Registration Advising Campaigns

Campaign Objectives:
➢ Proactively outreach to students who need to meet with an academic advisor prior to registration to plan for the upcoming semester.
➢ Track and monitor student appointment scheduling and attendance.
➢ Dedicate time specifically to registration advising.

CAMPAIGN SET-UP

Step 1: Determine the group of students you will reach out to for registration advising.
Recommendation: Think broadly, such as 1st and 2nd year students, all students (if logistically feasible), exploratory track students, etc.

Step 2: Determine which advisors will participate in the appointment campaign.
• Option 1: Run individual advisor based campaigns based on smaller lists of students.
• Option 2: Run a department/major wide campaign with multiple advisors based on a broader/larger list of students.

Step 3: Add campaign specific availability (and update other availability if needed)
• Option 1: Add your own individual campaign availability.
• Option 2: Ensure that all participating advisors in the departmental/major campaign add campaign availability for the reason, location and date range aligned with the appointment campaign definition.

Step 4: Create your campaign
To create your campaign, you can:
• Start with an existing watch list or saved search:
  o Go to the Lists and Searches menu
  o Select the list/search you would like to use
  o Select the students from the list you would like to reach out to (Note: All only captures the students on the first page, make sure to select the option that will appear to include all students on the list)
  o Select Appointment Campaign from the drop-down Actions menu.
• Create a new campaign and generate a student list through the campaign:
  o Go to Campaigns from your left side menu bar
  o From the right-side Actions menu, select Appointment Campaign
Step 5: Define your Campaign

- Campaign Name: Give your campaign a name that identifies who, what, why and semester
- Campaign Type: Advising Appointment
- Slots Per Time: You can meet 1:1 with students or have group based appointments.
- Course or Reason: Aligned with the service listed in your availability. Be sure to select the service that is pre-fixed with your major/department. (Ex. NURS – Registration Advising, Psych – General Advising, etc.)
- Begin / End Date: These dates identify when students should be meeting with an academic advisor for the campaign reason. These dates should also align with your campaign availability range.
- Appointment Length: Select the length for the appointment.
- Appointment Limit: For this appointment/campaign, how many appointments are students allowed to schedule with you? For example, does each student only need to meet with you once for registration advising? If yes, then the appointment limit will be one.
- Location: Aligned with your availability and services, the location is the same location you add when creating availability. Based on the service you selected, you should only have one location option.

Registration Advising (1st/2nd Year Nursing Students)

Step 6: Review Students

- If you...
  - started with an existing list, it will appear here.
  - started by creating a new campaign, use the advance search filters to create your student list.
- Once you have our list of students, review the student list. During this step, students can also be removed from the list.

Step 7: Add Staff

- Select the participating advisors who will be available to meet with students for this campaign.
  - NOTE: Only advisors with campaign availability for the campaign reason (defined in the campaign, Step 5) will appear here.
Step 8: Compose Message

- The merge tags will automatically populate with the student’s first name and the unique appointment link.
- Customize the submit line (if you’d like to). ‘Call to Action’ type subject lines are recommended – i.e. what do you want the student to do?
- Update the body of the message. *Short and to-the-point emails are recommended.*

Registration Advising (1st/2nd Year Nursing Students)

Compose Your Message

{$(student_first_name). Schedule an Advising Appointment$}

Please schedule your Advising Appointment.

Hello $(student_first_name):

Registration for Spring 2018 is almost here. Let’s meet to discuss your plans.

$(Schedule, link)$

Thank you!

By scrolling down on the page, you can preview the email the student will receive and the scheduling landing page associated with the link in the email to the student.
Step 9: Review

- Review the campaign details.
- Identify the types of reminders (email / text) you would like associated with the campaign appointments. (NOTE: The reminder settings apply to both students and advisors.)

Registration Advising (1st/2nd Year Nursing Students)

Step 10: Send your Campaign 😊
CAMPAIGN – STUDENT FACING EXPERIENCE
After sending your campaign, students will receive the email message you created with a unique link to schedule an appointment. There are 4 possible outcomes.

Outcome Possibility 1: Student Schedules via the Link in Email
Scheduling through this process connects the appointment to the campaign tracking.

Hello Andrew:

TEST - Please schedule a registration advising appointment to discuss

Schedule an Appointment

You can also copy and paste this address into your web browser.
https://umass-amherst.campus-training2.eab.com/a/123456

The link goes directly to the appointment scheduling grid.

Schedule Appointment

Choose A Day

Choose A Time

Comments

Confirmation page

Schedule Appointment Review

Almost Done... Please Review And Confirm Your Appointment Details Below

Appointment Details

Who: Erin Murphy with Kristen Norris
Why: Nurs - Registration Advising
When: Thursday, October 19
11:15am - 11:30am
Where: College of Nursing (Amherst) - Skinner Hall
Additional Details: Test Availability
Your Comments:
[Go Back and Edit This Appointment]

Confirm Appointment
Outcome Possibility 2: Student Logs in to SSC Campus and Schedules through Campaign

*Scheduling through this process connects the appointment to the campaign tracking.*

When students are a part of a campaign, a large yellow banner requesting an appointment will appear on their student home page with the unique ‘schedule the appointment’ link (same as the email). Students can click here to schedule the appointment. The student view is aligned with **Outcome Possibility 1** (above) for the scheduling process.

Outcome Possibility 3: Student Schedules via ‘Make an Advising Appointment’

*Scheduling through this process DOES NOT connect the appointment to the campaign tracking.* See information on Campaign Management for how to connect this appointment to the campaign.

If you have availability outside of the campaign type (thus, appointments) for the same service as the campaign (ex. NURS – Registration Advising), students can also schedule appointments through the ‘Make an Advising Appointment’ button on their home screen (assuming they overlook the yellow action banner).

The student will walk through the regular student-facing scheduling steps to schedule an appointment with you.

Outcome Possibility 4: Student does not schedule an appointment.

Through the campaign dashboard, you will be able to identify students who have not scheduled/attended appointments for the campaign and send reminder messages. See information on Campaign Management for more information related to this topic.
CAMPAIGN – MANAGEMENT

To get to the campaign ‘dashboard’, click on the campaigns icon from the right-side menu bar and select the campaign you would like to view.

There are a few tab options:

- **Appointment Made:**
  - Students listed here scheduled an appointment for the campaign service through the campaign email or yellow action bar on their home page.
  - There is also a column indicated whether or not the student attended the appointment.
  - **NOTE:** If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ will not be visible here.

- **Appointments Not Yet Made:**
  - Identifies students who have not scheduled an appointment through the campaign yet.
  - **NOTE:** If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ will continue to remain on this list until a report is filed and connected to the campaign.

- **Reports Created**
  - Identifies students for whom you’ve met with and submitted a report on advising.

- **Eligible Appointments**
  - If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ may appear here.
  - If there are appointments here, you can ‘associate’ them with the campaign.

At the conclusion of each advising appointment, you will create a report on advising. If the student scheduled through the campaign (email or yellow action banner), they will already be associated with the campaign. However, if they scheduled through another method or dropped in, you will need to associate them with the campaign in the report.

In the Advisor Report, a field for ‘appointment campaigns‘ will be an option for students who are on an appointment campaign list.

Click the drop-down menu and select the corresponding campaign name. (NOTE: Only the campaigns associated with the student should appear).

By selecting the campaign and saving the report, the student will now be ‘associated’ with the campaign and display on the **Appointments Made** tab (thus removed from the not yet made tab).
Question: If a student schedules an appointment with me outside of the campaign link, but the appointment is supposed to be part of the campaign, how can I associate the appointment with the campaign so that the campaign information knows that the student scheduled/attended?

Answer: There are two options for associating an appointment with a campaign.

- Option 1: Through the Report of Advising – If the student has a campaign associated with them, then the Advising Summary Report will have a campaign drop down menu where you can select that the appointment was part of the campaign.
- Option 2: The ‘Eligible Appointments’ Tab – Through the campaign, there is an eligible appointments tab. This will display any appointment scheduled with you for the same reason/service, location and in the timeframe of the campaign. If the student is a part of the campaign, you can use the ‘actions’ drop-down menu to add the appointment to part of the campaign.

Question: If the campaign appointment limit is one, and the student schedules, then cancels the appointment, is their one appointment taken?

Answer:

- If the student cancels the appointment themselves, then they can reschedule for themselves.
- If anyone other than the student cancels the appointment, then the student has lost their spot and will need work with the advisor to reschedule.
- If the student no-shows the appointment, then they have lost their spot and will need to reschedule.

Question: Do I need to update my current appointment availability when I run campaigns?

Answer: It’s up to you. If you only want to be available for appointments through the campaign, then you will need to change your existing appointment type availability to end the day before the campaign starts (and then update it after the campaign ends or create a new availability block for after the campaign). Alternatively, you can have overlapping availability types (campaign and appointments that will not double book) allowing any student (campaign or not) to access any of your availability.