Purdue University West Lafayette

Last Updated October 2022

BoilerConnect and Purdue All Aboard 2023

Creating Appointment Campaigns

Overview:

An Appointment Campaign is an important feature that allows staff members to reach out to specific populations of students to encourage them to schedule appointments. This functionality is commonly used when you have identified a population of students in need of additional support, and you are sending them a request to schedule an appointment with you.

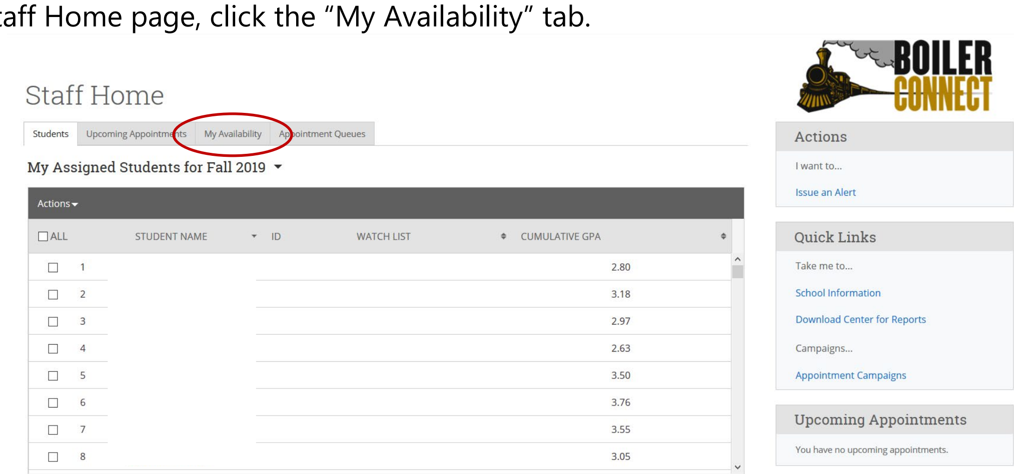
The expectation for is for all New Student Appointments to be scheduled for an advising appointment through BoilerConnect.

Log in:

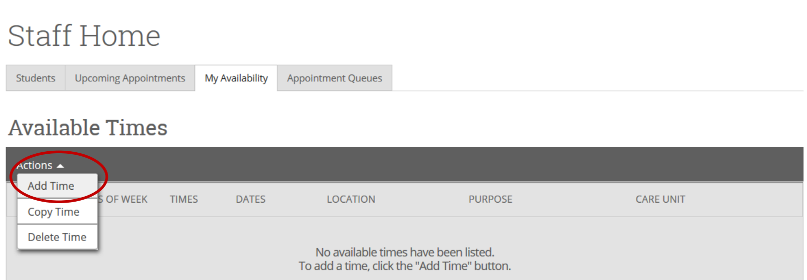
Log in to www.purdue.edu/boilerconnect.

Create Campaign Availability:

From your Staff Home page, click the "My Availability" tab.



Click on **Actions** and choose **Add Time**.



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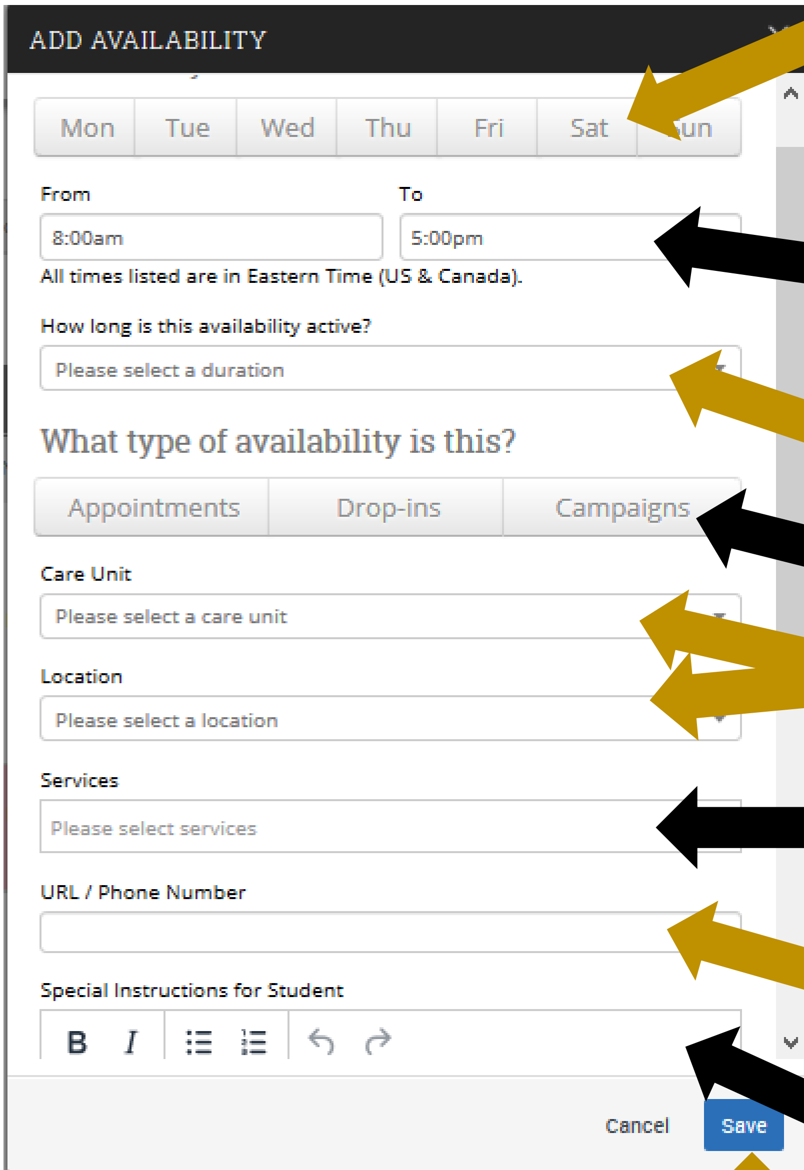
Set up your campaign appointment availability.



1. Select the days of the week you want to be available for appointments.
2. Choose the time frame you want to be available for appointments. The systems "talks" to Outlook, so appointments will not be able to be made at the same time as something already scheduled on your calendar.
3. Select your availability duration.
4. Select "Campaigns"
5. Select the appropriate Care Unit and Location for you.
6. Select the service(s) students will be receiving in this appointment (Advising units ONLY use STAR /VSTAR Appointment)
7. Include phone number or URL for your personal meeting room in Webex or Zoom.
8. Include any special instructions (example: All appointments are currently taking place via Zoom. If this platform does not work for you, please indicate your preferred method of meeting in the Comments section.).
9. Click "Save".

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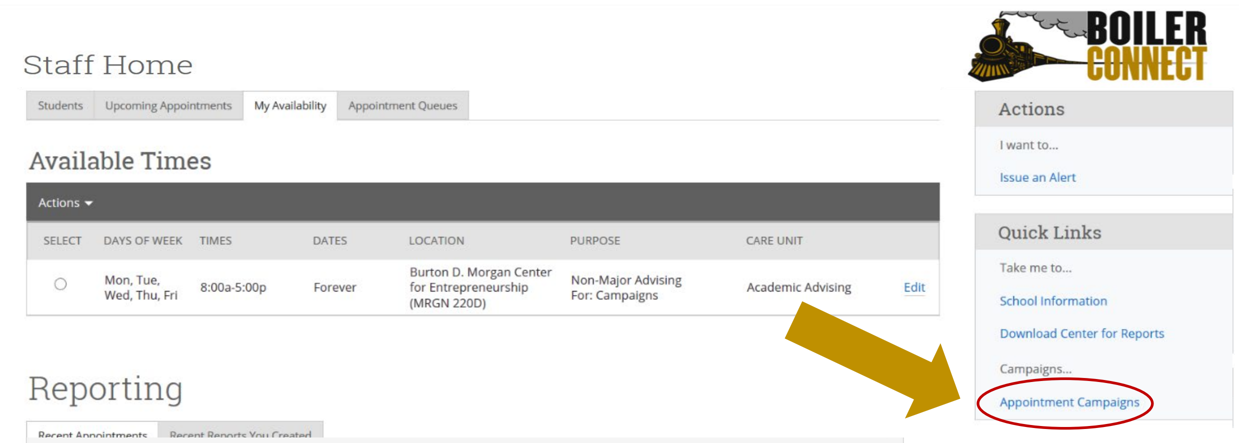
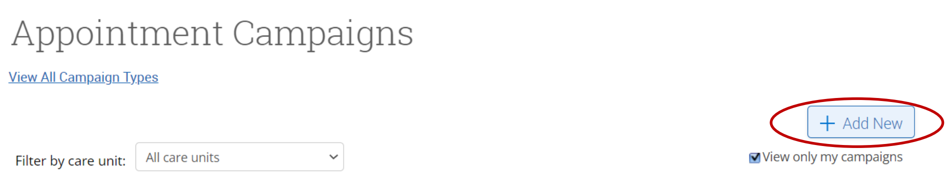
Creating an Appointment Campaign:

From your Staff Home page, click on **Appointment Campaigns** in the **Quick Links** box on the right side of the screen.



Click on **+Add New** button on the right side of the screen.



Define your campaign by selecting the appropriate information for you.

**Note: Choosing more than one for the Appointment Limit will prompt students to schedule an appointment until they have fulfilled the total number set as the limit. Example: limit is set to 3, student will be prompted to schedule an appointment until 3 total appointments have been scheduled.*

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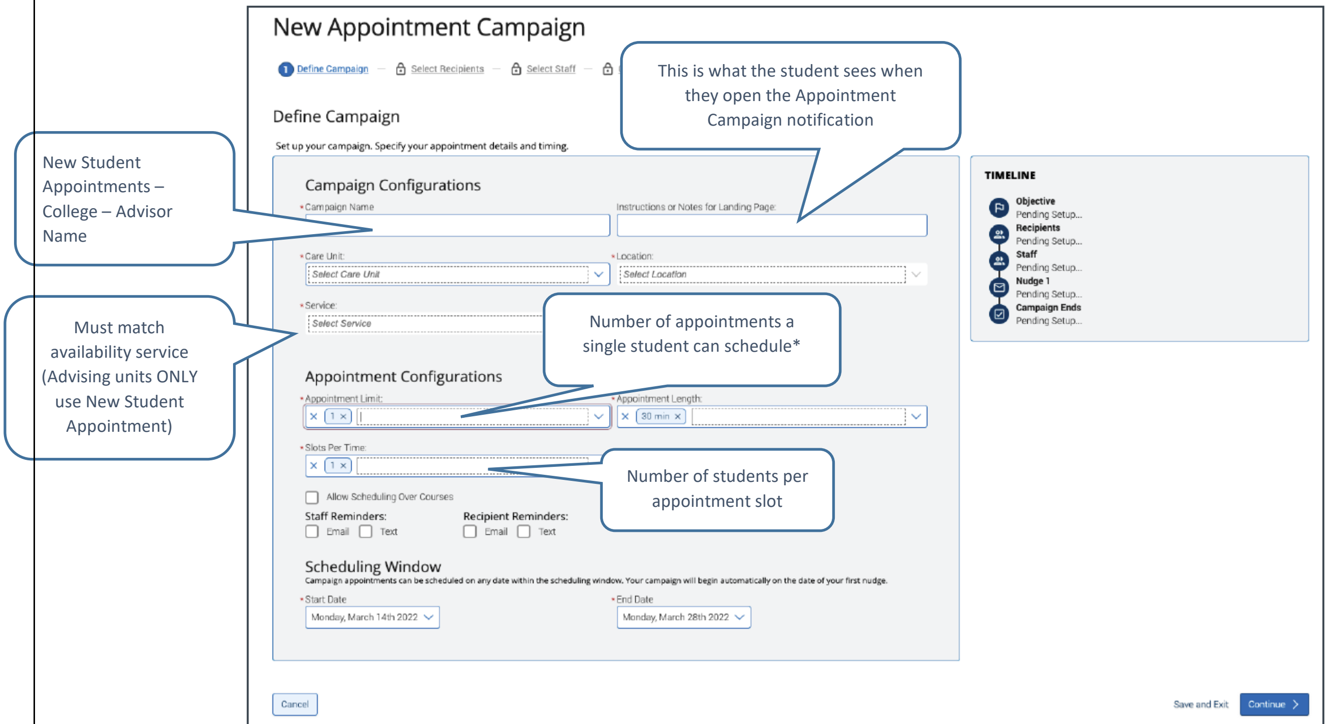
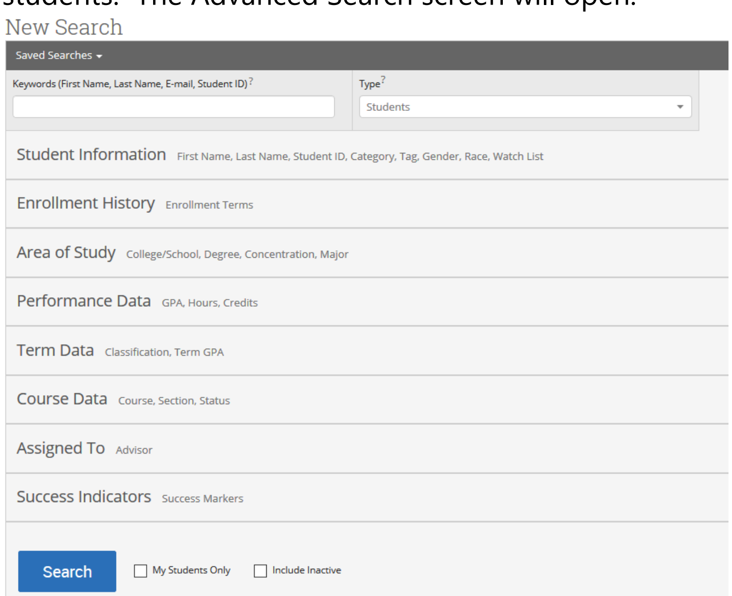


Group Advising Tip: The "Slots Per Time" box should match the number of students you will be meeting with at one time.

Your next step is adding students. The Advanced Search screen will open.



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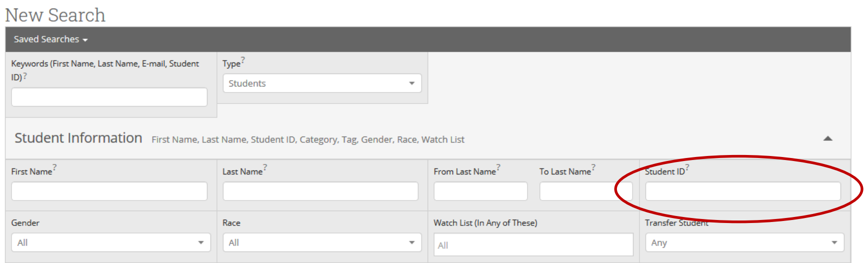
Copy all of the PUIDs from your list of students who have completed the Student Information Form (SIF). Paste them (all at once) into the **Student ID** box under the Student Information block (no commas needed).



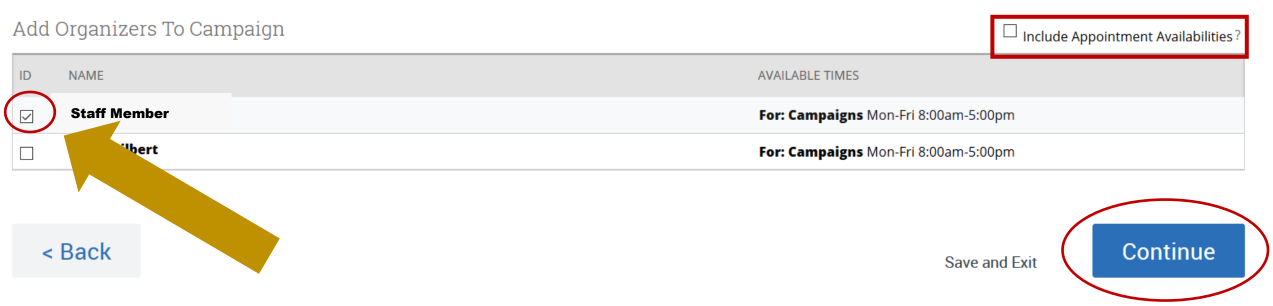
After starting the search, you will be presented with a list of students. Double check that the total number of students returned in the search matches the number of PUIDs copied you're your list of students who completed Purdue 101. If it did not, you may need to try the search again and check the **Include Inactive** box near the Search button. Select the students you wish to add and then click the blue **Continue** button near the bottom right of the screen.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed by checking the box next to their name and choosing Actions → Remove.

You will be asked to review the students in the campaign. If these are correct, click **Continue**.

Add Staff to the Campaign:

Add applicable staff to the campaign by checking the box to the left of their name. Often this will only be you, though if you are creating a campaign for someone else you will choose their name. If you do not see the name of the staff member you are trying to add, refer to the earlier step [Create your Campaign Availability.]



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“Include Appointment Availabilities?” – To Check or Not to Check

If this box is checked, a student will be able to schedule appointments for any open time matching the organizer’s pre-set Appointment Availability AND Campaign Availability. If the box is not checked, the student will only be able to schedule appointments for any open time matching the organizer’s pre-set Campaign Availability.

Create Messaging:

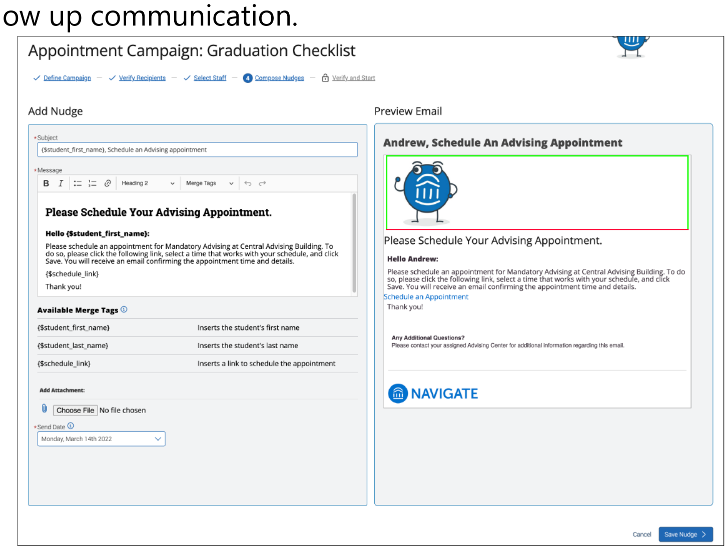
Develop the text you would like the student to receive when you send the appointment campaign, as well as any follow up nudge emails for students who delay in scheduling their appointment. For New Student Appointments, we recommend only using the Welcome Message and using the Send a Message feature for any follow up communication.

Nudges are a feature that allows you to schedule follow up emails to students in your campaign who have not yet scheduled their appointment. Each nudge is an email sent to individuals in your campaign recipient list. Nudge emails are sent the morning of the date chosen when creating the nudge.

[See a sample message at the end of this guide.](#)

The option to create a nudge(s) will appear after the campaign is defined and the list of students is created. To create a nudge:

1. Enter a **subject line** and **customize the message**. Available Merge Tags are listed under the Message text box and work exactly the same as they did previously. A preview of the message is shown in a panel to the right of the message composition panel. Files can be attached to this message.
2. Choose a **send date**. This is the date the email nudge will be sent. The Welcome Message will start your Appointment Campaign.
3. Click **Save Nudge** to continue. Multiple nudges can be created, though for New Student Appointments, we recommend only using the Welcome Message and using the Send a Message feature for any follow up communication.



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You also have the option to create a Success Message. This is an email sent the day after the recipient completes the objective (the scheduling of an appointment). The success message is for communication purposes only. Click **Add Success Message** to begin creating a success message.

Things to Note About Nudges:

- An unlimited number of nudges can be created
- Only one nudge email can be sent per day, and they must be scheduled to take place between the start and end date of the Appointment Campaign
- Users can edit/delete nudge emails until they are sent
- Users can continue to create additional nudges until the Appointment Campaign ends
- The nudge functionality is for email messaging only at this time

After you are finished creating nudges and your success message, click **Continue** to go to the *Confirm & Send* page.

Confirm and Send Campaign:

Review all the final campaign information. Click **Send** to activate the campaign. The initial message will be sent to students around 8:00am EST on the date the first nudge was scheduled for.

Be prepared!
Your calendar will fill up fast with appointments – so be sure your calendar is ready!

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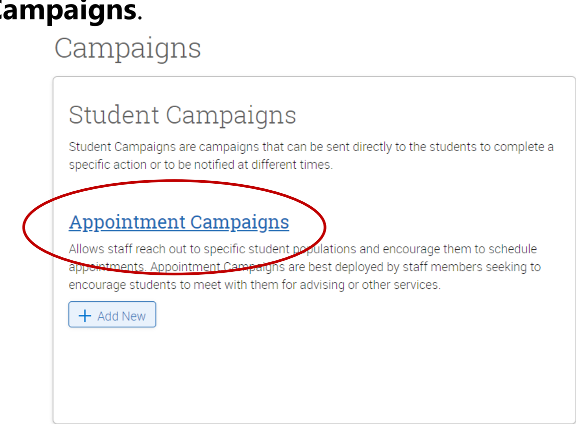
Adding Additional Students to Your Appointment Campaign

Using appointment campaigns for New Student Appointments means that you will be adding students to the campaign on an ad-hoc basis as students continue to complete their Student Information Form (SIF).

Navigate to Your New Student Appointment Campaign:

Click the campaign icon from the menu on the left side of the screen.

Click on the **Appointment Campaigns**.



Select the hyperlink for the appropriate appointment campaign.

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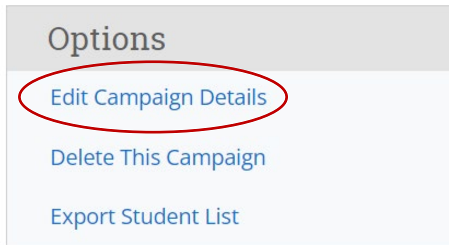
Add Students to Campaign:

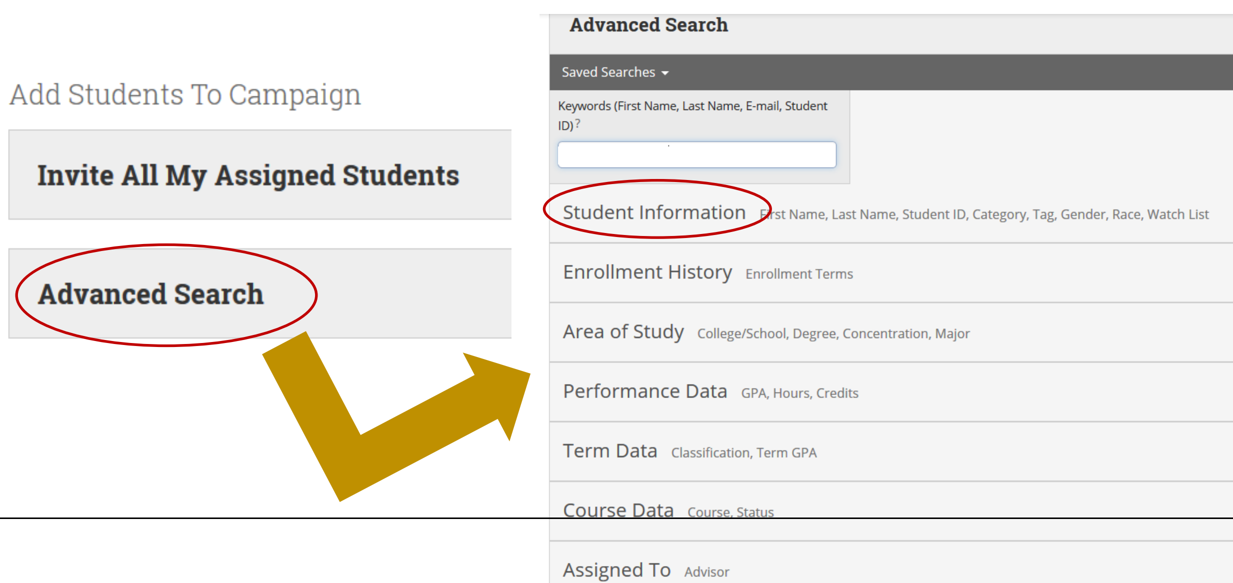
Click **Edit Campaign Details** on the right side of the screen.



Then choose **Verify Recipients** from the top of the screen.

Click **Add More Recipients**.

Use the **Advanced Search** option to add the student(s) to your campaign.



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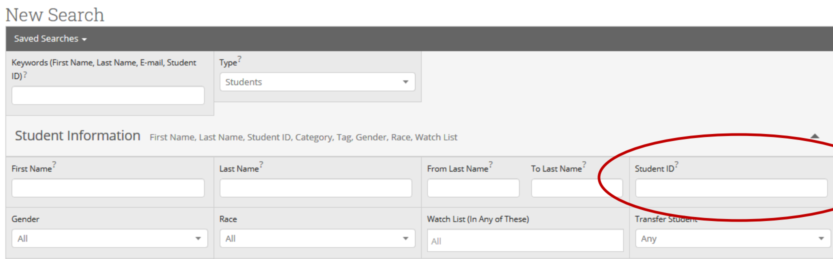
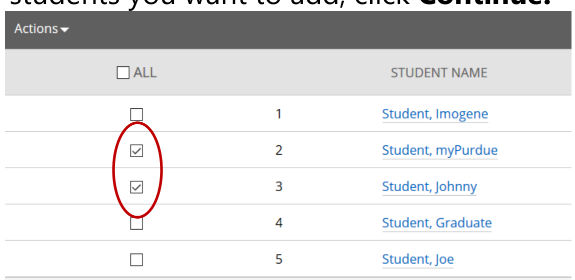
Copy the PUIDs from your list of students. Paste them (all at once) into the **Student ID** box under the Student Information block (no commas needed).



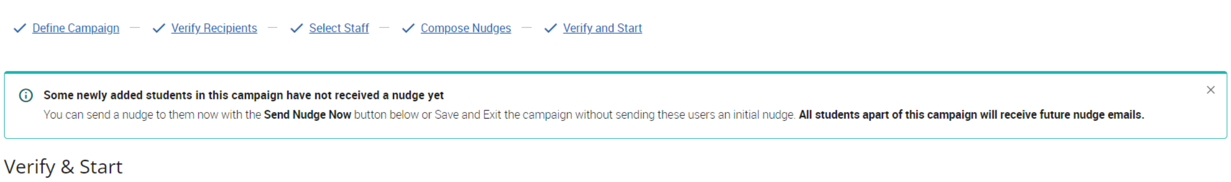
Select the student(s) you want to add to the campaign by checking the box to the left of their name. Once you have selected all the students you want to add, click **Continue.**



Review the students in the campaign. Click **Add More Students** if you need to add more students. If the list is correct, click **Continue**.

Send Campaign to Newly Added Student(s):

Navigate to the **Verify and Start** tab by clicking **Continue** or by using the link near the top of the screen. You will see a new notification at the top of the screen.



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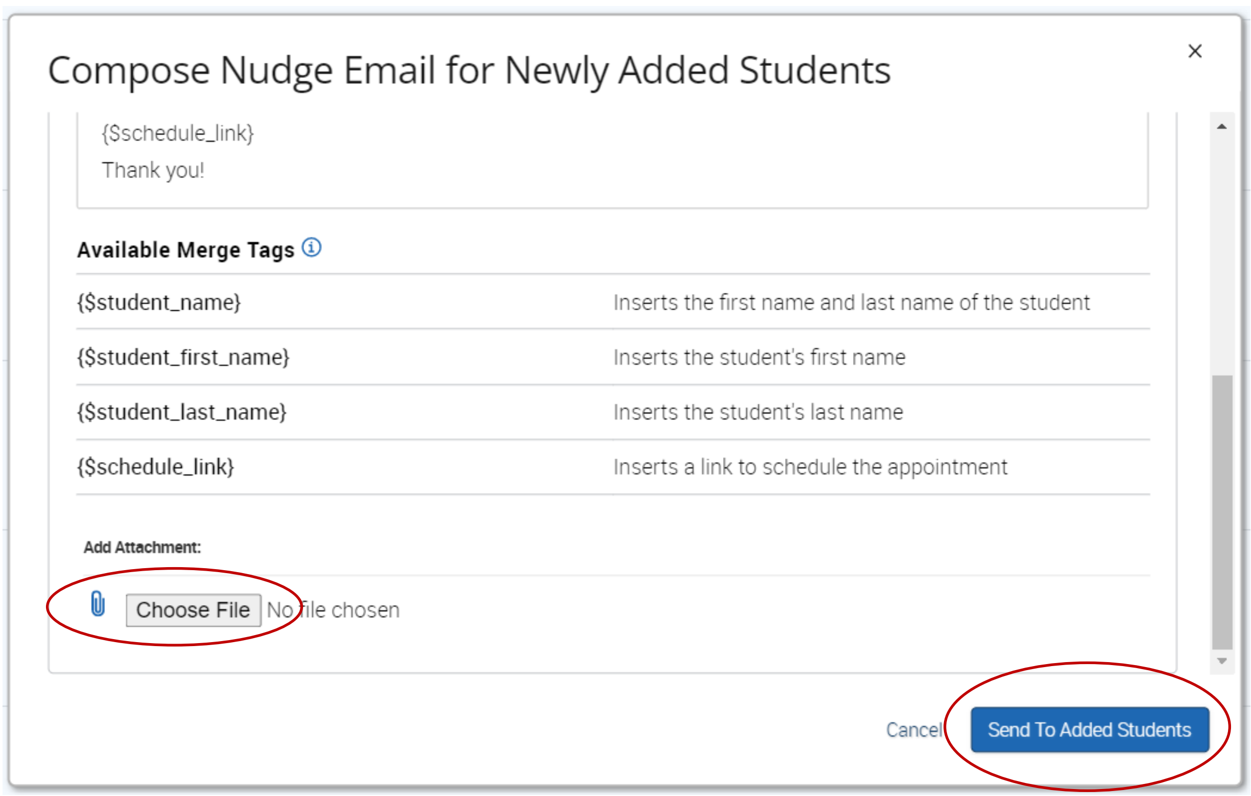
Click **Send Nudge Now** located in the bottom right corner.

A pop-up box will appear displaying your Welcome Message. Edit as needed and be sure to check that any original attachments are still attached. Click **Send to Added Students**.



Students will receive future dated nudge emails until they successfully schedule their appointment. Keep this in mind as you create your nudge emails, as recently added students may receive a later nudge (example: nudge #4) as their first one depending on when they are added to the campaign. For New Student Appointments, we recommend only using the initial nudge and using the Send a Message feature for any follow up communication.

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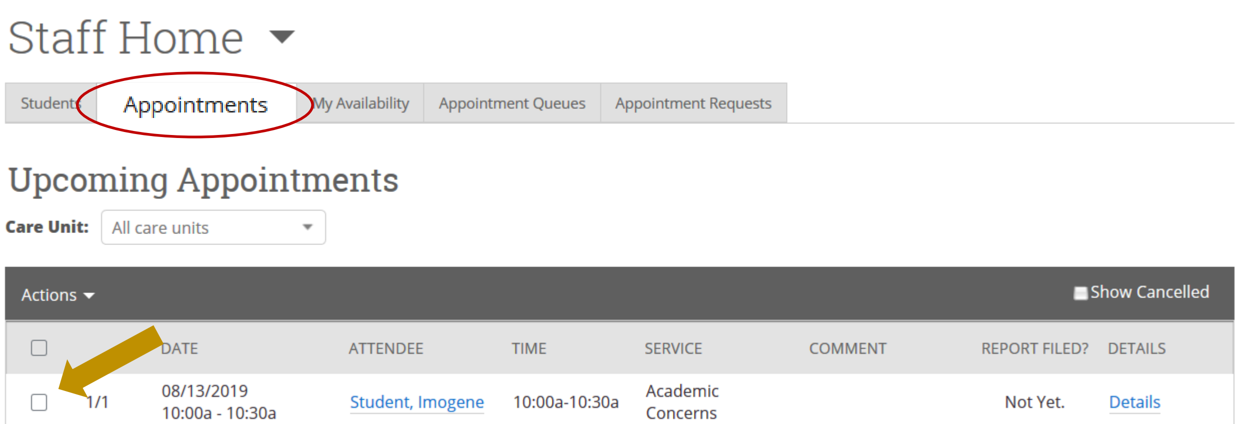
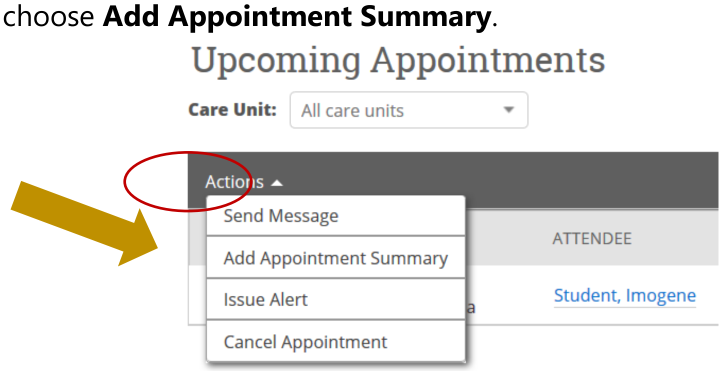
Checking in a Student/Documenting a Student Appointment – Before Appointment Begins

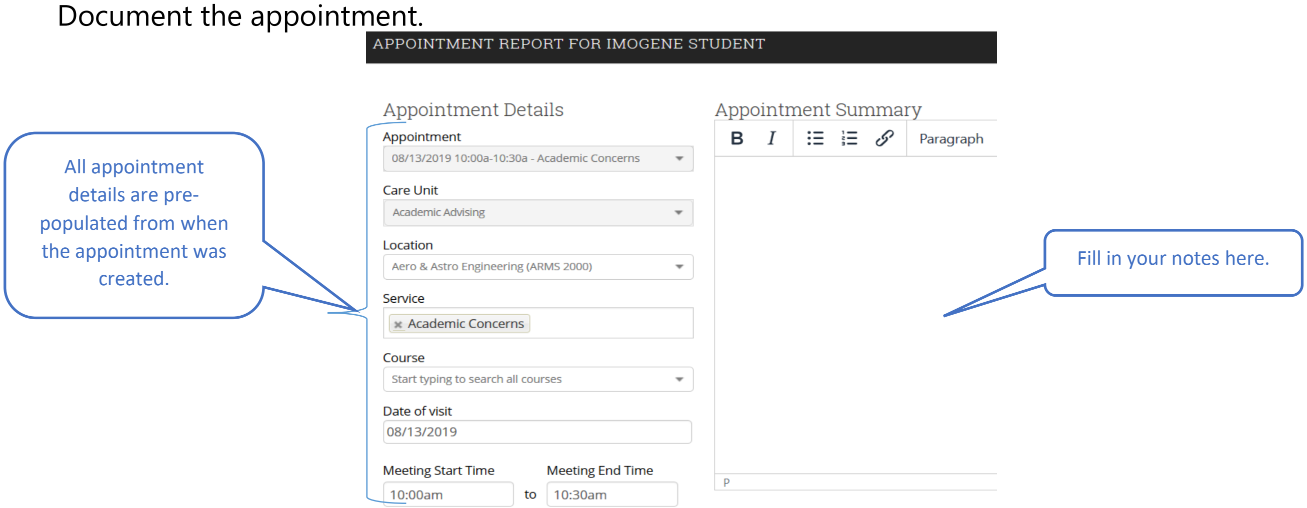
From the Staff Home page, click on the **Appointments** tab. Check the box next to the name of the student you wish to check in/document under the **Upcoming Appointments** section.



Click **Actions** and choose **Add Appointment Summary**.



Document the appointment.



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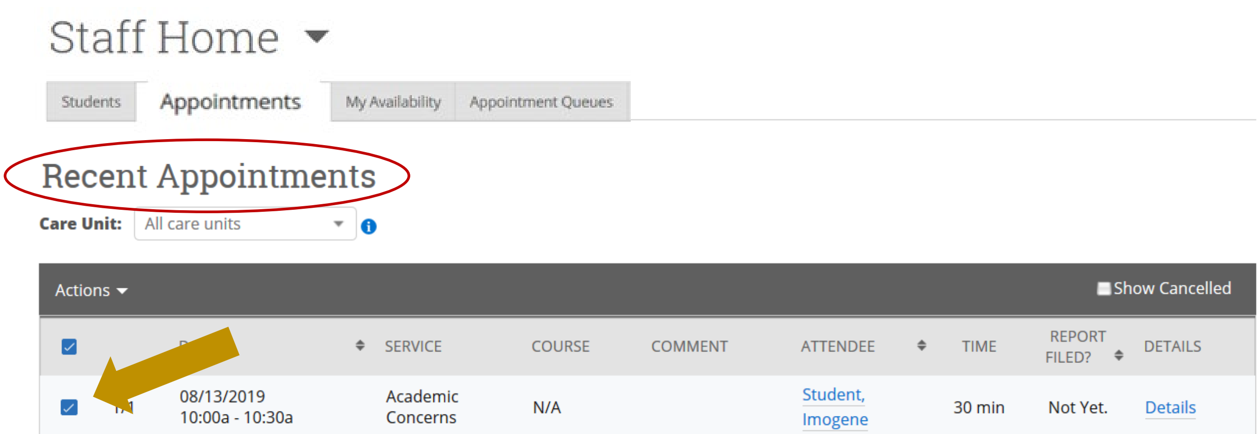
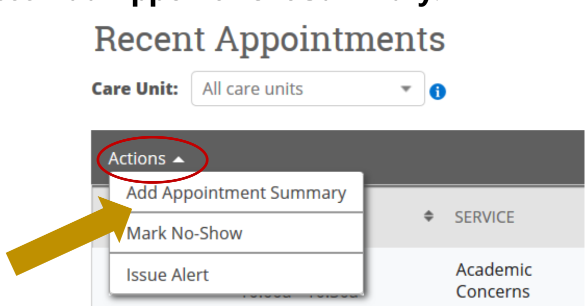
Checking in a Student/Documenting a Student Appointment – At the Time of the Appointment/After Appointment has Ended

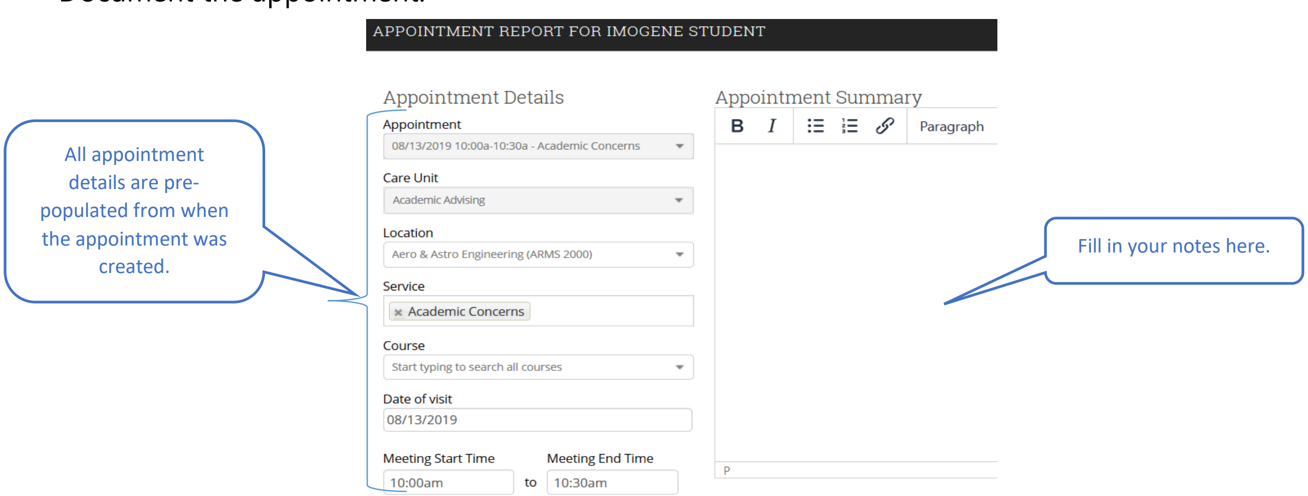
From the Staff Home page, click on the **Appointments** tab. Check the box next to the name of the student you wish to check in/document under the **Recent Appointments** section.



Click **Actions** and choose **Add Appointment Summary**.



Document the appointment.



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Frequently Asked Questions (FAQs)

Q: Can incoming students use the self-service scheduling feature in BoilerConnect or do I have to use an Appointment Campaign?

A: Students will not be able to use the self-service scheduling feature in BoilerConnect for their New Student Appointment. Appointment Campaigns are the recommended method for scheduling New Student Appointments. A few non-advising units that are open to all students are set up so that students can use the self-service scheduling feature.

Q: We do not normally assign advisors until just before the fall term begins. Do we have to assign advisors prior to students having their New Student Appointments?

A: No. By using the Appointment Campaign feature in BoilerConnect, students do not have to be assigned to an advisor in order to schedule an appointment. NOTE: advisors will not be able to use the "My Students" search filter in UniTime or see if students are not assigned to them. Advisors will still be able to look up students individually in UniTime.

Q: When do students become visible in BoilerConnect?

A: Students appear in BoilerConnect the day after a Banner record is created for them. This occurs after the students accepts their offer of admission and deposits.

Q: Are advisors expected to hold video call advising appointments with international students?

A: Yes, if at all possible. We understand time zones cause scheduling challenges. While video calls are the preferred method of communication, it is understood this is not always possible.

Q. When do my appointments campaigns need to be created by?

A: Appointment campaigns should be created and ready for students to be added beginning May 3, 2022 regardless of when advising appointments actually begin.

Q: I am away from the office for a few days, am I expected to add students to my campaigns daily even if I am not working?

A: No. If you will be out for multiple business days, please arrange to have a colleague add your new students to your campaign for you. Instructions on how to do this are included in the Appointment Campaign Creation documentation.

Q: Can another advisor or our administrative assistant create and add students to a campaign for me?

A: Yes, as long as that individual has an Advisor/Coach role or higher in BoilerConnect. In the step where staff is added to the campaign, they will choose your name instead of their own.

Q: Why is there so much central oversight on the appointment services we use and the timing of summary report completion?

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A: During Purdue All Aboard, University Undergraduate Academic Advising (UUAA) and Teaching & Learning Strategic Initiatives collaborate to provide weekly Purdue 101 completion data to the Office of the Provost. To ensure the data is as accurate as possible, consistency is critical.

Q: How do time zones work for students scheduling appointments from home?

A: When a student is choosing a time/date for their appointment, the times shown are based on the local time zone of their internet browser/current location. All email and text message reminder notifications sent to the student prior to the appointment will show times reflective of the time zone of Purdue University – West Lafayette (Eastern Daylight Time).

Q: Who do I contact for help with BoilerConnect specifically?

A: Your Department Trainer or boilerconnect@purdue.edu

Sample Campaign Message

STUDENT FIRST NAME,

Hello and welcome to DEPARTMENT NAME!

My name is ADVISOR NAME and I am an ACADEMIC ADVISOR (OR OTHER ROLE) for the Department of DEPARTMENT NAME in the College of COLLEGE NAME. Thank you for completing Purdue 101! It's now time to create your 1-on-1 Academic Advising appointment to discuss and complete pre-registration for fall 2022 courses. Please use this link (BOILERCONNECT CAMPAIGN-GENERATED LINK) to schedule your appointment with me between YOUR ADVISING DATES.

Prior to your advising appointment, please be sure to complete the following so I can best advise you during our appointment:

- ALEKS Math Placement Test
- myCareerPlan
- Request any AP scores and/or official college transcripts to be sent to Purdue Admissions. If you have taken dual credit courses at Purdue Fort Wayne or Purdue Northwest these courses will already be on your transcript and do not need to be submitted. Please also have a list of any AP/Dual Credit coursework with you during your advising appointment.

I look forward to meeting you soon. If you have any questions prior to our appointment, please email me at EMAIL ADDRESS or call PHONE NUMBER.

Boiler Up!

ADVISOR NAME