Registrar's Advisory Committee
Monday, February 3, 2014
Walter Library, Room 402 (East Bank)
9:30 a.m. - 12 noon
Prepared by: Elyse Paxton

Present: Alissa Allen, Bonnie Anderson, Claire Anderson, Rhonda Bjurlin, Alison Blomster, Earlene Bronson, Amber Cellotti, Beth Cunningham, William Dana, Dan Delaney, Clare Dingley, Erin Edwards, Eric Eklund, Tina Falkner, Tracy Fischer, Carol Francis, Teresa Fruen, Mike Galegher, Laurie Gardner, Stacey Grimes, Kevin Havard, Connie Hessburo-Odland, Andrew Hill, Amber Hodes, Lisa Hubinger, Jill Johnson, Sue Johnson, Kess Knight, Jennifer Koontz, Katie Koopmeiners, Pa Lee, Tracene Marshall, Rachel McKessock, Heather Micek, Amanda Miklik, Rose Miskowiec, Katherine Murphy, Ken Myers, Ingrid Nuttall, Laurie Pape Hadley, Natan Paradise, Cathy Parlin, Cindy Pavlowski, Elyse Paxton, Nate Peterson, Eleanor Pijut, Rebecca Rassier, Jeannine Rick, Katherine Russell, Ritu Saksena, Megan Schmidt, Julie Selander, Mary Ellen Shaw, Deanne Silvera, Nicole Snow, Kate Sophia, Susan Suchy, Roopa Sukumaran, Darlene Toedter, Georganne Tolass, John Vollum, Laura Walker, Jessica Whitcomb-Trance, Toni Wheeler, Elvin Woo

Undergraduate education agenda items

OTR general updates

Ingrid Nuttall announced a meeting recently took place with representatives from nearly every college to discuss the inter-college transfer process. The group talked about what works well with the current process and what things could be improved.

A RAC member asked whether the meetings would lead to the creation of an online form. Ingrid replied no; the point of the of the meeting was not to move to an online workflow.

President's initiative: Retaining all our Students

Sue Van Voorhis announced President Kaler's initiative for graduation and retaining Pell-eligible students. It will kick off now and become fully implemented by 2016. The program's goals are to improve first-year retention rates of low income students, to lower barriers to allow these students to obtain their degree, and to help them establish set career paths. The focus of the program is on Pell Grant recipients. Currently, the first-year retention rate for these students is 87%. First generation students will also be a priority.

The initiative has four focus areas, which include the following:

- The Bridge Program (funded for Pell eligible students)
- SMART Learning Commons program enhancements
- Increased awareness for advisers regarding these students
- Financial literacy (One Stop will focus on these students)

Sue said accomplishing the above focus areas are important so we can report to the White

House. She asked RAC members what information they would need to help accomplish these initiatives and mentioned providing data in degree progress reports and in APLUS, as well as alerts from faculty.

A RAC member mentioned some students in the College of Liberal Arts (CLA) have repeated financial holds and asked whether this is something advisers could be alerted to?

Tina Falkner said other alerts could be considered, such as those regarding students who are not going to class. The goal is to intervene early in cases such as this.

Graduation & retention update

Tracy Fischer provided the group with an update on student degree progress. The first meeting with the Student Degree Progress group was held in December and included a representative from each college. Tracy said some great feedback was generated regarding what data elements should be included in the data the colleges receive from ASR. The next student degree progress meeting is scheduled for Thursday, Feb. 20.

Right now, ASR is focused on creating a student degree progress data platform, with special attention given to first generation and Pell Grant students to align with the President's new initiative for retaining students.

Administrative graduation discussion

Tina Falkner lead the group in a discussion regarding policy language about administrative graduation. She explained the current policy details what the University requires for a student to graduate, which includes the student applying to graduate. In some cases, it may be in the institution's best interest to administratively graduate a student and skip the step where the student applies to graduate before he/she is cleared. In these instances the student would have fulfilled all degree and University graduation requirements but hasn't taken that last step to apply. Tina asked RAC members for their thoughts on this proposed policy, and several comments and questions arose, which included the following:

- Pre-health students may finish all graduation requirements but still be completing specific pre-requisites, so this could be an issue for them. (Tina and Sue responded that students can be allowed to use financial aid post-graduation for certain pre-requisites so they shouldn't delay graduation to use aid to take those courses)
- Should it be made clear who has the authority to enforce this policy? (Tina asked whether individual colleges wanted to do so, and the response was yes.)
- Was there a discussion about how this policy would affect a student's financial aid? (Tina said yes. The federal government is again saying that once students have completed their degree requirements, they should not be awarded additional aid. If we continue as we are doing, we are not in compliance.)
- What if a student is completing a second major? (Tina replied he or she is allowed to do so; the first major would be cleared, and then the student could pursue the second.)

- What if the student is taking pre-requisites for a graduate program? There is a stipulation where you can receive financial aid.
- Some students do not provide an address in which to send their diploma. (Tina replied there will be a way in the new PeopleSoft 9.0 upgrade to capture this information. The diploma can be sent to the last address on file.)
- A FAQ on this topic would be helpful.
- Is the goal to be in compliance with federal regulations? If so, can't we educate students more on what their financial situation will look like when it's close to the end of their degree?

Sue Van Voorhis explained the policy is meant for students that are simply sticking around, even though they have fulfilled the requirements to graduate.

Ingrid Nuttall said the policy was not conceived to be a routine administrative policy.

Common session agenda items

<u>Introductions and approval of January minutes</u>

There were no changes to the January minutes.

<u>Announcements</u>

CEHD Electronic Academic Policy Petition update

Nate Peterson announced that the CEHD Electronic Academic Policy Petition pilot program went very well. He detailed the steps of the process, which include the following:

1. CEHD receives the Academic Policy Petition from the student and approves it.

2. CEHD emails the student and One Stop, letting both parties know the petition has been approved. CEHD will include the petition as an attachment. These emails will come from only two people: Pam Cook or Mary Ellen Shaw. Any that do not come from Pam or Mary Ellen should be forwarded to Nate.

3. Petitions will come in as normal email and are distributed by CRM in a round robin format.

4. One Stop staff will print the petition, process it, and put a copy into imaging. One Stop staff will then comment on the record that action has been taken.

Nate said the pilot program will be extended to other colleges, and if interested, to let him know.

Natan Paradise mentioned that sometimes a student will initiate a petition but then decide not to follow through on it. Nate responded that students need to be aware that once One Stop has it, it will be approved for processing.

Drop/refund deadline for spring 2014 extended

Julie Selander announced that, due to the weather-related cancellation of University classes on

January 27 and the morning of January 28, the 100% drop/refund deadline for spring 2014 full semester and 1st 7-week session classes has been extended to February 3. All other deadlines will remain the same. This change was effective for the Law School as well.

Julie encouraged RAC members to be flexible when listening to appeals or questions that arise from this change. Professional judgement should be used to determine whether an exception should be made.

Katherine Murphy asked how many students would be affected by drop/refund deadline change. Julie replied that it's difficult to say, but probably around 1,000 students. She also mentioned this applies to the Twin Cities campus only.

ASR-IT updates

Laurie Pape Hadley announced that ASR-IT discretionary work is minimal at this time, as the majority of ASR-IT staff are dedicated to ESUP duties. For ASR-IT assistance, contact the Student Records Training and Support Team at 5-2803 or srhelp@umn.edu. For student financials assistance, email sfhelp@umn.edu. For financial aid assistance, visit the FA Help Request site.

She also provided a few informational updates, which include the following:

1. The majority of undergraduate certificates are now live in PCAS and the online catalog.
2. 1098-T tax forms were mailed last week.
3. One Stop is now using SalesForce for all email communications.

Student email account management follow-up

Hope Johnson shared that she had drafted a revised student life cycle, based on feedback she received the last time she presented at RAC. The new proposal outlines the current process, along with the group's suggested changes. The two key differences between the old and new process is 1) more communication to students about how long they can keep their account and 2) how long a student can keep his or her account if they don't register. Right now, Hope said she is proposing that students keep their accounts for two years, but that is open to discussion. An appropriate timeframe may be difficult to determine, as some students go on leave for military or medical reasons. In these cases, they don't really get accounted for in the life cycle process. Hope said she has shared the new proposal with Ingrid Nuttall and would like feedback on the document before making any official changes.

RAC members had several questions, which included the following:

- After two years of inactivity, will the student's account be shut down? Hope replied that alumni can keep their account active by checking in every 90 days. The two-year timeframe is for people who are not enrolled for a particular reason and have not graduated.
- Laurie Pape Hadley asked about students who choose to forward their gmail email to a different account. Right now, that has to be done in gmail. Hope replied that the new

proposal contains information allowing a student to forward their email to another account. She said she'll work with the service desk to make them more aware of this issue and to put it up on the public knowledge base as well.
- Mary Ellen Shaw said she would like the timeframe to be extended to five years. If we do so, then nothing special would have to be done for students who have gone on a leave of absence.
- Stacey Grimes asked whether a notice will be sent to students to notify them of the new life cycle timeline. Hope replied yes; students will receive this information when they initiate their account. If they don't register for a particular semester (excluding summer), they will receive another email saying they have two years.
- Nicole Snow asked how the two-year timeframe was decided upon. Hope replied that it is just a number at random, and one that is bigger than what we have now.
- Katherine Murphy asked whether there is a distinction between a suspended account and one that has had all its data wiped. Hope said yes; after the first 90 days of inactivity, all information is still there, but the account is suspended. After *another* 90 days of inactivity, then the data is wiped.
- Sue Van Voorhis asked whether you can get your email back, say seven years later, when you decide to go back for a PhD program. Hope said yes, that should be possible. The email names are preserved, but she will check on the lifespan of an internet ID.

A RAC member asked when these changes will be made. Hope said the latest date to make them is July 1. Comments and feedback regarding her proposal should be sent a week before the next RAC meeting on Monday, March 3.

<u>Staff access to registration processes in PeopleSoft/audit reminder</u>

Julie Selander provided an update on her August RAC presentation which detailed registration audit findings. One finding, in particular, was considered essential to address, so she reminded RAC members that it requires action. This finding concerned access rights to key registration functions. This is an important security issue, and Julie encouraged members to review staff access rights to determine whether their job responsibilities mandate registration access. If a change needs to be made, you will need to fill out an Access Request Form (ARF). For new staff members, be sure to look at job responsibilities to see whether access should be granted.

A RAC member asked, once a report is done, who should they report it to? Julie said you don't need to report back to her, but as part of ESUP, we will be going over access rights, so she wants to clean up whatever we can beforehand.

Another RAC member asked how to get details on what access a staff member has. Ingrid Nuttall replied that questions should be directed to her, and she will locate the information. Julie also said she and Ingrid can come up with some guidelines for certain rules to follow.

<u>Enterprise System Upgrade Program</u>

Communication to faculty

John Vollum gave an update regarding ESUP faculty engagement. The challenge is how to make confident users of more than 4,300 full and part-time faculty and many others involved in the learning process. He shared strategies the ESUP team is working on right now, which include:

- Sneak Peeks: videos to show changes and benefits
- “Go To” staff: prepare staff who work with faculty (e.g., schedulers, RRC managers)
- Quick Start Guides and UPK: written and video instructions
- Visits and presentations: demonstrate capabilities and answer questions

UPK, which stands for User Productivity Kit, is a training tool new to the University that will be used to post job aids and tutorials and will be integrated with the “Help” feature within PeopleSoft.

He also outlined some strategies for after go live, which include:

- Blitzes: just-in-time communication and resourcing to assist faculty and others during intense or critical periods (e.g., grading)
- Hypercare: expanded coverage after we go live; focus on customer support, data integrity, system availability, and performance

Ingrid Nuttall asked John to clarify when people should request that ESUP folks visit departments vs. when they’re *going to* come to talk. John replied that, at this point, they don’t have a training instance. They have to create demos when they go out. After April, however, they’ll have a live system to go out and use. The ESUP team are working from a general to a specific mode. Once they establish a training instance, they can focus more closely on a given process. Right now, it’s high level overviews.

Sue Van Voorhis encouraged RAC members to think of different ways faculty could be communicated with.

More information about the upgrade can be found at upgrade.umn.edu.

Portal update

William Dana shared an ESUP Portal status update with RAC members. Teams are working very hard on testing right now. So far, engagement has gone well, and they have received positive feedback from the portal rough draft. There are also some risks to minimize, which are that the project is not normalized with ESUP, the rough draft of the portal didn’t contain a lot of technical work, and timelines are very short. As a result, the team is normalizing and refocusing its business process focus and the Portal Leadership Team is being charged as a Functional Steering Committee.

Portal business process include the following:

- User navigation
- User interface/branding
- Communication
- Content management

- System integrations
- Governance

A new partner is also being brought on: IntraSee. Their focus is on user experience (they do not modify base CS/FIN/HRMS applications) and they are a strategic partner with Oracle. They also bring products and consulting services that will ensure the portal is up faster.

William shared a high-level timeline, which illustrated the many things that are happening as part of the program.

Sneak peek preview videos
Amanda Miklik & Heather Micek provided a demo of two "sneak peek" videos on the new Faculty Center and Advisor Center. Amanda asked RAC members how they might best communicate the release of these videos to faculty and staff.

Heather said anyone who is currently listed under the advisor page in PeopleSoft will see the advisor center video. A RAC member responded that PLCs (Plan Level Coordinators) are not listed as advisors in PeopleSoft, so how can they be made aware of the video? Ingrid Nuttall replied that more details can be shared at a college advisory meeting or as part of a graduate education meeting next month.

Information on other new sneak peek videos will be available on the ESUP blog.

Academic calendar start date discussion
Tina Falkner announced the question has been posed at the Senate Committee on Educational Policy (SCEP) of whether the Twin Cities should start spring semester earlier than it currently does. She said nothing has been set in stone, but do RAC members have an opinion of whether or not it's a good idea?

Eleanor Pijut asked if this mean spring semester would be a week longer or just shifting it, and Tina replied it would just mean shifting the start date of spring semester. Other concerns were raised regarding how this would affect degree clearance, probation/suspension review, study abroad, and international and transfer orientation.

Mike Galegher said the change would actually be great for the Law School, as it's always a scramble to get grades done. He did mention, however, that he wasn't sure how faculty felt about this. He asked whether feedback should be directed to Tina, and she said yes. She will share all feedback at a future SCEP meeting.

Eric Eklund asked whether students had been asked about this change yet. Tina said no, not that she is aware of.

Rachel McKessock asked whether this change applies to spring term only. Tina replied that she wasn't sure how much the start of fall semester could be changed, due to the State Fair. She mentioned that if we do seriously examine changing the start date for spring semester, then we might want to look at all the semesters as a whole. Tina said she will propose putting together a calendar committee to talk about some of these issues.

Graduate education agenda items

<u>GSSP general updates</u>

There were no GSSP general updates.

<u>Minor & plan type workflows</u>

Mike Brown provided RAC members with an announcement regarding minor declaration/master's plan type workflows. These two new workflows are intended to complement the new business process for Academic Advisement (AA), standardize processes for graduate (GRD) and departmental master's students (DMS), and reduce turnaround time.

The *current* minor/plan type processes are as follows:

- Minors: declared with paper Graduate Degree Plan (GDP) or petition approval and then entered into PeopleSoft (Program Plan)
- Plan types: assigned on paper GDP or petition and then entered into PeopleSoft (Program Plan)

The *future* minor/plan type processes will be as follows:

- AA will look for minor/plan type data in PeopleSoft (Program Plan)
    - AA cannot capture this information
    - AA will need masters plan types entered before coursework is input so it knows how to audit
    - Declared minors will also affect how AA audits
- Need outside systems for capturing minor/plan type data
    - Workflows

Graduate Student Services & Progress (GSSP) is still in the information gathering stage regarding these processes and is reaching out to programs and colleges for feedback. A process advisory group has been created for this purpose and met for the first time in late January. A soft rollout will occur in October, and surveys will be distributed soon to Directors of Graduate Studies (DGS) and Plan Level Coordinators (PLCs).

More information regarding these new processes will be available at future RAC meetings, at College Advisory Group (CAG) meetings, and in future issues of *PBED Digest*.

Mike asked RAC members for feedback. Katherine Murphy asked whether there will be a date when the GDP is not on paper anymore. Mike replied that a date has not been set in stone, but a pilot program for that will begin in October with the debut of AA.

Questions or concerns about these processes should be directed to Mike.

Future agenda topics brainstorming session

RAC members were encouraged to brainstorm future agenda items, which included the following:

- Best practice sessions and annual student reviews
- Clarity around the report recently released by Karen Hanson
- Orientation and prospective student visits