

## Advising Technology Subcommittee - Minutes

Monday, June 17th

In attendance:

- Rachel Denmark (Honors), Co-Chair
- Lauren Stefan (DMSB)
- Brittain Goff (DMSB)
- Lisa Pierce (CEC)
- Valeria Bates (HRSM)
- Rebecca Boyd (CAS)
- Michael Davis (CAS)
- Paige McKeown (First-Year Advising, UAC)
- Dr. Pinkney Epps (TRIO)
- Heidi Waltz (NURS)
- Claire Robinson (ex-officio)
- Brian Dusel (ex-officio)

### Approval of May 20, 2019 Minutes

- 1<sup>st</sup> Approval: Brittain Goff
- 2<sup>nd</sup> Approval: Heidi Waltz

### Review FAQ's on Technology Website

- Advisor Toolbox website displayed
  - Videos and Tutorials for Banner IX
  - Committee discussed instances for submitting tickets for Self Service Carolina
    - Members should encourage their colleges to submit tickets when something is missing from the platform rather than "moved."
  - Training Material Suggestions
    - Training for Summary class list and where to find test scores for advisors and students
    - More print materials that can be printed/distributed
- Suggestions for Banner IX
  - A link for **viewing holds** would be helpful under Advisee info as well as a link for **Student Information** and **Viewing test scores**
  - Brian D. advised that we are on the horizon of new items and advisors should work to adjust workflows. Many of the Banner VIII features may no longer be available
  - Heidi W. (NURS) Suggestion
    - It appears there has been a shift from focus on Navigate to focus on Degreeworks
      - It could be helpful to create a matrix of some sort to look at all the functions of each system
      - What should we use Navigate/Degreeworks/My UofSC Experience/Self Service
      - Claire R.: We should determine which processes are categorized as Intervention vs. Technical vs. Transactional and how can you do this in each platform.

### Transfer Work Update

- Paige M. IB scores should be sent directly to the Registrar, not Admissions. AP and Dual Enrollment scores are still processed in Admissions until the start of fall classes.

## Advisor Technology Survey

- Committee will receive print out of results at next meeting.
- Discussion of themes from the survey
  - Committee members explained how they use watchlists
    - Valeria B. (HRSM): To monitor GPA requirements
    - DMSB: To monitor progression and GPA
    - Upload csv file
    - Other colleges considering implementation
- Discussion of Areas for Growth theme on the survey (Degreeworks dominated the discussion)
  - Lisa P. (CEC): Posed the question of the possibility for the option of pre-loaded or blank plans. Students are not completing plans correctly.
    - Claire R. advised that the UAN voted on the matter and we will not be able to have pre-filled plans. While this is not a closed discussion. We must first work on the Bulletin to make sure that the uploads will be correct if we ever decide to go down that route.
    - Claire R.: Courseleaf will soon replace the bulletin and it will be a more dynamic field of study skeleton as well as incorporate major maps
    - Rachel D. asked about the possibility of Major Maps being linked in Degreeworks. She will take this question to a meeting with Tara George.
  - Brittain G. & Lauren S. (DMSB):
    - Commented on concerns in terms of time available in appointments, number of advisees, and the number of platforms that advisors are asked to use.
    - DW Plans become useless after the first year because all business students begin as Pre-Business. When they move to a new plan, advisor must create a new plan. The overall takeaway from the discussion developed a question for the committee to consider: **Should advisors “back fill” a plan when a student changes major?**
      - Valeria B. (HRSM) discussed their workflow and advised that they do not go back and fill in plans. They also advise by major so advisors are doing the same plan over and over.
      - There was a discussion of how each unit is doing advisor assignments. There was a mix of advisor assignment methods.
      - Questions for the committee to consider: **What is the recommendation from the committee for the best way to assign students to advisors that aligns with technology systems (A-Z vs. Major Assignments)?**
    - **Lauren S. mentioned that there is an issue of students changing their plan of study and the old advisor not being able to edit the plan once the major change has taken place.**
    - DMSB also posed questions about the purpose of SEPs and how they should be used.
      - Rachel D. discussed how SEPs can be used to replace the advisement form as well as foreshadow a student’s plan of study
        - Course Foreshadowing is a hope for the future from SEP plans to be able to determine how many seats will be needed in certain classes
    - Claire R. addressed and asked questions about concerns.
      - Claire suggests **benchmarking with other Business schools with similar structures that use the Degreeworks platform.**

- Claire encourages the committee to think about our recommendations in the land of the “Ideal Advising Workflow”

### Strategic Plan for Advising at UofSC

- Claire R. discussed plans for a Strategic Plan for Advising at UofSC
  - This should be one of the committee’s main focus in the coming year
  - We need to make sure the technology is doing what we need it to do to optimize our student and advisor experience
  - **Committee should consider:**
    - **Goals/Outcomes (What are our goals and desired outcomes?)**
    - **Initiatives (How will goals be accomplished?)**
    - **Assessment (What does this all mean and what has it done)**
  - **Committee should critically look at all 4 technology platforms and help to disseminate to those invested in advising technology.**
- Special Population Discussion
  - The committee should consider: **What are the expectations for special programs (TRIO, Honors, Athletics) in terms of Degreeworks and technology?**
  - Dr. Epps (TRIO): Explained that TRIO uses the Notes feature in the Degreeworks audit to help guide others advisors on campus
    - TRIO students depend on federal funding so it is important that they are meeting progression requirements
    - TRIO staff will reach out to advisors with concerns or questions
    - TRIO staff refer students to Exploratory Advising for students changing their major
  - Rachel D. (Honors): Explained the Honors Summer workflow for adding Degreeworks Plans
    - Honors advisors will only complete the SCHC Requirements plan this summer. Honors advisors will not create a major plan
    - The SCHC Requirements plan will only include Honors courses on the plan
    - Honors Advisors may foreshadow a semester in advance for courses the student plan to take as Honors
- How is CAS using Degreeworks?
  - Rebecca B. (CAS) advised that she recently received Exceptions access and is learning how to use it.
    - She had questions about how to get “overlay” courses to read correctly
    - Rebecca’s caseload will soon be increasing from 290 to 475.
  - Michael D. (CAS) advised that the Deans Office is trying to use it more now that more advisors have access
    - It depends on the department if they are using during Degreeworks
    - Since every CAS Department has an FYA there is someone in each college that can process Exceptions
  - Brittain G. (DMSB) advised that the more manual the use of Exceptions the less there will be buy-in from stakeholders and departments

**Rachel & Lauren Meeting with Tara George:**

- Co-chairs will meet with Tara George on June 25<sup>th</sup> to discuss questions from the committee including those posed today about Degreeworks:
  - **I.e.** Is it recommended that advisors “back fill” plans? Is there an update on the ability to foreshadow courses from SEPs?

**Other Items for Consideration:**

- Paige M. mentioned the printed materials for Schedule Planner Changes – Rachel will send out to the group
- Fall meeting dates will be discussed at the next meeting. There will not be a meeting in August.
- Committee is asked to : **Please consider the Technology Training items that exist at UofSC.**
  - **What is missing?**
  - **Are there recommendations for other methods of communication?**

**Next Meeting: July 15<sup>th</sup>**