Meeting Minutes: October 2, 2000

Present: Barb Anderson, Kristeen Anderson, Teresa Baultrippe, Ruben Belloriun, Jackie Carlson, Pam Cook, Anne Daly, Shelly Diers, Tina Falkner, Teresa Fruen, Bill Ganzlin, Laurie Gardner, Bonnie Gulbrandson, Michael Helget, Teesha Kirschbaum, Jennifer Koontz, Mary Koskan, Rick Marsden, Kathy Newell, Bob Nelson, Steph Nichols, Linda Norcross, Joan Pasiuk, Peggy Phan, Jan Reifseck, Vickie Roberts, Alice Ross, Jim Rowan, Jan Schlueter, Julie Selander, Clare Strand, Paula Swanson, Terri Tuzinski, Sue Van Voorhis, Judith Wanhala, Anne White, Gayle Woodruff.

PLEASE NOTE: THE FUTURE RAC MEETINGS WILL BEGIN AT 9:30 AM AND END AT 11:00 AM.

Review Minutes from September Meeting: There were no changes to the September minutes.

Announcements: At the September Council of Undergraduate Dean's meeting it was approved to change the name of Intersession to May Session. It was expressed that this wording allowed departments more flexibility in how they used this session.

OTR in conjunction with Student Services Communication (formerly Communications and Publications) is producing a survey assessing the use of the Undergraduate Catalog, the Course Guide and the Class Schedule which will be mailed to a random sample of 800 Twin Cities undergraduate students and a sample of staff members. If you receive a copy of the survey, please complete and return it.

Sue Van Voorhis asked for an update from collegiate representatives regarding discontinuing students for non-enrollment. From an OTR standpoint if students are continually term-activated term after term, we have an ever-increasing population that is eligible to enroll. Also, the size of this population raises questions about maintenance. There were varying responses from colleges, but the general consensus was that if there was good, regular communication to this student population (especially adult students in CCE) that discontinuing these students would be an acceptable procedure. CCE voiced a strong concern over discontinuing their non-degree students. Mary Koskan shared with the group that it is relatively easy for non-degree seeking students (even if they have not been enrolled for two consecutive semesters) to register via quick enroll at the Service Centers. After hearing this CCE was more comfortable with discontinuing their students. It was suggested that a publication be created to address this issue with all non-degree-seeking students.

At the September Regents' meeting it was approved to change the name of UMD's University College to Continuing Education.

Student Accounts Receivable Update: Julie Selander from Student Accounts Receivable (SAR) provided an update.

Student billing is 100% better than it was last year.

The first installment of bills was a week later than originally planned due to some Financial Aid packaging problems. Bill due dates were also adjusted by one week. SAR has encountered some problems with tuition waivers falling off of accounts. A fix to this problem will be tested and implemented during early- to mid-October.

The address sort order is not following the correct path, and as a result some bills and refund checks are being sent to the wrong address initially. Refund checks are automatically routed back to the SAR office, however bills will follow any forwarding requests. The bill sort is supposed to follow: 1) Bill address; 2) Mail address; 3) Home address (permanent address). The refund check process is supposed to follow: 1) Mail address; 2) Home address (permanent address); 3) Billing address.

The payment applier program is supposed to automatically apply payments to the oldest outstanding bill. This was not working correctly. As a result some students had negative service indicators placed on their records and were unable to register. These service indicators were removed when SAR was notified and the money was manually reapplied to the oldest past due amount. This problem was to be fixed the week of October 2-6.

One RAC member brought up an issue relating to timely application of course fees (i.e., course fees were assess after financial aid had been applied and checks had been disbursed). Julie Selander shared that SAR is working with Ted Skogman from Student Financials to cross-train several SAR staff on course fee assessment.

Informational flyers were stuffed in student bills to hopefully alleviate some student confusion and anxiety.

Due to the aforementioned problems, SAR will be very lenient with late fees and installment fees. Students are encouraged to contact SAR at 625-8500 if they have any questions about their account.

Degree Posting: There has been some confusion over who should be doing what with regard to degree posting.

Vickie Roberts suggested the following procedures for degree posting:

Second Major/Minor, same college - The college enters the second major/minor to student's program plan.

- This needs to be done anytime prior to posting of the "applied for graduation memo"
- OTR will screen degree applicants for discrepancies and return to college office for resolution.
- If not resolved prior to the applied memo posting, OTR will need to update the student's program plan prior to posting the degree.

Second Major/Minor different college - The primary college enters the second major/minor to the student's program/plan.

- All undergraduate major/minor's are available in the drop down box. This needs to be done prior to the post of the "applied for graduation memo."

Example:

Second major 0867 000 17

Major 0867 MIN 17

- OTR will screen degree applications for discrepancies and return these to the college office for

resolution.

- If not resolved prior to memo posting, OTR must update the student's program/plan prior to posting the degree.

Second Degree different college - Both colleges clear the student separately.

- Student submits two separate degree clearance forms
- Student can be admitted and active in two colleges within the same career at the same time. The primary college must have the lowest career number as student's are term activated in the lowest career number.

Not all of the RAC members were comfortable with these suggestions. A subcommittee will review the process and forward this issue again at future RAC meetings.

PeopleSoft Update:

The next implementation point is scheduled for November 4.

Registration – Preparation for Spring 2001 registration is underway. Registration appointments will begin appearing on the web for students on approximately October 30th.

Conversion/Data Integrity -

1) We have reinitiated loading historical students. The week of October 2-6 approximately 9400 historical student records were loaded into production.

1. The modification to the 0998 term building is progressing on schedule. We plan to move these fixes into production in mid-October.
2. Data Integrity

- Approximately 30 new data integrity reports have been moved into production. These reports are assisting in the manual clean up of data. Currently a team of staff members from the registration centers is beginning to clean up over 6000 rows of extraneous data.
- Data integrity reports phase II (automated cleanup) is underway.

1. Conversion load problems resolved include:

- Graduate school plans loading incorrectly
- Blank plan loading incorrectly
- Reviewing the SDB for data problems before loading it into production.

1. Conversion completion service indicators will be appearing soon for student records which have been converted over the past 9 months.

Student Financials - See Student Accounts Receivable update.

Some improvements have been made to the turbo calc program which allows more than 26,000 students to be processed in one night. This is quite an improvement over past processing. Once tuition calc has adequate performance, we will consider looking at a Web based solution so that students could calculate

their tuition on line.

Transcripts - Continues to be rolled out to colleges. If anyone still needs access please contact Tina Falkner at rovic001@tc.umn.edu. Several colleges have had problems printing transcripts. Many of these issues are related to printer configuration. Also, several colleges noted that the total semester credit amount does not match on the APAS report and the Transcript. OTR is working to fix this problem. OTR is currently manually auditing all of the degrees posted in the past year and a half. If colleges experience problems related to degree posting, please call 625-2803. If colleges have problems with their APAS reports, please contact the appropriate APAS representative.

Web Update -

- Registration facelift continues to move forward. OTR has received several positive comments from students regarding the face lift.

Coming in mid- to late-October, an easier login/logout process and some other additional fixes to the web should be expected.

- Advising web site is live. It can be accessed at http://onestop.umn.edu/Advising/index.html

The KickOff meeting for "Advising in Portfolio" was held September 26 and 27. This project is based on 1997 plans for web-based PeopleSoft advising that never was fully implemented due to the complexities of PeopleSoft. "Advising in Portfolio" is envisioned to allow student's adviser of record to have default view access to specific PeopleSoft data elements. It is hoped that by clustering the PeopleSoft elements into a user-friendly web interface this tool will allow advisers the opportunity to advise better/differently/ because they won't have to spend as much time on collecting "basic" student information used in the advising appointment. Also, this tool will allow faculty advisers access to view some of the information contained in PeopleSoft without actually using the system or needing training. The web interface will only pull information from PeopleSoft and will not write back to the system. Students will also have access to view the PeopleSoft information about themselves.

- Paperless Financial Aid Office is still in progress

Registration Procedures for Non-degree Seeking Students:

If a student has never attended the University:

Staff enters the person as a CCE non-degree student with resident status.

If a student has graduated from a college within the University system (in -person): Generally, OTR enters the student as a non-degree student in CCE, however on a case by case basis, students may be

entered into their college of graduation. OTR does not change the residency status, as the student once was an admitted student.

<u>If a student is in the process of graduating from a college within the University system and has already registered for the upcoming semester:</u>

Students in the above category will be identified during the degree clearance process, error reports or error in the tuition calculation process.

OTR will create a new career and enter the student as a non-degree student in the college from which he or she is graduating.

<u>If a student has been discontinued in their college:</u>

If there is not an academic suspension on the student's record, staff will offer to enter the person as a CCE non-degree student. OTR will not change the residency status, as the student once was an admitted student.

<u>If the student is active in their college and they wish to be considered a non-degree student:</u>

OTR would refer them to their college office to have their status changed from degree seeking to non-degree seeking.

<u>When a non-degree seeking student requests degree seeking status:</u>

If the student was never in a degree-seeking program, OTR would refer them to the Admissions Office. If the student was once in a degree-seeking program OTR would have them fill out a Change of College form and return in to OTR.

Advising Web Site: Please see the PeopleSoft update.

Program Plan Action Reasons & Suspension: Sue Van Voorhis brought the issue of placing the suspension action reason on the official transcript to the Council of Undergraduate Deans (CUD). They were opposed to this action. Representatives at CUD, did not believe that placing the suspension reason would add more substantial information than the GPA. Also, suspension is intended as a time to regroup and think about their schooling, not as a punitive measure. They supported putting a suspension reason on

the unofficial transcript.

Vickie Roberts again shared some additional Action Reason values to be used with the "DISC – Discontinue" Program Action or Student Program panel. Program Action of DISC is being used for many reasons (e.g., ICT, multiple active programs) and can, therefore, be confusing to others. The addition of an action reason would clarify why a DISC action was taken.

Values to be added:

SUS1 – Suspension; to be used by collegiate staff when a student's program is being discontinued due to suspension for the 1st time.

SUS2 – Suspension; to be used by collegiate staff when a student's program is being discontinued due to suspension for the 2nd time.

IUT – Intra Collegiate Transfer/Inter University Transfer; to be used by OTR staff when a student transfers into a new program.

DUAL – Dual Active Careers; to be used by Professional/Graduate School staff when a student is admitted to more than one career. Although they are eligible to enroll in either career/program, policy states that registration must be done in one program per term.

DACT – Deactivate/Non-enrollment; to be used by OTR staff when a student is being discontinued due to non-enrollment for two consecutive terms.

2PLN – Completed 2nd plan; to be used by OTR staff when a student finishes their second plan after their degree has been posted. The 2nd plan will be posted as transcript text and the program will be discontinued.

MULT – Multi Institution; to be used by OTR staff to prevent a student from continuous enrollment as a Multi Institution student.

STRQ – Student Request; to be used by collegiate staff when a student requests to be discontinued from their program.

NDG - To be used by OTR and Admissions staff to discontinue a student's career due to admission to a degree-seeking status, either at the same career level or at a different career level.

Graduate School Posting Transfer Work: When the graduate school accepts transfer credits from another institution the name of the institution and the number of transfer credits will be noted on the transcript. The actual course work will not appear. Also, when a student gets approved to use coursework from the University of Minnesota at another transcript level a similar memo will be posted. The work will not move from the undergraduate transcript to the graduate transcript as it has in the past.

Training Update: Please do not share your PeopleSoft ID and password with other individuals. It is

essential that individuals using the system have undergone training. If staff members are having difficulty getting into training sessions or feel they would learn better with individualized training please contact the training team.

The schedule for November and December PeopleSoft training is now available at http://www1.umn.edu/esptrain/rec_training.html or send an e-mail to techteam@sossgw.stu.umn.edu.

The Student Records Training Team offers the following training:

- Student Data Inquiry - view only access to selected information in Admissions, Student Records, Financial Aid and Student Financials, and FERPA.
- Pre-Registration - update access to Student Plan (display access to Student Program), Class Permission Numbers, Student Specific Permissions, Service Indicators, and Student Groups.
- Registration - display access to Term Activation, and update access to enrollment

The following is a summary of Student Records Training for August and September:

Staff trained in Student Data Inquiry 72

Staff trained in Pre-Registration 48

Staff trained in Registration 24

Staff trained in Special Sessions 53

Total number of staff trained 197

Changes in Security Administration:

Security Administration for all PeopleSoft systems is being centralized within the Office of Information Technology (OIT). Since OIT staff are not familiar with the business processes within Student Administration, requests for access will need to both complete and specific on the AR001. Once this centralization is complete, we will no longer be able to contact a Security Administrator directly to request changes in access. All requests, including those for changes, will need to be submitted on an AR001 and sent to OTR Security Administration.

Access to update Service Indicators and Student Groups:

The Student Records Training Team is beginning a project to update the ownership of each service indicator and each student group. We will be working with a key contact in each college to update this information and create standardized profiles for granting access to staff. This information will be forwarded to OIT Security Administration to ensure access and updates to access can be granted appropriately.

Data Warehouse Spreadsheet: A spreadsheet that lists the projects that IMS is working on currently for

OTR was distributed. As of the beginning of October, IMS is working on 31 different reports. IMS has received several requests to be able to select specific prompts (i.e., section level, course level). They hope to have this functionality available in November.

OTR staff is meeting with the Data Warehouse to examine the Business Process related to graduation clearance. They will determine what pieces are missing currently to assist with graduation clearance, and how IMS can assist in meeting these needs. Please contact Linda Miza (l-miza@umn.edu or 6-7214) with suggestions.

Issues List for PeopleSoft: This issue was tabled until the November RAC meeting due to time constraints.

Refresh IMS Data: This issue was tabled until the November RAC meeting due to time constraints.

Honors: OTR will once again post a memo stating that a student has completed lower and upper division honors. This is not currently being done on the PeopleSoft transcript.