

Appointment Campaigns

1. To begin, click **Appointment Campaigns** in the Actions of Quick Links menu.
2. You will then set the criteria for your Appointment Campaign. All fields must be filled out.
 - a) **Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student.
 - b) **Care Unit:** Select the Care Unit the Appointment Campaign will be associated with.
 - c) **Location:** Select the location of where the appointment(s) will be held.
 - d) **Service:** Select the Student Service that will be associated with the campaign.
 - e) **Course or Reason:** Add the reason or associated course for the campaign here. This will only appear if the service is tied to a course.
 - f) **Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign.
 - g) **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.
 - h) **Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at a 5-minute lengths and will be determined by your configuration.
 - i) **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.
 - j) **Allow Scheduling to Override Course Times:** Students will be able to schedule appointments over their class times, and the other classes of the faculty/staff member they are scheduling with, within the campaign date range.
3. After entering details on the define Campaign page, click **Continue**. Your next step is adding students. If you created this campaign directly from a Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.
4. You have ways to search for and select your students.
 - a) **Invite All My Assigned Students:** Adds all students assigned to you to the campaign.
 - b) **Advanced Search:** Use Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu. Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.
5. You will need to select yourself as staff for the campaign. You may also have the option to select additional staff to make them available for appointments based on the campaign.

The screenshot shows the 'Define Campaign' page in the Navigate software. On the left is a vertical toolbar with icons for calendar, folder, chart, magnifying glass, mouse cursor, heart rate, user, document, and gear. The main area has a title 'Define Campaign' and a subtitle: '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.' It contains several input fields: 'Campaign Name' (empty), 'Begin Date' (05/20/2020), 'End Date' (06/03/2020), 'Care Unit' (dropdown), 'Appointment Limit' (1), 'Location' (dropdown), 'Appointment Length' (5 min), 'Service' (dropdown), 'Slots Per Time' (1), and a checkbox for 'Allow scheduling over courses' which is unchecked. At the bottom are 'Cancel', 'Save and Exit', and a large blue 'Continue' button.

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.

Campaign Name:

Begin Date: 05/20/2020 End Date: 06/03/2020

Care Unit:

Appointment Limit: 1

Location:

Appointment Length: 5 min

Service:

Slots Per Time: 1

Allow scheduling over courses

Cancel Save and Exit Continue

NOTE: Staff will need to have availability defined before they can be added to an appointment campaign. **If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.**

6. Your next step is to compose the message that you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use merge tags. DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.
 - a) Fields used in the message composition are:
Email Subject: The topic will be the subject of the email going to the student.
Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.
After you have finished composing your message, it's time to send out your campaign!
7. Review your campaign details, invitees, and advisors on this page. Click **Send** when you are ready to email the invites to the selected students.