Office of the Provost

Pathways Appointment Campaign Documentation

Pathways Team
1-21-2024

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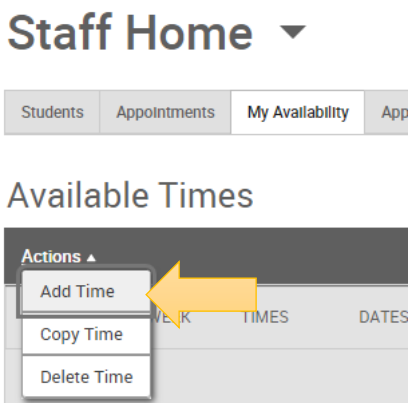
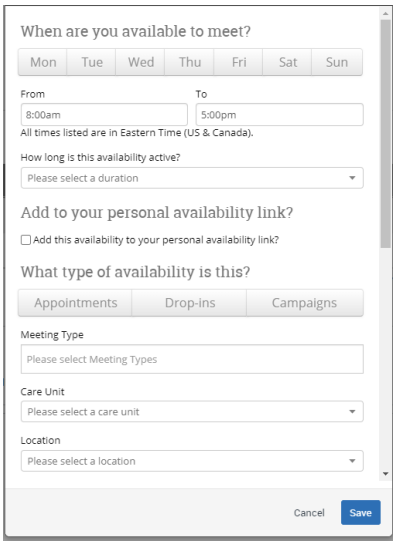
How to Set Your Availability in Navigate

Set up your availability in Navigate so that students can schedule appointments to see you. It's important to note that locations and services are created by university administrators.

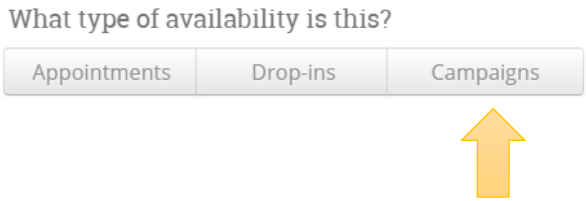
1. Click on the My Availability tab. Under Available Times,
   Go to the Actions menu and select Add Time



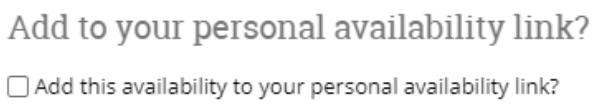
2. Select the days and times when you are available to meet with students



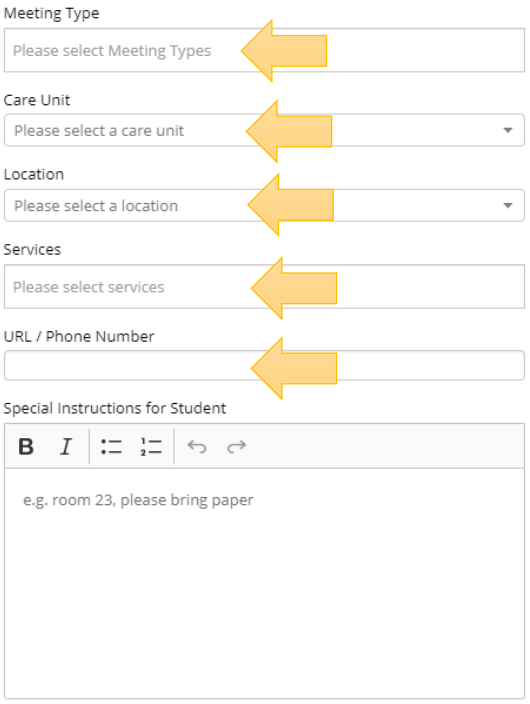
3. Select the Campaign button to be able to include your availability with your campaign.



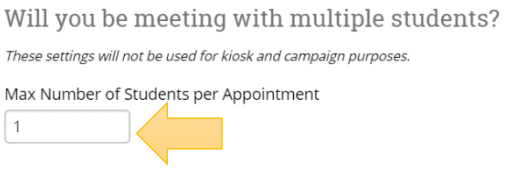
4. Determine if you want to have this availability associated with your Personal Availability Link. If yes, click on the box. If no, leave it unchecked. NOTE: This feature allows you send the Personal Availability Link directly to students and is used only for availability that is associated with "Appointments" in the previous step. Students cannot access the campaign from your personal availability link.



5. Select the type of meeting (in person v. virtual) that you want to make yourself available for.
6. Choose the care unit from the drop down menu.
7. Choose the location where you are available from the drop down menu
8. Select which type of appointment(s) for which you are available in Services.
9. If it applies, you can add a URL or phone number for virtual appointments.



10. Select the number of students per appointment.
11. Click the Save button.



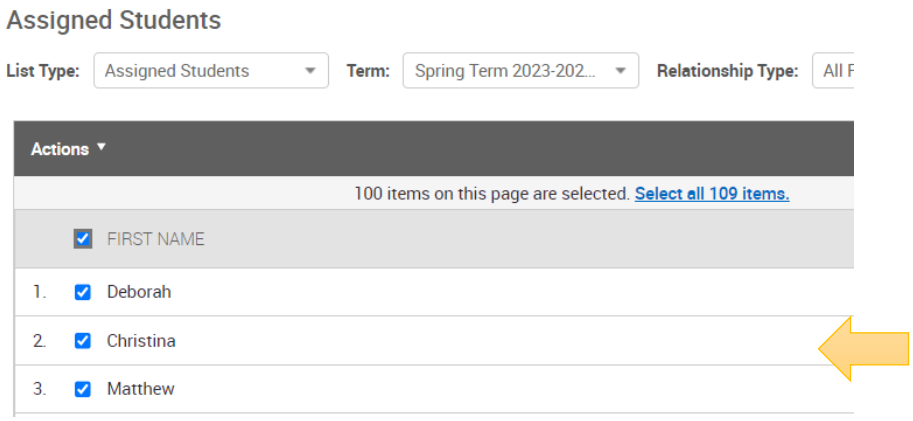
Repeat this process until all of your availabilities have been defined. You can have as much availability as you need!

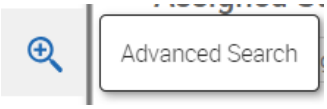
Tip: *Use the Special Instructions to Students box to include personalized information such as office number and/or directions. If you want different messaging depending on the type of appointment a student selects, you will have to set up a separate line of availability.*

How to Create a Student List from your Assigned Students or via Search

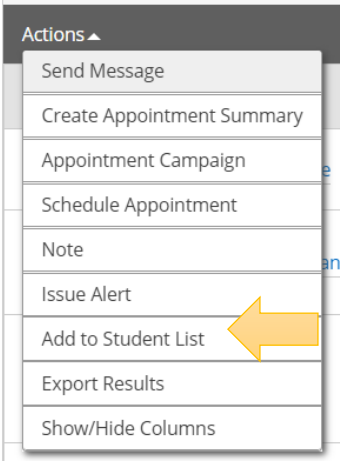
To help keep track of a list of students, you can create a student list. This is a list of students manually created and maintained by a user that highlights a particular population. This list can be used for Advising Campaigns, communications, or other monitoring.

1. Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students or by using the search functionality. You can select students individual or select all students. You can also search for students using the Search tool.

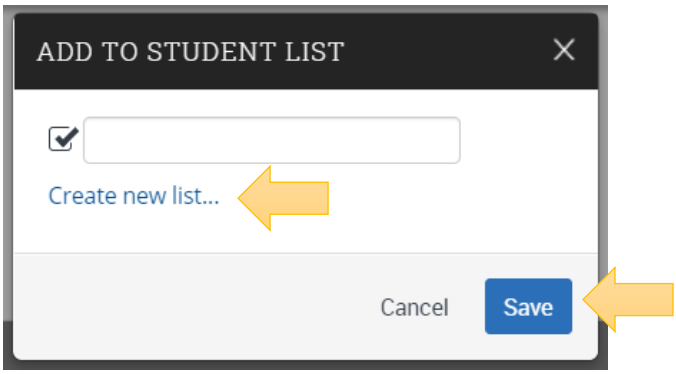




2. Under the Actions Drop-down menu, select Add to Student List.



3. Click on Create new list and give the new student list a name. Click Save.



NOTE: Saved lists are static groups of students and if the population of students changes, you must edit this list, or delete it and create a new one. It will not change like your "Assigned Students" as your list of assigned PeopleSoft Advisees changes.

How to Upload a Student List via Batch

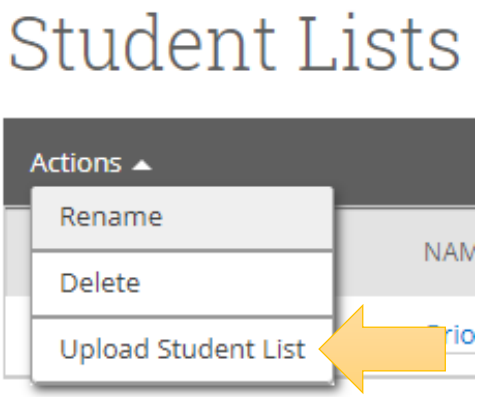
Often, you have queries from other systems that would be useful to your work within the Pathways system. Rather than recreate that list within Advanced Search or manually add students to a Student List, you can load students into the system from the list you already have using the Batch feature.

1. Before you start in Pathways, you will need to create a **.csv** file in Excel. The spreadsheet should include header and a list of PeopleSoft IDs of the students that you want to include in your Student List.

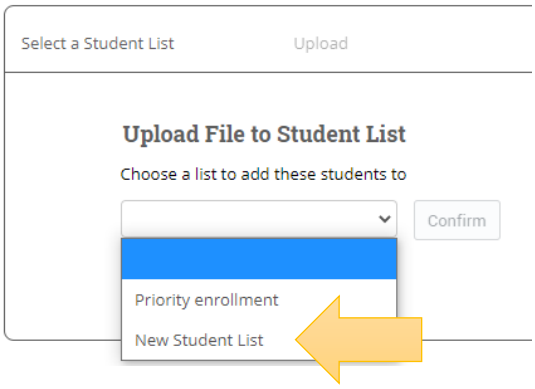
	A	B
1	Students	
2	123456	
3	234567	
4	345678	
5		
6		

2. Click on the List & Saved Items icon. 

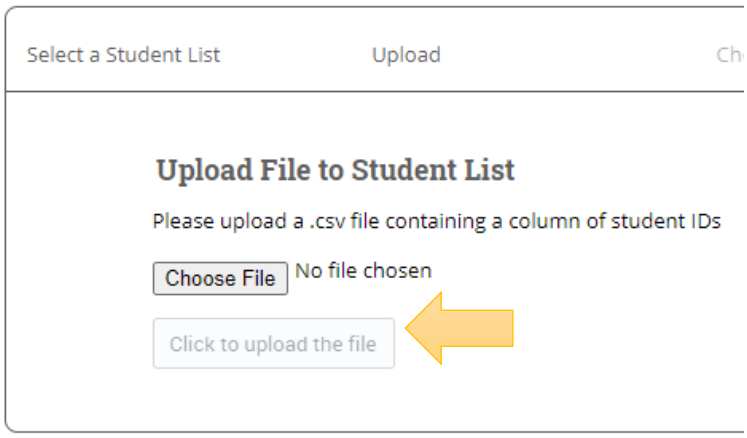
3. Click the Actions drop down and select Upload Student List.



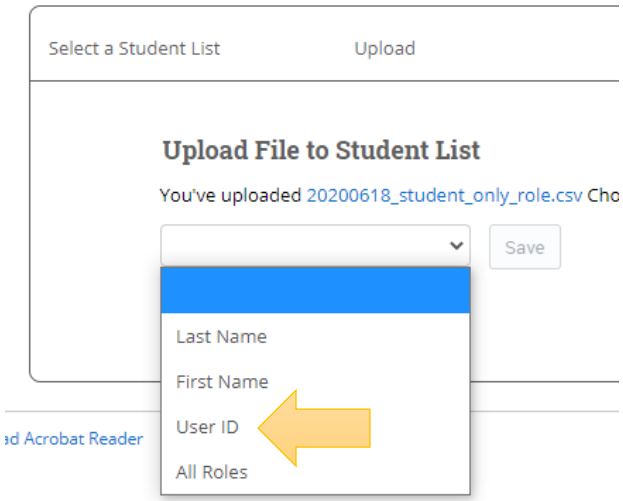
4. You can add these students to an existing list, or select New Student List then click Confirm.



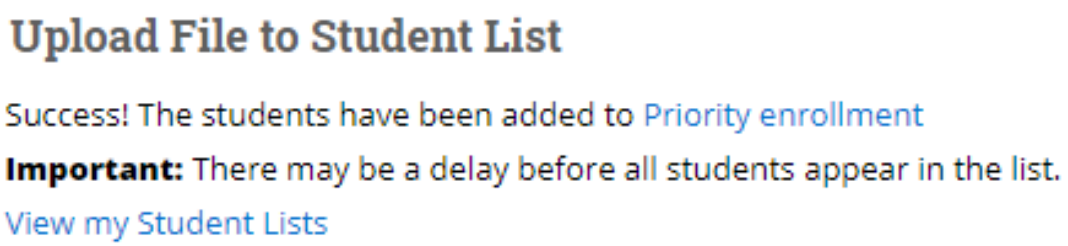
5. Click on the Choose File button to select the file you want to load and click on the Click to upload the file button.



6. Select the header of the column that holds all of your PeopleSoft ID's and click the blue Save button.

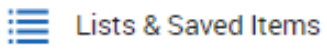


7. Depending on the size of the Student List, it may take a few minutes to load all of the students into the Student List.

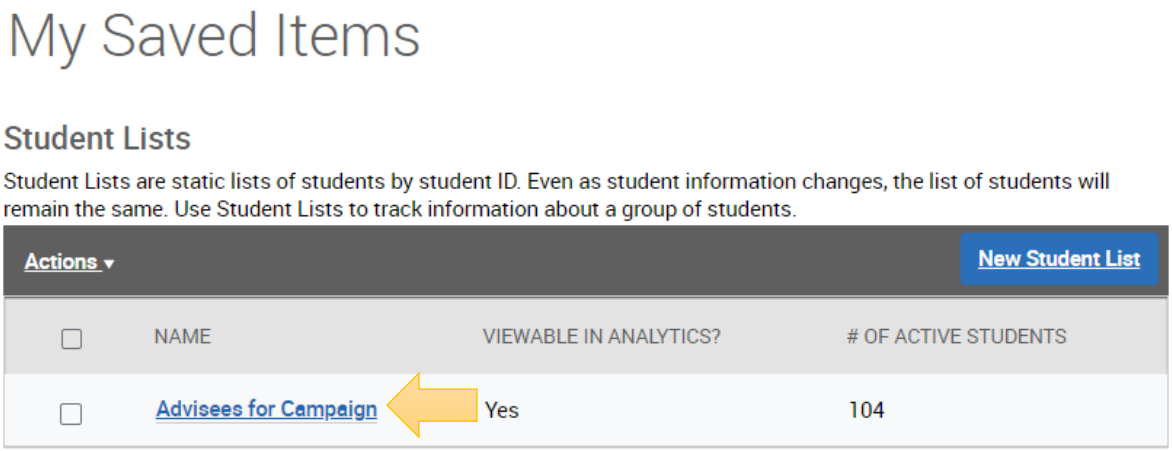


How to Create an Appointment Campaign from a Student List

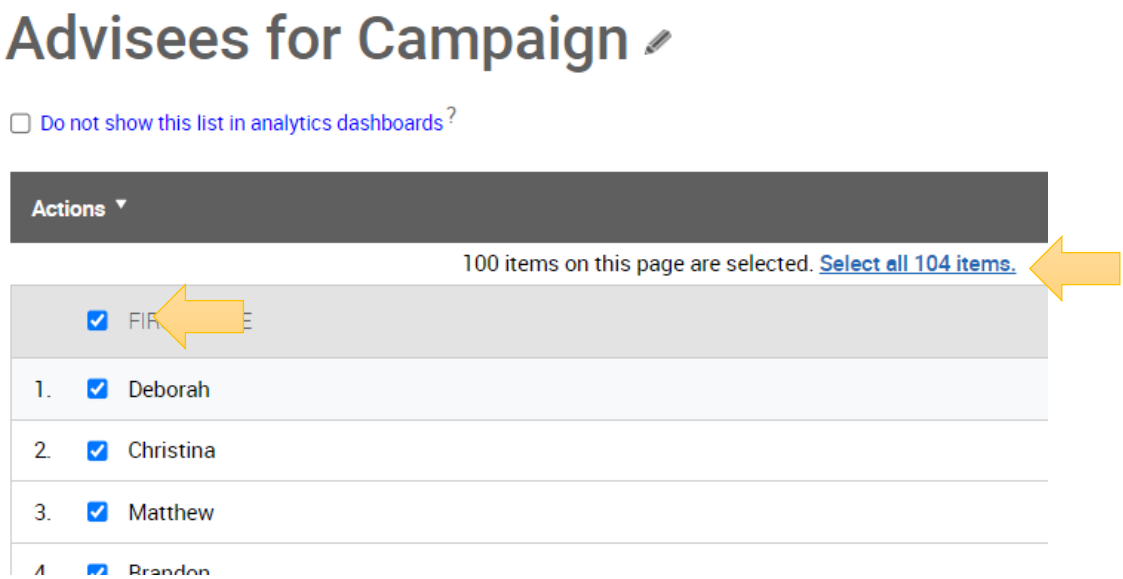
1. Access your saved student list from the Lists and Saved Items button on the lefthand menu.



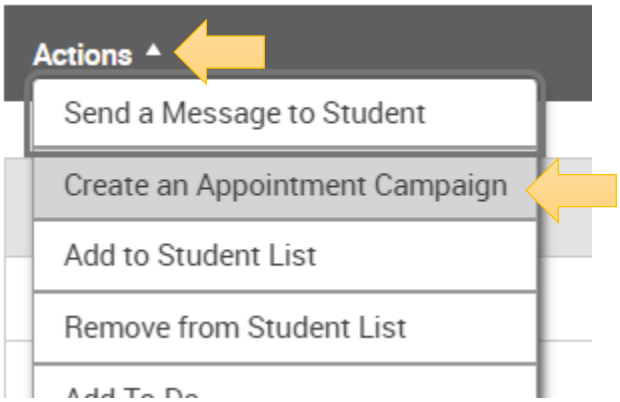
2. Click the list that includes students who you want to be included in the campaign.



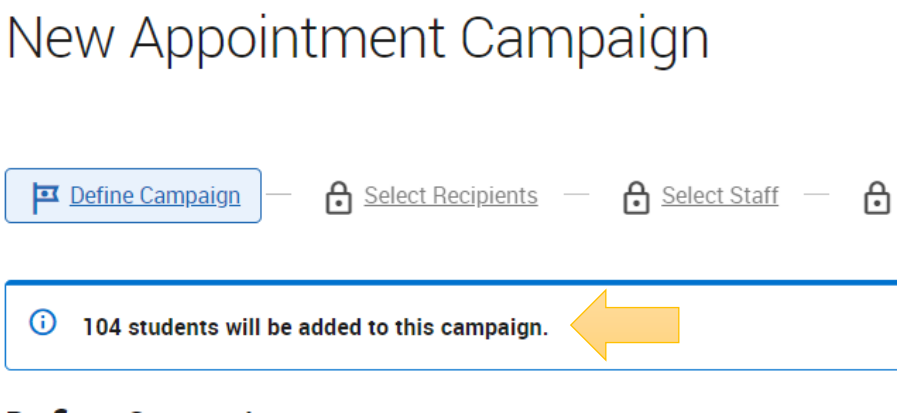
3. Use the checkboxes to check individual students, or the checkbox at the top to include all of your students. If you have more than 100 students, be sure to click the link that is displayed at the top of the list to "Select all items".



4. Use the Actions drop down and select Create an Appointment Campaign.

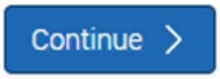


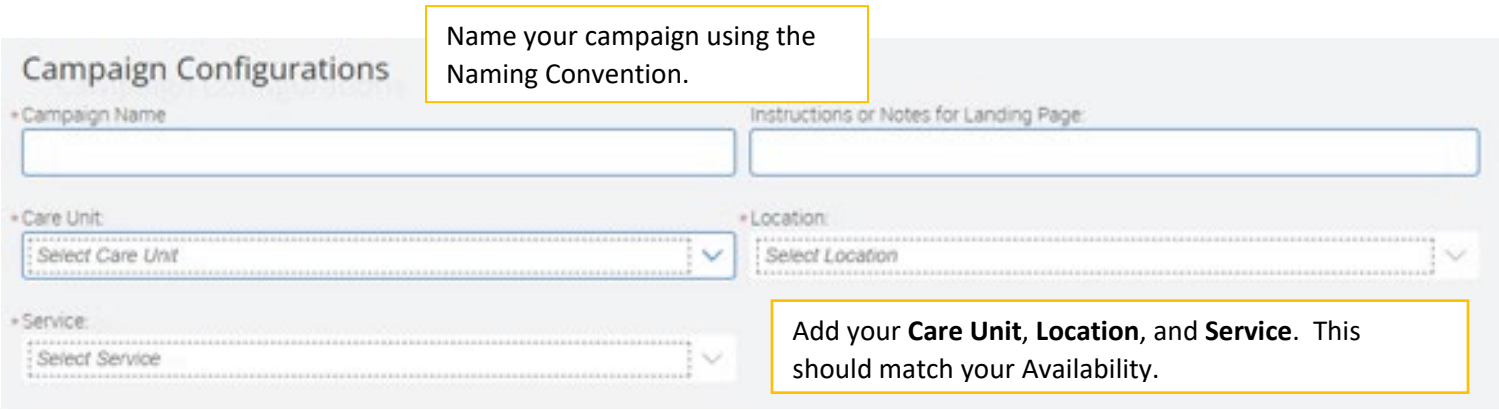
You will then be able to Define your campaign and see the number of students who are included.



Tip: Many locations in Pathways where you can select students, including your assigned student list from your Staff Home page, allow you to use the Actions drop-down to quickly create an Appointment Campaign.

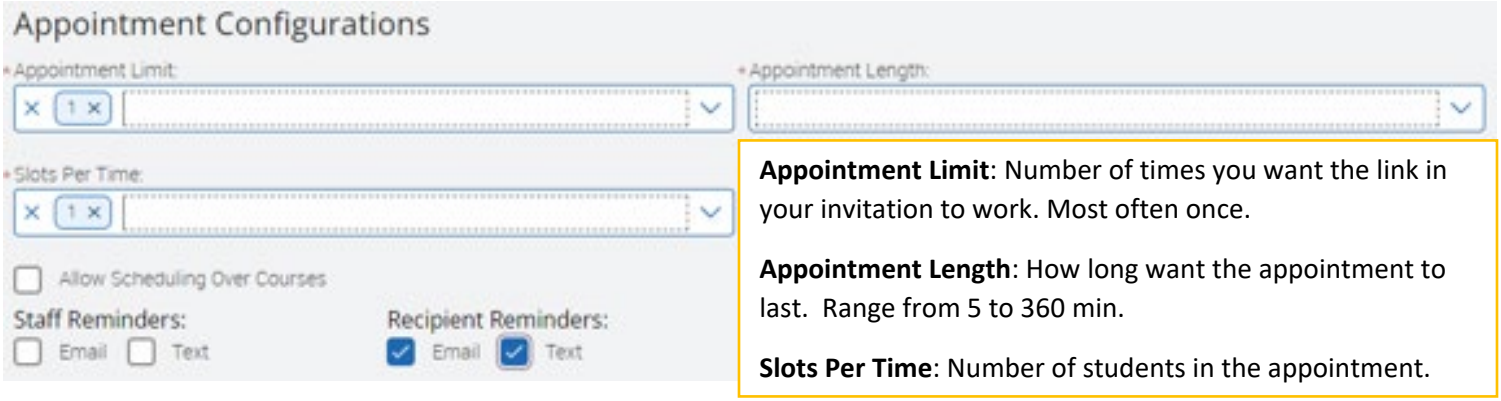
5. Define your campaign. When finished, click Continue.





Name your campaign using the Naming Convention.

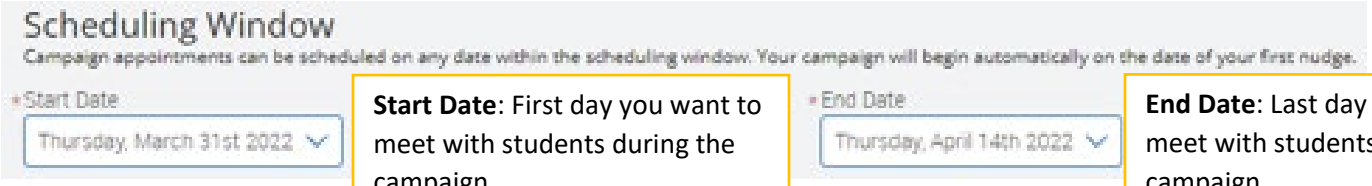
Add your **Care Unit**, **Location**, and **Service**. This should match your Availability.



Appointment Limit: Number of times you want the link in your invitation to work. Most often once.

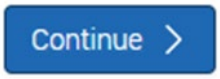
Appointment Length: How long want the appointment to last. Range from 5 to 360 min.

Slots Per Time: Number of students in the appointment.

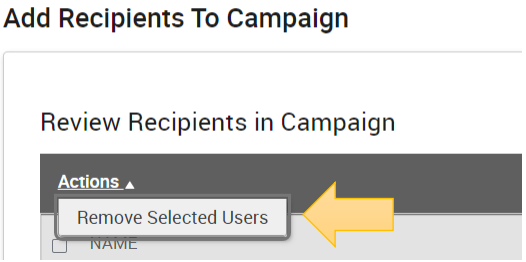


Start Date: First day you want to meet with students during the campaign.

End Date: Last day you want to meet with students during the campaign.

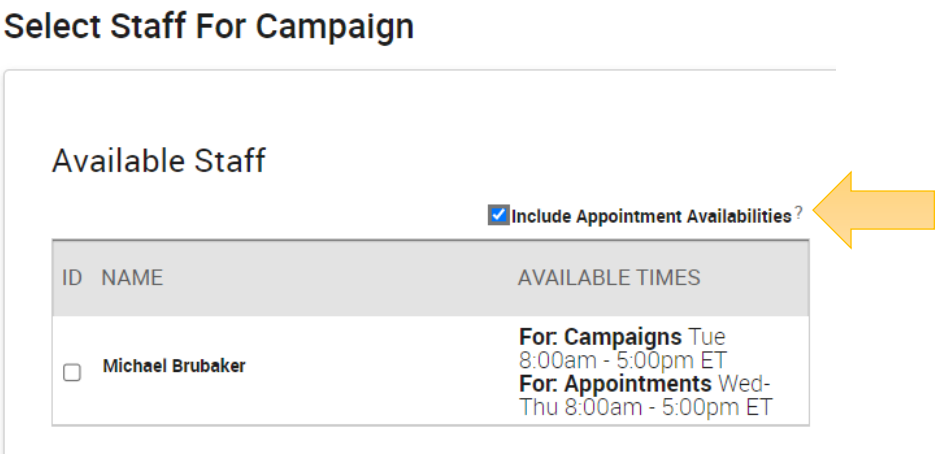


6. In the Verify Recipients step, review your list and click Continue. If necessary, you can select and removed individual students.

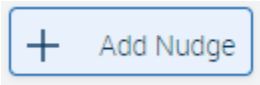


7. You will need to add Staff to your Campaign. Click the box next to your name and then click Continue.

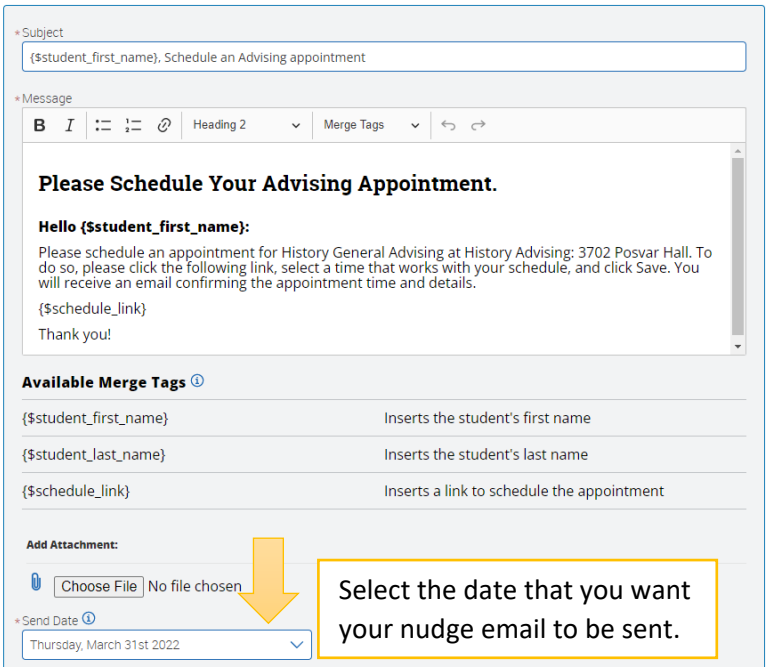
   If you do not appear as an available staff, the services for your availability and campaign my be different, or you may not have made availability for Campaigns. Go back to edit your availability, re-define your campaign or select the option to "Include Appointment Availabilities" to reference all of the availability you have created.



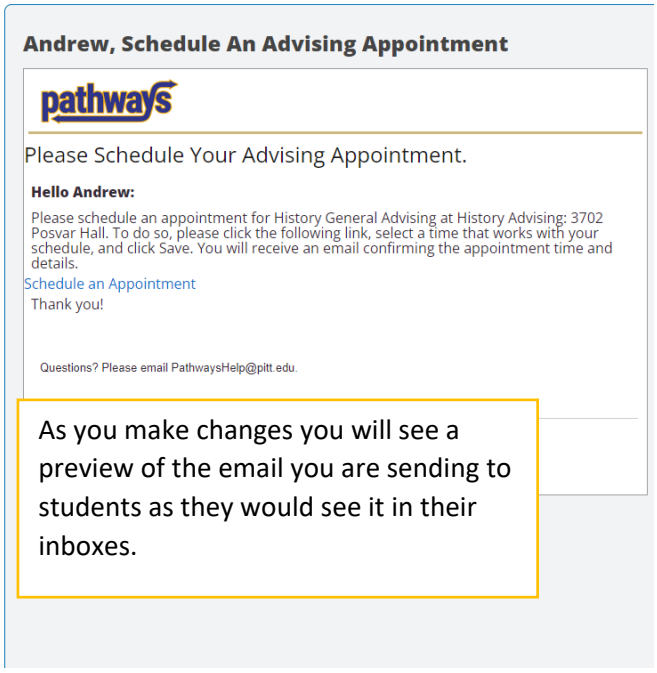
8. Now you compose your email message or Nudge. To do this, click the Add Nudge button.



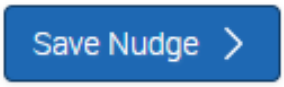
Add Nudge



Preview Email



9. Make edits to the email that you want to send to students. Make sure that the {$schedule_link} tag stays intact. This is how a student can make an appointment with you. Click Save Nudge.



10. Using Nudges, you can resend email reminder messages to the students who have not yet made an appointment with you. You can add as many Nudges as you want when you set up your Campaign, and they will be sent out on the day you choose. Once you have set up all of your nudges, click Continue.

You can send email reminders in advance for students who have not made an appointment with you using multiple Nudges. You decide the date that you want a new reminder to go out. Just follow the steps above to create as many reminders as you need. Now, you won't have to remember to check!

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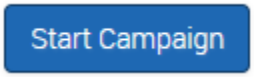
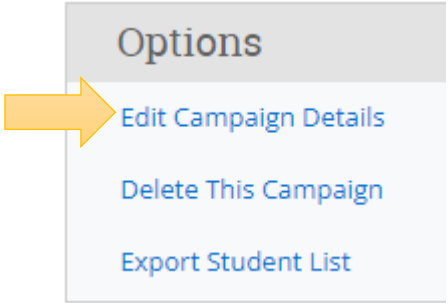
11. Confirm your Appointment Campaign and click Start Campaign.



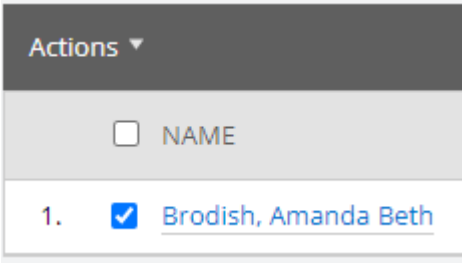
How to Add a Student to an Existing Campaign

1. Click the Campaign icon  on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details



3. Select Verify Recipients at the top of the screen.



4. Click Add More Recipients and find the student you want to add. Click the box next to the student before clicking continue

5. Once you have added the students, click on Verify and Start to get to the last screen.

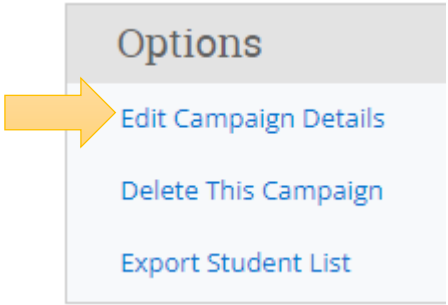
6. At the bottom of the screen, click Save and Exit.

7. An email will be sent to the new students in your campaign in the next Nudge.

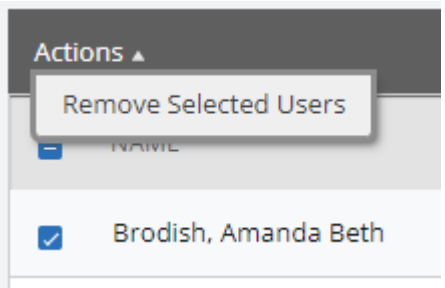
How to Remove a Student from a Campaign

1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details

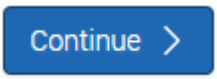


3. Select Verify Recipients at the top of the screen.



4. Click on the box in front of the student you want to remove. Under Actions, select Remove Selected Users.

5. Once your list refreshed, click Continue



6. Once you have removed the students, click on Verify and Start to get to the last screen.

8. Click Save and Exit to save your changes.