

## UNIVERSITY OF MINNESOTA

### **Registrar's Advisory Committee**

Monday, May 6

9:30-11:20 a.m.

[Student Success Analytics Initiative Demo and updates](#)

[PeopleTools update](#)

[My Finances project update](#)

[Negotiated rulemaking update](#)

[Policy update](#)

[End of term reminders](#)

[Degree progress and Federal Financial Aid project update](#)

[TADA project updates](#)

# Student Success Analytics Initiative

May 2019

Rachel M., Tracy F. & Nate M.



# First...

The Student Success Analytics initiative is a University-wide effort to understand and utilize institutional and student data to enhance student success.



# And second...

This effort seeks to continue and build on the progress of existing University best practices.

- APAS
- APLUS
- Promoting Financial Wellness
- Career bridging
- Risk segmentation
- Peer mentoring
- Campus engagement



# Undergraduate Degree Progress dashboard

- Version 1 released to collegiate stakeholders
- Reviewing training feedback for new enhancement and communication opportunities

# Retention Risk analysis & dashboard

- Two retention risk visualizations in development
- Sharing analysis and models with the U of M's Retention Committee

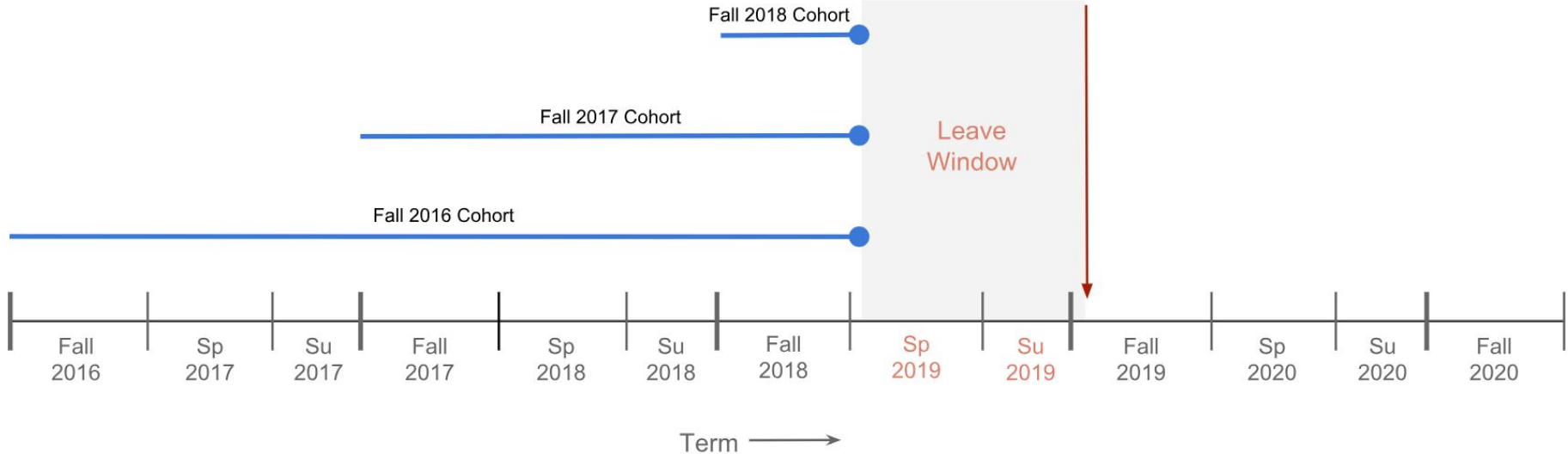
# Retention Risk analysis & dashboard



# Spring 2019 Start of Term Risk Model: Given what we know about the student at the start of their current term, what is their probability of being enrolled the following term?

Demographics + Interactions

Enrolled?





# Demographics + Interactions

Ethnic Group

Sex

ACT/SAT Score

Home Location

First Gen. Student

First Choice College

On Campus Housing

Entry College/Program

Entry Credits

Cumulative Total Units

Cumulative Transfer Units

Cumulative GPA

Term GPA

Term Attempted Credits

Summer Credits

Term Grade Points

Term Total Units

Term Transfer Units

Term Grade Counts:

W, F, D, C, A

Active in Degree Plan?

Active Entry College/Prog?

Active in First Choice College?

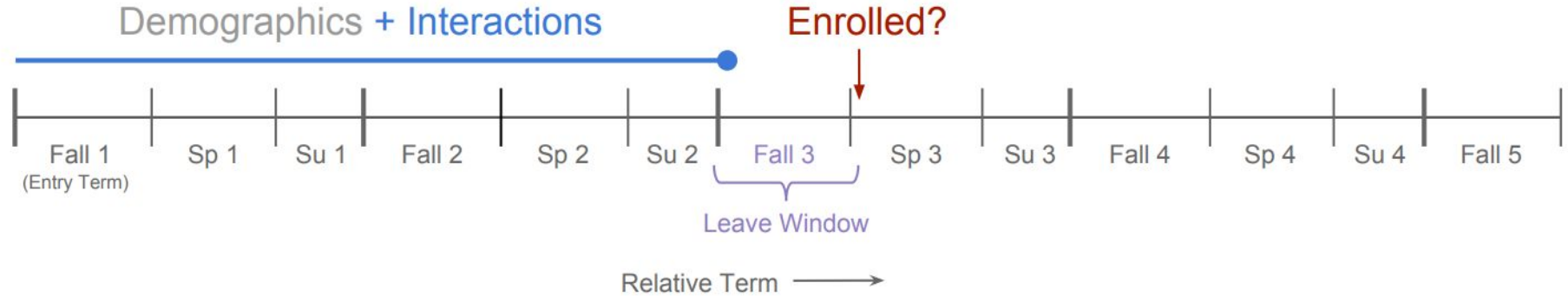
Program Added?

Active in Major Plans (count)

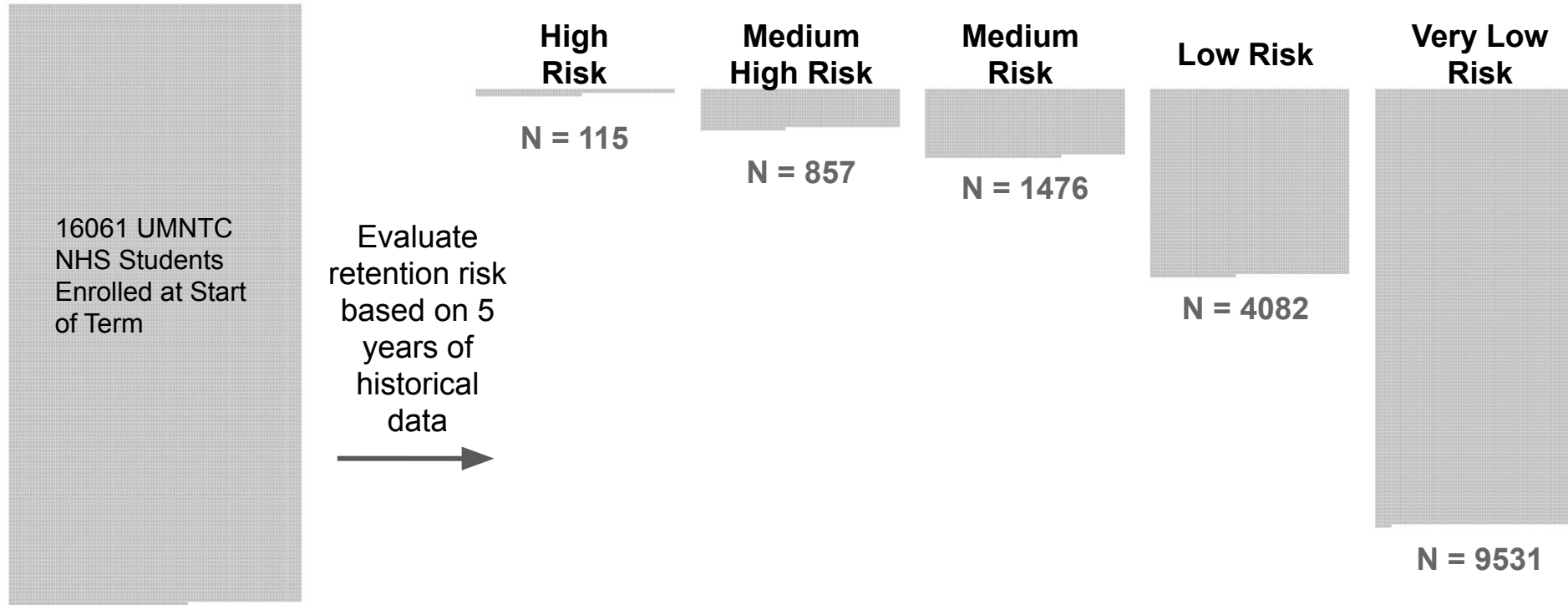
Active Degree Plans (count)



Start of Term Risk Model: Given what we know about the student at the start of their current term, what is their probability of being enrolled the following term?



# Retention Risk pools & model performance



# Retention Risk pools & model performance

**High**

**Leave rate  
= 57%**

**Medium  
High**

**Leave rate  
= 19%**

**Medium**

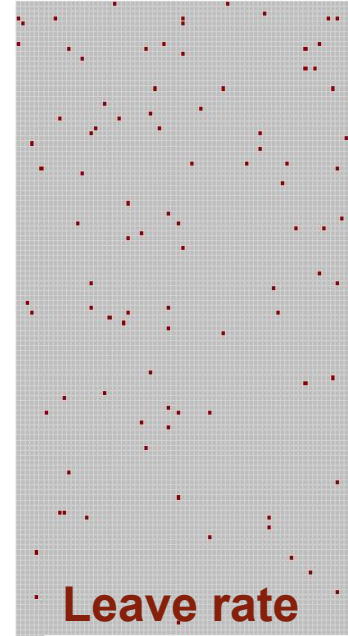
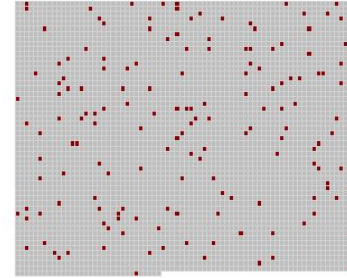
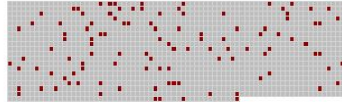
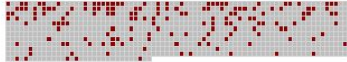
**Leave rate  
= 8%**

**Low**

**Leave rate  
= 4%**

**Very Low**

**Leave rate  
<1%**



# Dashboard demonstration



# PeopleTools 8.56 Update

ASR IT: Marc Keaveny  
ASR Communications: Christina Yoong

Date: 5/6/19



# Project overview

- PeopleTools = PeopleSoft development platform
- Project team includes CS, EFS, HR, OIT, MyU
- PT 8.55 will no longer be supported.
- Update weekend is scheduled June 1-2, 2019
  - MyU and PeopleSoft will be down

# What is not changing?

- MyU
- Existing PeopleSoft favorites (will be rolled over)
- Security
- Page functionality





# What is changing?

- Homepages (Unified Navigation)
  - My Homepage
- Navigation options
  - No breadcrumbs
  - Tiles, Navigation collections
  - NavBar - Recent places, Navigator, Favorites



Campus Community



Comment Chklist Communication



Curriculum Management



Financial Aid



Records and Enrollment











Student Admissions



Student Financials



<b>Campus Community</b> 	<b>Comment Chklist Communication</b> 	<b>Curriculum Management</b> 
<b>Financial Aid</b> 	<b>Records and Enrollment</b> 	<b>Student Admissions</b> 
<b>Student Financials</b> 		

NavBar 



Recent Places



My Favorites



Navigator



Classic Home



Campus Community



Comment Chklist Communication



Curriculum Management



Financial Aid



Records and Enrollment



Student Admissions



Student Financials



NavBar: Navigator



Recent Places



My Favorites



Navigator



Classic Home

Campus Solutions Menu >

EFS/Finance Menu >

HRMS Menu >

Interaction Hub Menu >



Campus Community



Comment Chklist Communication



Curriculum Management



Financial Aid



Records and Enrollment



Student Admissions



Student Financials



Personal Information ^

Names

Add/Update a Person

Search/Match

Emergency Contacts

View Names

Ethnicity

Relationships

Relations with Institution

Person-to-Person Summary

UM FERPA Display

UM Athletic Grade Changes

Addresses/Phone v

Names

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

ID:

Campus ID:

National ID:

Last Name:

First Name:

Include History

Limit the number of results to (up to 300):

Search

Clear

Basic Search



Save Search Criteria



# Central training and communications

- Overview demo video (2:00 min) sent in first message, May 7, 2019
- Google Slide job aids (6) shared May 14, 2019
  - Homepage Navigation Overview
  - Personalize My Homepage
  - Change Default Homepage
  - My Favorites
  - NavBar
  - Navigation (Nav) Collections



# CS training and communications

- Online trainings will be updated
- Additional communication topics for May
  - System downtime (PeopleSoft, MyU) June 1-2
  - Graduate/professional students' apply to graduate deadline extended to June 3, 2019
- Communication channels
  - Meetings
  - Newsletters (The Record, Training Update, etc.)
  - Student messaging (UU/ACCU, MyU tile, One Stop alert, etc.)





# Questions?



# MyU: My Finances Revamp

Project Update

Registrar's Advisory Council

May 6, 2019

**Matt Tveter**

Project Manager



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# MyU: My Finances Revamp

- Help students make informed borrowing choices by providing student-specific loan/debt information through the MyU: My Finances tab.
- Reorganize the information included on the MyU: My Finances tab.
- Ensure students can access all business processes related to Financial Aid and Student Finance through the My Finances tab.



# Alignment with goals

- Achieving Student Success
  - All degree-seeking students graduate within set time measurements
  - Every student is equipped with pertinent tools/knowledge to manage finances while in school and after graduation
  - Graduating undergraduate students are below the national debt average or \$20,000 in student loans
- Enhancing systems and processes



# Update - reciprocity messaging

- Students identified using home state data from Admissions data table
- Message will display for approximately 90 days, then will “fall off” and appear again during the next semester if student does not apply
- Message will be limited to two years after original application
- One-time message will be sent to current students that have not applied for reciprocity for over 2 years this summer



# Update - FA history table

- Financial Aid data will display back to the year 2000 (semester conversion)
- “Accepted” amounts are pulling from “award entry” screen - not different that what they’d see if they did a deep dive into PeopleSoft
- There are OSF processes that run overnight that will update the “Accepted” amounts; OSF also has daily processes to update these numbers manually



# Current MyU: My Finances Tab

The screenshot displays the 'My Finances' section of the MyU portal. On the left is a vertical navigation menu with options: NEWS, ACADEMICS, MY FINANCES (highlighted), MY TIME, MY PAY, MY BENEFITS, PURCHASING, and MY INFO. The main content area is titled 'My Finances' and contains two primary sections: 'Billing & Payment' and 'Financial Aid'. The 'Billing & Payment' section shows a message: 'You have no outstanding charges at this time' and includes three buttons: 'MAKE A PAYMENT', 'ACCOUNT ACTIVITY', and 'UPDATE DIRECT DEPOSIT'. The 'Financial Aid' section features two dropdown menus labeled 'Aid Year' and 'Campus', both currently set to 'Select a year' and 'Select a campus' respectively. Below these sections is a 'Questions About My Finances?' heading with a 'SEE HELP OPTIONS' button. A list of links is provided under two expandable categories: 'Billing & Payment' (including Student Center, Dates and Deadlines - UMTC, Costs, Tuition, Fees - UMTC, How to Pay - UMTC, Live Like a Student - UMTC, 1099-T Tax Form, Parent/Guest Access, and Registration & Fee Summary) and 'Financial Aid' (including Student Loan Borrowing History, Scholarship Search - UMTC, Report Scholarships - UMTC, Am I Eligible for Aid? - UMTC, Where is My Aid? - UMTC, Request More Aid? - UMTC, Financial Aid Forms - UMTC, and U of M Student Jobs). At the bottom, there is a 'Need Help?' section with a 'Show Help Options' button.

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# New MyU: My Finances Tab - SAP messaging

The screenshot displays the MyU website interface. At the top, the University of Minnesota logo and "Driven to Discover" slogan are visible, along with navigation links for Crookston, Duluth, Morris, Rochester, and Twin Cities. A search bar and a "University Student" profile icon are also present. The left sidebar contains navigation options: NEWS, ACADEMICS, MY FINANCES (highlighted), and MY INFO. The main content area is titled "FINANCIAL AID" and includes tabs for BILLING & PAYMENT, FINANCIAL AID, and FINANCIAL AID HISTORY. A yellow warning banner for "Satisfactory Academic Progress (SAP)" is displayed, indicating a warning for cumulative GPA and/or cumulative completed credits percentage. Below this, the "Financial Aid Steps" section features dropdown menus for "Aid Year" and "Campus". The "Estimated Cost of Attendance" section provides information on how the university uses these figures for financial aid eligibility. At the bottom, there is a "Questions About Financial Aid?" section with a "SEE HELP OPTIONS" button and a list of links for various financial aid topics.

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Crookston Duluth Morris Rochester **Twin Cities**

MyU Key Links Campus Info Resources Favorites University Student

NEWS

ACADEMICS

**MY FINANCES**

MY INFO

BILLING & PAYMENT **FINANCIAL AID** FINANCIAL AID HISTORY

TWIN CITIES/ROCHESTER FALL 2018

**Satisfactory Academic Progress (SAP):** VIEW MY SAP STATUS

This is a warning that you are not meeting SAP standards for cumulative GPA and/or the cumulative completed credits percentage. You may receive financial aid while under warning. You must attain the required standards by the end of the current term to continue to receive financial aid.

Financial Aid Steps

Aid Year: Select a year

Campus: Select a campus

Estimated Cost of Attendance

The University uses cost of attendance figures to calculate your financial aid eligibility. You can use this information as a planning tool to decide how much to borrow in loans or pay out-of-pocket. **This is not a bill.** Actual costs may differ depending on your program, coursework, and personal spending.

Select an 'Aid Year' and 'Campus' above to see your Estimated Cost of Attendance.

Questions About Financial Aid? SEE HELP OPTIONS

Scholarship information - UMTC Am I Eligible for Aid? - UMTC Where is My Aid? - UMTC Financial Aid Types - UMTC  
Financial Aid Forms - UMTC Work Study Info - UMTC





# New MyU: My Finances Tab - SAP messaging

UNIVERSITY OF MINNESOTA  
Driven to Discover

Crookston Duluth Morris Rochester Tw

MyU Key Links Campus Info

NEWS

ACADEMICS

**MY FINANCES**

MY INFO

Search MyU

University Student

My Satisfactory Academic Progress

Federal regulations require that we monitor the academic progress of all students who receive financial aid. The table below displays your current information along with the requirements for each category.

Your Statistics		Requirements	
Cumulative Grade Point Average	1.733	Minimum GPA Required	2.00
Cumulative Credit Completion Percentage	100%	Minimum Cumulative Credit Percentage	67%
<a href="#">HOW IS THIS CALCULATED?</a>			
Timeframe Credits	22		

For questions on Satisfactory Academic Progress, including how to submit an appeal, or timeframe requirements for your program, click on your campus link below:

Crookston	<a href="#">Financial Aid &amp; Scholarship Office</a>
Duluth	<a href="#">One Stop Student Services</a>
Morris	<a href="#">One Stop Student Services</a>
Twin Cities/Rochester	<a href="#">One Stop Student Services</a>

VIEW MY SAP STATUS

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ncial

# New MyU: My Finances Tab - Financial Aid Steps (same as before)

### Financial Aid Steps

**Aid Year**  
Financial Aid Year 2018-2019 ▼

**Campus**  
Twin Cities/Rochester ▼

- ✔ Step 1: FAFSA Status  
Your FAFSA was received on 07/27/2018.
- ✔ Step 2: To-Do Items  
At this time, all documentation is complete.
- ✔ Step 3: Financial Aid Awarding  
[View your awards.](#)
- Step 4: Loan Documents  
You have no loan documents to complete at this time.
- ⓘ Step 5: Disbursement  
[View your student account](#)  
Disbursement information  
Excess financial aid will be refunded to you by direct deposit. [Enroll/update here.](#)

# New MyU: My Finances Tab - Estimated Cost of Attendance table

Estimated Cost of Attendance			
<p>The University uses cost of attendance figures to calculate your financial aid eligibility. You can use this information as a planning tool to decide how much to borrow in loans or pay out-of-pocket. <b>This is not a bill.</b> Actual costs may differ depending on your program, coursework, and personal spending.</p>			
Term	Description	Amount	
Fall 2018	Ave Sub/Unsub & PLUS Loan Fees	\$104.00	?
Fall 2018	Books & Supplies	\$500.00	?
Fall 2018	Personal & Misc Exp	\$1,000.00	?
Fall 2018	Room & Board	\$1,594.00	?
Fall 2018	Transportation	\$114.00	?
Fall 2018	Tuition & Fees	\$7,380.00	?
Spring 2019	Ave Sub/Unsub & PLUS Loan Fees	\$104.00	?
Spring 2019	Books & Supplies	\$500.00	?
Spring 2019	Personal & Misc Exp	\$1,000.00	?
Spring 2019	Room & Board	\$1,594.00	?
Spring 2019	Transportation	\$114.00	?
Spring 2019	Tuition & Fees	\$7,380.00	?
		<b>Total Estimated Cost of Attendance: \$21,384.00</b>	



# New MyU: My Finances Tab- Estimated Cost of Attendance table

Books & Supplies

This expense estimate for books and supplies was provided by the U of M Bookstores and reflects average undergraduate student academic year purchases. Your actual costs will vary according to your class selection and course load. Consider purchasing used books (available at the U of M Bookstores) to lower your costs.

Estimated Cost of Attendance

The University uses cost of attendance figures to calculate your financial aid eligibility. You can use this information as a planning tool to decide how much to borrow in loans or pay out-of-pocket. **This is not a bill.** Actual costs may differ depending on your program, coursework, and personal spending.

Term	Description	Amount	
Fall 2018	Ave Sub/Unsub & PLUS Loan Fees	\$104.00	?
Fall 2018	Books & Supplies	\$500.00	?

# New MyU: My Finances Tab - Financial Aid History

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Crookston Duluth Morris Rochester **Twin Cities**

MyU Key Links Campus Info Resources Favorites

University Student

NEWS

ACADEMICS

**MY FINANCES**

MY INFO

BILLING & PAYMENT FINANCIAL AID **FINANCIAL AID HISTORY**

Your Financial Aid History

Keep track of all your financial aid at the University of Minnesota. With the table below, you can:

- See all your financial aid from the University.
- Sort or filter by types of aid. For example, type "loan" in the filter bar.
- Download or print the table. Click "Excel" or "PDF" to export.

Note: This may not represent your complete student loan history. Check with all previous institutions you attended for loan information. To see your complete federal loan history, or to learn about federal loan repayment options, go to [studentaid.gov](http://studentaid.gov).

25 FILTER EXCEL PDF

Aid Year	Term	Campus	Description	Aid Type	Accepted	
2018-2019	Spring 2019	UMNTC	Fed W-S Comm Serv Off Campus	Work/Study	\$1,750.00	?
2018-2019	Spring 2019	UMNTC	Federal Direct Subsidized Loan	Loan	\$1,410.00	?
2018-2019	Spring 2019	UMNTC	Federal Pell Grant	Grant	\$3,047.00	?
2018-2019	Spring 2019	UMNTC	Federal SEOG Grant	Grant	\$300.00	?
2018-2019	Spring 2019	UMNTC	MN State Grant	Grant	\$3,118.00	?
2018-2019	Spring 2019	UMNTC	U Promise Scholarship	Grant	\$1,067.00	?



# New MyU: My Finances Tab - Financial Aid History

10 FILTER EXCEL PDF

Aid Year	Term	Campus	Description	Aid Type	Accepted	
2018 - 2019	Spring 2019	UMNTC	Federal Pell Grant	Grant	\$3,047.00	?
2018 - 2019	Spring 2019	UMNTC	Federal SEOG Grant	Grant	\$300.00	?
2018 - 2019	Spring 2019	UMNTC	MN State Grant	Grant	\$3,118.00	?
2018 - 2019	Spring 2019	UMNTC	U Promise Scholarship	Grant	\$1,067.00	?
2018 - 2019	Spring 2019	UMNTC	Federal Direct Subsidized Loan	Loan	\$1,410.00	?
2018 - 2019	Spring 2019	UMNTC	Fed W-S Comm Serv Off Campus	Work/Study	\$1,750.00	?
2018 - 2019	Fall 2018	UMNTC	Federal Pell Grant	Grant	\$3,048.00	?
2018 - 2019	Fall 2018	UMNTC	Federal SEOG Grant	Grant	\$300.00	?
2018 - 2019	Fall 2018	UMNTC	MN State Grant	Grant	\$3,117.00	?
2018 - 2019	Fall 2018	UMNTC	U Promise Scholarship	Grant	\$1,067.00	?

Total aid displayed indicates the total value of all of the awards on the screen. Total aid displayed: \$18,224.00

Total aid accepted takes into account those on the other pages. Total aid accepted: \$32,456.00

SHOWING 1 - 10 OF 18 RESULTS

< 1 2 >

# New MyU: My Finances Tab - Financial Aid History

25 ▾

The filter box will match on alphanumeric values in any of the first 5 columns.

Loan

EXCEL PDF

Aid Year	Term	Campus	Description	Aid Type	Accepted	
2018 - 2019	Spring 2019	UMNTC	Federal Direct Subsidized Loan	Loan	\$1,410.00	?
2018 - 2019	Fall 2018	UMNTC	Federal Direct Subsidized Loan	Loan	\$1,410.00	?
2017 - 2018	Spring 2018	UMNTC	Ford Federal Subsidized Loan	Loan	\$1,750.00	?
2017 - 2018	Spring 2018	UMNTC	Ford Federal Unsubsidized Loan	Loan	\$1,000.00	?

Total aid displayed: \$5,570.00  
Total aid accepted: \$32,456.00

SHOWING 1 - 4 OF 4 RESULTS (FILTERED FROM 18)

< 1 >



# New MyU: My Finances Tab - Financial Aid History

Federal Pell Grant

The Federal Pell Grant does not have to be repaid. Students are eligible to receive up to 12 semesters (or its equivalent) of Pell funding. If you register for less than 12 credits per term, your Pell Grant will be reduced based on your enrollment level at the end of the drop/add period. Please keep in mind you cannot receive Pell from two schools at the same time. You may charge your books to your student account at University of Minnesota bookstores.

25 ▾

Grant

EXCEL PDF

Aid Year	Term	Campus	Description	Aid Type	Accepted	
2018 - 2019	Spring 2019	UMNTC	Federal Pell Grant	Grant	\$3,047.00	?
2018 - 2019	Spring 2019	UMNTC	Federal SEOG Grant	Grant	\$300.00	?
2018 - 2019	Spring 2019	UMNTC	MN State Grant	Grant	\$3,118.00	?
2018 - 2019	Spring 2019	UMNTC	U Promise Scholarship	Grant	\$1,067.00	?



# New MyU: My Finances Tab - Financial Aid History

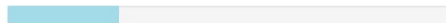
## Remaining Grant Eligibility

The estimates below are based on federal, state and University regulations, your past enrollment, and your most recent Free Application for Federal Student Aid (FAFSA).

For questions regarding your remaining grant eligibility, click on your campus link below:

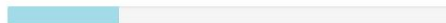
- Crookston: [Financial Aid & Scholarship Office](#)
- Duluth: [One Stop Student Services](#)
- Morris: [One Stop Student Services](#)
- Rochester: [One Stop Student Services](#)
- Twin Cities: [One Stop Student Services](#)

## Estimated Pell Grant Eligibility



25% used to date, estimated 8.75 semesters remaining

## Estimated MN State Grant Eligibility



25% used to date, estimated 6 semesters remaining

## Estimated U Promise Eligibility



75% used to date, estimated 1 semester remaining



# Next steps

- Moving from DEV to TST this week
- Usability with students end of May
- Launch date is Sunday, June 16th
- Continue communications planning





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UMNews



UofMN

# Negotiated Rulemaking with ED Round Three and Four: Give and Take

Registrar's Advisory Committee (RAC)

May 6, 2019

**Tina Falkner**

Director - Office of Student Finance, Twin Cities



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# Spoiler Alert: Consensus

Yep, Consensus! (with three minutes to spare)

Draft consensus [language](#)



# Approving 'bucket one': TEACH Grant

- Timeline for grant-to-loan conversion
- Opportunities to complete teaching service
- Communications with TEACH recipients
- Eligibility for service-clock suspension and service year discharge
- Conversion reconsideration



# Approving 'Bucket one': Faith-based entities

- Acknowledgement of religious mission: but not creating a 'carve out' for these entities
- Allows students to participate in Federal Title IV programs that they weren't eligible to before
- Non-profit work 'counts' for loan forgiveness (for Public Service Loan Forgiveness) but not if engaged in religious instruction, proselytising or worship service



## Approving 'Bucket two': accreditation, the credit hour, and the Robert C. Byrd Honor Scholarship

- Didn't truly redefine geographic area; didn't make regional = national
- Include industry members in defining standards
- More solid Teach Out plans
- Byrd - not funded so support removing
- Credit hour = pretty much is the same as what we have :)
- Kept the language the same re. 'written arrangements' (more than 25% but less than 50%)



## Approving 'Bucket two': accreditation, the credit hour, and the Robert C. Byrd Honor Scholarship

- Wanting to address timeliness of innovation
- Added some definition of 'subscription-based' programs

And more that applies to accrediting agencies, especially pertaining to 'branch' campuses and what those are.

# Approving 'Bucket three': Distance Education, State Authorization, and Competency Based Education

- In distance education, 50 to 60 minutes in a 60-minute period of attendance in a synchronous class, lecture, or recitation where there is opportunity for direct interaction between the instructor and students.)
- Greater definition of what 'academic engagement' means (mostly for Return of Title IV purposes)
- Allowances for ED to permit institutions to continue to give Title IV aid to students for 120 days if institution is closing
- Greater disclosure requirements for institutions and programs, but not great definition of what and how (some reference to 'direct disclosures')
- Strengthens 'teach out' requirements (this is good)
- 



# NPRM

- Late spring or early summer
- Comment period (normally three months)
- Final rules published in Federal Register, November 1, 2019





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# Policy Discussion

RAC

May 2019



# Recent policy reviews

- [Holds on Records & Registration](#) policy (no major changes)
- [Withholding Diplomas & Transcripts](#) policy (no major changes)
  - Debt limit for students will be increased from \$100 to \$200 at start of fiscal year

# 2019-20 Policy Projects

- [Makeup Work Policy](#): request from Boynton to further update the “single episode” absences
- Review [Awarding Posthumous Degrees](#) policy
- Look at issues relating to zero credit courses and definition of academic credit
- Comprehensive reviews

# Policy planning

- Select policies for review for 2019-20
  - What are your policy needs?
- Directed Study, Directed Readings policy is due for comprehensive review + need for language regarding internships
- Anticipate work related to Student Education Records policy and directory information



# End of Term Reminders - Spring 2019

Registrar's Advisory Committee

May 6, 2019

**Adrienne Bricker**

Director, Office of the Registrar, University of Minnesota - Twin Cities



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# Overview

- Dates and Deadlines
  - Grading
  - Bracketing
  - Degree Clearance
- Academic Standing
- Diplomas



# Dates and Deadlines

## Grading

- Last day instruction: **May 6**
- Last day finals: **May 15**
- Final grades due: **May 20**
- NR email to instructors: **May 21**
- NR email to Assoc. Deans: **May 28**

# Dates and Deadlines

## Bracketing

- Begin running the day after grades are due (May 21)
- Continue running up until the start of the term and a bit after (less frequently)
- Email [otr@umn.edu](mailto:otr@umn.edu) if you need anything bracketed that seems like it has been missed

# Dates and Deadlines

## Degree Clearance (UGRD)

- Confer date: **May 15**
- Spring 2019 clearances due **June 4**
- All degrees will be posted by OTR by **June 5**

# Academic Standing

- Last day of exams (end of term): **May 15**
- Academic standing clean-up run for fall 2018: **May 20**
- Academic standing calculations run: **May 21-28**
- Spring 2019 SAP run: **May 22**
- Deadline to place P3 service indicators: **May 31 (by noon)**
- Summer financial aid disbursement begins: **June 3**
- Summer begins: **June 10**
- Academic standing clean-up run for spring 2019: **August 21**

## Dates also available at:

<https://www.asr.umn.edu/important-dates/twin-cities-probationsuspension-schedule>



# Diploma Communications

- “Confirm diploma name/address” email sent to students on **May 1**
  - Sent to those with an EGT of spring 2019 (1193) and who have a degree checkout status = applied
- Other communications sent when:
  - Degree posted (last chance to update address or name)
  - Diploma ordered
  - Diploma mailed



# Diploma FAQs

- Name on the diploma
  - Students must add a “Degree name” in MyU
  - If no “Degree name” is added, we will default to “Primary name”
  - “Preferred name” is never used
- Major is never printed on the diploma, only the degree earned (BA, BS, MA, MS, etc)
- Diploma address
  - Students must add a “Diploma address” in MyU
  - If no “Diploma address” is added, we will default to “Home address”
  - “Mailing address” is never used
- FedEx Diploma Delivery and Pick-up requests must be received by the Spring conferral date (5/15/19) in order to guarantee the student's request





# Diplomas

- OTR will not scan and email diplomas to students
- Diplomas are ordered and mailed weekly
  - FedEx shipping available (\$15/\$25 int'l)
- Enrollment verifications & letters of certification are available at no cost
- Still ordering and distributing diplomas weekly

# Questions?

[otr@umn.edu](mailto:otr@umn.edu)





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# Financial Aid & Degree Completion Project Update

Registrar's Advisory Committee  
May 6, 2019

**Michelle Curtis**  
Associate Director, Office of Student Finance



# Background

## Project overview

- Using APAS degree audit data, stop **federal** financial aid at the point when degree requirements are met
- TC/RO undergraduates only

# Background

## Objectives

- Compliance with federal guidelines
- Timely communication to students

Timeline: Fall 2019



# Communications update

- Notifying students week of May 13 or May 20
  - 75% PTD (including in progress) for su/fall 2019
  - 100% PTD (including in progress) for su/fall 2019
  - Only students who are receiving federal financial aid
- Emails will be viewable in APLUS
- PS Comment will also be added



# Communications details - “75%”

**Timing:** Sent once a term during open enrollment

**Audience:**

- Students who are at 75% degree completion (with current and in-progress credits), and
- Financial aid applicants, current year, currently enrolled

**Message/goal:**

- Plan for degree completion, check-in with academic advisor
- Federal aid compliance, but state or institutional aid may be available
- Monitor progress through MyU > Academics > Degree Progress



# Communications Details - “100%”

**Timing:** Sent once a term, during open enrollment

**Audience:**

- Students who are at 100% degree completion (with current and in-progress credits), and
- Financial aid applicants, current year, currently enrolled
- Will exclude students who have an EGT of 1199

**Message/goal:**

- Student will meet all of their degree requirements in current term, and
- Federal financial aid not available beyond that term

# Monitor/Review Process

Students who receive the “100%” communication will have the FAC service indicator added to their record to prevent future federal aid disbursement.

Office of Student Finance will monitor and adjust the service indicator as needed depending on student actions (e.g., registration changes).

# Questions/Feedback

Michelle Curtis: [mcurtis@umn.edu](mailto:mcurtis@umn.edu)

Amber Cellotti: [knap0071@umn.edu](mailto:knap0071@umn.edu)





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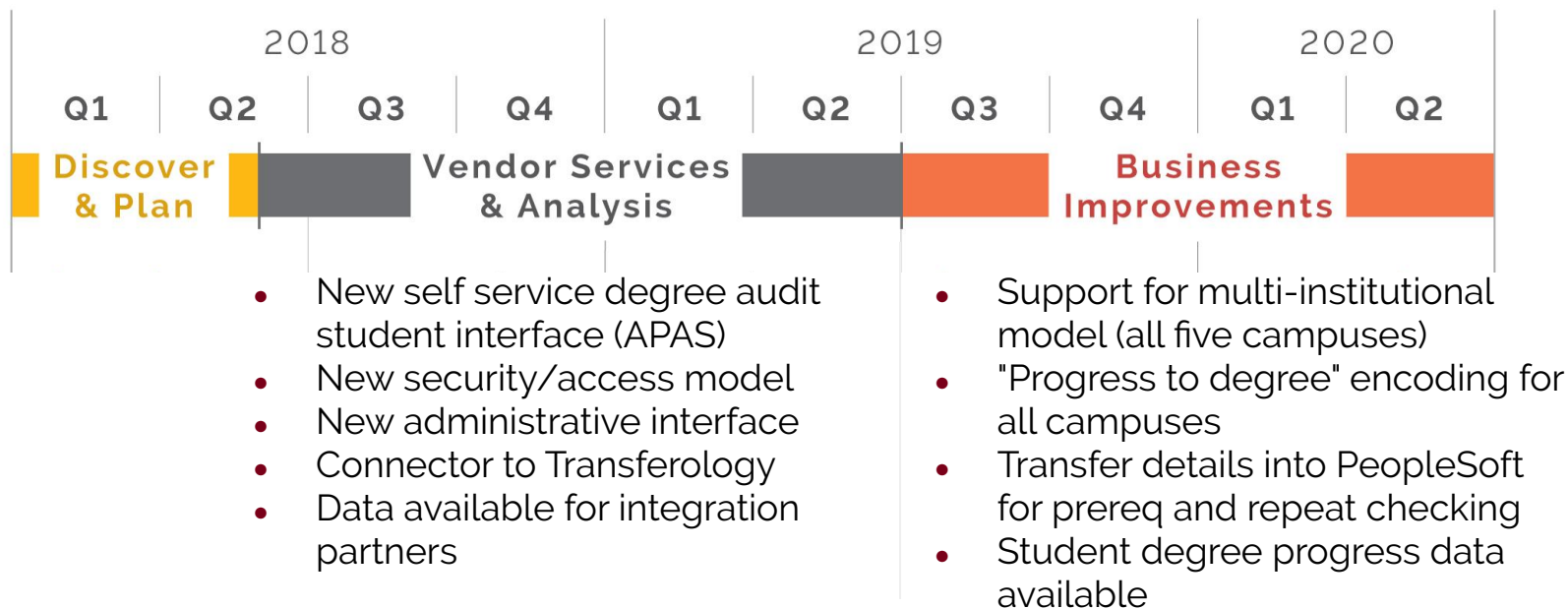


# Transfer Articulation and Degree Audit Project (TADA)

Implementing uAchieve and related processes



# Estimated Project Timeline



# Progress

- Self-service and dashboard configurations
- Security and access configuration complete
- Lab usability conducted with students and advisors
- Incorporating usability and accessibility findings
- Best practices across campuses finalized



# Usability approach

- Engaged Usability Services early and often
  - We want students to help guide our choices
- Completed several usability studies
  - Terminology review (summer 2018)
  - Paper prototypes with UMD students (fall 2018)
  - Affinity diagram with transfer students (winter 2018)
  - Lab usability with UMTC students and advisors (spring 2019)





# Lab usability findings

## Students

- Largely positive response
- Liked clean look and improved layout
- Most students felt more confident using and making decisions with new version

## Advisors

- Mixed responses — change is exciting, but can be difficult
- Planned training and resources should address most observed challenges
- Positives were very positive
- Will take time for some advisors to adjust

[Open All Sections](#)

[Close All Sections](#)

**\*\* PLEASE NOTE: AT LEAST ONE REQUIREMENT HAS NOT BEEN COMPLETED \*\***

Major Core

1) Introduction to Biomechanics

SELECT FROM:

1KIN 3112

Add Course (AC)

Sub-Requirement

Introduction to Biomechanics

[1. Add Course](#)

[2. Verify & Save](#)

Find the course you want to use:

Dept

Course



OR Select a student course:

20153

20159

1WRIT1301

(4 Credits) B+

University Writing

1PSTL1211

(4 Credits) A-

America: Sociological

Persp.

Course(s) being added:

1STAT3011

[Add Date](#)

(0 Credits)AP3

STATISTICS



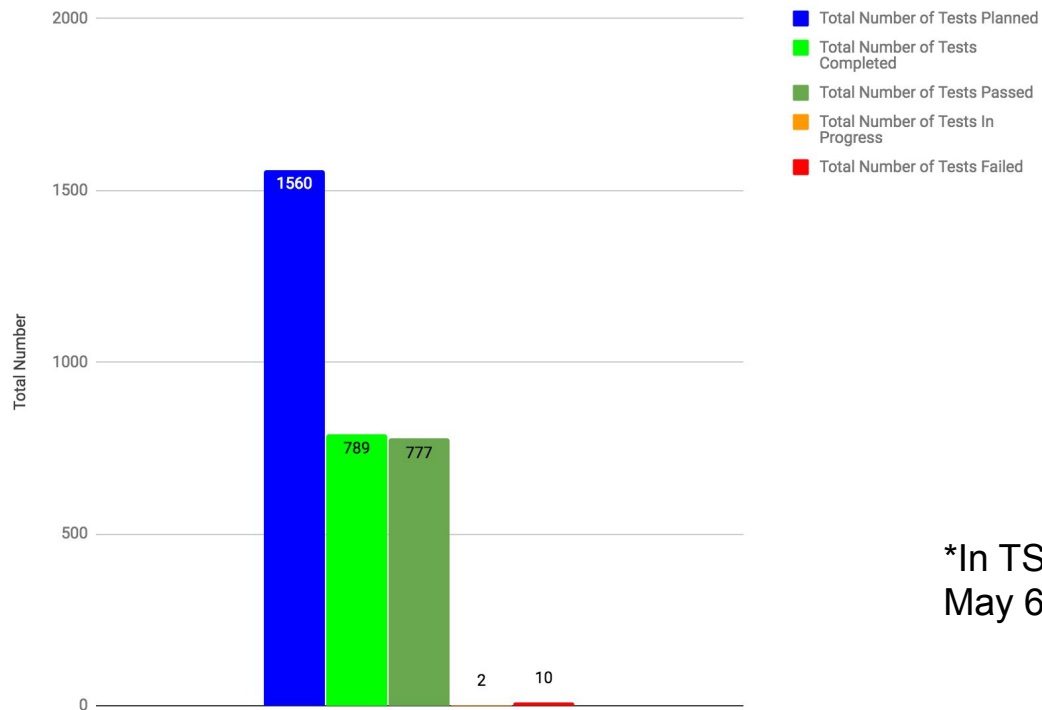
Next

Cancel

## Exceptions in the APAS

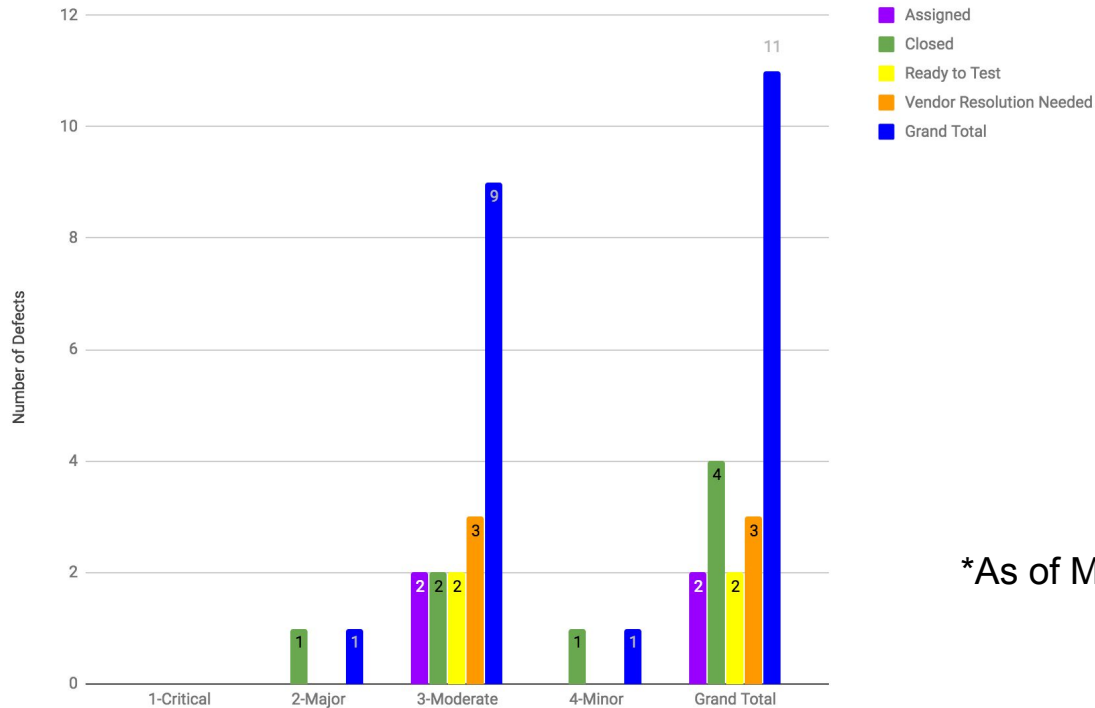
- Simplified process for entering exceptions
- Requires less data entry, minimizes room for manual errors

# Testing status



\*In TST environment, as of May 6, 2019

# Defects



\*As of May 6, 2019

# Next steps

- Move to quality assurance environment (“QAT”)
  - Final move before production
- Develop implementation plan for best practices across campuses
- Communications and training cycles begin
  - Training required to maintain exceptions access (completed online)



# TADA Project Status Dashboard

## May 2019

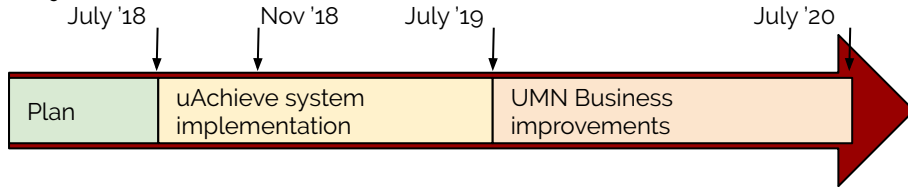
### Current Activity:

- Planning conversion to consistent second major ACAD\_PLAN code on all campuses
- Gathering requirements for Graduation Planner RFP
- Finalizing shared best practices across campuses
- Executing TST test plans
- Working with vendor to incorporate usability and accessibility findings
- Audit data retention feasibility and implementation
- Phase 2 analysis of repeat checking and "types of credit" alignment
- Training and communication planning and development

### Upcoming Activity:

- Final configuration changes and tweaks by May 15th
- Sneak peeks and demos of functionality
- Develop implementation plan for best practices across campuses
- PTD error checking for all campuses (Forseti)
- Design and prototype options for putting transfer detail into PeopleSoft

### Project Timeline



Scope

Budget

Schedule

### Completed Milestones:

- Functional Specification of STUINST to CollegeSource 9-7-18
- Initial CS programming for SDL complete 9-14-18
- Move from "sandbox" (UPG) to development (DEV) environment 10-8-18
- Self-Service / Dashboard vendor orientation 11-12-18
- SDL User Acceptance testing complete 2-11-19
- SDL / Audit Testing 93% complete 2-28-19
- uAchieve security and access configuration 4-26-19
- Usability evaluation of Self-Service 4-19-19
- Encoding best practices defined 5-01-19

### Upcoming Milestones:

- Move to QA envt 5-07-19
- Training available for Exceptions access 6-01-19
- PTD error checking for all campuses available 6-30-19
- Launch of Phase 1: 6-30-19

### Risks:

- Vendor does not always have resources available for timely turnaround.
- Campus differences in policy and practice raise challenging issues.
- Transfer detail data is very complex in Multi-I context.
- Markered Second Major requires ACAD\_PLAN code changes.
- Out of scope Transcript changes may be desired in Phase 2
- Technical environment changes may impact project.

### Budget:

~\$5,000,000 spread over 2 years  
July 1, 2018—June 30, 2020

### Project documentation:

[Charter](#) · [Website](#)



# Thank you!

For project charter, status reports, and more:

[z.umn.edu/tada](https://z.umn.edu/tada)

Questions, comments, feedback:

[tada@umn.edu](mailto:tada@umn.edu)

