

# Advising Technology Strategic Plan

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## University Advising Network Technology Subcommittee

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# Goals

**GOAL 1. All students and advisors should have access to an accurate degree audit online.**

## Context

A degree audit is a web-based planning tool that provides a student with a view of their academic record including progress toward degree. For advisors this is an advising tool that tracks degree requirements and aids advisors in guiding students on academic planning and course selection to obtain their degree from the University. Overall, the degree audit provides a level of transparency between the student and the advisor.

## Challenges

Although this goal is broad in scope it is important to note that most advisors use the current degree audit software that is available DegreeWorks. The accuracy of the audit relies on several factors such as:

- User and training
- Curriculum integration into ease of audit rules
- Constant review and update of changes
- Management of errors in audit and process for corrections
- Exceptions
- Bulletin policy vs procedure

## Considerations

It is important to note that the selected platform and relevant stakeholders' part of the selection process is crucial in consumer buy-in. In addition, the budget for selecting such a tool, including what features and enhancements are purchased or not purchased aids in tool success.

Of particular interest is curriculum integration and cooperation with the degree audit tool. Many users identify a barrier to audit accuracy with the current selected platform, DegreeWorks, due to curriculum management.

Coordination between colleges, advisors and the Registrar is vital. Review of specific college requirements, exceptions reports, cross-referencing bulletin policy over procedure, and adoption of universal standards and terminology assists with that management.

## **GOAL 2. Ensure students have access to accurate advisor assignments in EAB Navigate and Self-Service Carolina.**

### Context

It is mission critical that students know who their advisor is so that they have a consistent point of contact for academic advisement questions and student services. A dedicated, assigned advisor is part of the Re-Envisioning Academic Advising report of 2015. Accurate advisor assignments create consistency across colleges to enable efficient and effective advising. The percentage of students with assigned advisors has seen a 227% improvement from 2015-2019 (30%-99%).

### Existing Resources

- Advisor Assignment Repository shared folders.
- Trainings available for “one-off” advisor assignment changes in Banner.

### Strategies for continued growth and upkeep of advisor assignments

- Formal timeline of advisor assignments for new students, reassignments, and major changes. Initial assignments of new students should happen before the start of the semester to the greatest extent possible.
- Education on correct advisor reassignment protocol for major changes. Advisor assignments should follow curriculum change effective terms.
- Educate advisor assignment processors on secondary advisors. There are instances where a student should have two advisors listed. Ensure there are no accidental deletions of secondary advisors:
  - Dual degree/dual major students
  - Students considering changing their major that have been assigned an exploratory advisor
  - Honors college students
- Create a process for expedited student re-assignment when advisor turnover occurs.
- Collaborate with Advising Tech Process Steward on who should have access/training for advisor assignment and reassignment.

## **GOAL 3. All undergraduate students should be able to schedule an appointment with their advisor online through EAB Navigate.**

### Context

The EAB Navigate platform serves as both the scheduling tool for all advisors, as well as a student success platform. Navigate unites students, administrators, advisors, faculty, and other staff in a collaborative network to improve student support. It allows multimodal student communications, and in-app or web version appointment scheduling. It facilitates and track interactions between students and their academic advisors.

It is important for advisors to be easily accessible to students through a standardized scheduling platform. Advisors can email, text, and contact individual students or groups from within the platform to schedule and manage appointments. Currently 52 out of 56 departments responsible for undergraduate advising have adopted use of the EAB Navigate scheduling system.

Having one scheduling platform that all students can schedule an appointment with their advisor through helps to eliminate a barrier for students to easily connect with and find time to meet with their advisors. Furthermore, it promotes consistency across the advising process, messaging, and tools.

Students being able to self-schedule appointments online from any web device improves student success.

### Challenges

- Major change students depending on time of year may face a challenge with being able to schedule with their new program and advisor due to the term changeover timeframe in EAB Navigate. EAB Navigate recognizes students and advisor assignments for the current term only in association with advisor access and appointment scheduling.
- Departments not currently using EAB Navigate have faculty advisors.

### **GOAL 4. All students beginning after Fall 2019 should have access and understand how to use a Co-Curricular transcript.**

#### Context

As published in the Experience By Design University of South Carolina Quality Enhancement Plan On-Site Review March 22-25, 2021, “the University of South Carolina (UofSC), including the Columbia campus and four regional branch 2-year Palmetto College campuses of Lancaster, Salkehatchie, Sumter, and Union, is embarking on the Quality Enhancement Plan (QEP), Experience by Design, with an overarching goal focused on beyond the classroom (BTC) engagement and reflection for all students.” As such, “as part of the efforts to provide messaging for ELOs and other high-quality engagements to students...My UofSC Experience was launched to students in 2020...Undergraduate students are encouraged to explore and engage in the vast opportunities that UofSC offers in order to maximize their education.”

With their academic advisor, students critically plan, reflect on, and make meaning of their integration in beyond-the-classroom activities. Beginning in students’ first semester at UofSC, using My UofSC Experience, academic advisors help students plan and engage in educationally purposeful experiential activities including internships, study abroad, student organization membership, undergraduate research, and campus leadership opportunities. As the only mandated interaction with a representative of the

university, academic advisors will play a key role in the university's reaccreditation as student integration and reflection on experiential and integrative education is being written into UofSC's new Quality Enhancement Plan.

#### Existing resources for Advisors provided by the University Advising Center

1. A dedicated website where advisors can utilize the MyUofSC Experience/Beyond the Classroom platform that tracks students record of participation
2. A series of training opportunities related to Experience by Design and advising
  - a. Specifically, advisor training titled "My UofSC Experience for Advisors to learn more about the My UofSC Experience initiative & how to incorporate it into advising conversations as it provides a more holistic view of a student's college experience.
3. Specialized videos for advisors on high-impact practices.
4. A four-year advising plan for incorporating reflection and integrative learning into advisement in which the academic advisor shows the student in year one a [sample Co-Curricular Transcript](#)

#### Existing resources for students regarding the Co-Curricular transcript

1. Every semester an email is sent to all students by the University Advising Center to introduce My UofSC Experience and the co-curricular transcript.
2. The University Advising Center Experiential Learning [Community of Practice](#) was charged with creating a University 101 pilot presentation that would incorporate an introduction to systems that students should know which incorporates students learning about the co-curricular transcript. This presentation will be an official U101 Campus Partner Presentation beginning in Fall 2022.
3. [A dedicated website](#) for My UofSC Experience Student Resources

#### Needed Resources for Improvement

Providing and assessing how advisors are sharing this information with students and talking about the co-curricular transcript is needed. With this data, recommendations for messaging can be made as well as identifying other systems of support. There is also a need to verify consistency across advisors on how the co-curricular transcript is introduced, discussed, and recorded during appointments.

Although there are existing resources available to advisors, more training and awareness is beneficial. Just as students receive an email each semester targeting My UofSC Experience and the co-curricular transcript, a yearly email reminder to advisors on ways to incorporate this conversation into their advisement appointment is vital. Concerns of how to incorporate beyond the first year, promotion, basic understanding and time constraints are blockades to some units.

Leaning on the University Advising Center Experiential Learning [Community of Practice](#) for recommendations on best practices and innovative ideas may be key.

- Request for videos of seniors or recent graduates who can identify how they have successfully used the co-curricular transcript. Student facing view of My UofSC Experience.
- Targeted emails to advisors with example messaging and training resources may be beneficial in ensuring consistency.

## **GOAL 5. Ensure advisors have access to reports and appropriate training that facilitate advisement. (i.e. course prediction reports)**

### Context

Provide appropriate technology access with training modules for proper understanding of systems and data to use in advising our students. Advisors should be able to utilize reports to gain a holistic view of their academic advisees.

### Challenges

- The current advisor to student ratio (sometimes more than 300 to 1) does not allow for ample time to analyze data within reports.
- There is not consistent training for how to run reports in EAB.
- Reports are housed in different systems (EAB, data warehouse, home-grown systems) and it can be difficult to merge information.
- Advisors do not always have access to reporting systems (data warehouse) and “levels” of reporting in EAB.
- Onboarding time to gain access to technology systems for advisors.

### Strategies for continued implementation

- Continue to encourage UAC training for advisors.
- Continue to have Advising Process Steward stay after UAN meetings to answer individual questions related to technology.

### Suggestions for enhancement and consistency in technology

- Educate advisors on how to run various reports. Offer “real time” support for advisors to assist in running reports for the first time. This could be office-specific or centralized through UAC.
- Encouraging leadership to standardize/create equitable access to these reports for advisors across campus.
- Investigate advisors time commitments and consider encouraging new "best" practices for scheduling administrative time in addition to student/appointment availability.

## **GOAL 6. Ensure advisors and supervisors can access a summary of each advising appointment with a student.**

### Context

The ability of student support providers across campus to see the same summary of a student's advising appointment supports consistency in campus advising network. The University has adopted EAB Navigate as the central platform in which this should take place. All advisors should fill out an appointment summary in EAB following an interaction with a student. Closing out appointment summaries consistently facilitates effective data reporting on advising and auditing of advising consistency.

### Existing Resources

- All advisors with assigned caseloads have access to EAB and their assigned students.
- All advisors with EAB access have access to detailed trainings and resources to facilitate its use.
- An in-person training, "Advising Workflow and Appointment Notes", is facilitated by the UAC once per semester and is open to all advisors.

### Strategies for continued implementation

- Consistent reminders and training for advisors on tools for advising or reporting.

### Suggestions for enhancement

- Create an [automatic appointment summary template](#) in EAB that allows a consistent way of advisors and other staff recording summary notes.
- UAC configure specific appointment summary questions that must be answered before closing out an appointment report.

### Challenges

- Time between appointments to allow for efficient and accurate recording or appointment notes to create an appointment summary. Caseload size impacts time to see and wrap up appointment summaries. Student to advisor ratio may be outdated now there is updated technology and new initiatives required by advisors.
- Allowing students to be able to see appointment summaries or not as best practice impacts the advisor's procedure of how to recap and follow up with students.

## **GOAL 7. Ensure students have access to and are aware of advisement and registration tools in Self Service Carolina.**

## Context

Self Service Carolina is where the registration transactions happen. If students are not able to use these tools effectively, they cannot register for classes. If they cannot register for classes, they cannot progress towards a degree. Advisement planning tools (EAB, DegreeWorks, course equivalencies) are all located in a central location in Self Service Carolina to streamline ease of use for students and enable to them to further take ownership over their academic and degree planning.

## Challenges

- Students only register two to three times a year, so they forget things they have learned about Registration.
- Students receive so many emails from the University that sometimes emails with vital information, such as videos or links to help with registration, can get 'lost' or overlooked.
- Registration can be a little complicated at times with how many clicks they need to get information.

## Strategies for implementation

- Use existing and future advising video tutorials, and create text-based instructions, as well. This accommodates different learning styles among students.
- Auto-replies during high-volume email periods.
- Sending emails about how to register and use SSC prior to the start of registration. Make sure that advisors are thoroughly trained and able to teach students how to use the tools.

## Suggestions for improvement

- Send out the Constant Contact emails before priority registration week.
- Get all U101 instructors on board by devoting a day or two of class to go over registration.

**GOAL 8. Assist in student understanding and competency when using advising technology.**

- a. ***Entire University will be on Degreeworks by December 2022***

## Context

Students having access to resources to take ownership of advising allows for equitable access to the advising process. If students are not aware of how to use an advising technology platform, they will be at a disadvantage to those students who are familiar with the platform. Advisors operate as teachers in multiple ways, and one learning outcome should be the student understanding how to use Self Service Carolina, DegreeWorks, EAB Navigate, and the Co-Curricular transcript. Additionally, there is a need for students to understand their degree requirements and progression and how advising technologies aid in this understanding. Therefore, the subgoal of this recommendation is for all undergraduate degree programs to be effectively using DegreeWorks by Fall 2023. This goal is in alignment with Goal Six of the ACT Report.

### Existing Resources

- “Student Advising Resources” dedicated page on UAC website.
  - Specific student facing DegreeWorks content.
- Several instances of college specific student resources pages (I.e. HRSM, DMSB, CEC).
- Collaboration with Registrar and Financial Aid on the CPoS project, which will help facilitate DegreeWorks adoption out of necessity.

### Strategies for continued implementation

- Student-targeted early-semester campaign to raise awareness of existing student-focused training resources
  - Marketing campaign for all class years (not just for freshmen)
- Strategies to gather further data on student barriers to this goal
  - Focus group to ask about areas of misunderstanding of advising technologies.
- Continued collaboration with Student Government legislation regarding advising technology

### Suggestions for enhancement

- Improved DegreeWorks coding for majors that currently are not coded well
- Updates to the newest versions of DegreeWorks that features design improvements for ease of use.

### Challenges

- Identifying timing and pacing of training for students at appropriate times throughout their years at UofSC.
  - “Firehose effect” of Orientation as focus of training for incoming students
- Development of effective strategies for empowering students to be the drivers of their educational experience and choices.
- Advisor buy-in based on history of DegreeWorks errors – trickle-down effect of student buy-in.

- DegreeWorks should be nearly error-free by the implementation of CPoS.
- Frequency of exceptions needed for curriculum accuracy.

## APPENDIX

Common themes that present challenges on a higher level beyond technology.

- Exceptions Management in DegreeWorks
- Training
- Advisor/Personnel Resources
- Organizational Structure (workflow in the department)
- Curriculum
- Supervisor Support

[Self-Assessment graphs on units meeting goals](#)

### Technology Survey

- Survey ran from October 9th to December 15th, 2020
- 14% response rate – 106 full responses of 726 surveyed (UofSC Columbia Campus advisor listserv – may be some inactive people on this email list)
- 59 total questions covering the four primary technology platforms used by advisors
  - Self Service Carolina
  - EAB Navigate
  - Degree Works
  - My UofSC Experience
- One area of concern was the frustration with multiple advising platforms