

# Appointment Campaigns

## Setting Up and Managing Appointment Campaigns in Nanook Navigator

### What is an Appointment Campaign?

Allows users to proactively engage students to schedule appointments and commonly used when an identified a population needs additional support, or advising.

[Video on how to create and manage appointment campaigns](#)



Staff Home page→

### Registration Appointment Campaign Details

- **Campaign Name:** Semester you are registering for-Registration-Unit- Your Initials (EX: SP22 Registration GS JS)
- **Service:** Registration (service in **campaign availability**)
- **Begin Date:** first date appointments start- **End Date:** lastdate appointments can be made
- **Appointment Limit:** recommended 1 (# of appts a student can make)
- **Appointment length:** recommended 60 minutes
- **Slots per time:** 1 (# of students that can choose the same appointment)
- **Email:** Advising language, request student to indicate their contact information in comments, your contact information, and any attachments.

This is a highly encouraged intervention to reduce registration barriers, increase student enrollment, reduce degree plan barriers, prevent low course enrollment, keep students on track for graduation, reduce excessive and unnecessary credits, and get students enrolled in semester to semester courses based on what is best for their goals.

### Registration Appointment Talking Points

- Upcoming Semester(s) Registration
- Degree Plans
- On track for goal graduation semester
- Career planning (EX: interested in health career but not likely to meet pre-health requirements)
- FASFA

### Create an Appointment Campaign

1. Set up your [campaign availability](#) and sync your calendar ([handout](#)).

Meeting Type  
 Phone Call  Video Conference

Care Unit  
Advising

Location  
Academic Advising Center

Services  
 Registration

URL / Phone Number  
https://alaska.zoom.us/j/907

Special Instructions for Student  
**B I**

Please provide your current phone number in the comments below.  
Phone: (907)-XXX-XXXX  
Office: Eielson 598  
Email: uaf-nanooknavigator@alaska.edu  
Video conference link: https://alaska.zoom.us/j/907

When are you available to meet?  
Mon Tue Wed Thu Fri Sat Sun

From 8:00am To 5:00pm  
All times listed are in Alaska.

How long is this availability active?  
A Range of Dates

Starting on 10/31/22 Ending on 1/27/23

Add to your personal availability link?  
 Add this availability to your personal availability link?

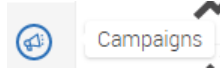
What type of availability is this?  
Appointments Drop-ins Campaigns

2. If you have a forever duration campaign availability, double check special instructions and URL.

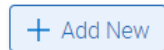
# Appointment Campaigns

## Create an Appointment Campaign, continued

- Click on the Campaigns icon on the left-side panel



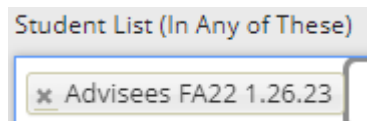
- Click on “add new” under Appointment Campaign.



- Define your campaign and click continue.

Name:	SP23 Registration GS JS
Instructions or Notes for Landing Page:	If you have already met with
Care Unit:	Advising
Location:	Academic Advising Center
Service:	Registration
Appointment Limit:	1
Appointment Length:	60 mins
Slots Per Time:	1
Scheduling Window:	10/31/2022 - 01/27/2023
Allow Scheduling Over Courses:	No
Staff Reminders:	Email - No   Text - No
Recipient Reminders:	Email - Yes   Text - Yes

- Choose your students, search, select all or certain students and click continue. *\*Recommend [creating a student list](#) of your advisees in advance. Student list option is under “Student Information”.*



- Review Students in Campaign. Check the boxes of those you wish to remove → click actions → Remove Selected Users

## Create an Appointment Campaign, continued

- Add Organizer to Campaign → Select yourself. *\*If you do not see your name, check that you have [campaign availability](#) with the same or wider parameters as this appointment campaign.*
- Click on “add welcome message” Compose your message and add attachments. *\* **Do not use your own google/other appointment link, the appointment campaign links will be auto populated.***
- Information to include in email & availability instructions: Please schedule an appointment for Registration with (Unit/location). Click the following link below, select a time that works with your schedule, in the comment section provide your current phone number and click Save. You will receive an email confirming the appointment time and details. For video conferencing, a link will be supplied in your appointment confirmation email. Join the video conference link on the date and time of your appointment. For in-person appointments I am located in ELIF 555. *If you are already working with RSS, SSS, or AAC advisor please schedule your appointment with them.*
- \*If you have added your personal zoom link to your campaign availability then it will be provided through email to the student when the student schedules an appointment (see [availability handout](#) before using a zoom link)*
- Optional: Add success message
- Recommended:** Add [text message and email nudges](#) with the appointment link merge tag and select a date about 7-10 days from the campaign start date. This will automatically **message** the students who have not created an appointment. Be sure to **associate eligible appointments** regularly before the scheduled nudge dates.
- Confirm the details of your campaign and start campaign. *\*Once you click start, the students will receive an email at their UAOnline preferred email address.*

# Appointment Campaigns

## Student Steps & Screenshots

### 1. Email Student Receives

The student will receive the campaign email from your Alaska.edu email address to their UAOnline preferred email address with the students' personalized link. The student will **not need to log into Nanook Navigator** to access this link or to schedule their appointment they already have access through their personal link.

### Please schedule your Advising appointment.

Hello B Test :

Please schedule an appointment for Registration at Academic Advising Center. Click the following link below, select a time that works with your schedule, in the comment section indicate your current phone number and click Save. You will receive an email confirming the appointment time and details. For video conferencing, a link will be supplied in your appointment confirmation email. Join the video conference link on the date and time of your appointment. For in-person appointments I am located in ELIF 555, please wear and mask, and distance 6 feet away.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.  
<https://uaf.campus-training2.eab.com/a/ByqLN4t81b>

Thank you!

### 2. Student Clicks on Link from Email

The student clicks on the link. They choose a date, time, and add comments.

**No log in needed.**

24 25 26 27 28 29

Wed, Oct 27th

10:00 - 11:00 AM (1)

### 3. Student Clicks on Time

Student can then see the special instructions provided in your campaign availability and the appointment details chosen by the student.

\*How would you like to meet?  
Video Conference/Skype

You are seeing the meeting types available for this time slot.

Would you like to share anything else?  
907-555-5555

Email Reminder  
Reminder will be sent to

Text Message Reminder

Phone Number for Text Reminder  
907-555-5555

Schedule

### 4. Email Student Receives After Clicking "Schedule"

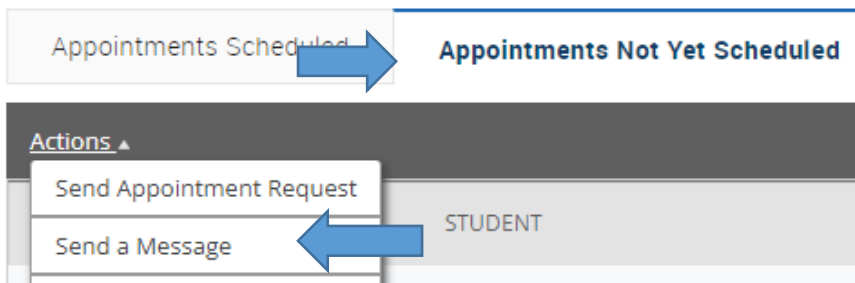
- Your availability special instructions and URL/Phone
- Appointment details

<b>Organizer</b> Jessica Skipper	<b>Location</b> Academic Advising Center
<b>Topic</b> Registration	<b>Meeting Type</b> Video Conference/Skype
<b>Comments</b> B Test Student: 907-555-5555	<b>Date of Appointment</b> 10/27/2021
	<b>Time</b> 10:00am - 11:00am AKT

# Appointment Campaigns

## What does the student receive?

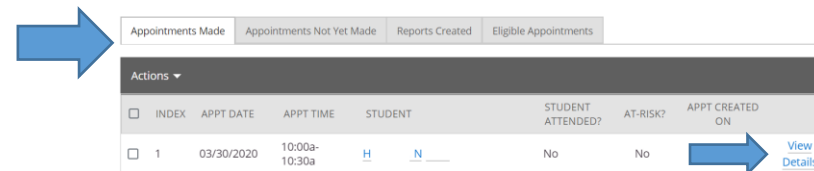
1. Students selected for your campaign will receive the email you created in your campaign as soon as you click send
  - a. The automatic personal link to schedule their appointment. This link is student specific so they can not share links.
  - b. Any details you provided in your campaign email.
2. Student schedules their appointment, they receive an appointment confirmation email. This email includes the appointment details, URL/Phone and the “special instructions” (i.e. office location, phone number, zoom link...) provided in your campaign availability.
  - a. Not sure how to set up your campaign availability see the [availability handout here](#).
3. 24 hours before the student’s appointment they will receive a reminder email with the appointment details, your campaign availability URL/Phone, and “special instructions”
4. Reminder text 90 minutes before appointment.
5. If you update, add anything, or delete an appointment, then the student will receive an appointment update email with all of the new details and information.
6. You can send out reminder emails/texts for those that have not scheduled yet through the appointment campaign (see handout below).



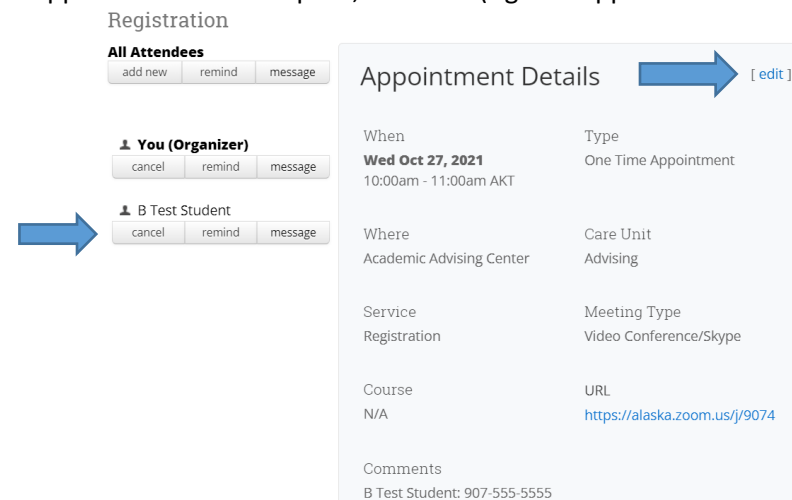
## Editing Appointments

**Important:** [See availability handout for more information on setting up your personal meeting zoom link.](#)

1. Go to “appointments made” and click on the “view details”. Or go to your appointments tab in your Staff Home Role.



2. Appointment screen opens, click edit (right of appointment details).



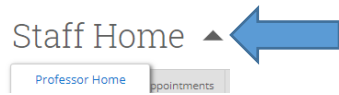
3. Update appointment or comments.
4. Save Appointment (bottom of the page).
5. Student receives an updated appointment email.
6. How to [manage appointments](#) and quickly [create appointment summaries](#) from scheduled appointments.

# Appointment Campaigns

## Managing Appointment Campaigns in Nanook Navigator

### How to send a reminder to students with no appointment

1. Go to your "Staff Home" role



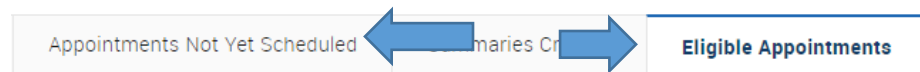
2. Click on the Campaigns icon on the left-side panel



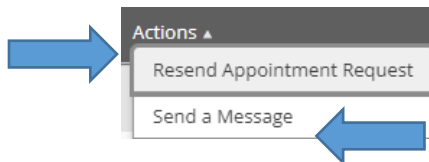
3. Click on Appointment Campaigns and your active campaign



4. Check **Eligible Appointments** and associate appointments to campaign.
5. Click on the "Appointment Not Yet Made" tab



6. Click the checkboxes near all of the students you wish to send a text nudge to, or use the select all check box.
7. Click "Actions" and then click send message



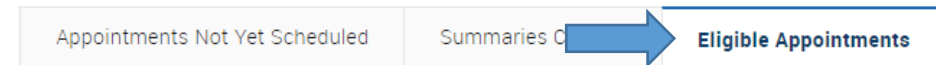
8. Click Text. Send a text to each student prompting them to schedule an appointment today. [Texting policy](#) & [texting handouts](#)

"Hi! This is Jess your advisor. Log in at <https://uaf.navigate.eab.com/app/> to schedule a registration appt. today!"

### Eligible Appointments

(NOTE: In order to be considered an Eligible Appointment, the student must be part of the campaign and their appointment must be for the same service & location as the campaign.

1. Click on your active appointment campaign.
2. Click on the Eligible Appointment tab.
3. Check the box next to each student name or select all and click "actions".
4. Click "associate appointments" to add these students to your campaign data.



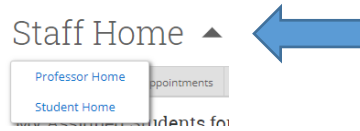
This grid will display all eligible appointments that have been scheduled outside of the campaign link. Eligible appointments only include appointments containing the same location, service, and selected when creating the campaign.

Actions	DATE	STUDENT	ORGANIZER	SERVICES / COURSE
<input checked="" type="checkbox"/>	1	0 4:00pm AKT	M B	K
				Registration

# Appointment Campaigns

## How to add more students to an active campaign

1. Go to your "Staff Home" role



2. Click on the Campaigns icon on the left-side panel



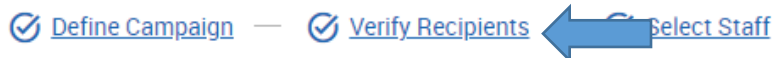
3. Click on Appointment Campaigns and your campaign



4. Click on Edit Campaign Details (right side)



5. Click on Verify Recipients



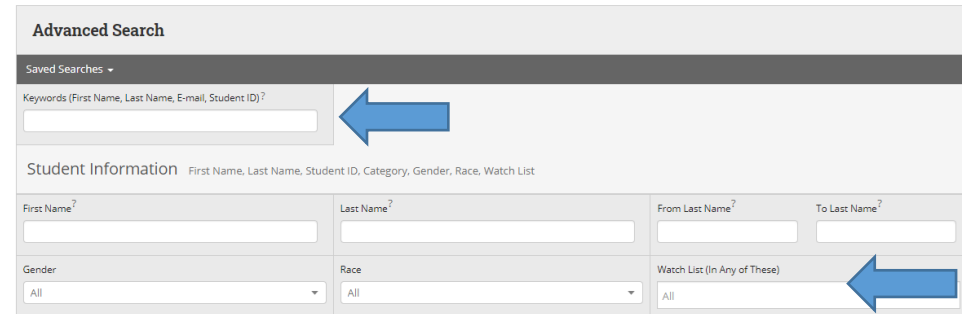
6. Click on "Add more recipients"



## Add more students to an active campaign, continued

7. If you are adding one student you can enter their student ID in the Keywords box and then scroll to the bottom and click search.
8. You can also add students through student lists or running any search criteria and then click search.

Add Students To Campaign



Advanced Search

Saved Searches -

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

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

First Name? Last Name? From Last Name? To Last Name?

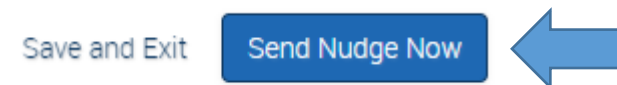
Gender: All Race: All Watch List (In Any of These): All

9. Check the boxes for the students you wish to add or the "all" box

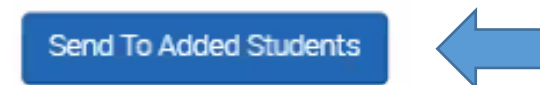


<input type="checkbox"/> ALL	STUDENT NAME
<input checked="" type="checkbox"/>	1 Skipper, Jessica

10. Click continue through all screens until Verify and Start Page
11. Click "Send Nudge Now"



7. Compose your nudge to the newly added students. Do not remove the schedule link merge tags. Click "send to added students".



# Appointment Campaigns

## Updating Appointment Campaigns in Nanook Navigator

### Updating a Live Campaign

1. Log into [Nanook Navigator](#) and go to your “Staff Home” role.
2. Click on the Campaigns icon on the left-side panel



3. Click on Appointment Campaigns

[Appointment Campaigns](#)



4. Click on your appointment campaign.

[SP22 Registration DGS JS- Training](#)



5. Click edit Campaign Details

#### Options

[Edit Campaign Details](#)

[Delete This Campaign](#)

[Export Student List](#)



6. Click on the section you wish to edit.

[Define Campaign](#) —  [Verify Recipients](#) —  [Select Staff](#)

### Updating a Live Campaign, continued

6. Update the information or add students.
7. Click save and exit or continue to edit the rest of your campaign.  
**\* You have to click continue through all screens once you are ready to send out your email to the newly added students.**
8. If you add new students you do not need to send out the campaign to the entire set of students, you can choose to send a nudge to newly added students.
9. Click Send Nudge

**Some newly added students in this campaign have not received a nudge yet**

You can send a nudge to them now with the **Send Nudge Now** button below or Save :

Save and Exit

[Send Nudge Now](#)

10. Compose your nudge to the newly added students. Do not remove the schedule link merge tags. Click “send to added students”.

[Send To Added Students](#)

# Appointment Campaigns

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## Updating an unspent campaign

1. Log into [Nanook Navigator](#) and go to your “Staff Home” role.
2. Click on the Campaigns icon on the left-side panel



7. Click on Appointment Campaigns



[Appointment Campaigns](#)

8. Click on your appointment campaign.

[SP22 Registration DGS JS- Training](#)



3. Click on Define Campaign (top left) or another section

[Define Campaign](#) —  [Verify Recipients](#) —  [Select Staff](#)

6. Update the information or add students.
7. Click save and exit or continue to edit the rest of your campaign. **\* You have to click continue through all screens once you are ready to start.**



# Report on an Appointment (Appointment Campaign)

## Creating & Managing Appointment Summaries Nanook Navigator (EAB Navigate)

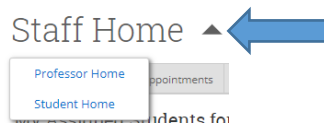
### What is an appointment summary?

Appointment Summaries provide **staff** and **faculty** with the ability to record interactions with students pertaining to a specific appointment or communication.

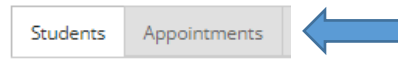
These instructions are for students who created appointments through an appointment campaign. To reduce errors in data and duplication of appointments please use one of the following methods for creating an appointment summary.

### Creating Summaries Through Reporting Appointments

1. Go to your “Staff Home” role



2. Click on the appointment tab and scroll to “Recent Appointments”



3. Click the check box for the student
4. Click “Actions” and click “Add Appointment Summary”

#### Recent Appointments

Care Unit: All care units

A screenshot of the 'Recent Appointments' table. The table has columns for SERVICE, COURSE, COMMENT, and ATTENDEE. The first row shows 'Registration' for 'N/A' with a comment 'B : VC meeting please.' and an attendee 'B.'. A blue arrow points to the 'Add Appointment Summary' action in the 'Actions' dropdown menu.

	SERVICE	COURSE	COMMENT	ATTENDEE
	Registration	N/A		M
<input checked="" type="checkbox"/>	Registration	N/A	B : VC meeting please.	B

### Creating Summaries Through Appointments, *continued*

5. Required to be able to save: Care Unit, Location, at least one service provided, date of Visit and start time.
6. Not required but highly encouraged: summary details (quick boxes) and appointment summary text.
7. Click “Save this report” at the bottom right.

#### Information

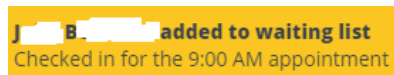
- **Course:** You can associate the appointment with one specific course. You may search for any course.
- **Meeting Start/Meeting End:** For appointments scheduled in advance, the Meeting Start and End times will default to the scheduled start and end times for the appointment. For walk-in/drop-in appointments, the Meeting Start time will default to the time the summary report is created and End time will default to the time the summary report is saved. You can edit the fields as needed.
- **Attendees:** checkboxes will be checked or not to indicate attendance for each appointment attendee. Not checking the box indicates a no show.
- **Attachments:** attach a file to the summary report, such as a plan or tutoring schedule.
- **Suggested Follow-up:** These fields are used for informational purposes only. No appointment will be created as a result of filling them out.

See more details on appointment summaries in the [Report on an Appointment handout](#).

# Report on an Appointment (Appointment Campaign)

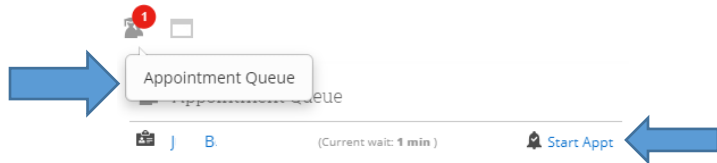
## Creating Summaries Through Kiosk Check In

1. If your office is using the Kiosk feature at the office front desk, then students can be checked in at the time of their appointment. When a student has been checked in the advisor receives a message on their staff home page.



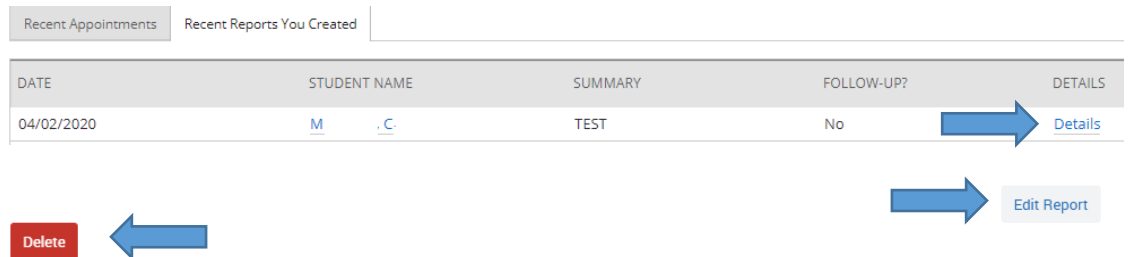
Staff Home ▾

2. Then you will see a notification in your appointment queue.
3. Click on the notification icon and then you can click "Start appt" for the student you wish to create a summary report for.



## Edit & Delete Appointment Summaries

1. Go to your "Staff Home" role
2. Click on appointments tab
3. Scroll to towards the bottom to "Recent Reports You Created" or "Recent Appointments"
4. Click the word "Details"
5. Click "Edit Report" (bottom right), edit and save the Report
6. Or Click delete



DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?	DETAILS
04/02/2020	M .C	TEST	No	<a href="#">Details</a>

Delete ←      → Edit Report