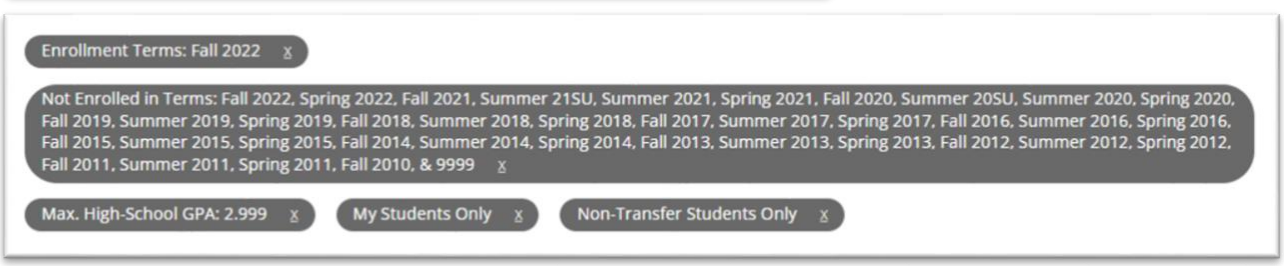


4. Select recipients for (add students to) the campaign
   - On the *Add Recipients to Campaign* page, input filters:
   - Open the *Student Information* drawer and under *Transfer Student*, select *No* from the drop-down menu. NOTE: If your unit *only* works with transfer students, select *Yes*.

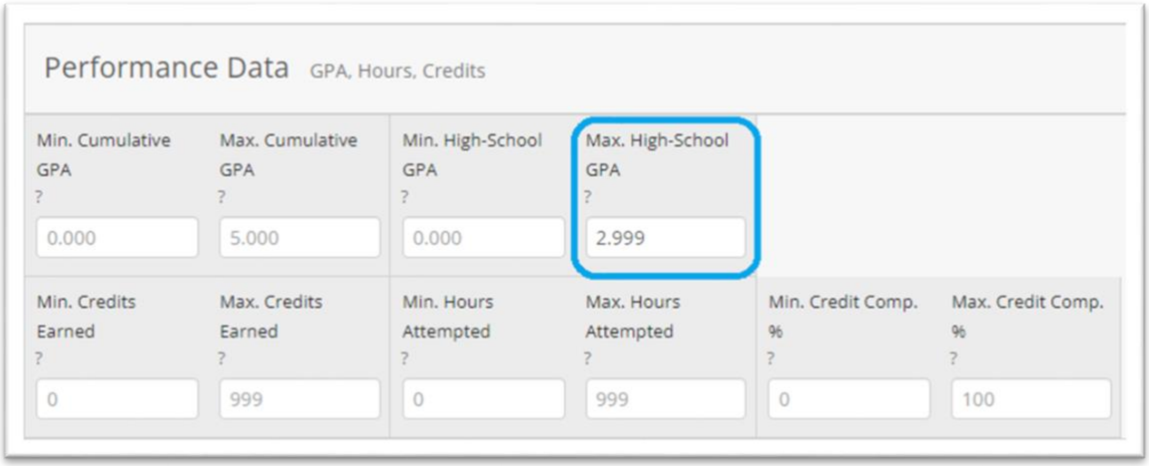


   - Open the *Enrollment History* drawer
   - Under *Enrollment Terms (In Any of These)* select the correct *Fall term*
   - Click the expansion button . Under *Enrollment Terms (In None of These)* select every term <u>except</u> for *Summer 2023* and *Fall 2023*. HINT: Click inside the *Enrollment Terms (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*

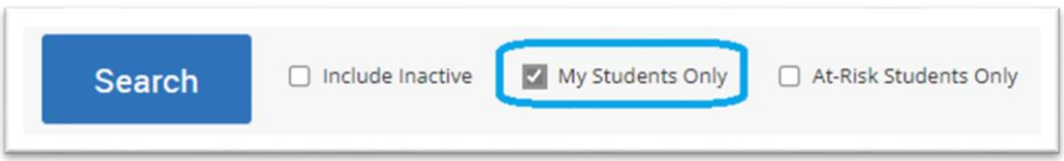




- Open the *Performance Data* drawer and under *Max. High-School GPA* enter *2.999*



- At the bottom of the filters click the checkbox for *My Students Only*.
- Click *Search*.



- 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*.