

RAC/PRAC/AAN/CSAA
September 13, 2004

Present: Gary Anderson, Shuji Asai, JoAnn Ash, Theresa Baultrippe, Sheryl Bolstad, Pam Cook, Carolee Cohen, Jenelle Davis, Anthony de San Lazaro, Dan Delaney, ETTY DeVeaux Westergaard, Tina Falkner, Tracy Fischer, Carol Francis, Laurie Gardner, Carol Gross, Emily Holt, Kitty Jones, Patsey Kahmann, Char Klarquist, Pam Klopffleisch, Mary Koskan, Jennifer Koontz, Dave Krueger, Drew LaChapelle, Keelii McCarty, Linda Norcross, Stephanie Nichols, Ingrid Nuttall, Jan O'Brien, Kathleen Propp, Jan Reifsteck, Lonna Riedinger, Vickie Roberts, Margaret Rodgers, Genny Rosing, Alice Ross, Jennifer Rude, Cindy Salyers, Steve Schaus, Chris Schlichting, Lisa Shefchik, Phil Stedje, Clare Strand, Hanae Tsukada, Sue Van Voorhis, Kendra Weber, Kris Wright

Announcements: Jan Reifsteck announced that the College of Education and Human Development will hold an advising fair will be held the week of September 20th.

Mary Koskan distributed the enrollment verification form, an annual occurrence. She asked that everyone look over the form to make sure the all the information was correct, and to please contact her with questions at m-kosk@umn.edu.

Sue Van Voorhis requested that the Office of the Registrar be notified when colleges acquire a new dean. Incorrect information in this regard has been appearing on diplomas. To avoid this in the future, Sue asked that notification be sent in time to get the correct information on students' diplomas.

Dave Krueger began by requesting that departments send notification to the Office of the Registrar when/if an approver in a department changes. Departments in PeopleSoft are tied to lots of other information, so it's crucial that approver information is current. This will prevent grades from not getting approved promptly. Changes can be directed either to Dave Krueger at krueg055@umn.edu or the Tech Team at techteam@sossgw.stu.umn.edu.

Review of August Minutes: There were no changes to the August minutes.

Class Search Follow-up: Dave Krueger said that there is a specific way to search for Freshman Seminar courses that will prevent all other 19XX courses from being generated. To search for Freshman Seminars, enter "190*." Failure to add "seminar" will result in non-Freshman Seminar courses being generated and displayed.

Dave announced that the team is still working on a time search feature for courses that have multiple components. For example, when a student registers for an astronomy course, she must register for the lecture and the lab separately so a search for course time will only show that part fitting the identified time. Dave said that this is a high priority problem that we are currently working on fixing.

Dave said that the team is still working on providing an accurate way to determine the number of seats in classes that are cross-listed, but the time search feature is currently a higher priority.

Dave announced that the class extract failed twice during the first week of courses. Why this happened isn't clear. We are aware that this is a big issue and it will be addressed to avoid reoccurrence.

K-Grade: Dave Krueger announced that the team is currently looking at changing the way K-grades are posted. Ideally, once the instructor submits the final part of a K-grade course, the previous grades for the earlier courses would be automatically posted and appear on a student's record. This is currently not the case but is being addressed for future enhancement.

Correction Access to the Advisor Page: Dave Krueger announced that almost everyone in the colleges will lose their correction access in PeopleSoft. This is being done to keep the history of a student's adviser intact in PeopleSoft. If a correction must be made, people should contact the Student Records help line at Techteam@sossgw.stu.umn.edu or whoever in their office has access.

Jan O'Brien asked if the only way to remove the current adviser in PeopleSoft and replace it with a different one was to do a correction. Gary Anderson said no, one need only add a row with the new effective date and remove advisor.

When working with UM Reports, Cindy Salyers explained that for term-by-term list reports such as Student Roster and Probation, the student's advisor is listed for the specified term. The maximum effective dated row is less than or equal to the term end date, meaning if a college assigns an adviser effective for the second date of fall 2004, the reports will include that adviser for fall 2004 reports.

Dave noted that there are two issues: How departments can add a second adviser and how to remove the top row and replace with a department's own adviser. Jan asked which adviser appeared on APAS. Dave responded that all advisers currently appear associate with current effective date. Gary noted that correction access will help with this issue so that only advisers with current effective date show up on the APAS. Sue Van Voorhis asked if there were still individuals confused about entering advisers. Because confusion remained, there will be a demonstration led by Gary Anderson at the October meeting. Gary will also clarify which advisers appear on APAS. Dave concluded the discussion on correction access by noting it is important to retain a historical record of a student's advisers which is why correction access is being restricted since using correction access removed the information from PeopleSoft entirely.

Class Permission Numbers: Dave Krueger distributed a handout which showed an enhancement to permission numbers. Effective 9/20/04, it will be possible to extend the date of when a permission number will expire. Those with questions should contact Dave at krueg055@umn.edu or Terri Tuzinski at t-tuzi@sossgw.stu.umn.edu.

Preferred Name follow-up: Sue Van Voorhis reported that it had previously been believed that the U Card Office wanted the U Card to become a legal form of identification. After further discussion with the U Card Office, Sue discovered that this is not the case. Rather, students are using their U Cards as identification at airports, as ID when using a credit card and in other instances. The primary name will now be put on the ID because the preferred name might be something unacceptable. Students will also have to submit an actual picture of themselves to avoid, for example, cartoon characters being used.

Regarding staff using preferred over primary name, Sue reported that this is a tricky issue. For example, faculty may prefer to use different names in different situations. Because changing the policy would be more disruptive than leaving it alone, it has been decided to just leave the policy as is. It was asked whether it would be possible to just change a staff name on APAS. Sue said she believed it was still a tricky situation but would follow-up with Margo Mueller to verify.

PeopleSoft Priorities: Sue Van Voorhis notified the group that the new PeopleSoft financials system was being implemented.

Sue reported that the 4-year grad planner is moving forward. ECAS and PCAS are essentially moving forward and these are needed before the grad planner can be completed.

The ECS upgrade will be live 9/20/04. Training for this has been ongoing. Sue noted that AHC needs to get more people to training.

Regarding the Learning Management System project for non-credit courses, Sue noted that they're still in the process of gathering business requirements. An enterprise solution is the goal to eliminate the multiple practices and lack of tracking that is currently in place. Currently, non-credit students can't search in one place for all non-credit courses. Sue stated that this project has the scope of implementing a new student system, so it needs to be approached with some care and consideration.

Sue stated that the AHC is moving forward with their PeopleSoft implementation. Once this occurs and the admissions upload is complete, dual entry into systems will be eliminated. Regarding degree clearance, the many projects within this topic are still being prioritized.

DARWIN upgrade will go live the week of 9/20/04.

Sue also stated that a PeopleSoft solution to a problem with Distance Education courses and tuition is still being worked on. Currently students who register for Distance Ed. Courses but who should receive resident tuition rates aren't credited until after the fact.

Linda Norcross asked if there was a way to indicate IDL courses on transcripts and APAS. Sue said this is what they're trying to do for degree clearance with APAS, and it's hoped that a solution to APAS will fix other problems.

Sue noted that some Distance Ed. courses are offered to students throughout the country. Public Health and CNR are working with the Registrar to streamline a way for departments to offer such courses. Sue asked the group to notify her or Vickie Roberts if there are other classes like this out there. In order to address this, they need to know all the different courses and different scenarios.

Class of 2008 Portal Usage: Sue Van Voorhis noted that Amy Lund-Swalley is the Class Portal representative for OESS. Sue wanted to know how the portal is working in the colleges and asked if there were any ideas on how to make it more useful, including more user-friendly. Linda Norcross stated that COAFES had showed it to incoming freshman who really enjoyed the 2nd layer with the video. Linda felt it created lots of discussion topics. Linda also noted that she knew the information would change as the freshman progressed through their college careers but wasn't sure how. It was clarified that students would be accessing the portal through the U's main homepage, www.umn.edu.

Sue noted that there were concerns about retention of the portals use. The question of who would take responsibility for updating the content for students after freshman year requires additional follow-up.

Freshman Seminars: Sue Van Voorhis stated that as of spring '05, freshman with 30 or more credits will be eligible to take Freshman Seminar courses without obtaining a permission number. Departments should update their Freshman Seminar courses in ECAS to require students to be Freshman *or* be in the FRFY student group.

Advising web page discussion: Ingrid Nuttall noted that currently the advising web page consists of links to various points on One Stop and UMReports. Ingrid asked the group for volunteers to form a small working group to discuss the future of this page, what information it would need to have to be useful to advisers, including if it is needed at all. Kitty Jones, Carol Francis and Lonna Riedinger volunteered. Kitty Jones asked Ingrid if she had contacted anyone from AAN. Ingrid said she had not but would before the working group's first meeting.

Fall 2004 discussion: Sue Van Voorhis asked the group how the start of the school year was for everyone. Genny Rosing informed the group that an batch process ran two weeks early which had a negative impact on graduate students. These students, all of whom had yet to register for classes, were unable to do so because of this error. Genny said that a clear line of communication and/or a better process for communicating these problems should be in place so all appropriate people know.

Mary Koskan stated that she was unaware of this problem, as was Sue. Mary said that incidents such as this should be run past herself and Janet Crittenden and they will determine if the larger community of One Stop should know. Gary Anderson said the tech team should also be informed.

Sue and Mary noted that One Stop gets 6,000 calls a week the three weeks before school starts. Because it's impossible to respond to everyone, a process is being discussed to spread out EFAN notification to help with coverage issues. If EFAN notification is spread out, this will not impact when students receive their financial aid.

It was requested that a contact list of One Stop counselors be available. A brief introduction to the new counselors will be in the October issue of the Record. Mary reminded the group that the 5-9050 line is available for staff members who need to get through to a One Stop counselor. Please do not give this number out to students.

One Stop Update: Mary Koskan reported that the beginning of the semester has gone pretty smoothly. Financial aid packages were assembled earlier, and her team will continue working with Office of Student Finance to improve this process further. Mary also noted that this was the first semester in which One Stop staff could experience the benefits of the new Financial Aid steps.

Office of Student Finance has been excellent with their communication to students, and Mary noted that her staff is aware of when they will typically get lots of calls and walk-ins. Mary will be looking toward next fall to see what's coming up that could potentially cause problems. A calendar will be created once more information has been gathered. Mary noted that a time table of email notifications will be included in the calendar, and this will be shared with the group.

Mary noted that One Stop lost 6 staff members and after the replacements were hired, their training wasn't completed until the end of August. Currently, there are three open counselor positions. The week of 9/20 the search committee for these positions will continue to narrow down the field.

Mary stated that a new online loan application online from MHESO included 16 complicated steps which generated more calls to One Stop.

There were times this late-summer and early fall when there zero calls were in queue and short waits in the front. Of course, there were still long lines, too. Mary and her staff will continue to analyze the system to look for improvements in order to improve service and decrease complaints.

Mary noted that the first week of classes there were greeters in the One Stop lobby that helped direct students to the appropriate place in One Stop. Mary stated that the model of One Stop is premier, there's really nothing like it in other universities where professional counselors are on the front-line.

OSF Update: Carolee Cohen noted that only 4,900 of 45,000 (non-enrolled students or senior citizens) students received paper bills. There was also a record number of financial aid dollars disbursed, nearly \$86 million in the first run. This improvement can be directly attributed to the new electronic processes that have been built over the past few years (e-FAAN, e-prom notes, FA Steps) that allow students to provide information faster and check their status more easily.

Needs Analysis: Vickie Roberts led a discussion regarding how OTR can improve services for colleges and departments. Vickie noted that taking care of IDL courses on transcripts is one area that need attention and asked for others.

Genny Rosing noted that there are still a number of permission numbers being given for graduate courses that don't require permission numbers, for example, thesis credits. Genny asked if permission numbers can be deleted. Dave Krueger said he would follow-up on this issue. Jan O'Brien asked if student specific and class permission numbers could be used at the same time. Dave Krueger responded that they cannot, this is why there is not an extension option for permission numbers.

Clare Strand asked if it was possible for there to be a link from My Active Advisees users to APAS. Cindy Salyers responded that OTR is working on this, but currently one can look at an APAS in Portfolio. Kitty Jones asked if there was a place on One Stop where students can view their advisers and committee members, similar to viewing holds. Currently, there is not, but OTR will follow-up on this. It was noted that there's a link on the 2008 Class Portal where students can view advisers.

It was asked whether there is currently a way to restrict access to permission numbers to prevent some departments from issuing permission numbers for classes in other departments. All class permission numbers are listed in UM Reports. It is up to individual departments to verify if there is unauthorized use of their permission numbers.

Someone noted that PeopleSoft is very undergrad oriented but not oriented for graduate and professional schools. More discussion is required regarding how PeopleSoft could be more graduate/professional school appropriate.

Stephanie Nichols asked if OTR will try and get someone from Boynton Health Service to talk about student hospitalization insurance at the October meeting. Tina Falkner will follow up on this. Stephanie also asked for communication to clarify students billing for bookstore purchases. The charges are posted to the student account and then billed by OSF every month. If the book charge coincides with a month in which tuition is first billed, those purchases will be reflected on the same bill. If a student decides to buy their books early (example: in early August), the charges are NOT held up until the tuition charges are billed (in September). OSF is addressing how to better communicate this issue at the point of purchase.