

RAC

**May 5, 2008**

**Present:** Gary Andersen, JoAnn Ash, Frank Blalark, Sheryl Bolstad, Amy Brewster, Jackie Carlson, Steve Carnes, Laruel Carroll, Carla Claussen, Pam Cook, Dan Delaney, Tina Falkner, Tracy Fischer, Jennifer Franko, Teresa Fruen, Marci Freundsuh, Laurie Gardner, Shelly Gehrke, Kit Gordon, Carol Gross, Lucy Hartel, Jason Holscher, Pam Klopfleisch, Jennifer Koontz, Mary Koskan, Stephanie Lawson, Linda Lindholm, Aileen Lively, Emily McCreight, Kathy Nolan, Linda Norcross, Ingrid Nuttall, Heather Peterson, Andrea Raich, Lonna Riedinger, Vickie Roberts, Genny Rosing, Chelsie Schafer, Jody Seiler-Peterson, Clare Strand, Nate Thompson, Kasi Williamson, Kris Wright

**Announcements:** Frank Blalark announced that the dates distributed to the RAC listserv will also be appearing on the staff One Stop Web page shortly.

Kasi Williamson reported a limited issue regarding the grading basis. A correction made by a department to the grading basis did not appear on the online class schedule. This issue has only happened once but a fix won't be able to be in until July. If anyone notices this issue, they should contact the Student Records Training Team so the issue can be tracked. Clare Strand asked if the issue was causing problems for students changing the grading basis; the issue was only on the staff side. When the student registered for the course, the correct grading basis appeared in the registration system.

Mary Koskan announced that fall registration went well and the group agreed. 98 percent of the transactions were completed in five seconds or less. The most transactions occurred on Tuesday, April 15. At this point, One Stop is still having a post-mortem registration queue meeting with OIT; however, there likely won't be any changes made since things went well. Jackie Carlson commented that the printer issue that caused system problems prevented Duluth staff from getting work done.

Mary Koskan announced that Veterans Orientation dates are July 30 from 5:00-7:00 p.m., July 31 from 10:00 a.m.-12:00 p.m., August 27 from 1:00-3:00 p.m., and September 4 from 5:00-7:00 p.m. All orientations will be in B20 Fraser Hall. If you or your staff are working with student veterans, please encourage them to come to one of the orientation sessions.

Clare Strand announced that she has been appointed Registrar at the Morris campus.

Ingrid Nuttall asked the group to notify her if they receive any comments about the recent URL change to staff PeopleSoft access and self-service.

Ingrid Nuttall asked the group if it was their preference to meet in June as well as July; there will likely be a July meeting due to the EFS project. The consensus was to skip June and send an update via e-mail instead. This recommendation will be forwarded to Sue Van Voorhis.

Linda Norcross asked if we could put graduation clearance deadlines on the One Stop Web site; these will be added as well.

Tina Falkner announced that EFS went through pass three and everything is looking good. ASR has indicated that from its perspective, the project is a go.

**Review of April minutes:** There were no changes to the April minutes.

**Project update:** Jody Seiler-Peterson provided the group with an update of ASR-IT projects. Due to the EFS project, all moves into production have been frozen. Between now and July, no changes will be moved through to production. The production freeze will continue through the July 1 implementation of EFS and will last until the production environment is stable (likely 2-3 weeks after implementation). Financial Aid has a bundle that is critical to be moved to production during the week of July 21.

Financial Aid continues to work on summer packaging.

Student financials is continuing prep-work for fall tuition set-up. They are also helping Morrill Hall staff get a Regent's report ready for next year's requests; this will be reviewed in May.

One Stop Web page redesign: There has been a change in approach to the One Stop Redesign. We are now planning to implement small changes in increments. The change has occurred because University Relations is looking at redesigning the University's front page (umn.edu). We will be collaborating with U Relations to make sure the One Stop design and the new University design are in line with each other. While we are working on the larger redesign, smaller changes will still be moved through. Mary Koskan indicated we might be able to show the group the redesign before it goes live in late June. The UR templates are set to launch in October 2008.

E-degree clearance: The team is finalizing the scope of the project and have submitted request for development work. They are planning for development to begin during Quarter three, which is July-September.

Student Engagement Planner: The Engage! search will be a tool that helps undergraduate students intentionally connect with meaningful experiences outside of the classroom. Students can tailor their search to specific academic majors and disciplines as well as their other interests and aspirations. The team completed usability last week with good results. They are now reviewing the results and making small tweaks to the search. They are also looking at the Google custom search business edition, which will allow for output of search results in XML so we can manipulate how it looks and so it can be plugged into Grad Planner.

Self-service student account rewrite: A small breakout team is reviewing requirements that have been gathered to-date and the full team will review them in a couple of week. This project will replace Nelnet and because of this, there is an RFP involved.

PCAS to create a new plan type of other: The team is currently working on general process flows for the existing process, since they were never created during the original project. These will serve as a basis to document the process for the other program types. The group is also working on a timeline for the project.

#### *Upcoming projects*

Early alerts/early warning system: The team is working on the discovery phase of this project. Tina Falkner noted that the team presented some data last Wednesday to SCEP about the efficacy of midterm alerts in general. Because we don't have a controlled, study, it is hard to say that alerts make a difference. Over 50% of students with C and D warnings are able to salvage their grade. These numbers were not as good for students who received an F. There was some discussion about the revised version of early warning system; SCEP seemed to think it was a good idea.

Customer/Constituent Relationship Management (CRM) project: The team is continuing to try to find a consultant. They want someone who has experience in student services in higher education, and this has proved difficult. Tina Falkner noted the team is not just looking for the admissions or alumni end of the CRM.

**One Stop benchmarking:** Mary Koskan stated that One Stop continues to try and improve customer service. Students are surveyed annually and One Stop receives good feedback from this. One Stop would also like to survey other customers such as RAC, Housing, and Boynton; when might be a good time to do such a survey? It would likely be electronic survey but an option to have a follow-up meeting in person with One Stop management. The group felt October would be a good time.

**13 credit policy:** Mary Koskan raised an item about the 13 credit policy. Periodically, the Tuition Refund Appeal committee approves an appeal for a student, but no refund of tuition is made because the student is under the 13 Credit Policy, did not have a Reduced Credit Load approved, and therefore is charged the 13 Credit flat tuition rate. Students in this situation are inconvenienced because they have to get another form completed (after they have already completed the Petition for the College and the Tuition Refund Appeal). Some of these students have severe medical conditions and have to go out of their way to get yet another form completed. Mary proposed that in situations where the student has dropped below 13 credits and where a Tuition Refund Appeal has been approved, that the Tuition Refund Appeals (TRA) committee would have the authority and access to approve a Reduced Credit Load in PeopleSoft. It is estimated there are about 15 cases per year.

Any approved reduced credit loads processed by the TRA committee would be communicated via email to the college (the current list of email addresses is below). One Stop staff works with the colleges if a student's Tuition Refund Appeal had been

approved but they were denied a reduced credit load appeal.

Here are the emails that are currently in the system for the online Reduced Credit Load form:

College of Food, Agriculture and Natural Resource Sciences = [cfans13@umn.edu](mailto:cfans13@umn.edu)

College of Design = [CDes13@umn.edu](mailto:CDes13@umn.edu)

College of Biological Sciences = [cbsrcp@umn.edu](mailto:cbsrcp@umn.edu)

School of Dentistry = [dh13@umn.edu](mailto:dh13@umn.edu)

College of Education and Human Development = [cehd13@umn.edu](mailto:cehd13@umn.edu)

Carlson School of Management = [csom13@umn.edu](mailto:csom13@umn.edu)

Medical School = [clsp@umn.edu](mailto:clsp@umn.edu)

School of Nursing = [soncred@tc.umn.edu](mailto:soncred@tc.umn.edu)

Institute of Technology = [thirteen@it.umn.edu](mailto:thirteen@it.umn.edu)

College of Continuing Education = [thirteen@cce.umn.edu](mailto:thirteen@cce.umn.edu)

College of Liberal Arts = [thirteen@class.cla.umn.edu](mailto:thirteen@class.cla.umn.edu)

The group agreed to this process; however Lonna Riedinger noted that denied appeals weren't actually coming through as denied. Aileen Lively indicated she would take this information back to the IT unit.

**New 99PRD registration form:** Heather Peterson noted that there have been some recent changes to the 99PRD registration form, also known as the Registration Request for Graduate Credit (for Non-Degree Students). One Stop was receiving the form without the authorized signature because the location of the signature made the student think it was for office use only. This has been changed to move the student signature to the bottom of the page to avoid confusion. The new form is posted online; click on non-degree tab on the right corner of the home page, or go to "forms online." We will be accepting the old version of the form through fall 2008. After that, One Stop will send the student back for the new form.

There has also been a recent policy change; it has always been the case that when students don't pay their bill in full, they're canceled from their classes. To get back in, the student had to fill out Registration Request for Graduate Credit (for Non-Degree Students) again with authorized signature. One Stop has decided to grant the student a two-week timeframe; after the student is dropped, he or she can come into One Stop, pay the bill in full, and will be put back into the class. This policy will be effective beginning summer 2008.

Tina Falkner asked how students are being informed of this policy change. Heather Peterson indicated that One Stop is not heavily advertising the two week extension, but they want counselors and staff to be aware. One Stop will be sending out messages informing past students registered as non-degree graduate students who have not taken classes in the past semester and who haven't been admitted to a program; students who have taken a 5XXX level course as a non-degree undergraduate will also be contacted about their option to take a 5XXX non-degree graduate. These messages are for

promotional purposes and will not explain the new two week bill extension policy. Dan Delaney noted that when students are canceled, they receive a message telling them to contact One Stop.

**Registration withdrawals and retroactive registration withdrawals:** Mary Koskan informed the group that a question had come up a few months ago about the difference between registration withdrawals and retroactive registration withdrawals. Mary presented the group with a handout to clarify the difference:

#### *Withdrawal*

A student-initiated registration cancellation occurring after the 2<sup>nd</sup> week of the term of the course. Withdrawals after the 8<sup>th</sup> week require college scholastic committee approval. Please note that May/summer and special term deadlines vary. The posted date of withdrawal will be the day the request was processed. A 'W' will always appear on the student's record.

#### *Retroactive Withdrawal*

A withdrawal that is backdated in one of the following situations.

College requested/supported – in cases of advising or collegiate error, a college may request a withdrawal be backdated. The 'W' may be removed in certain circumstances. If approved, the retroactive withdrawal date will be within the refunding period, but no earlier than the beginning of the term.

Student requested – through the submission of a Tuition Refund Appeal to One Stop Student Services for reasons of medical, death in immediate family, military, or advising/instructional error not directly supported by student's college. The 'W' remains on the student's record. If approved, the retroactive withdrawal date will be within the refunding period, but no earlier than the beginning of the term.

The handout further explained the process for these withdrawals. Mary Koskan thanked Dan Delaney and Heather Peterson for their work on this document.

Jackie Carlson noted that medical petitions have significantly increased and asked if One Stop has different degrees of medical scenarios that they work through when looking at withdrawals. Mary Koskan stated the One Stop uses the new supplement form for the doctor to indicate the severity of the condition; if they receive multiple petitions from a student for the same issue, they take that into account.

Clare Strand asked if for reasons of documentation the student never attended and a retroactive withdrawal is given, does the student still earn a W? Mary Koskan noted it would depend on the situation. Dan Delaney stated there is a way to give a refund without removing a W and we have used that process, but we would not backdate registration. Heather Peterson noted there are two different appeals: the refund appeal and then an appeal to remove the W. It is rare that a W would be removed. Jackie Carlson asked if whether or not a student received financial aid plays a great part in whether or

not they get a refund. Kris Wright suggested this issue be taken up with the coordinates at a separate meeting.

Linda Norcross asked what the percentage of Tuition Refund Appeals One Stop sees after the college standing committee has approved a student's retroactive withdrawal. Mary Koskan noted that the appeal is not based on college documentation; Linda noted it would be helpful if this number could be determined. Mary noted that the committee takes into account if there was an error in college advising.

Marci Freunds Schuh asked if these forms apply to the graduate school; yes, they do.

**Degree policy review and discussion:** Tina Falkner reminded the group of a message that was sent to the RAC listserv asking individuals to forward the degree policy information to department chairs. A big question was raised regarding D grades and what is a major course; have we really defined what is considered a "major course?"

Kit Gordon noted it would be important to clarify information about honors degrees. Latin honors requires 60 graded credits, not just 60 credits. This is located in line 147.

Laurie Gardner noted that regarding D grades, nothing is indicated that these can be petitioned by the student.

Tina Falkner noted that the plan is to bring these forward throughout the fall and have the Senate approve them next spring.

Mary Ellen Shaw started that there is a lot of concern about D grade issue. Some majors have courses outside the department that are still required for the major, but it is not clear that D grades are not allowed in these courses. Mary noted that any course required for a major, whether or not it is outside the department housing the major, should count as degree credit. Tina Falkner confirmed that the policy language proposed about what is major credit would include this.

**Student Adviser Records Release form:** Tina Falkner reported on behalf of Julie Selander to the group on the progress of the Student Adviser Records Release form. Last year, a suggestion was made by some RAC members to leverage the existing online Parent/Guest Access system to allow students to authorize their parents or other third parties to view and discuss information held in the student's adviser files.

A group of RAC members from the collegiate units was assembled as a RAC task force and is chaired by Julie Selander in One Stop Student Services. The task force had some concerns about using the Parent/Guest Access system; however, they did recognize the need for a more streamlined process with a universal authorization form since each college had their own existing form and process.

Julie met with the AAN Board and these same concerns with using the Parent/Guest Access system were mentioned, including the concern of increased parent traffic to

advisers and college student services office if students were allowed to quickly click on a button in the system without knowing the consequences. The AAN Board and others on the committee felt that by having the student submit a hard-copy form to the adviser or college, it was a "teachable moment" in which they could advise the student on whether or not this form should be completed.

The task force then worked collaboratively over many months to create a universal form to be used by all colleges and all five campuses. You are now being presented with the final draft of this form. Thank you to all of the committee members who assisted with this form!

The next steps for this new process are as follows:

On May 12 - Emily McCreight and Julie Selander will present the new form/process to the AAN Board.

On May 28 - Julie Selander will present to the CSAA.

On June 19 - Julie Selander and I will present the new form/process to the Council of Undergraduate Deans (CUD).

Upon approval from CUD, we will announce the implementation of this new process.

The new process will require the student to submit the form to their adviser for approval. Upon approval, the adviser will add the IR service indicator to indicate on the student record that there is an existing release form on file. The adviser will also be required to indicate the following information in the comments section of the Service Indicator Data field in PeopleSoft: authorized third party's name, address, phone number, e-mail address, month/date of birth, and any other important information listed on the release form by the student.

If you haven't already done so, please send a list of employee names and X.500/Internet ID to Julie Selander at [goode021@umn.edu](mailto:goode021@umn.edu) for any staff that need access to add the new IR service indicator. Note that this new IR service indicator will be for all campuses.

Julie has also made a request to create two new My Advisees reports and to modify the existing Service Indicator report; however, this was not completed before the OIT work freeze and most likely will not be completed until after the EFS implementation. For any adviser/collegiate staff that have access to PeopleSoft, this does not pose a problem; however, for faculty advisers on the coordinate campuses (who do NOT have access to PeopleSoft), this does pose a problem. Until the IMS reports are created, faculty advisers will need to consult with someone who does have PeopleSoft Service Indicator access to determine if the student has signed a release and to whom the information can be released.

Upon CUD's approval, Julie will communicate the final version of the form and the new process across various venues including RAC, AAN, CSAA, The Record, etc. and will present a mini-training session at the July RAC meeting. Part of the process developed in

the procedures is for students who want to later remove the release request. These procedures will also be shared at the mini-training session. We will place the procedures on the ASR extranet for adviser/college reference.

There will be a print version that Julie will supply to all of the colleges, as well as a "commentable" pdf version that will reside on the One Stop "Forms Online" web site; the colleges did not want this option so it will not be on the One Stop forms page.

It's important to note that if the only information that a student wants to release to a parent or third party is information such as grades, holds, classes enrolled in, student account, and financial aid information, advisers should be instructing students to authorize this type of access through the Parent/Guest Access system.

If anyone has any questions about this new proposed procedure, please contact Julie Selander at 612-625-6579 or via email at [goode021@umn.edu](mailto:goode021@umn.edu).

Genny Rosing asked if it was intentional to exclude admissions; Tina Falkner noted that the undergraduate admissions information is housed in admissions, and they have to sign off as part of the application. The form could probably be modified for the Graduate School.

Clare Strand noted that the Morris campus only has one professional adviser, most faculty are advisers. As a result, Morris is not planning on making this form readily available because faculty don't have time to take this on. It will be made available for three different offices, but more for professional staff to intervene.

Vickie Roberts asked if this form follows the student; this was the intention.

Mary Ellen Shaw asked if the student needed to fill it out annually or one time; one time is all that is required.

Chelsie Schafer noted that if a student signs the form on the TC Campus and goes to Morris, the faculty won't know that the student has the form on file. Clare Strand stated that the intent is for the form to follow the student; this will be accommodated by the report being created by UM Reports, so having Peoplesoft Access is not relevant.

Jackie Carlson clarified that this form is for information in the adviser file. There's other information that could come up that might need either parent guest access or student info release form. Tina Falkner stated that whatever information in the advising file is able to be viewed; information such as bills should not be (and are not) kept in the advising file.

Laurie Gardner pointed out that when a student graduates and there's a release on file, the release might have been purged. Tina Falkner noted that the way it happens now with Parent Guest Access and SIRA is that after someone is not longer active for a certain time period, it is inactivated. Dan Delaney noted that the indicator is not removed for SIRA. Tina Falkner noted that this is a good question and required more investigation.

Mary Ellen Shaw asked if we have a form that allows students to indicate what kind of information they wanted to share. Tina Falkner stated that it started out this way (with check boxes) and it seemed most reasonable to change it. Mary Ellen also noted it would be good to have the student indicate what format the information can be given in; this is on the form.

**Subplans discussion:** John Kellogg spoke to the group about a change in reporting data in the STIX raw data table. Because of EFS, each subplan currently in the STIX raw data table will need to be mapped to a department ID. Is it important in the raw data table to use the sub plan to correctly tie to the department ID? As far as the official report, subplans are irrelevant. The proposed solution is to create an independent table that will have every major, minor plan, and subplan captured at a point in time.

Linda Lindholm noted that in Journalism, every six years the department goes through accreditation and everything reported has to be by sub plan. As long as all the data we need can be found by sub plan, that should be fine.

Clare Strand asked if the second table will be more accurate; this is correct.

Linda Norcross noted that John Kellogg should talk to CFANS Steve Gillard.