

Academic Advising Network/Professional and Graduate School Registrar's Advisory Committee/Registrar's Advisory Committee

August 8, 2001

Present: Jane Anderson, Kristeen Anderson, JoAnn Ash, Jose Beruvides, Larry Bjorklund, Trish Blomquist, Kelly Brooks, Jackie Carlson, Linda Chin, Leah Clark, Pat Coffey, Pam Cook, Anne Daly, Julie Ann Edin, Rick Endris, Tina Falkner, Mary Vincent Franco, Wendy Friedmeyer, Teresa Fruen, Bill Ganzlin, Laurie Gardner, Peter Haeg, Nanette Hanks, Claudia Hasegawa, Connie Hessburg, Denise Hesselton, Sarah Huhta, Patsey Kahmann, Char Klarquist, Mary Koskan, Rich Kott, Dave Krueger, Drew LaChapelle, Stephanie Lawrence, Ingrid Lehnhoff, Linda Lindholm, Jodi Malmgren, Rick Marsden, Rose Miskowiec, Margo Mueller, Jessica Murra, Maureen Kelly Neerland, Maureen Nielsen, Les Opatz, Kathie Peterson, Amy Primus, Jan Reifsteck, Lonna Riedinger, Vickie Roberts, Alice Ross, Jim Rowan, Cindy Salyers, Jan Schlueter, Pat Sherman, Karen Smith, JoAnn Hanson-Stone, Jess Sundin, Paula Swanson, Terri Tuzinski, Judith Wanhala, ETTY Deveaux Westergaard.

Announcements: Teresa Fruen from the College of Continuing Education announced the demise of the Bachelor of Applied Science in Applied Business. Students will be allowed to enter the program through October.

Review of the May minutes: There were no changes to the May minutes.

Billing update: Darcie Brezany from Student Accounts Receivable (SAR) distributed a "quick guide" for understanding the University billing statement, which is included in students billing statements. The statement begins with "Your financial aid funds are listed in your student account with a minus sign before the amount. They are applied against most on-campus charges. If excess financial aid remains after all charges are paid, you will receive a credit balance check. If your funds are not sufficient to pay all of your eligible charges, you will receive a billing statement for the amount due." The guide also explains what charges look like, that charges and credits are posted daily, due dates (and the associated late fees for late payments), the installment plan option, and where to call with questions.

In the beginning of each term, due to the volume of credit balance checks being processed, SAR reminds everyone that credit balance checks will be issued via direct deposit (offered through TCF bank) or they will be mailed to the students current mailing address. Students can verify their correct current mailing address by visiting the web at www.onestop.umn.edu or by calling SAR at 612-625-8500 for more information.

SAR will begin issuing credit balance checks for Fall 2001 on August 27th, but students only receive a credit balance check if they have excess funds posted to their account after all tuition and fees have been paid. Students can view their account information by visiting the web at www.onestop.umn.edu

Fall 2001 billing cycle is:

Bill date

Due date

9/17/01	10/10/01 – 1 st installment (33% minimum due)
10/15/01	11/08/01 – 2 nd installment (50% minimum due)
11/12/01	12/06/01 – Final installment (100 % due)
12/10/01	1/9/01 – Past Due Collection Bill (100% due)

Portfolio demonstration: A demonstration of Portfolio 3.0 was provided. The demonstration focused on the advisor view – a new feature in Portfolio 3.0. This view will give all advisors of record access to much of their advisees PeopleSoft information. Advisor training will begin in September for the Twin Cities campus.

U of M Portfolio Data Elements

Personal Information	Education
Identification Data	Education History
*Name of Record	Academic Plan
Additional Name	Academic Record
*Identification Number of Record	*College and Major
Additional Identification Number	*Adviser(s)
*Demographic Information of Record	Degree Requirements
Contact Information	Graduate/Professional Students
*E-Mail Address of Record	Thesis
Additional E-Mail Address	Examination Committee Members
*Address of Record	Registration Information
Additional Address	*Holds
*Phone Number of Record	*Registration Queue
Additional Phone Number	*Tracking Flag
	*Registration Record

Personal Interests	*Graduation
Mentors	Co-Curricular Activities
Role Models	Learning Differences
Personality Inventories	Professional Development
Myers-Briggs	Learning Inventories
Personal Information Documentation	Assessment Scores
	Kolb Learning Style Inventory
	Sensory Modality Inventory
	Education Documentation
Career	Skills
Work History	Communication Skills
Career Plan	Computer Skills
Informational Interviews	Diversity Skills
Professional Interests	Language Proficiency
Expertise	Leadership Skills
Professional Skills	Quantitative Reasoning Skills
References	Transferable Skills
Career Interest Inventories	Additional Skills
Career Exploration Inventory	Skills Documentation
Self-Directed Search	
Strong Interest Inventory	
Career Documentation	
Professional Practices	Recognition
Committees	Academic Honors

Exhibitions	Awards
Performances	Certificates
Presentations	Grants
Professional Memberships	Scholarships
Professional Activities	Recognition Documentation
Publications	
Research	
Service	
Teaching	
Travel	
Professional Practices Documentation	

IMS demonstration: Cindy Salyers provided a demonstration of the latest from the Data Warehouse. Their website is www.umreports.umn.edu

The UM Reports web site can be accessed by any University faculty or staff using your x.500 id and password. Most of the student reports also require access to private student data.

Address Lookup Report looks up students by either name or ID number. The report lists a complete history of all addresses available in PeopleSoft with effective dates.

Complete Cancellation Report shows all students across an institution or in a college who have completely cancelled during the selected term. The report includes complete cancel date and indicates if they have subsequently re-enrolled.

Unofficial Academic Record is intended to function like the Unofficial Transcript and contains transcript information plus service indicators, student groups, e-mail address and a cum GPA for each term. The report is best printed in landscape format.

Student Roster shows all students registered for the selected term in a selected major (student's primary plan). Lists student's name, ID, major(s), minor(s), term and cum GPA and credits, advisor name or committee, CLA Advising Community Student Group, and student's e-mail address. Student's ID numbers link to their Unofficial Academic Record. Checkboxes allow printing of up to 25 Unofficial Academic records at a time. The report is linked to an Honors Subplan Report listing honors students, a Subplan Report showing all students with any subplans

they may have, and an Address Report listing current mailing addresses and phone numbers. The College of Liberal Arts may run the Student Roster for selected CLA Advising Community Student Group or by major.

Student Group Report can be run for all students on a campus or by college and displays name, ID, college, major, term and cum credits and GPA, total transfer credits and e-mail addresses for students registered in the selected term and for whom the selected student group is *currently active*. Student groups are not term-specific in PeopleSoft. If you try to run this report for previous terms, you may get erroneous data. IMS is working to resolve this issue with student groups and other effective-dated data not tied to a term such as subplans.

Watch for new reports coming soon: Official Degrees Granted Report, Degree Applicants, Degree Candidate Activity Report, Major Roster for Departments (will list all students active in the specified major or minor regardless of student's primary college), Change of College: New Admits, Change of College: Exiting Students. New summary level data for management decision-making on course enrollment, grade analysis and tuition analysis will be available by the end of Fall Semester.

Office of Student Financial Aid Update: Judy Swanson from the Office of Financial Aid provided a brief update on web-based Financial Aid. Students can now accept or decline their financial aid on the web. If students choose to either accept or reject their entire FA package, the information is being directly updated into PeopleSoft. Approximately 1/3 of students do this. In order to see their FA students must be term activated – be aware that some new transfer students may not yet be term activated. New freshman may also receive a paper FAAN in addition to the e-FAAN because their award packages needed to be sent earlier than returning students. Very few e-FAAN notifications bounced back to FA – the reasons noted for some of the bounced notifications include: accounts that are not activated yet or people choosing not to attend the University of Minnesota.

Students have the option of viewing current and upcoming aid year information. Upcoming aid year holds and/or checklists information will display as soon as they are assigned. Award information will display as soon as it is populated on the PeopleSoft award entry panel. Aid years are deactivated on the Web at the end of the summer term. It is possible for students to have two aid years active on the Web from late winter to the end of summer term.

Students respond to their award offers by clicking the radio buttons: accept, decline, or reduce. (They must choose one button).

For a description of the fund, students can click on the award name. Fund descriptions can be updated in PeopleSoft by designated OSF staff.

Students also have the ability to report additional aid or other assistance not already indicated on their FAAN. Students enter the name, amount, type and term of the award and then click “add to list.” If a student makes a mistake, he or she can remove the additional award by highlighting it in the list and clicking “remove from list.”

After this, students must indicate their enrollment plans. “Fall and spring terms” is the default status for the radio buttons. Students can also choose “fall only” or “spring only” attendance. If a student checks “will not attend” and does not enter an additional award or comment, his or her aid will be automatically cancelled in PeopleSoft.

A confirmation page recording the student’s responses will display after the student submits his or her responses. The student can print this page out for his or her records if so desired.

Questions about the e-FAAN should be directed to Judy Swanson at 612-624-3562.

Tuition Refund Petition Form: The Petition for Retroactive Tuition Form has been revised. The new form asks students specifically if they are receiving financial aid and explains that if they are receiving aid, that in most instances retroactively canceling classes will result in being billed for aid that had been disbursed on their original enrollment. Contact Maureen Nielsen at 612-625-6051 for copies of this form.

Spring 2002 Appointment times: The Spring 2002 Queue times were distributed. These times are not yet available on the web.

Bursar Update: Effective August 27, 2001, the Office of the Bursar – East Bank Office only (145 Williamson Hall) will have extended student service hours on an ongoing basis. The new hours for student service at this office will be as follows:

Mon-Thursday 8:00 am-5:00 pm

Friday 8:00 am – 4:00 pm

Note: The Departmental window will continue to close at 3:30 pm and the West Bank and St. Paul Bursar’s Office hours will remain unchanged.

What’s new with PeopleSoft and DARS: The APAS group continues to work with the Web team to have audits available on the web. If all goes as planned, students will be able to access their audits via the web in the fall. There is an APAS users group meeting scheduled for September 20 from 1:30-3:00 pm in 140 Nolte.

CAS (Course Applicability System) is a product of DARS. The U of M has entered into this project with the MnSCU institutions. It will allow students to transfer between Minnesota institutions easier. Students will sign on to a Minnesota Transfer Web site and will self report their coursework. They will then access transfer information directly from whatever Minnesota institution that they are interested in attending to see how their coursework will transfer to that institution. We are currently focusing on the Metro Alliance schools. There are several other states that are implementing the CAS system and the hope is that in the future a student could access this Web site and find out how their coursework would transfer to any institution in the United States. We are hoping to have a pilot project up and running yet this fall.

PeopleSoft Update: Over the last three months, the information technology unit of the Office of the Registrar has focused on conversion of historic records and data integrity issues. Conversion has reached the halfway point.

“Comment Records” and “Milestones” are upcoming enhancements to PeopleSoft. Currently Admissions is using the comment records area in PeopleSoft and the College of Education and Human Development is using Milestones. Comment records can be used to store information about students electronically, so that paper records may not be necessary. The use of milestones enables colleges to electronically store progress that students make toward non-class items, or enables them to record completion of similar types of items. Milestones may be displayed on the transcript.

PeopleSoft Version 8.0 will likely be implemented in the summer of 2003.

Future maintenance releases for PeopleSoft: August 11, October 6 and December 15.

Dual Degrees: The Office of the Registrar has created a new form entitled “Application for Undergraduate Change of College or Application for Admission to Second Undergraduate Degree Program.” Students are to use this form when they are changing colleges or when they are seeking admission to a second undergraduate degree program. When students complete this form for a second undergraduate degree program, OTR will check the “joint program” box in PeopleSoft. This admission process for new students should follow the same procedures for admission as IUT processing. Please forward any known students enrolled in second degree programs to Vickie Roberts at v-rob1@umn.edu.

When a student applies for his or her degree, OTR will send a copy of the application to the second college.

Change of College Deadlines: Vickie Roberts distributed the Change of College deadlines for Spring and Fall 2002. The Spring 2002 deadline for undergraduate students is October 1, 2001. The Fall 2002 Change of College deadlines is March 1, 2002 for all colleges except for the Carlson School (deadline May 1) and the School of Nursing (deadline February 15).

Graduation Clearance Dates:

Fall Semester 2001 (DRAFT)

September 17	Application Due Date Deadline
September 24	Honors List Due from College Offices (For Summer)
October 1	Applied Row and Expected Grad Term Posted in PS
October 15	Program/Plan updated with Final Applied Row &

Expected Grad Term Posted in PS

December 22 Official Commencement Date/Confer Date

January 4, 2002 Grades Posted on PS

January 11, 2002 Late Grades Posted on PS

January 22, 2002 Lack Notice Due Date

January 28, 2002 Clearance Deadline from Colleges

Jan. 28-Feb. 15 Cleared Degree Appls Posted on PS & Forwarded to

Wmson for Diploma ordering

Feb. 15, 2002 All degrees posted on PS

Training and Procedures update:

Degrees displayed on transcript. All degrees (semester and/or quarter) display only the appropriate transcript level. This means only undergraduate degrees will show on the undergraduate transcripts, graduate level degree display on the graduate level transcript, etc.

Repeat rule. Repeat rule message is displaying again. Previously, when a student enrolled in a course, cancelled it and then tried to enroll in it the next term, the warning message “Course was previously taken and may be subject to institution repeat policy” was displayed. The latest modification has stopped the display of the warning message for students in this situation. Whenever this message is displayed, it is informational only, it does not prevent the student from enrolling in the course.

Batch Study Lists with fees. Not yet available to staff outside of OTR. Working on a resolution for a problem with selecting to run a batch of Study Lists by course.

Allied Health Program

Students admitted or enrolled prior to Fall 2001 in the following Programs:

Mortuary Science, Occupational Therapy, Physical Therapy, Medical Technology, and Dental Hygiene are expected be moved to the new their respective new Programs by the end of August 2001.

Program Code for those admitted prior to Fall 2001	New Program Code for all starting end of August 2001	Plan Code
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25 UGR Mort Sci	Medicine 11UGR	057211111/Mortuary Science A Mort Sc 057211111/Mortuary Science
21 UGR Occ Therapay	Medicine 11UGR	060820111/Occupational Therapy BS 060800011/Occupational Therapy
23 UGR Phy Therapy	Medicine 11UGR	067220111/Physical Therapy BS 067200011/Physical Therapy
12 UGR Medical Tech	Medicine 11UGR	054420111 Medical Technology BS
05 UGR	Dentistry 04UGR	021610704 Dental Hygiene G D H 021620104 Dental Hygiene B S 021624904 Dental Hygiene B S D H 021924904 Dental Hygiene Educ B S D H 022124904 Dental Hygiene Publ Hlth BSDH 090600004 Summer Only

IMS Student Roster Report

This report can be used to identify students with undecided and undeclared majors who are also approaching enough credits to graduate. See handouts for details on how to run this report.

D Grade Policy Discussion: OTR has encountered much difficulty in establishing how colleges are interpreting the D-grade policy. Sue Van Voorhis will bring this issue forward to CSAA (Collegiate Student Affairs Administrators). It would be preferable if the University had standard language to define this, but if this is not possible, OTR at least needs to have copies of current college interpretation and practice.

Repeat Policy Discussion: OTR has found that colleges are interpreting the repeat policy differently. OTR is working with the Senate Committee on Educational Policy to provide an official interpretation of this policy.

60+ Credit Policy Discussion: It was discussed whether students should be notified centrally or by the college when they reach the 60+ credit level (when they need to declare a major). RAC members were asked to discuss this with their associate dean.

As part of the University's Recruitment and Retention effort, colleges are encouraged to use the *Student Roster* Report available through IMS reports that shows all students registered for the selected term in a selected major (student's primary plan). It also lists student's name, ID, major(s), minor(s), term and cum GPA and credits, advisor name or committee, CLA Advising Community Student Group, and student's e-mail address. It should be used to track those students with undecided and undeclared majors and having completed 60 or more credits.

FERPA Training: Tina Falkner distributed a FERPA Informational Guideline brochure. Also, OTR has designed a FERPA training session for colleges and departments. The training is approximately an hour long. Please contact Tina Falkner, 625-1064 or rovic001@umn.edu if you are interested in the brochure or if you would like to have a training session conducted in your office or department.

New Refund Schedule in Effect: The new refund schedule (approved by the Council of Undergraduate Dean's last spring) is now in effect. All students, new and returning, will follow the same refund schedule. The new schedule can be accessed on the One Stop at <http://onestop.umn.edu/Finances/refunds/>

Web Fixes: The following fixes/enhancements were made to the web registration system:

- Hospitalization Insurance: If a student changes (within the same term or different terms) from having his or her own insurance coverage to buying U of M insurance, and new "inactive" row will be entered on the Student Groups panel. One caveat: if two actions happen on the same day, the second row will overwrite the first row.
- Hospitalization Insurance: Added text regarding the number of credits for Summer – "I am taking fewer than 6 credits (3 credits for summer) in this term, or am a non-degree seeking student."
- Hospitalization Insurance: Added phone numbers to text when Past Deadline Date to make changes. "Past deadline date for changes to hospitalization insurance information. Problem – Your selection for insurance cannot be modified via this website for this term. Solution – Contact your student insurance representative with questions:

Crookston – 218-281-8331

Duluth – 218-726-8022

Morris – 320-589-6070

Twin Cities – 612-624-0627 (grad asst plan 612-625-6936)

Morris students: Medical insurance is highly recommended for all student at the Morris Campus. For students without medical coverage, a group insurance policy may be purchased at the Business Office."

- No active student record error message: New text "We are not able to access your student record. Ensure that you have accessed this link from the correct website (e.g., Morris

students must enter through the Morris web site). If you have not registered for two consecutive terms, you are no longer considered active in your college. Please contact your College regarding readmission procedures.”

- Add a class appointment check: Web registration now checks for appointments at the time students click “Add a class.” This saves students time before searching, entering the class number and waiting for the PS enrollment engine to run and tells them that it is not their scheduled time to register.
- View Grades: Updated code to differentiate between “ Repeated – Exclude from GPA” and “Exclude from GPA.” Text now displays the same as the U of M transcript.
- Change grading basis or units screen: Add header (maroon U of M Office of the Registrar banner) to the top of the page. This was lost during a previous fix.

Rush Certification Service: OTR now offers students rush certification service. This service will fax a copy of the certification letter to a designated recipient. The cost of this service is \$10.00.

Revisiting the 29 Undergraduate Policies: Throughout the coming year, OTR will be revisiting the 29 undergraduate policies. We will look for gaps, overlaps, and interpretations.

Good Academic Standing: OTR will work with the colleges and the athletic departments to create standard language to define good academic standing.