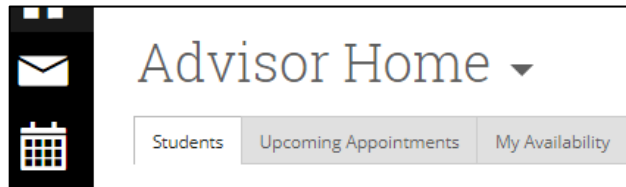


Appointment Campaigns

Appointment Campaigns enable the advisor to request that specific students select a specific date and time in which to schedule an appointment instead of the advisor creating appointments for each and every student. This feature is commonly used when an advisor must meet with all of their students at least once per term.



Before you create an Appointment Campaign, it is important to set your available time to meet with students specific to this Campaign.

To add a new block of time you are available:

The image shows the 'ADD AVAILABILITY' form. It has a title bar with 'ADD AVAILABILITY' and a close button. The main content area starts with 'I'm available on' followed by a row of buttons for days of the week: Mon, Tue, Wed, Thu, Fri, Sat, Sun. Below this is a time range '8:00a - 5:00p' with a slider. Then it says 'for' followed by buttons for 'Drop-ins', 'Appointments', and 'Campaigns'. There are two dropdown menus for 'Duration' and 'Location'. Below the 'Location' dropdown is a text field with the placeholder 'Select Location to select Student Services'. At the bottom right are 'Cancel' and 'Save' buttons.

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select Campaigns

Step 4: Choose the location where you will be available.

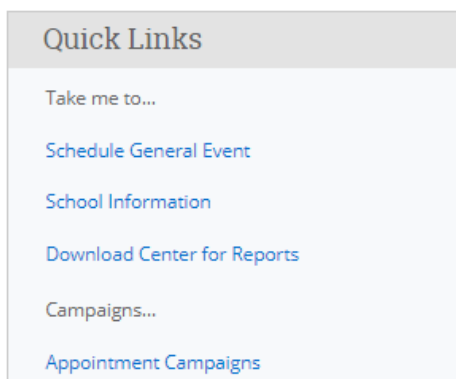
Step 5: Lastly, select which student services you can provide to students during this availability. Note: Leaving this student services field empty means you will appear to be available for all advising student services.

Step 6: Click the Save button.

Repeat this process until all combinations of the days and times you are available have been defined.

Create a New Appointment Campaign
There are two ways to do this:

1. Under Quick Links, click on Appointment Campaign



OR

2. Click on the Campaign icon Campaign which looks like the graph.



Step 1: Define the Campaign - SSC Appointment Campaigns enable the advisor to request that specific students select a specific date and time in which to schedule an appointment instead of the advisor creating appointments for each and every student. This feature is commonly used when an advisor must meet with all of their students at least once per term. To begin, click on Appointment Campaigns under Options > Create a New Campaign and follow the setup steps.

Enter the Name of Campaign-The name of the campaign only appears to the advisor. This needs to be a name that makes sense to you.

Email Subject- The topic will be the subject of the email going to the student.

Special Instructions to Student - This will be your message to the student.

Choose the advisors for the Appointment Campaign - will let you select multiple advisors if desired. For instance, if you want a student to meet with you or any other advisor, select them here.

Choose the Start and End Date- This will be the date range for which you want the students to make their appointments.

Length of the Appointment- This is where you define exactly how long the appointment will be. Durations include 10, 15, 30, 45 and 60 minute intervals.

Appointment Limit- This will determine how many appointments you wish for the student to schedule.

Location- Select the location of where the appointment(s) will be held. (This is not the physical address, but a general term encompassing the role and work of the advising taking place.)

Step 2: Select Recipients of Campaign- Once the Campaign Details are created and the selections are defined, the next step is adding recipients. Click Continue to select Students to Invite. Here you can use the tabs to search for recipients in several ways.

You have several ways to search for and select your students.

Invite All My Assigned Students: Provides users with students that are assigned to me.

Advanced Search: Provides users with advanced search filters to find, and select, students. When you select students from a tab, click Continue to move to the next page. Next you can review what the email message will say and look like.

Step 3: Add Advisors to Campaign- You will need to select yourself as the advisor for the campaign. You may also have the option to select additional advisors to make them available for appointments based on the campaign. *Advisors will need to have availability defined before they can be added to an appointment campaign.*

Note: If the other advisor(s) you wish to include are not listed, you can check the box to Include Appointment Availabilities to show available advisors. This section will default to search for campaign availabilities first.

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Joy McLaughlin	Appointment Availability: Mon-Fri 8:15am-5:30pm
<input type="checkbox"/>	Mark Jefferies	Appointment Availability: Mon, Wed, Fri 8:00am-1:00pm (Summer 2020)
<input type="checkbox"/>	Harry Kent	Appointment Availability: Tue, Thu 8:00am-5:00pm (Summer 2020)

Step 4: Compose your Message- Compose the message that you will send to students in the invitation to schedule a tutoring appointment through the campaign.

Email

Subject: The topic will be the subject of the email going to the student.

Instructions or

Notes: This will be your message to the student.

Note: This screen will also give you a preview of what the

Time to register for Fall classes!

Compose Your Message

Time to register for Fall classes!

Please schedule an appointment with me to receive your PIN number to register for the upcoming Fall semester. You will not be able to register for class

Hello [student first name],

You have been requested, by your advisor, to schedule an appointment with them. By clicking the link provided, you can simply select a time that works with your schedule, save it, and an appointment will be created for you.

Please schedule an appointment with me to receive your PIN number to register for the upcoming Fall semester. You will not be able to register for classes until you have met with an advisor.

Schedule an Appointment (campaign link)

You can also copy and paste this address into your web browser.
[campaign link]

Thank you for using GradesFirst.com!
support@gradesfirst.com

invite will look like.

Step 5: Confirm and Send- Please make sure that you review your selected options before you start the campaign.

The screenshot shows the 'Confirm & Send' step of an appointment campaign. At the top, there are navigation tabs: 'Define Campaign', 'Review Students', 'Add Staff', 'Compose Message', and 'Confirm & Send'. The main heading is 'Appointments'. Below it, the 'Confirm & Send' section contains a summary of the campaign details:





Campaign Type: Advising	Start Date: 09/28/2015	End Date: 10/12/2015
Reason: Advising	Appt Length: 60 minutes	Slots Per Time: 1
Appt Location: Academic Success Center	Appt Limit: 1	Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS
Subject: Please come in for an Advising appointment		
Email Preview: View	Invitees: View All (3)	Included Advisers: View All (1)

At the bottom, there are three buttons: '< Back', 'Save and Exit', and 'Send'.

Review the campaign details one more time and then click Send.

Monitoring the Campaign

After a Campaign has been sent, you will see the Campaign progress in terms of Appointments Made, Advising Reports created as a result of an advising appointment, and Attendance Rate.

NAME	STATS
 Students under 2.85 ADVISING [Expired] 09/11/2017 - 09/19/2017	 Appts. Made (16%)  Reports Created (33%)  Attend. Rate (8%)

To open the Campaign, click on the name. There, you will be able to quickly see who has made an appointment, who hasn't made an appointment, and advising reports created from an appointment. If a student makes an appointment outside of the campaign link, they will show under "Eligible Appointments." If the appointment is in fact associated with the campaign (rather than for some other reason they met with you), select the radio button next to the student's name, then under "Actions" in the dark grey bar, select "Associate Appointments." This will be reflected in the Campaign statistics.

Appointment Campaigns > Students under 2.85

[Expired] 09/11/2017 - 09/19/2017

Appointments Made

Appointments Not Yet Made

Reports Created

Eligible Appointments

Actions ▾

☐

INDEX

APPT DATE

APPT TIME

STUDENT

STUDENT ATTENDED?

AT-RISK?

APPT CREATED ON