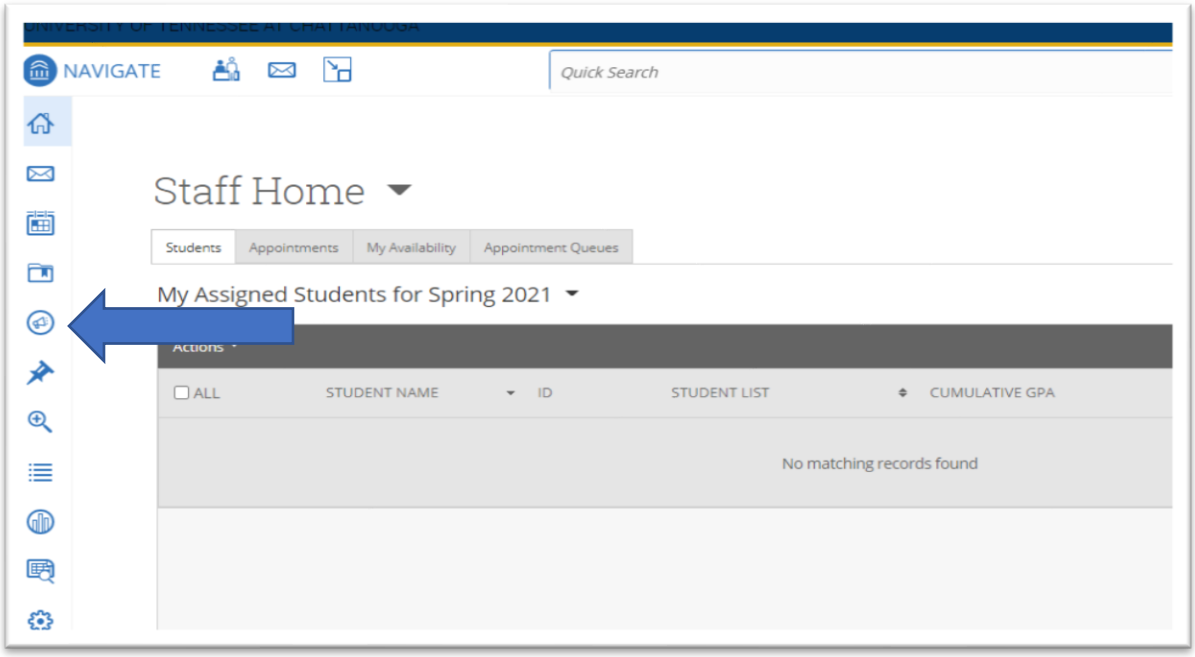
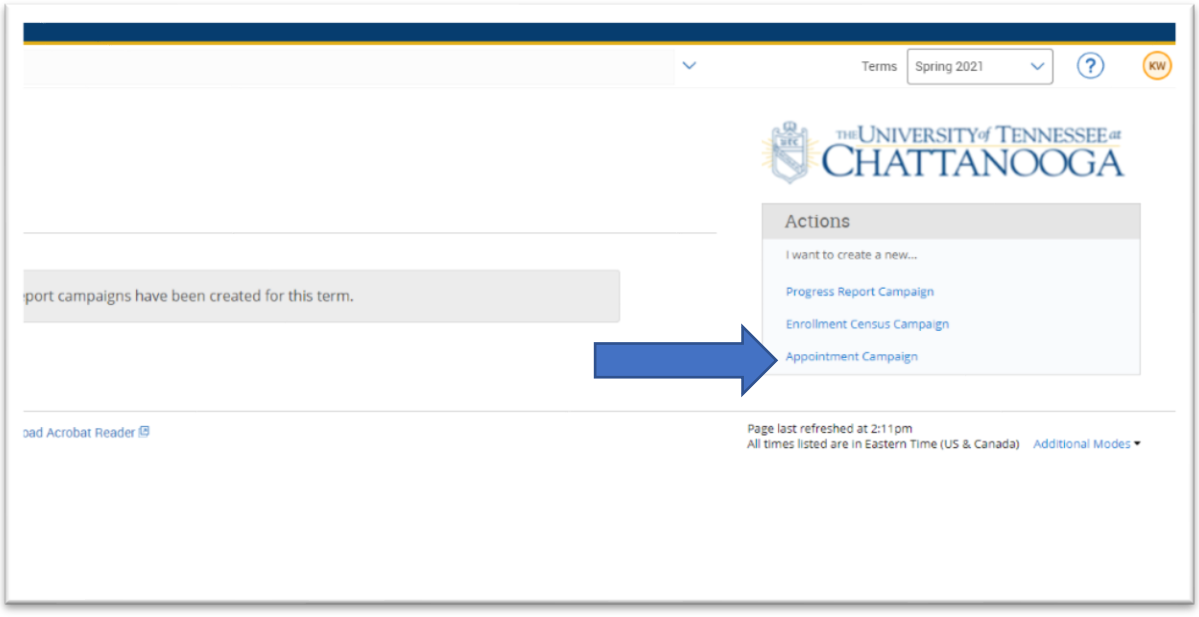
Appointment Campaign

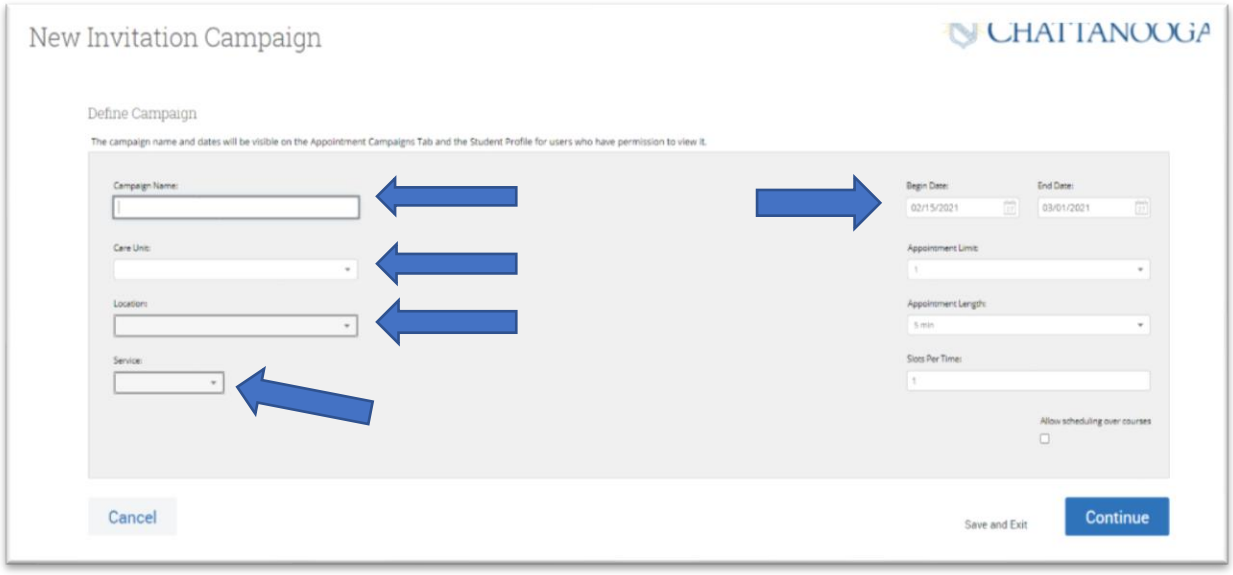
1. From the main home screen, select the “Campaign” icon on the left.



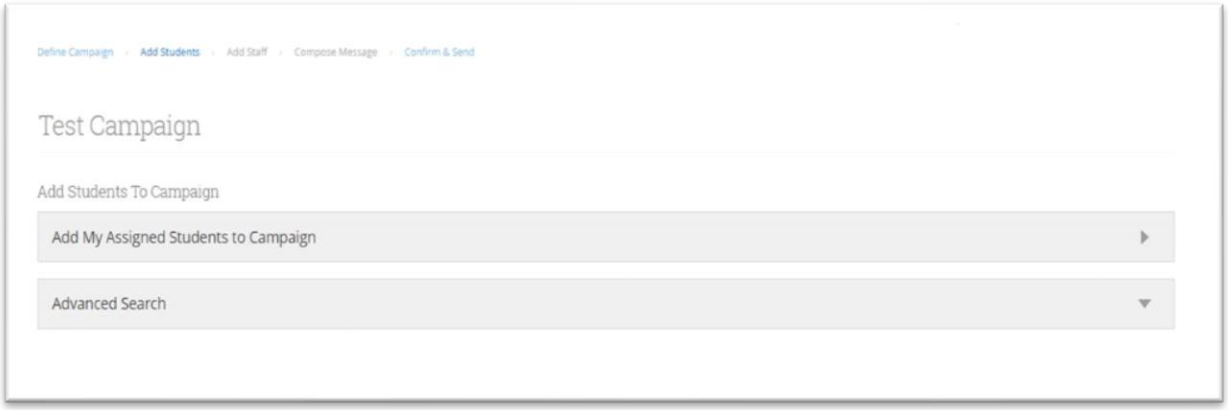
2. On the right side on the page, select “Appointment Campaign” under “Actions”

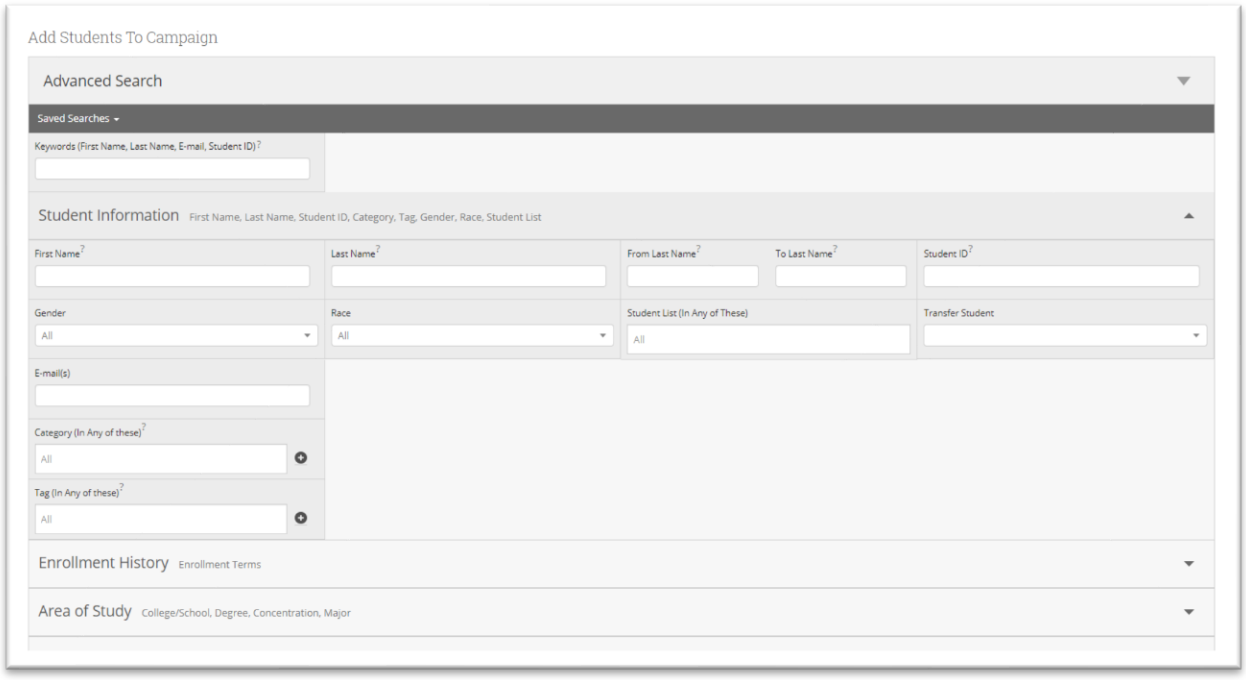


3. From here, enter a campaign name, the care unit, location and service. Also fill in the start and end date along with the appointment length and limit.

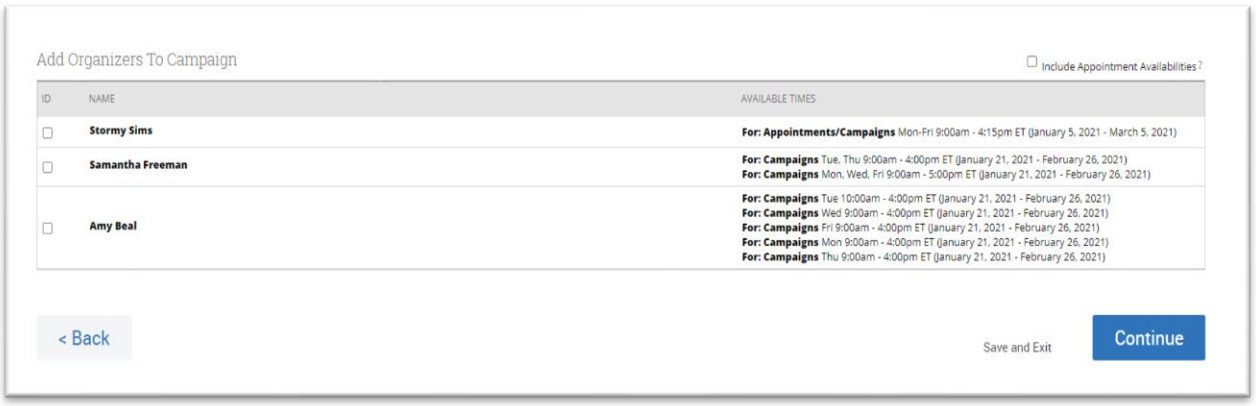


4. You will now need to add students to your campaign. You can do this by directly adding students that are assigned to you, or by searching for students using the Advanced Search feature.

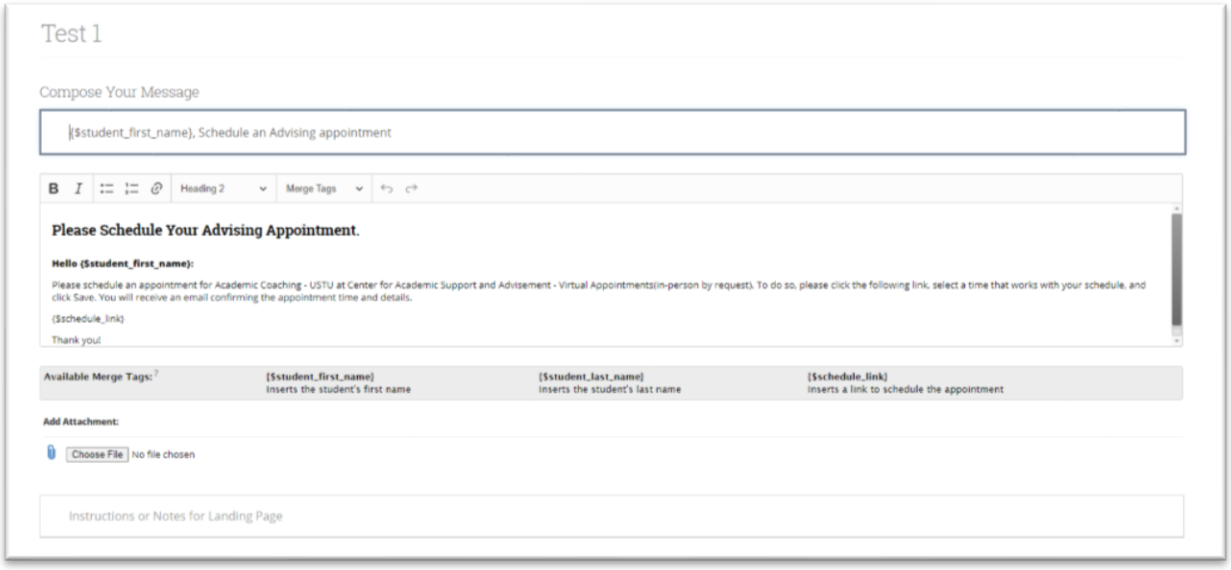


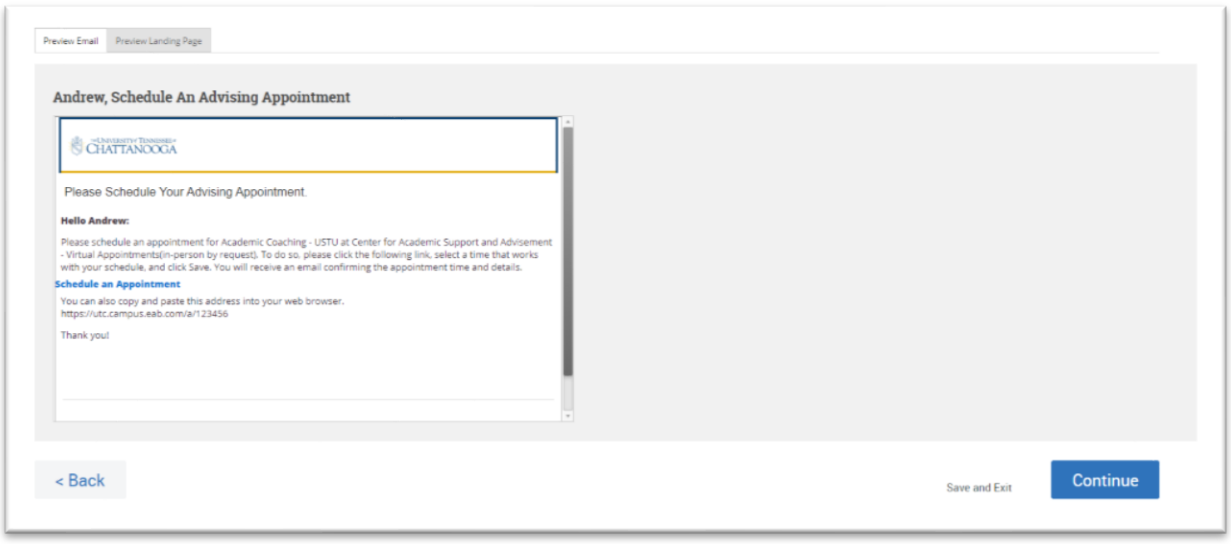


5. Based on the location you selected, the campaign will ask if you want to add an organizer to the campaign. In most cases you are selecting yourself as the organizer. Organizers shown, will be those who also have availability for the time range selected from the selected location. If you don't see yourself in the list, it is likely because you have not added Availability for meetings, or you need to adjust your location setting.

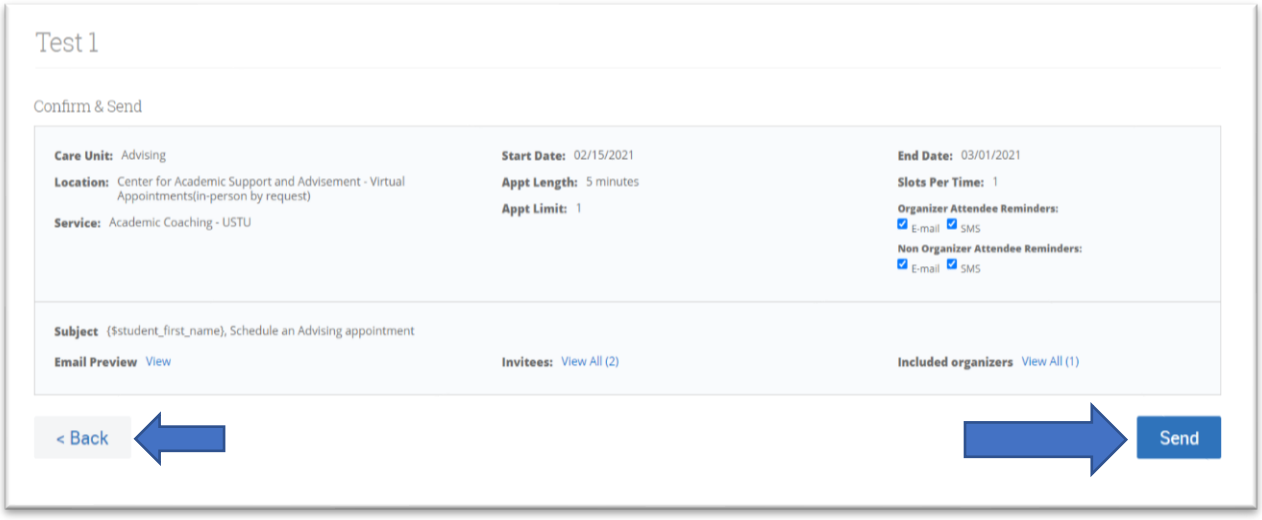


6. This step will ask you to confirm the message sent to students. The message is pre-developed based on the information you entered about the campaign. You may edit the message, however, be careful not to delete or change the info in brackets (e.g. {$Student_First_Name}) as this information is automatically imported. You can also add an attachment in this section. You can receive a preview of the message going to students at the bottom of the page.





7. On the final screen, it will ask you to confirm all the information about the campaign. Review the information and if everything looks correct, select "Send". If any of the information seems incorrect, select "Back" and correct the error.



You can keep track of the campaign from the main campaign menu.