RAC minutes

June 6, 2011

Attending: Gary Andersen, Kristeen Anderson, Rockne Bergman, Rhonda Bjurlin, Robert Bode, Earlene Bronson, Sara Cannon, Cortney Carlson, Amber Cellotti, Agnes Chagani, Gary Cooper, Dmian Damiani, Dan Delaney, Stacy Doepner-Hove, Jessie Eastman, Jennifer Engler, Marta Fahrenz, Tina Falkner, Renae Faunce, Santiago Fernandez-Gimenez, Vicki Field, Carol Francis, Alison Frank-Quick, Teresa Fruen, John Gardner, Laurie Gardner, Stacey Grimes, Jeremy Hernandez, Constance Hessburg-Odland, Emily Holt, Lisa Hubinger, Rachel Jorgenson, Charleen Klarquist, Nathan Kopka, Linda Lindholm, Aileen Lively, Jo Ellen Lundblad, Stacia Madsen, Gayla Marty, Candice McDermott, Heather McLaughlin, Katherine Murphy, Cindy Pavlowski, Julie Prince, Genny Rosing, Alex Ryan, Fran Schirmers, Mary Ellen Shaw, Gale Shea, Judy Soine, Karen Starry, Susan Suchy, Ali Suehle, Georgann Tolaas, Dean Tsantir, Sue Van Voorhis, John Vollum, Susan Westacott, Kasi Williamson, Ellyn Woo

Announcements

Dean Tsantir announced that the new GRE general test is coming in August. The Graduate School's Office of Admissions is preparing to import the ETS data. You can learn more on the ETS website; links are available in the Graduate Admissions Toolkit: http://www.grad.umn.edu/prospective_students/admissions_toolkit.html

Sue Van Voorhis announced that the next meeting will be held on July 11, because the first Monday in July is July 4, a University holiday.

Transition update: Where are we now?

Gayla Marty gave an overview of the key events and accomplishments in the Graduate School over the past year. The Graduate Education Work Group reports came out a year ago, and implementation of the transition recommendations began after that.

The Graduate School's role has been changing. In March 2010, the Board of Regents established a definition of a "college," and this is one of the things that the Graduate School is responding to. The vision of the Graduate School is in development; there has also been a lot of work on policies, which has been accomplished through significant collaboration.

Five consultative and governance groups have been formed. The provisional Graduate Education Council includes 15 faculty members and three students; they have met 8 times so far, and are exploring how they fit within the current governance structure. The provisional council was extended through the 2011-2012 academic year; the call for nominations for elections to the permanent council went out May 25, 2011.

Graduate and Professional Assemblies were held in fall and spring semester; these assemblies included all graduate and professional programs. In the fall, "The Path Forward" event contextualized the Graduate School on the national landscape. In the spring, the event focused on student-centered program review strategies. Both assemblies had broad participation from both graduate and professional programs.

The College Representatives for Graduate Education met throughout the year; attendance increased, and now includes students. This group will meet next on August 18. A group of college representatives for interdisciplinary programs also formed; they have met four times since November. They are focused on the restructuring impact on interdisciplinary programs. Gayla noted that staff dedicated to supporting interdisciplinary initiatives remain in the Graduate School.

In the area of funding, the Graduate Student Funding Task Force was formed and charged by the Provost. A memo to college deans from early May spells out the work of this task force in greater detail; it is available on the transition website. The Graduate School Fellowship (GSF) program moved to the college deans for distribution this year. Diversity-related funding moved to the Office for Equity and Diversity. Other fellowships continue to be administered by the Graduate School, including the Doctoral Dissertation Fellowships (DDFs) and interdisciplinary fellowships. Next items up for the Graduate Student Funding Task Force include the distribution of funds for 2013 GSFs and block grants, as well as the relationship of this fund distribution to program quality metrics.

In regard to communications, a transition website was developed, and a stakeholder analysis was completed. The Graduate School's website will be redesigned, beginning this summer.

In the area of Admissions, Apply Yourself has been upgraded. The online tool now serves about 200 programs, instead of 150. Apply Yourself will undergo continued development over the next year.

Graduate student orientation will continue for this year; a decision about AY 2012-2013 will be made this fall.

Support for graduate student academic and professional development activities will continue for the next academic year. The Graduate School supports one staff person for 25% time; this staff position works primarily for OED. Programming includes career development activities, writing workshops, and so on.

Overall Graduate School staffing has been reduced from 37 to 26; staff continue to do most of the Graduate School's ongoing work plus support transition initiatives. Demands on Graduate School staff are high.

Commencement for graduate students was moved to the colleges. A joint commencement was held on April 29, separate graduate student commencements were held by two colleges, and graduates joined with existing ceremonies in the remaining schools.

The National Research Council (NRC) report was released in November; this report provided some benchmarks and will help to guide the development of additional metrics for program evaluation over the next year. Updated assessment results from the NRC will also be posted soon. Evaluation practices are currently being discussed.

Other changes from the last year include a new process for reviewing new and changed academic programs, which was announced on May 27, 2010. Graduate faculty categories were discontinued as of July 1, 2010; graduate faculty now report to their individual collegiate deans. The next Graduate School catalog will transition to be the 2011-2013 graduate education catalog, including many more programs than before. Memoranda of agreement are being created for the more than 20 interdisciplinary programs that cross colleges. Advising continues to arise as an essential issue; that topic is sure to be an increased priority in the next academic year.

Kasi Williamson began the overview of ASR's work on the graduate education transition project over the past year. The scope of ASR's work extends to those matters that have an impact on the academic record, including the milestones and other items that must be verified in order to certify degree completion, and the processes through which those processes make it into the system. ASR's work also involved central systems, especially those related to reporting, curriculum, degree progress, enrollment status, and the processing of student financials information. Finally, ASR seeks to coordinate the redesign of key elements of student services administration, so that new processes are as efficient as possible and reduce the burden on staff as much as possible.

The focus of ASR's work is to continue an exceptional student experience for graduate students, during and after the transition. Future processes should be clear and transparent, as well as online and efficient, wherever possible. ASR also hopes to create opportunities for colleges and programs from across campus to learn from one another to build best practices, and to make any transfer of responsibilities as smooth as possible.

To date, the academic data conversion has been mostly completed. The team in ASR and OIT did an exceptional job of making this seamless. The remainder of academic data will be moved into the new structure this fall. The Program and Curriculum Approval System (PCAS) is now under development. Nearly everyone present at RAC and many more individuals in the colleges and departments assisted with this project, and the project team extends its gratitude and appreciation.

As far as what is moving "out" from central entities to the colleges or graduate programs, the new, online registration exceptions process will be introduced at the beginning of fall semester. The final approval for registration exceptions will move from the Graduate School to the colleges, and the program-level approval will be streamlined. All elements of the process will take place online.

The new online process for submitting preliminary written exam scores will go live later in fall semester. In the new process, graduate programs will enter a "pass" or "fail" indication for the

student online, and colleges will be notified of the result. Data entry of this and other milestones will continue to be done by a central entity.

In regard to PCAS, program information was entered into worksheets by colleges and graduate programs. Initial data entry into PCAS will be completed centrally. University Relations will, in a parallel process, create a PDF catalog from the program worksheets. Beginning fall 2011, ongoing curriculum updates will be made into PCAS; the usage structure should be determined by each college. For undergraduate programs, some colleges distribute the data entry to the program level and maintain an approval role; other colleges complete all of the data entry centrally. If development stays on schedule, a training invitation for new grad PCAS users should go out in August. The question was asked if and how programs would be able to review the information that was entered into PCAS; Kasi responded that this is a known need, but the process for accomplishing this review step has not yet been finalized.

John Vollum reported that view access to Image Now is now available to colleges and programs; this is an important initiative, because it will allow the University to cut down on the processing and transit of a lot of paper. Additional Image Now capabilities will be assessed and implemented this fall.

Affinity strings in the MyU portal have been adjusted to reflect the new college affiliations. There is a new content cell available to colleges; for access to this cell, contact Sandra Ecklein.

As the transition proceeds, more knowledge about graduate education processes, policies, student experience, will be required at the college and program level. The Graduate School has conducted a lot of advising and consulting on policies and procedures; some parts of this role will gradually shift as processes move. The effort is being made to incorporate or link to key information from the central systems that will support new processes.

Colleges will likely have an increased role when it comes to readmission and change of status for graduate students. Discussions on this topic are ongoing, and more information will be available soon.

Initiatives related to degree progress procedures will take up to two years to complete. The team began by looking at procedures related to Ph.D. degrees, so there is much work to be done in reviewing procedures specific to various master's degrees. Work is specifically focused on degree progress milestones; the milestones themselves (e.g., preliminary written exam, preliminary oral exam) will likely remain the same, though the forms will change and move online. The objective is to reduce the administrative workload associated with paper forms and move decision-making authority and approval to the appropriate levels. At the college level, there were will be long-term role related to managing or monitoring milestone completion at a high level. There may also be a different role for programs and colleges in communicating some aspects of degree progress information to students.

Graduate School vs. Departmental Master's programs, Tina Falkner and Frank Blalark

Frank Blalark began by explaining the historical difference between Graduate School and departmental master's programs in PeopleSoft. All programs in the Graduate School were associated with the academic program code 08GRD, while departmental master's programs were specific to each college, with the code XXDMS. There are also doctoral programs coded as "DMS," so "departmental master's" is, in some ways, a misnomer.

When academic program data was moved to new collegiate XXGRD codes, this blurred the line between former Graduate School and DMS programs; both are now associated with the college in PeopleSoft. Now each college might have GRD and DMS programs; some also have PRO programs.

Each academic program is also associated with a career level in PeopleSoft. Both GRD and DMS programs are associated with the GRAD career; the five federally-identified "first professional" programs each have their own career (e.g., MED, VET MED, LAW, PHARM, and DENT). A student will have a separate transcript for each career they have been enrolled in. Each term a student enrolls, they are "term activated" in one career, and in one academic program; if a student is associated with two different academic programs (i.e., two colleges, or one DMS and one GRD in a single college), the term activation alternates between the programs from term to term. Term activation has to be associated with one or the other, and tuition with one or the other. Now that some of these GRD and DMS programs are in the same college, there will need to be some discussion about how this will work going forward; for example, if a Doctor of Nursing Practice (a DMS) student takes graduate Nursing courses (associated with the GRD) program, which tuition rate should be associated with that—the DMS or the GRD? An appropriate standard and practice will need to be established.

There is also ongoing conversation about "dual career" enrollment. If a student wants to take GRAD and UGRD classes at the same time, could they be charged at different rates and different tuition plateaus? Currently, this isn't possible, but the concept received approval from the colleges five years ago.

The association of DMS and GRD programs with the indivdiual colleges also raises the question: Should all programs be made "GRD" programs and treated consistently in all areas?

Tina Falkner stated that the policy issues are somewhat clearer. The policy review committee has determined that the updated graduate policies should apply to all programs except the five federally-identified first professional programs (M.D., J.D., Pharm.D., D.V.M, and D.D.S.) All other post-baccalaureate programs should be under the umbrella of the University's education policies.

It seems that one of the goals of this transition is to have, to the greatest possible extent, unified policies and procedures, so that all post-baccalaureate students can have the best possible experience. In the past, ASR has encountered issues when students in DMS programs were not covered under Graduate School policies, and also not covered under undergraduate education policies. Students could encounter problems that were effectively not governed by any University policy, which is problematic when it comes to adjudication and appeals. The University does students a disservice when there are no unified policies on key issues.

Post-baccalaureate certificate programs will be treated differently in many cases, because the programs are often fundamentally different in character. Certificate programs are addressed in the policy proposal related to program proposals; however, the policy proposal related to degree progress and credit requirements will not apply to certificate programs. The policy review committee is looking into ways to assist colleges in providing clear, policy-like information for their certificate students.

The policy proposals also include exception language, so that appropriate exceptions can be requested. For example, in regard to the policy proposal related to credit requirements, the national standard for the MSW degree is very different; in cases like that, programs should request policy exceptions.

Carol Francis stated that, in the School of Public Health, they had existing policies for their DMS programs. They had hoped to apply those collegiate policies to their graduate programs. Would their programs be governed by the new University policies, instead?

Tina Falkner replied that the University policies would provide the "floor" standard. In most cases, colleges can elaborate on these policies or create more rigorous standards. If there are particular concerns or policy proposals that should include exception language but do not, please bring those to Tina's attention.

Carol specified that the School of Public Health allows bracketing in certain rare cases, but the Graduate School does not. Tina Falkner stated that, though revisions to the grading and transcripts policy have not yet passed even the first approval step, the current draft would deem it impermissible to bracket grades for graduate courses, because there would be no bracketing at the post-baccalaureate level. If this is problematic, the policy review committee needs to look at the issue. Carol Francis clarified that they do not bracket grades frequently, and they are trying to build consistency within their college.

Nita Krevans added that the grading and transcripts policy will go back to SCEP when they meet this fall.

Mary Ellen Shaw asked a question about the proposed Leave of Absence policy, which seems to assume a practice of continuous enrollment. However, the M.Ed. program does not require continuous enrollment, because it is designed for working professionals who may not be enrolled every semester. Jennifer Engler added that there is no exception language in the LOA policy; will this policy imply that continuous enrollment is required?

Sue Van Voorhis stated that more data should be gathered on this issue. How frequently do students take a semester off, and how often do they return? How are these students managed in the system?

Mary Ellen Shaw agreed that there should be conversation around this issue, because requiring continuous enrollment for all programs would be difficult.

Tina clarified that the LOA policy does not seem to be the place to include language related to continuous enrollment. The policy committee has raised the issue of whether there needs to be

a registration-related policy. The continuous enrollment requirement was addressed in the Graduate School catalog, and it was not technically a "policy" statement. Michele Gross has being exploring the potential components for such a policy; a policy for continuous enrollment alone does not seem substantial enough.

Nita Krevans clarified that the LOA policy is a policy that allows an exception; a leave of absence is not necessary if the expectation for continuous enrollment does not exist. Continuous enrollment may be an issue in any policies related to registration or readmission.

Tina added that those proposed policies have not been drafted yet, so they have not been discussed in detail by the policy review committee or any of the consulting bodies.

Frank Blalark reported that the project team will be enlisting the Humphrey School as a pilot for a collegiate-level readmission process. The transition team hopes to understand how, in those colleges where the know-how and staff are in place, how would the readmission process work? The change of status process will also be involved; there are times when it makes sense for the college to change a student's status (e.g., from the "weekend" to the "full-time" program in social work) without requiring the student to go back to the Office of Admissions.

Kasi Williamson commented on the development of online workflow procedures, like registration exceptions. The question of how DMS programs will be included in those implementations has not been finalized. Carol Francis from the School of Public Health indicated that they intended to use the new online process for all of their programs, DMS and GRD. Kasi commented that this seems like the best solution.

Frank Blalark confirmed that they want to create uniformity wherever it is possible. A registration is a registration, and the process for petitioning to drop a course late should not vary greatly.

Emily Holt added that there may be some different routing processes for students in departmental master's programs. Everyone is encouraged to use the new online form and workflow, but if there are requests for variations in the automated process, those issues will likely not be addressed before fall 2011.

The group was asked to contact Frank or Tina if there were other items that needed discussion, so that those topics could be added to the July agenda.

Graduate School policies: Complete and on deck, Nita Krevans and Tina Falkner

Nita Krevans and Tina Falkner reported on the graduate education policies that were in progress and what is coming up next.

Nita reported that one new policy is now in effect: the policy on appointments to graduate examining committees.

The additional policies that are currently under review or in development are intended to codify aspects of the policy language from two general sources: the Graduate School catalog and the Graduate School constitution.

Four policies are currently on the agenda for the upcoming meeting of the President's Policy Committee (PPC). This is the final review step for these policies before the 30-day public comment period. The draft policies have already been reviewed by SCEP, the FCC, and the University Senate. These four policies are:

1. Leave of Absence
2. Policy on appointments of Directors of Graduate Studies
3. Two policies on credits: One that addresses the minimum and maximum credit requirements for graduate degrees, and another on the "Application of Credits." (The latter policy includes both transfer credits from other institutions and University of Minnesota credits applied from other degrees.)

The policy on proposing and changing academic programs is also at the final approval level. That policy essentially codifies existing approval practices and takes into account changes in governance structure. The policy language assumes that all program approvals will be managed online.

The policy review committee is currently working on drafting proposed policies related to degree progress. These are policies that encompass various material that was in the Graduate School catalog. Because these policies will include all post-baccalaureate programs and not only those formerly in the Graduate School, the policy committee is also taking into account policies and practices from other programs, e.g., the MBA program. This set of policies will primarily address the kinds of information that must be supplied to students when they are first enrolled in a program; the student's first matriculation should establish a contract under those terms. The policy will likely include components on how a student's progress will be monitored and reviewed, and what major milestones will be included in that. The policy will need to be general enough to include the various ways that former Graduate School and other graduate programs measure and monitor degree progress, including but not limited to the Degree Program Form (to be renamed the Degree Plan Form) in its present and future iterations. Policies will establish the basic requirements, including key components and retention practices, and programs will be able to build on those.

The committee is also beginning work on an admissions and fellowship policy. Admissions policies are likely to reflect current practice, without significant change. Dean Tsantir reminded the group to notify him of new programs that the Graduate School Office of Admissions would be working with, as they occasionally learn about one at the last minute, which can be difficult.

Revisions to the Grading and Transcripts policy will also be taken up, after incorporating feedback from SCEP.

The committee will also confirm that student grievances can be handled under existing policy. If this is indeed the case, they will work to develop an information page that directs students to

appropriate policy and resources. If an additional policy is needed, the committee will take that up.

The committee would also like to address issues related to programs, like post-baccalaureate certificates, that are not governed by central policies. The committee would like to find a way to encourage colleges to develop key policies related to these programs.

Tina Falkner added that there may also be a registration policy, if there is more to include in it than the single issue of continuous enrollment. The group will also do a final review of existing documents to ensure that no issue has been left out, and identify items that are not policies, but do need to be addressed somewhere.

Mary Ellen Shaw asked about CEHD's additional licensures and endorsements, and where they would fit in regard to these policies. Tina Falkner replied that these programs stand on their own, because they are governed by federal regulations. Nita Krevans mentioned that continuing education (CE) credit for professional fields would, similarly, not be governed by these University administrative policies.

The question was asked if there were changes proposed for the English language proficiency minimum for graduate admissions. Nita Krevans replied that the sub-committee draft of that policy has not yet come to the full policy review committee, but a draft proposal would eventually go to RAC for review.

The question was asked about the timeline for policies that are currently under review. Nita Krevans replied that, if the PPC approves the policies, there would be a 30-day public comment period. She is working with Michele Gross in the University Policy Office and Gayla Marty in the Graduate School to determine communication strategies to notify people about the comment period and the go-live date. Some policies have an implementation date that is several years after the policy goes into effect. Currently, the policy related to credit requirements would become effective in fall 2013; the two-year rollout would give programs time to propose curriculum changes or request exceptions. The curriculum proposal and approval process will be streamlined with the new online system, but there still needs to be adequate time to think through changes and then review them.

Tina Falkner added that some of the other policies would include appendices with template documents to use as an optional starting point for implementation.

Nita Krevans stated that there are already forms in progress for the LOA policy, and these would be included when the policy goes live.

The question was asked if the LOA policy would be effective for students going forward, or if it would affect someone who is already on a leave of absence arranged with the program.

Tina Falkner stated that the policy would apply going forward. If the LOA row is in PeopleSoft for students whose leave is approved, then they do not need to register for GRAD 999 or apply for readmission; this is intended to be a "time out" for the student. Nita Krevans commented that, if the student is on a leave for fall, they may be an ideal "first user" for the new policy.

Individuals can contact Nita Krevans, Tina Falkner, or gepolicy@umn.edu with policy questions, or go to the policy review committee's web page on the transition site to stay posted on progress: http://www.grad.umn.edu/Transition/policy/index.html.

Sue Van Voorhis gave an update on federal regulations related to certificate programs and the "gainful employment" requirement; this regulation goes into effect on July 1. Going forward, none of the University's certificate programs will be federal (Title IV) financial aid eligible. There are 140 students affected by the change for fall 2011 and spring 2012, and they will be notified by email. The 40 students affected for summer 2011 have been notified.

Carol Francis asked for some additional information about the change so that she could respond to student questions. The group was encouraged to contact ASR if they hear questions or concerns.

Certificate students may be eligible to apply for SELF loans and/or private loans. Refer students to Julie Selander or to One Stop Student Services. One Stop can also help with issues related to drop dates, if students need to withdraw from courses.

UM Reports in fall 2011, Kristeen Anderson

Resources from OIT have been assigned to help get UM Reports up and running for fall 2011. The "grad custom tables" will be populated temporarily to keep the reports functioning; filters will be changed so that data affiliated with the new college (i.e., acad prog) codes will appear in the graduate UM Reports; and filters will be adjusted so that the reports will function better.

Several reports are already fully functional for fall 2011. Those include:

- Graduate Career Demographics
- Graduate Students Hired on Higher Tuition
- Fringe Rate who Qualify for Lower Rate
- NSF-NIH Survey of Graduate Students and
- Post doctorates in Science and Engineering
- Graduate Education Applications by Applicant
- Graduate Education Applications by Program

Some reports are being streamlined and developed with filters, so that many reports can be combined into just a few, and users can filter to get the data they need.

1. This report will be maintained: GS Faculty Role Detail report
   - These reports will be retired, because they contain the same data as above: Graduate School Active Advising and Committee Assignments; Graduate School All Advising and Committee Assignments (including historical data); Graduate School Active Advising Assignments; Graduate School All Advising Assignments (including historical data)

2. This report will be maintained: GS Faculty Advising/Committee Summary by Major or Minor
   - These reports will be retired, because they contain the same data as above: Graduate School Student Report for Minors; GS Faculty Advising/Committee Summary by Major (GO42)

These reports will be adjusted so that they are functional by the first day of fall semester, 2011:

1. Graduate School Student Report (GO32)
2. English Language Proficiency - Eligibility for TAs
3. Graduate School Student Profile
4. Graduate School Degree Award
5. Eligibility for Lower Tuition Fringe Rate Assistantship
6. Degree Applicants
7. GS Faculty Appointment Record
8. GS Faculty Advising/Committee Summary by Major (GO42)
9. GRAD 999 Enrollments
10. GS Student Non-Graded Course Enrollments
11. Graduate School Milestones and Committees
12. Graduate School Milestones
13. Graduate School Committee

The question was asked if users could run these reports for all students in a single college. Kristeen answered that this is being investigated. A member of the group commented that it was possible to select multiple graduate programs, but there was a maximum number one could select, which can make work difficult. Genny Rosing commented that this limit was in place because of systems limitations with UM Reports; if the report attempts to pull too much data, it may never generate. Selecting all students in one college may work in smaller colleges, but would just time out in some larger colleges.

Kristeen stated that the target delivery date for the final group of reports was 9/6/11. However, if some reports would need to be delayed to 9/30/11, would numbers 9-13 on the list be acceptable? The group indicated that this would be acceptable.

The question was asked about why these reports needed to be fixed. Kristeen replied that the reports were programmed to include students affiliated with the Graduate School (08GRD) as a college, but most students are no longer affiliated with the Graduate School, as of 9/6/11. The reports need to be revised to work after that date.

Upcoming online processes, Heather McLaughlin and Santiago Fernandez-Gimenez

Santiago Fernandez-Gimenez and Heather McLaughlin reported that project teams have been working on some pilot processes to develop using online workflow software. Many members of the group have attended meetings to discuss these processes.

There is a two-minute video about the benefits of using online workflow available at this link: http://mediamill.cla.umn.edu/mediamill/display/63568

Frank Blalark stated that the online workflow processes will allow decision-making to happen at the program or college, without the processing workload. Programs and/or colleges will basically click "approve" in the online form, and the technology will ultimately push that decision directly into PeopleSoft. Until this PeopleSoft capability has been developed, processing will still happen centrally; colleges will not need to add milestones in PeopleSoft.

Santiago and Heather reviewed the two processes that are currently in development. First, stakeholder meetings were held to gather information about the different roles involved in particular processes, and the messages that students or administrators should receive. Then, the project team mapped out the process, created mock-ups of what the form(s) would look like, and identified the key data points that would allow the forms to be routed appropriately. Then, stakeholder groups were re-convened to walk through the mock-ups, discuss the process steps, and review the language. After that, the project team begins development of the forms and workflow. The final step will be user acceptance testing and training. Training needs will probably not be significant as far as the technology goes, as many administrators have probably already used the Workflow Gen tool.

In regard to the Preliminary Written Examinations process, the first stakeholder meetings have been completed. The team is now building mock-ups of the forms and determining what the process flow will look like. The target go-live for this form is fall 2011; it will likely go live in October or later, as the Graduate School has indicated that this would be an easier time of year for the transition.

For the registration exceptions form, development in the workflow software has begun. The target go-live for this form is the beginning of fall semester; the team will plan to present a detailed demo of the new form in the August RAC meeting, so that you can know what to expect. The team continues to encounter new issues, e.g., how registration holds should play into the petition process. Some of these issues will be handled through text or messaging, rather than programming. Not all steps need to be automated, and users should be empowered to make decisions for their programs.

The transition team will be using a similar workflow process to automate all of the degree progress milestones going forward. They will get feedback from stakeholders to help determine the priority of when these should be developed.

The question was asked about where these new online forms will be housed. Santiago replied that each form is an independent application, so it could be linked to from multiple places. Registration exceptions seems to fit into the registration area of One Stop; however, graduate students are probably accustomed to looking for this form on the Graduate School website, so the form could be linked to from both places.

The question was asked if the Preliminary Written Exam form would be routed to the DGS assistants. Heather confirmed that the form goes directly to the DGS assistant, and the DGS assistant determines the routing of the form from there.

Frank Blalark commented that the team was working to identify a better way to track DGSs and DGS assistants in PeopleSoft. They are investigating using the instructor/advisor table in PeopleSoft, and to add the role of DGS or DGS assistant. Those individuals may have different job titles, but the role would be assigned, according to the system. Frank also stated that they are determining the appropriate place to house milestones in PeopleSoft, and ways to tie those milestones to particular programs or program types.

Heather reported that training resources would be available online from the graduate education transition site. Workflow Gen provides several comprehensive videos that explain the software, step by step. Santiago added that most functionality does not require training; however, there are some components, like the "delegate" function, that may not be used frequently. The online training is useful for cases like that. Heather stated that there will be additional presentations at RAC, and the team can host additional meetings as needed, for specific processes. There will be documentation in the Graduate School Student Services registration primer; workflow processes will be addressed there, as well.

Heather and Santiago asked if this training seemed sufficient, or if the group would like something more formal. When asked if there were any individuals who had never used Workflow Gen tools before, about ¼ of the group raised their hands.

Mary Ellen Shaw noted that it would be helpful to have access to support contacts, to get help as questions came up. Another individual stated that they would need to share the information with faculty and students in their programs. Kasi Williamson stated that the team could create email templates and talking points, similar to what they have created for other projects in the past. It was requested that these resources be added to the Graduate School's registration website.

The comment was made that, in regard to registration exceptions, it would be helpful to know what criteria decisions were based on in the past. Santiago replied that the team has tried to include messaging and links to appropriate policies in the form itself, so that the information is readily accessible. The form can be modified quickly if more or different information is needed.

The comment was made that it would be critical to have historical information about previous registration exceptions. Santiago replied that petitions processed before the online system will be accessible in Image Now. Petitions processed through Workflow Gen will be available in Workflow Gen, and in Image Now.

Image Now access and discussion of future needs, Robert Bode

Robert Bode reported that the team would be conducting a survey about college and department needs and intended uses for Image Now. Please respond to the survey, which will help the team formulate a plan for future usage.

Future agenda items

When asked about potential future agenda items, Carol Francis recommended that the group discuss degree clearance processes. Another individual asked about the required progress review of students, how it is conducted, and whether it could be centralized.