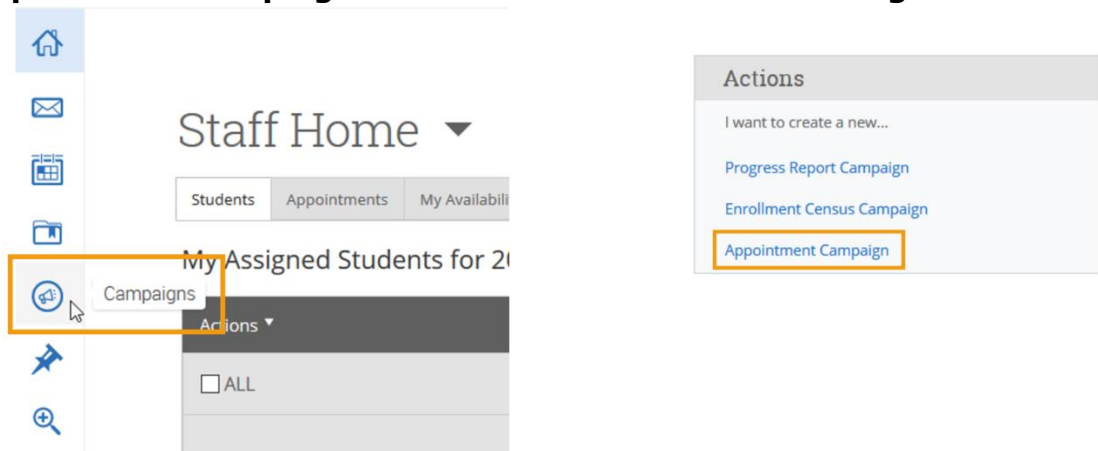


# Create an Advising Campaign

The **appointment campaign functionality** is the backbone of targeted outreach in Run4Success. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication. *Appointment campaign functionality in Run4Success automatically tracks and reports on which students in your targeted population have received communication, scheduled appointments, and completed those appointments*, allowing for effective outreach and efficient follow-up.

Questions? Contact Kim Raynor or Anne Van Der Karr at [student.success@newark.rutgers.edu](mailto:student.success@newark.rutgers.edu).

1. Use the left-hand side bar to navigate to the Campaigns page, and then select 'Appointment Campaign' from the Actions table on the right side of the screen



2. You will be prompted to define the campaign

Fill in each field to name and set the parameters and goals of your campaign

## 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.

A screenshot of the 'Define Campaign' form. The form contains several fields: 'Campaign Name' (with an annotation 'WHEN, WHY, WHO'), 'Begin Date' (01/20/2021), 'End Date' (02/03/2021), 'Care Unit' (dropdown), 'Appointment Limit' (1), 'Location' (dropdown), 'Appointment Length' (5 min), 'Service' (dropdown), and 'Slots Per Time' (1). There is also a checkbox for 'Allow scheduling over courses'. Annotations with orange arrows explain the fields: 'How many appointments should the student schedule?' points to 'Appointment Limit'; 'How long is each appointment?' points to 'Appointment Length'; 'How many students can sign up for a time slot at one time?' points to 'Slots Per Time'; and 'Students will be able to schedule over their own classes, within the campaign date range' points to the 'Allow scheduling over courses' checkbox.

### 3. Continue to Add Students to Campaign page and use the Advanced Search to identify the students you want to receive the campaign outreach

Advanced Search ▼

Saved Searches ▼

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Student List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Status

Assigned To

Academic Plan Planned Terms, Plan Warnings

Success Indicators Predicted Support Level, Success Markers

*You can choose to limit the search to only students that are assigned to you*

Search

My Students Only
  Include Inactive

Step 1: Select your filtering criteria

Step 2: Click 'Search'

💡

You have several options for choosing the right students to include in your campaign once you have selected the **enrollment status** and **term**:

- **Student Information** – Filter students by name, gender, race, or a pre-existing watch list
- **Area of Study** – Filter students by college, concentration, degree, or major
- **Performance Data** – Filter by min. or max. credits earned
- **Semester Data** – Filter by semester-specific data, such as term GPA or professor and section assignment
- **Course Data** – Filter by course
- **Assigned To** – Filter by advisor, tutor, coach, or team member assignment

**Example:** Craft your targeted student population by filtering for students majoring in Nursing who have completed between 30 and 45 credits

Area of Study College/School, Degree, Concentration, Major

College/School (In Any of These)? <input style="width: 95%;" type="text" value="All"/>	Concentration (In Any of These)? <input style="width: 95%;" type="text" value="All"/>
Major (In Any of these)? <input style="width: 95%;" type="text" value="Pre-Nursing"/>	

Performance Data Hours, Credits

Min. Credits Earned? <input style="width: 95%;" type="text" value="30"/>	Max. Credits Earned? <input style="width: 95%;" type="text" value="45"/>	Min. Hours Attempted? <input style="width: 95%;" type="text" value="0"/>	Max. Hours Attempted? <input style="width: 95%;" type="text" value="999"/>
-----------------------------------------------------------------------------	-----------------------------------------------------------------------------	-----------------------------------------------------------------------------	-------------------------------------------------------------------------------

## 4. Review the invite list and add students to your campaign

Advanced Search

Saved Searches ▾

Enrolled in Spring Semester 2017 Standard User Type: Majoring In: Pre-Nursing x Min. Credits Earned 30 x Max. Credits Earned 45 x ← Your applied filters here

Search Modify Search

**Check this box to import all students returned into your campaign roster**

Actions ▾

<input type="checkbox"/> ALL		STUDENT NAME	ID
<input type="checkbox"/>	1	Abdelwahed, Cecil	596437606
<input type="checkbox"/>	2	Abramovitz, Radha	428362883
<input type="checkbox"/>	3	Accardi, Gwen	921725358
<input type="checkbox"/>	4	Ackley, Lillian	525081749
<input type="checkbox"/>	5	Argujlo, Ahava	525081749
<input type="checkbox"/>	6	Baczewski, Claire	525081749
<input type="checkbox"/>	7	Benike, Hide	525081749
<input type="checkbox"/>	8	Berentson, Varana	525081749

Review Students In Campaign

Actions ▾

Remove Selected Users

<input type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	Aardema, Klarika
<input checked="" type="checkbox"/>	Alberro, Athena
<input checked="" type="checkbox"/>	Archut, Lynette
<input checked="" type="checkbox"/>	Avery, Max
<input type="checkbox"/>	Bachtel, Nasira
<input type="checkbox"/>	Bamberg, Livvy

**You can also use the Actions menu to remove selected students if you would like to exclude them from the campaign**

## 5. Add Advisors to your campaign

You need to choose which Advisors are available for appointments. You must select yourself. You can also select additional staff.

Add Advisors To Campaign

Include Appointment Availabilities

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	LaToya White	Mon-Fri 8:00am-5:00pm (Fall Semester 2016)
<input type="checkbox"/>	Gina Schorr	Mon-Fri 8:00am-5:00pm (Fall Semester 2016) Mon-Fri 12:45pm-5:00pm
<input type="checkbox"/>	Emily Sentz	Tue, Thu 3:00pm-5:00pm
<input type="checkbox"/>	Griha Singla	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Maanie Hamzaee	Mon-Fri 8:00am-5:00pm

**If Advisors haven't set up Availability for Campaigns, you can select Include Appointment Availabilities**

Students can schedule with any Advisor in the campaign. Appointment campaigns override any restriction that students can only meet with their assigned Advisor.



## 6. Compose the message you want students to receive

You have the ability to customize both the subject line and the messaging of the email you will send to students. The invitation to schedule an appointment through the campaign appears in a preview panel below the message.

Compose Your Message

Use Merge Tags like this to include each student's name in their message

{student\_first\_name}, Schedule an Advising Appointment

**B I** | [Icons] | Format

Please schedule your advising appointment.

Hello {student\_first\_name}:

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{schedule\_link}

Thank you!

A link to schedule the appointment is directly embedded in the email the student receives

**Warning.** Do not remove the schedule link from the email body.

## 7. Confirm and Send

Review your campaign details, invitees, and advisors on this page. Select how your organizers and attendees get reminders about appointments.

### S21 Planning Check

Confirm & Send

<b>Care Unit:</b> Academic Services	<b>Start Date:</b> 12/09/2020	<b>End Date:</b> 01/22/2021
<b>Location:</b> 2420 M Street	<b>Appt Length:</b> 15 minutes	<b>Slots Per Time:</b> 1
<b>Service:</b> Academic Advising	<b>Appt Limit:</b> 1	<b>Organizer Attendee Reminders:</b> <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS
		<b>Non Organizer Attendee Reminders:</b> <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS

**Subject** {student\_first\_name}, Schedule an Academic Services appointment

**Email Preview** [View](#)      **Invitees:** [View All \(1000\)](#)      **Included organizers** [View All \(2\)](#)

[< Back](#)      [Save and Exit](#)      [Send](#)

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



Once you have sent out the campaign, you will be able to **track appointments made as a result of the campaign** at any time by revisiting the Campaigns page and selecting the 'Appointment Campaigns' tab.