NAVIGATE

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Common Appointment Campaign Questions

Help Center Manager
3 days ago · Updated

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Intro: Appointment Campaigns are an important part of the Navigate platform. Below are some common questions we've received about this tool.

Appointment Campaign Functionality Questions

Are Appointment Campaigns located within a Care Unit? Does that mean they are Care Unit-specific?

Yes to both.

How hard is appointment scheduling for students for Appointment Campaigns?

It's easy! The student is provided a link to schedule. They are able to select who they will meet with (based on who is offering advising within the campaign) and the range of dates and times that person is available. They are also able to include a personal note back to the advisor and can opt in for email reminders at the conclusion of scheduling.

What counts as an Eligible Appointment?

In order to be considered an Eligible Appointment and appear on the Eligible Appointments tab, the student must be part of the campaign and their appointment must be for the same reason and location the campaign was created with, and with a staff members associated with the campaign.

How can I move students from Appointments Not Yet Made List to Appointments Made? My student scheduled prior to the Campaign start date.

You should be able to associate that student's appointment to your campaign using the **Eligible Appointments** tab on the **Appointment Campaign** page.

The **Eligible Appointments** tab lets you associate appointments that should be counted toward the Campaign, but were scheduled without using the Campaign link. To do this, navigate to the specific Appointment Campaign, and open the **Eligible Appointments** tab. Select the appointment you want to associate with the Campaign. Choose **Associate Appointments** from the **Actions** menu. The appointment is then associated with the campaign.

Note that appointments are only eligible if they have the exact same Location and Service as the Appointment Campaign. The student must also be on the campaign list.

What happens when a student cancels a campaign appointment?

When a student cancels a campaign appointment in advance, the Navigate platform moves this student from the **Appointments Made tab** to the **Appointments Not Yet Made tab.** The platform also removes the canceled appointment from the advisor's calendar so it's available to another campaign student.

What happens if a student schedules an appointment in response to my campaign communication by a means other than the appointment link (e.g. via phone, individual email, or walk-in)?

If a student schedules an appointment outside of their custom campaign link, this appointment is not tracked as a campaign appointment by the appointment campaign functionality in Navigate. It MAY appear on the **Eligible Appointments tab**. An appointment made like this appears on the **Eligible Appointments tab** if the appointment contains the same location, service, advisors, and students selected when creating the campaign.

How can advisors add or remove students to a campaign? For example, if new students are added to an advisor's list due to major changes or removed from a list due to graduation, what is the easiest way to update a campaign?

When you add students to a campaign that has already been sent, you should see an option to **send to all** or **only send to newly added recipients** before saving.

How does the campaign functionality track students who have made only one appointment in a campaign that allows for two per student?

In a campaign that allows for multiple appointments per student, a column appears on the Appointment Campaign dashboard on the **Appointments Not Yet Made tab** that shows how many appointments a student has made and how many more they have left to schedule.

How customizable can you make Campaign Appointment lengths?

We have selected the appointment lengths that are the most popular with our partners. We have no plans to expand these options to e.g., 75 minutes.

When do Appointment Campaigns expire?

The expiration time is 11:59 PM of the specified date/12:00 AM the next day in the institution's time zone. This means that if the expiration date specified in Navigate is 8/24/2019 then Appointment campaign expires on 8/25/2019 at 12:00 AM.

Do any Location restrictions apply for Appointment Campaigns?

Appointment Campaigns override ALL settings at the location level **EXCEPT** the *Number of Hours Ahead of Time Students are Allowed to Schedule an Appointment* setting.

Is it possible to use course-based tutoring as the service for more than one course?

No. Each appointment can only have one course associated with it.

Can I forward a campaign email to a student?

Appointment Campaign links are individual to each student, so you cannot forward them.

Troubleshooting Appointment Campaigns

How do you deal with no-show students in an appointment campaign?

Mark that student as no-show as you would with any other type of appointment, by unclicking the **This person attended** checkbox in the Appointment Summary report. These students display as “no-shows” on the Appointment Campaign dashboard. Once marked as no-show, the student can use the original appointment campaign link to schedule again within the campaign.

When a student schedules via an appointment campaign and cancels the appointment, the student is unable to use the campaign link again to schedule an appointment. Is this expected or a bug?

If the STUDENT cancels for themselves, then the link should be active again. If the appointment is canceled for the staff member in the appointment, then the link does not go back to active. This is a known issue.

Is there a maximum number of students I can add to an Appointment Campaign?

No, there is no maximum. Performance may be affected if you add over 10,000 students to one campaign.

If an advisor sends an Appointment Campaign to all their assigned students, will students who have already scheduled an appointment for the same service/location get the campaign email? Or will those appointments instead show under eligible appointments? Or both?

Students will still receive the invitation. The platform doesn’t know to pull them out unless the advisor manually does so. It’s a good practice for advisors to manually remove them if they already have a booked appointment for the purpose of the campaign with specific students. If the advisor doesn’t send a clean list, they risk muddying their response rates and will have a harder time tracking the effectiveness of that particular campaign. However, an appointment will not show under the eligible appointments tab (even if the student has scheduled for the same advisor, service, and location) unless the student is also already in the campaign.

As an administrator, can I get a high-level view of different Appointment Campaigns that are ongoing or complete?

Yes! You can set up user role permissions to see different campaigns that are ongoing or complete, as well as run reports to get more specific information.

If I create an Appointment Campaign for multiple advisors, but have turned on the permission that students can only meet with their assigned advisor, does that prevent a student from scheduling with any of the other advisors?

No, students can schedule with any advisor in the campaign. In other words, if a student is part of a campaign that includes 2 or more staff, they can schedule with any of those staff members, even if under the Locations settings the student is only allowed to schedule that service with their assigned advisor.

Appointment Campaign Tips and Tricks

Can you run a student-facing campaign if your desired goal is not necessarily a student appointment?

Although the appointment campaign functionality is primarily designed to manage outreach for the purpose of live student intervention, Navigate partner institutions have used it to accomplish a diversity of outreach goals. Contact your Strategic Leader for more ideas!

Do you have any examples of good Appointment Campaigns to run?

Yes! We have over 60 examples for both two and four year institutions that are available as an infographic on eab.com or here on the Help Center (4 year version; 2 year version)

Using Navigate Student with Appointment Campaigns

How do Appointment Campaigns work in Navigate Student?

If an Appointment Campaign is made in Navigate, it does not prompt a student to schedule an appointment in Navigate Student. It appears in the Appointment Campaigns section of the student scheduling tool. However, the communication is sent to the student's email with a link.

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Was this article helpful?

✓ Yes ✕ No

6 out of 25 found this helpful

Still have questions after reading this article? Check out our **Community** where you can discuss Navigate functionality and best practices with both others users and EAB staff!

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Comments

43 comments

Sort by

Deborah Wyatt

0

Set a specific campaign for 59 graduation seniors and sent yesterday. Today, receiving notices from students they click on the "schedule appointment" and it's blank - not working. What can I do from here?

Help Center Manager

0

Hello Deborah,

Thank you for your post. I've opened a support ticket on your behalf. Our Support Team will be in touch to help you figure out what the issue is.

In the meantime, this article may help you check if certain settings are potentially causing the scheduling errors.

Best

Jessie (Community Manager)

Andrais Brandon

1

How can I move students from Appointments Not Yet Made List to Appointments Made? Students scheduled appointments prior to designated date of CAMPAIGN and I completed Report but not showing in Report on Appointments. Thanks, Andrais

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Help Center Manager

0

Hi Andrais,

You should be able to associate that student's appointment to your campaign using the Eligible Appointments tab on the Appointment Campaign screen.

The **Eligible Appointments** tab lets you associate appointments that should be counted toward the campaign, but were scheduled without using the campaign link. To do this, navigate to the specific appointment campaign, and open the Eligible Appointments tab. Select the appointment you want to associate with the campaign. Choose **Associate Appointments** from the **Actions** menu. The appointment is then associated with the campaign.

Please keep in mind that appointments are only eligible if they have the exact same Location and Service as the Appointment Campaign. The student must also be on the campaign list.

You can read more about this feature in this article. Please let me know if this didn't answer your question or you need more assistance.

Best,
Erin

Ian Banuelos

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If a student is marked as a No-Show for their appointment, can they reschedule another appointment? If not, how should advisors proceed to allow the student to reschedule within the campaign?

Help Center Manager

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Hi Ian,

Yes, if a student is marked as no-show, they should be able to re-use the same appointment campaign link to schedule another appointment.

Best,
Erin

Georgia Kennedy

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Is there a way to export the invitation token (scheduling link) for a course registration advising campaign in a report so that we could populate a link on a dynamic new student checklist which appears on the students application status page?

Help Center Manager
2 years ago · Edited

0

Hi Georgia,

I answered this question on your other post, but just to have a record on this page as well, here it is again:

It is not possible to export the scheduling link from appointment campaigns into a report, given that functionality is designed to be specific to that point in time appointment campaign. Also, please keep in mind that the scheduling link within an appointment campaign is **specific to each student** it is sent to, so we also do not advise copying and pasting it elsewhere outside of that appointment campaign email.

I have two other ideas for how you could promote scheduling to students in your new student checklist.

1) I see that your institution has our Navigate Student product, which means that students could download the mobile app and schedule an appointment through their phone (or the web browser version). I'd recommend promoting that in your new student checklist to get them

scheduling appointments. Check out our template student promotion materials in this section of the Help Center to get some ideas. You can read more about what that student experience looks like in this article.

2) You also might want to explore our new Personal Availability Link (PAL) functionality, though those links are specific to individual staff members. You can read more about PALs in this article.

I hope that helps!
Erin

Karen McGrath

0

Good morning, I am having trouble with the schedule link in the campaign. Students seem to be clicking the link but they are told that there are no more appointments available. I have updated by availability link for the campaign. The "schedule link" merge tab is a generic one. How can I add my availability to that message so they are taken to MY availability? Best, Karen

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Tina Stockton

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Can a student who is part of a campaign receive staff-assisted scheduling for that campaign? We set up our service at that location for "campaigns" only and we did not check box to say "include appointment availability" on campaign set-up.

Bonnie Sullivan

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Hi Karen and Tina,

Thanks for your questions!

Karen - I have turned your comment into a ticket, so that our Partner Support Team can work with you one on one to resolve that behavior.

Tina - if you're able to schedule an appointment in the staff scheduler that matches the criteria of the campaign, it should be able to be associated with the campaign. Please reach out to our Partner Support Team if you have a specific campaign example you'd like us to look into!

Best,

Bonnie (Partner Support Team)

Abigail Drescher

0

"Service The Student Service associated with the campaign."

Is it possible to use *course-based tutoring* as the service for more than one course?

Bonnie Sullivan

0

Hi Abigail,

Thanks for your question! Each appointment can only have one course associated with it. So if you are using a course-based service, you can only have one course in each of those appointments.

Best,

Bonnie (Partner Support Team)

Neil Voss

0

I send out the campaign email to my advisees, but they don't receive it. So, I send he campaign email again and they still can't find it. Any tips? Does it go into their spam folder. Is there a way to send the campaign email to myself, and then I can forward it to them?

Bonnie Sullivan

0

Hi Neil,

Thanks for your question! I opened up a ticket with our Partner Support Team on your behalf so that we can look into this specific situation further. However, I wanted to note that appointment campaign links are individual to each student, so there is not a way to forward them at this time. More follow up to come by ticket!

Best,

Bonnie (Partner Support Team)

Help Center Manager

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2.24.22: I have added some of the questions in the comments to this FAQ.

Alecia Gray

0

Where does the campaign name appear? I learned from the Appointment Campaigns Video (https://helpcenter.eab.com/hc/en-us/articles/360061847653-Appointment-Campaigns-Video) that students don't see the name. Is it only visible on the Appointment Campaigns Tab and the Student Profile? Is it visible in any reports?

Bonnie Sullivan

0

Hi Alecia,

Thanks for your question! The name of the Appointment Campaigns will also show as an option to filter by in some of the reports (Like the Appointment Summaries Report). It will also show in some of the Analytics Dashboards, also as a filter.

Best,

Bonnie (Partner Support Team)

Sally Heath

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We accidentally deleted a campaign - is there a way to recover or restore it?

Alexis Triforo

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Hi Sally,

Thanks for reaching out! Once a campaign has been deleted from Navigate, it is unable to be recovered. Additionally, the campaign data cannot be restored by our Development Team, as it is completed removed from our system once deleted. You can utilize the campaign permissions to limit who is able to delete a campaign to avoid this hiccup in the future.

Kindly,

Lexi (Partner Support Team)

Elizabeth Fritz

2

When adding students to a campaign that has already been sent, we are no longer seeing an option to **send to all** or **only send to newly added recipients.** Has that feature been moved?

Thanks!

Jane Mostue

0

Am I correct in thinking that a student can schedule an appointment with ANY staff you select during the "Add Staff To Campaign" step? In other words, if a student is part of a campaign that includes 2 or more staff, they can schedule with any of those staff members, even if under the Locations settings the student is only allowed to schedule that service with their assigned advisor?

Maria Higuera

0

Hi Jane Mostue,

Thank you for writing in! You are correct - if the campaign is configured to allow students to schedule with any of the staff members included in the campaign, that will override the Locations settings to only schedule with their assigned advisor.

Have a great day,

Maria (Partner Support Team)

Jane Mostue

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At what step do we "configure to allow students to schedule with any of the staff members included in the campaign"? I don't see that step when creating a campaign.

Maria Higuera

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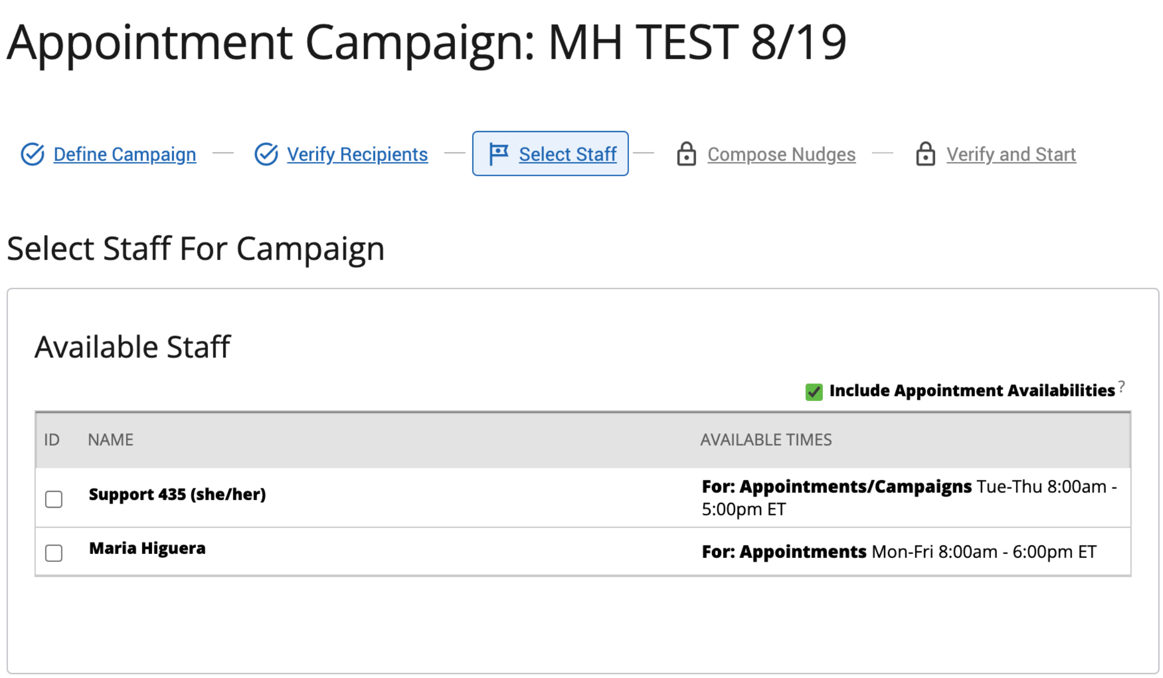
Hi Jane Mostue

Step 3: Select Staff is where you can include the Staff Members that students would be allowed to schedule with for said campaign. Any staff selected here will be made available to the students. There is not a specific permission you will have to select.



Best,

Maria (Partner Support Team)

Sharon Taylor

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Good morning,
Registration begins in a week on my campus and I am unable to schedule appointments and appointment campaigns with my students. When I click the drop down boxes the following options are no longer available, nor can I edit my Availability as in the past.

Care Unit - Faculty
Service - Academic Advising
Location - Faculty Office or Virtual

Please advise.

Ian Banuelos

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@Sharon have you added in Meeting Types to your existing or new availabilities?

Sharon Taylor

0

Yes, I selected appointments and drop-in. I do not work in ACE and those are the only options.

Ian Banuelos

0

@Sharon those are Appointment Types. Meeting Types are a different option within availability. It can be found above Care Unit.

Eden Blair

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It won't let me click on "Start Campaign" on the "verify and start" page.

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Help Center