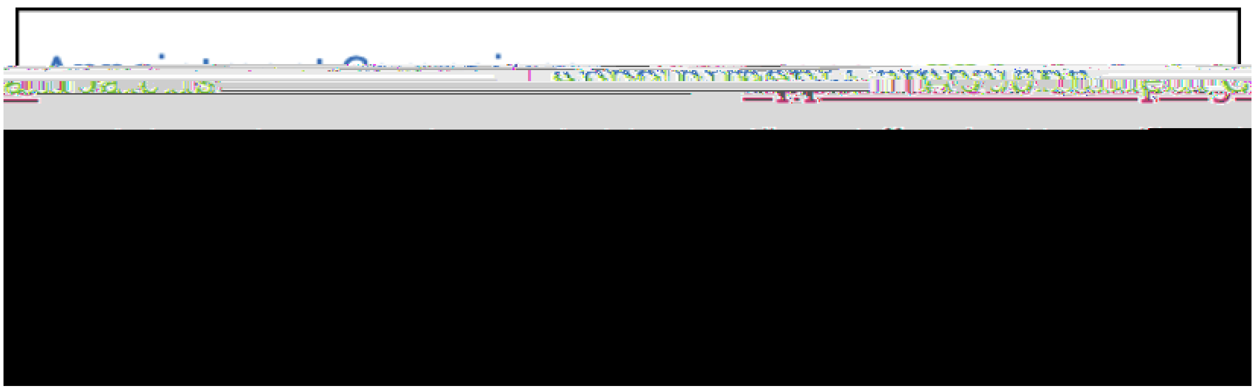
Appointment Campaigns are a critical part of Navigate workflow. Strategic questions should be asked when creating appointment campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

To begin, open the page and select from the Appointment Campaigns section.



Define the Campaign

The page opens. Now you set the criteria for the Appointment Campaign. The fields that must be filled out are listed and defined below.

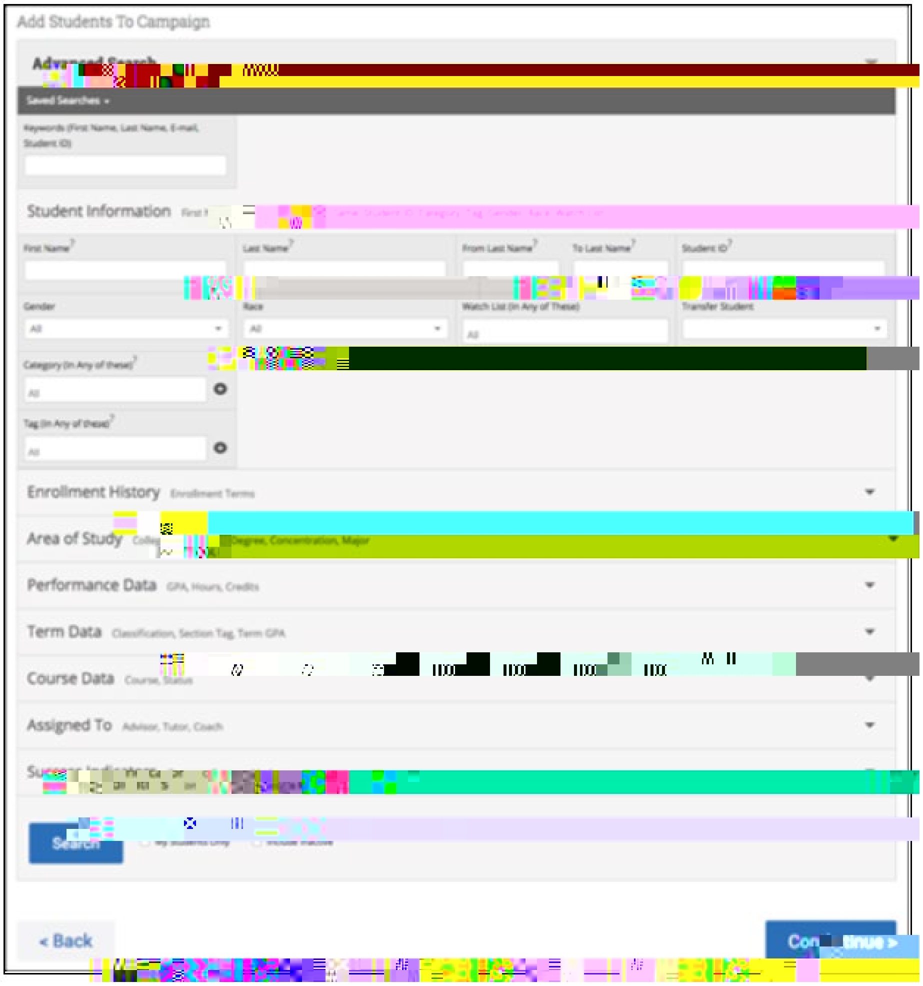
> If other staff are going to be included on this campaign, the reason/location/date range align with Campaign Availability for the advisors that are going to be included in the campaign if you want them to be available.

This field shows instructions for the campaign the student sees when they open the Appointment Campaign notification. Make this text short and descriptive.

The Care Unit the Appointment Campaign is associated with.

The location where the appointments will be held.

The Student Service associated with the campaign.



You have several ways to search for and select your students. You can add all students assigned to you to a campaign using the *Invite All My Assigned Students* option. The other option is an Advanced Search. Use Advanced Search filters to find and select students.

After starting the search, you are presented with a list of students. Select the students you wish to add and then choose

from the actions menu.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

Once finished, click to move to the next page. You are asked to review the students in the campaign. If these are correct, click .

Add Staff to Campaign

Next, you need to choose Organizers for the campaign. You must select yourself. You can also select additional staff to make them available for appointments based on your role permissions.

Staff must 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-

Add Welcome Message, Nudges and Success Message

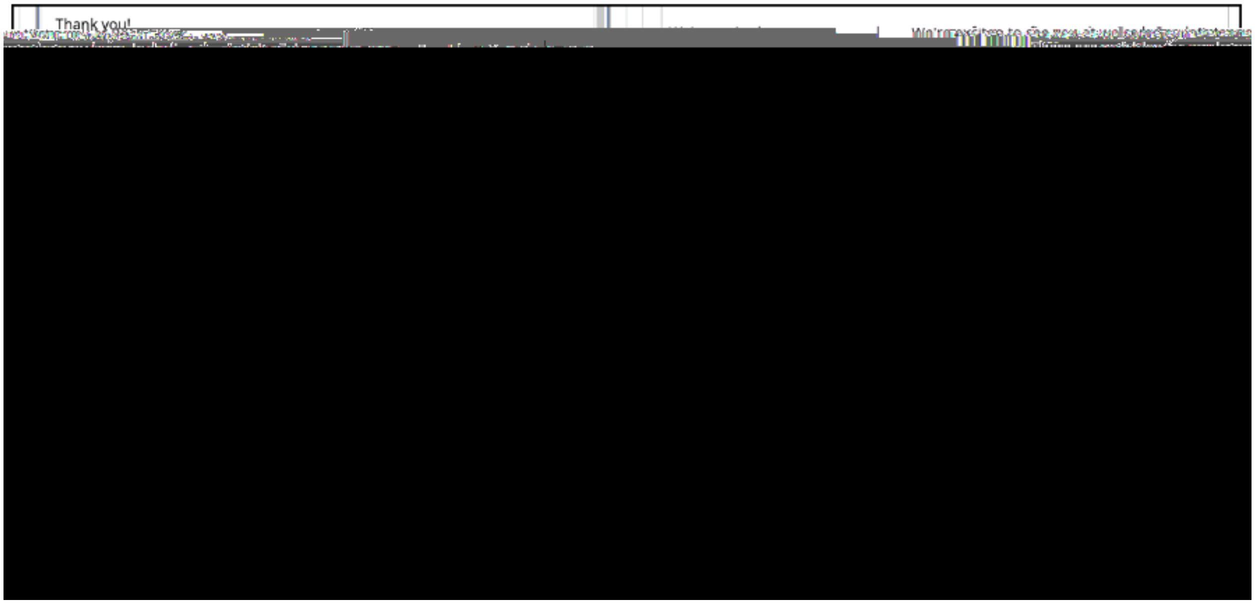
Welcome messages are the first nudge sent to students.

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email sent to your campaign list. You can customize the message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Appointment Campaign.

Nudge emails are sent the morning of the date chosen when you create the nudge. Welcome messages send immediately after starting the appointment campaign. As with any email, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Appointment Campaign. The Nudges page opens.

Click to create your first nudge. When composing the Welcome Message nudge, the compose message page shows instead of



You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.

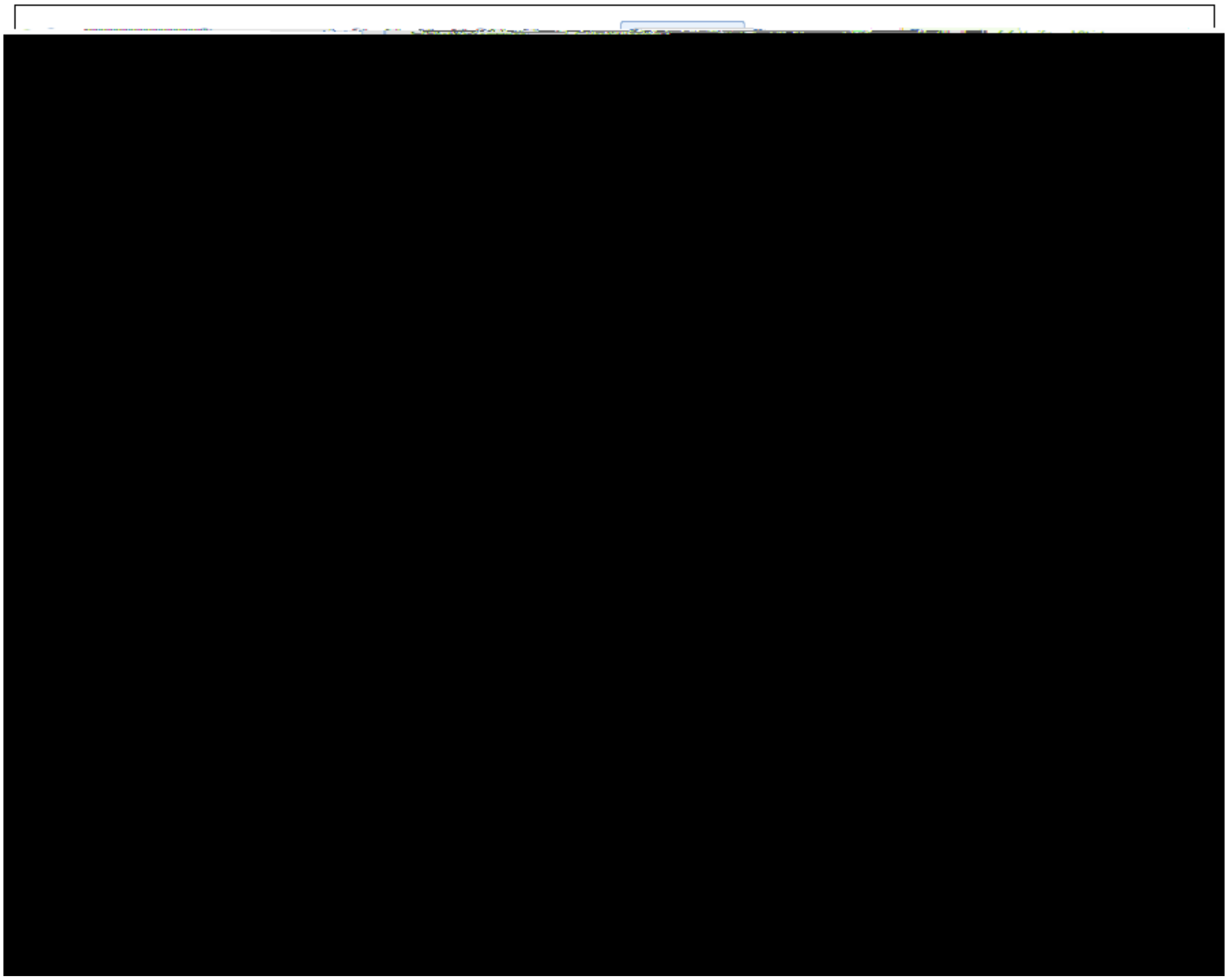
Do not remove the schedule link from the email body.

Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

After creating a nudge, click

Review your campaign details, nudges, invitees, and advisors on this page.



Click when you are ready to email the invites to the selected students.