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 Virtual STAR 2021 is for all students to be scheduled for an advising appointment through BoilerConnect.

Step 1 – Log in:
Log in to www.purdue.edu/boilerconnect.

Step 2 – Create Campaign Availability:
From your Staff Home page, click the “My Availability” tab.

Step 2a:
Click on “Actions” and choose “Add Time”.

Step 2b:
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 (must use STAR Appointment or 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 Webex. If this platform does not work for you, please indicate your preferred method of meeting in the Comments section.).

9. Click “Save”.

Step 3 – 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.

Step 3a:
Click on “Appointment Campaign” in the “Actions” block on the right side of the screen.

Step 3b:
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.
**Group Advising Tip:** The “Slots Per Time” box should match the number of students you will be meeting with at one time.

**Step 3c:**
Your next step is adding students. The Advanced Search screen will open.

Copy all of the PUIDs from your list of students who have completed VSTAR. 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 VSTAR. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the Actions menu.

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.

**Step 3d:**
Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.

**Step 3e:**
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 back to **Step 2 – Create Campaign Availability**.

**“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.

**Step 3g:**
Develop the text you would like the student to receive when you send the appointment campaign. Note: DO NOT change the text in the red boxes. You have the option to view the way the actual email will look by scrolling down. Once you are happy with the message, click “Continue”.

*See a sample message at the end of this guide.*
Step 4 – Confirm and Send Campaign:
Review all the final campaign information. Click “Send” to begin the campaign and send the appointment email and link out to the included students.

*Be prepared!*

*Your calendar will fill up fast with appointments – so be sure your calendar is ready!*
Adding Additional Students to Your Appointment Campaign

Adding Students to the Campaign:
Using appointment campaigns for VSTAR means that you will be adding students to the campaign on an ad-hoc basis as students continue to complete their VSTAR modules.

Step 1 – Navigate to Your VSTAR Appointment Campaign:
Click the campaign icon from the menu on the left side of the screen.

Step 1a:
Click on the “Appointment Campaigns” tab and the hyperlink to your appointment campaign.
Step 2 – Add Students to Campaign:
You will add students in the same way you initially added them during the creation of your campaign. Click “Edit Campaign Details” on the right side of the screen, then choose “edit” for the “Student Select” area and search for the student(s) you want to add.

Step 2a:
Click “Add More Students”

Step 2b:
Use the “Advanced Search” option to add the student(s) to your campaign.
Copy all of the PUIDs from your list of students who have completed VSTAR. Paste them (all at once) into the **Student ID** box under the Student Information block (no commas needed).

**Step 2c:**
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”.

**Step 2d:**
Review the students in the campaign. Click “Add More Students” if you need to add more students. If the list is correct, click “Continue”.
Step 3 – Send Campaign to Newly Added Student(s):
Click “Continue” until you reach the Confirm and Send screen. You will know because the “Continue” button has changed to a “Send” button. Click “Send” to send the appointment email and link out to the newly included students.

Step 3a:
After clicking “Send,” you will be given the option to send the campaign to only the newly added students or to re-send to all students included in the campaign. Typically, you will choose “Invite Only New Students.”
Checking in a Student/Documenting a Student Appointment – Before Appointment Begins

Step 1:
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.

Step 2:
Click “Actions” and choose “Add Appointment Summary”.

Step 3:
Document the appointment.

All appointment details are pre-populated from when the appointment was created.

Fill in your notes here.
Checking in a Student/Documenting a Student Appointment – At the Time of the Appointment/After Appointment has Ended

Step 1:
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.

Step 2:
Click “Actions” and choose “Add Appointment Summary”.

Step 3:
Document the appointment.

All appointment details are pre-populated from when the appointment was created.

Fill in your notes here.
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 VSTAR appointment. Appointment Campaigns are the recommended method for scheduling VSTAR appointments.

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 VSTAR 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 11, 2021 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 above.

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: Who do I contact for help with BoilerConnect specifically?

A: boilerconnect@purdue.edu
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 your VSTAR Module! It’s now time to create your 1-on-1 Academic Advising appointment to discuss and complete pre-registration for fall 2021 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