BoilerConnect and VSTAR
2022

Process Overview

1. Beginning May 2, 2022, students are automatically added into their Brightspace VSTAR module (includes both University and College) once they accept their offer of admission and deposit. They will also automatically be given a student role in BoilerConnect at this time.

2. Once students have been through the entirety of their VSTAR module, they will complete the Student Information Form (SIF). This indicates they are ready for advising.

3. Advising units will receive a list of students ready for advising daily beginning May 3, 2022 from University Undergraduate Academic Advising (UUAA).

4. Advising appointments can begin as early as May 9th.

5. Advising units follow their internal process for assigning students to academic advisors for VSTAR advising.

6. Advisors add their students to their appropriate New Student Appointment Campaign(s) to prompt the student appointment scheduling process.

7. Students will be advised virtually (video call, phone call, email) during their scheduled new student appointment time.

8. Advisors set student pre registration status window to allow student to submit their Course Request Form (CRF). Status windows should not be opened until the advising appointment has taken place. Status windows are set to "today plus two business days" by default.

Expectations

- All New Student Appointments are scheduled using appointment campaigns in BoilerConnect.

- Advising Units - All initial New Student Appointment campaigns need to use the "STAR Appointment" or "VSTAR Appointment" service (appointment reason) only. Follow up appointments should use a <u>different</u> appointment service.
- Non-advising units – All appointment campaigns need to use a service (appointment reason) other than "STAR Appointment" or "VSTAR Appointment". If you aren't sure which service to use or that you currently have an appropriate option, please contact boilerconnect@purdue.edu.

- Advising units will receive lists daily of students who have completed their VSTAR modules and are ready for advising. Students should be added to appointment campaigns daily beginning May 3, 2022 to allow for scheduling regardless of when advising appointments will actually begin.

- If a student cancels their appointment outside of BoilerConnect, be sure to cancel the appointment on your end in BoilerConnect to provide accurate data reporting.

- If a student does not attend their scheduled appointment, mark it as a "No Show" by navigating to the Appointments tab and finding the student appointment in the Recent Appointments section. Check the box next to the student's name, click Actions and choose Mark No Show. Be sure to complete the appointment summary to complete the appointment occurrence.

- If you are unable to complete the appointment summary report the day the appointment took place, save it (even if it is blank) so the appointment is counted as complete in the appointment data. Be sure to go back and complete the summary report!

Recommendations

- Include your preferred method of advising (Webex, Zoom, etc.) in your appointment campaign message as well as in the "Special Instructions for Students" you enter as part of your campaign appointment availability. Students will list their preferred method in the Student Information Form (SIF).

- Create separate campaigns for students beginning summer and fall to ensure all students are advised prior to their batch schedule run. Summer start and Early start students pre-registration closes June 20th at 5:00pm.

- As you are creating your appointment availability, remember you can release times on your calendar as the summer progresses. Consider blocking the last 2 weeks of appointment availability on your calendar until that time is needed. Similarly, if you would like to fill certain days of the week before releasing a new day on your calendar. All things done in a typical registration campaign cycle can apply here.

- Title appointment campaigns "VSTAR 2022 – College – Advisor Name."

- For VSTAR/New Student Appointments, only use the initial nudge and using the Send a Message feature for any follow up communication.

Reminders

- Complete the appointment summary report that is attached to the scheduled appointment. Clicking "Create Appointment Summary" from a student's profile page will create a duplicate appointment instance and make it look like you are not completing your appointments. *Pro Tip: If the care unit, service, date/time of appointment, etc. are pre-populated in the appointment summary you are doing it correctly!*

- Appointment summaries are what "complete" an appointment instance. If you create Note on Student so the student can see your documentation, you also need to complete an appointment summary.

- If you have any questions or just want someone to verify you are doing things correctly please contact your BoilerConnect Department Trainer or email boilerconnect@purdue.edu.

- To see the student experience when responding to an appointment campaign click here. Note that students were provided this in their VSTAR module.

- Like 2021, BoilerConnect is continuing to schedule appointments off the :00 and :30 in the hour. BoilerConnect tries to use up as much availability as possible on the calendar based on the appointment length determined in the campaign.

  Previously, if an advisor had a block on their calendar 9-9:40am, the first option a student would be able to schedule is 10-10:30.

  Now, using the same 9-9:40 block example, students will see 9:40-10:10 as the first appointment option. It will do the same thing regardless of how long the default appointment length is. For example, for 45 minute appointments, you would have 9:40-10:25 as the first appointment slot.
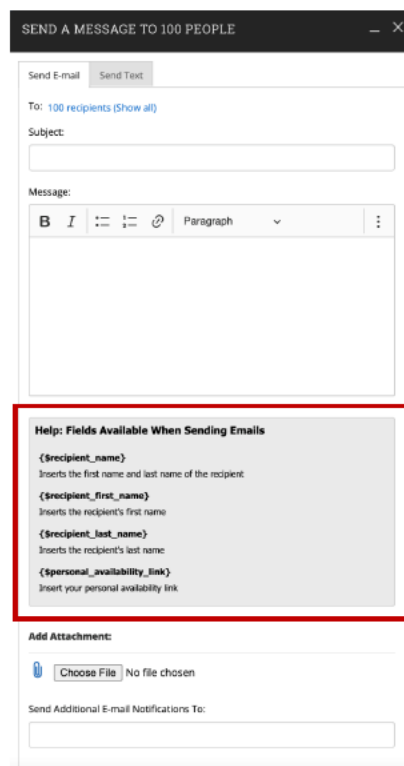
NEW for 2022!

Appointment Campaign Updates

Several updates were made to Appointment Campaigns April 2022. Updates include the look and feel, the addition of nudge emails, and aggregate campaign statistics. More information about these and a few updated processes can be found in the New Student Appointment Campaign Creation document. *NOTE: the process for adding students to a campaign after it has been created has changed!*

Merge Tags for Messaging

When a user sends a message using the Send Message functionality, they can now add four merge tags: Recipient First Name, Recipient Last Name, and Personal Availability Link.

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 Advising New Student Appointment. Appointment Campaigns are the recommended method for scheduling Advising 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?

A: During VSTAR, University Undergraduate Academic Advising (UUAA) and the Boiler Success Team (BST) collaborate to provide weekly VSTAR completion data to the Office of the Provost. To ensure the data is as accurate as possible, consistency is critical.

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

A: Your Department Trainer or boilerconnect@purdue.edu