

**RAC/AAN**  
**January 7, 2008**

**Present:** Jeanne Anderegg, Gary Andersen, JoAnn Ash, Deb Basarich, Frank Blalark, Sheryl Bolstad, Paula Brugge, Jackie Carlson, Carla Claussen, Grant Clavelle, Carolee Cohen, Pam Cook, Damian Damiani, Dorothy DeJager, Dan Delaney, Santiago Fernandez-Gimenez, Jennifer Engler, Laura Ericksen, Tina Falkner, Tracy Fischer, Jennifer Franko, Teresa Fruen, Marci Freundsuh, Michael Galegher, Katrina Ginther, Sarah Groskreutz, Carol Gross, Kevin Havard, Lucy Hartel, Holly Hatch-Surisook, Jason Holscher, Barb Horvath, Barb Jensen, Pam Klopffleisch, Mary Koskan, Stephanie Lawson, Linda Lindholm, Aileen Lively, Mary Moga, Melvin Monetto, Margo Mueller, Stephanie Nichols, Kathy Nolan, Linda Norcross, Ingrid Nuttall, Jan O'Brien, Cindy Pavlowski, Heather Peterson, Andrea Raich, Lonna Riedinger, Vickie Roberts, Genny Rosing, Cindy Salyers, Steve Schaus, Chris Schlichting, Jody Seiler-Peterson, Mary Ellen Shaw, Lisa Shefchik, Pat Sherman, Danielle Tisinger, Fran Van Slyke-Zaslofsky, Kendra Weber, Kasi Williamson, Kris Wright

**Announcements:** Vickie Roberts announced that probation/suspension P3 holds needs to be posted on students' records no later than January 10, 2008. Fall degree posting is due by January 16, 2008. This includes graduate students.

Mary Koskan announced that there are upcoming veterans' orientation sessions. Two sessions will accommodate 20 new student veterans. The sessions will be held January 8 from 4:00-6:00 p.m., and January 17 from 9:30-11:30 a.m. Both sessions will be held in B20 Fraser Hall.

Kasi Williamson directed the group to additional posters promoting Graduation Planner. She encouraged the group to take as many posters as they needed or to contact her at [will2026@umn.edu](mailto:will2026@umn.edu) should they need more.

Margo Mueller noted that on January 26, a new version of MnCAS will be rolled out. Accounts and passwords created in the old version will work in the new version as well. The data will all be the same; however, the buttons will have more of a dashboard feel.

Pam Klopffleisch announced that Institute of Technology's (IT) Academic Advising Services is moving to 130 Lind Hall. They will be there for about a year while new space is renovated; their phone number will stay the same. IT Student Services will remain in its current location.

Jan O'Brien announced that Carlson's course BA 3033 will be housed under MGMT 3033. Students looking to register for BA 3033 should register for MGMT 3033 instead.

Sue Van Voorhis announced that Craig Swan retired on December 31, 2007. He will be working 25% time to help with the transition of the new Dean, Bob McMaster.

Sue Van Voorhis announced that continuing issues with system problems are still working to be addressed. We realize this is frustrating, especially when problems are duplicating themselves.

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

**Project update:** Jody Seiler-Peterson provided the group with an Academic Support Resources (ASR) IT project update. Jody directed the group to a handout. Graduation Planner reached a statistics milestone; 10,000 students with one or more plans in the system and 13,873 total named plans in the system.

The option to add the degree GPA and DOB to the certification letter is now live and available for everyone to use.

In-progress: Spring disbursement of financial aid will take place on January 14. Also, the Office of Student Finance will be creating and sending out about 70,000 1098T tuition statements.

ECAS data: This is a project to keep PCAS users in the loop when changes are made in ECAS. We are hoping for an end of January 2008 timeline delivery.

x.500: Right now, the request being worked on to streamline and clean-up the existing PeopleSoft to x.500 student data extract. This should be in production in early February 2008. By mid-February, we should be able to run extracts several times a day so the data are as current as possible. Also, all degree recipients and their data have been added to the directory. When 1-Help reinstates the internet ID, the ID will remain active indefinitely assuming the student logs in on a regular basis. E-mail accounts for students are now created upon application rather than matriculation.

Learning Abroad Fee posting: This is a project to eliminate the need for manual posting of learning abroad fees. This project has a mid-February timeline.

Exit interview project: This project is defining requirements for correct identification of all of a student's loans and looking at how to deliver exit counseling to loan recipients. The goal of this is to make students aware of their loan totals and to remind them of their obligation to repay. All data is ready to be converted into PeopleSoft; this will provide a full view of what students have borrowed. The goal is to be done by Grad Fest 2008 (March, 2008).

Entrance interview project: A new federal regulation mandates that Grad PLUS loan recipients must go through entrance loan counseling before they borrow. We must have something in place to track their entrance counseling participation by July 1, 2008. The Office of Student Finance (OSF) is currently researching how best to accomplish this task.

E-degree for grad professional students: The request for this project has been submitted and we are waiting for a feasibility review from the Office of Information Technology (OIT).

EFS Testing: The first cycle of testing was completed before the holiday break but there was limited success. OIT is working on fixing identified defects and another round of testing will take place on January 22, and a third round in March.

Founders Scholarship: OSF is required to report to Morrill Hall who receives these scholarships. This is a project to create jobs that will identify these students and create reports. The target date for this project is March 21, 2008.

LA prospect module: The goal of this project is to develop an enterprise-level module in PeopleSoft so study abroad staff across all campuses use a common system. Group continues discussion of functional processes by working through scenarios and scripts (i.e., how staff would be using this system). The team is also beginning work on requirements for the front-end interface for students.

Student engagement planner: The team continues to document process flows and work on the business requirements.

Self-service student account rewrite: The goal of this project is to develop a more user-friendly application that will make working with student account information easier for students (via Web applications) and staff (via PeopleSoft). The group is currently gathering requirements.

PCAS—new plan type of OTHER: The goal of this project is to add a new plan type in order to identify Honors and secondary education students with a plan. The group is gathering business requirements and preparing for a feasibility review.

Graduation Planner Phase 2: The focus to deliver adviser tools. Now that there are other University initiatives such as the Adviser Portal project, we are waiting on this project to avoid duplicating efforts.

On hold--Customer Relationship Management (CRM): This project recently received approval from the University's Strategic Technology Advisory Team (STAT) to hire a consultant to guide the search for a product that will work on an enterprise level.

**Graduation Planner reports:** Cindy Salyers provided the group with a demonstration of the new Graduation Planner reports. A new column has been added to three existing reports: Student Roster detail, Major Minor Roster, and My Advisees Roster. The column is a "Graduation Plan" column that indicates whether or not a student has a plan in Graduation Planner. If the student has a plan, it will be indicated by the number of courses a student has in that plan. If there are no courses in a plan but the plan has been created, it will be indicated by "0 courses." Selecting "BLANKS" in the Expected Grad Term column will allow users to see students who have not applied for graduation.

Two versions of a new "Grad Plan (Favorite) vs. Actual Enrollment" report will also be available by the end of January." One version will be prompted by college and major, the other is a "My Advisees" version for advisers. A message will be sent to the RAC and AAN lists when the reports are available.

The information in this report is based on the student's "Favorite Plan". If the student has multiple plans, he or she can select their favorite; or if they only have one plan, it is marked as the favorite by default. This report provides information about the students' favorite graduation plan. It compares the programs that the students have included in their plans with the actual declared programs associated with the students in PeopleSoft. The report looks at how well students are following their graduation plans by comparing their planned courses to their actual enrollment. It will help student services staff and advisers identify red flags such as not enough terms planned for, no planned for courses included within the plan, no programs added to the "My Choices list" within the plan, and students not registering for courses they have planned to take. Cumulative statistics at the bottom of this report show the extent to which all students selected in the report are "conforming" to the plans that they have made in Graduation Planner

Type "Grad Plan" into the search reports box to locate the report on the UM Reports Web site. See the help document for a full explanation of report columns and functionality. Make sure to check out the customization features in the report.

Jackie Carlson asked if a student drops out for awhile, will his or her plan still be in the system. Yes, their information will still be in Graduation Planner. For the reports, IMS is "snapping" data, meaning they will be looking at courses around the 10<sup>th</sup> day of each term. Otherwise, it's a daily download.

Sue Van Voorhis noted that this information is critical for improving graduation rates.

**Adviser portal update:** Tina Falkner provided the group with an update on the adviser portal project. This project is designed to provide advisers with the tools they need to help foster student success and improve graduation rates. In December, the group received a strong commitment for resources to make sure this project can go forward. A charge letter is currently being worked on that will be sent to the colleges. The goal is to make this an integrated tool that will not be a set of static links. It will be built on the portal platform. The goal is to launch something in fall 2008. Any thoughts about what individuals would like to see included should be sent Tina at rovic001@umn.edu.

**Financial literacy:** Kris Wright spoke to the group about financial literacy. Financial literacy has many components: entrance and exit counseling, identity protection; and learning how to use credit appropriately are just some of the pieces. October is "financial literacy month." Two years ago, there were 400 participants. This past October, there were over 2,000 participants.

Money affects all students and to the extent to which anyone runs into a student who is having trouble, people should know where to refer students. There is a “money management” section currently on the One Stop Web site ([http://onestop.umn.edu/onestop/Services/Money\\_Management.html](http://onestop.umn.edu/onestop/Services/Money_Management.html)) and OSF is looking at making this more prominent. As students sign up for their loans, they will be presented with all the information about their current borrowings that we have knowledge of. Kris Wright asked the group if they felt there was a need for peer counseling on this subject. Mary Ellen Shaw noted that peer could focus on lifestyle adjustments.

**Scholarship search demonstration:** Santiago Fernandez-Gimenez provided the group with a brief background of this project. The goals are to raise the profile of scholarships and make it easier for students to apply for them, and to facilitate the relationship between donors and recipients. The target for this project has been to have 85% of Twin Cities promotional scholarships entered into the system before launch. Currently, we’re about 15% short. Next week, ASR will provide scholarship administrators student emulator access. All scholarship data will be received by ASR in February and the launch to continuing students will take place during spring semester. Current students will be able to search within a customized list of appropriate scholarships. There will be “What if?” scenarios so students can see how their scholarships may be affected by different major selections or GPA. In usability, students did not have problems using the application. ASR really wants users to add tags so it helps students sort through their scholarship offerings. Students can also search for a specific scholarship and can star scholarships to highlight them and then e-mail starred scholarships to their e-mail account. This is the only way students can capture what they have viewed in a particular session.

Kathy Nolan asked what the thinking was behind the decision to not let a student save their current search set. Santiago Fernandez-Gimenez noted that saving searches required a lot of memory and security. It’s possible that at some later date, this will be part of the planning suite, but not at this first run.

Danielle Tsinger asked how “current students” were being defined. All students admitted to a program are current students; if the student is admitted as non-degree, they can use this tool.

Fran Van Slyke-Zaslofsky asked if fewer than half of the scholarships are public, how does one communicate with students about the scholarships they’re not going to see. Santiago noted that scholarship administrators have indicated that they are planning to make other scholarships public that are not currently public. As the tool is used, we might get others interested in displaying scholarships that are not currently public just so students can see them, even if they can’t apply for them.

Laura Ericksen asked if the tool shows national scholarships such as Rhodes. The answer is no; these are only scholarships paid through the University of Minnesota.

Frank Blalark asked if ASR has thought about how to avoid having to duplicate data entry; for example, how could this sync up with a college's home page. This is currently the case; ASR will be offering XML data extracts of the scholarship descriptions to the colleges so it can be linked back to Web pages. The College of Liberal Arts (CLA) will already be doing this and we've met with IT to discuss how to display using XML.

Sue Van Voorhis noted that the students really liked this tool and may help us get information in the system.

**Readmit processing:** Mary Koskan asked the group for assistance helping One Stop track student veterans. One Stop has added a question on the admissions applications to help identify student veterans so we can waive application fee and distribute information to them. They have also recently added a box to the Undergraduate Application for Readmission form for veterans or active duty service members to check to indicate their status. However, help is needed. Because there is a series of things the colleges do in PeopleSoft once they receive the Readmission form, Mary asked the group if they could add a VTRN student group if the box is checked then they receive the form.

The group agreed to do this. Mary said the next step would be to ensure that the appropriate staff have access to enter the VTRN student group. Please send a list of staff names, x.500 numbers, and employee ID number to the student records training team at [srhelp@umn.edu](mailto:srhelp@umn.edu).

Pam Cook asked if the new forms are available now. The forms are available and if additional copies are needed, they can be printed off or contact Admissions.

**Alert demonstration** Lonna Riedinger provided the group with a demonstration of CLA's midterm alert system. This uses the University's midterm alert system but is set up to provide additional information to advisers, including a set of risk factors: multiple alerts, low GPA, transfer student, on probation. It is currently set it up so advisers contact all students by e-mail. Name of student, assigned adviser, who contacted the student, and the course for which they received the alert with the projected grade are all included. Once the student received his or her grade, this is included as well. There is suggested e-mail text provided that varies based on the risk factors, and the message can be customized by the adviser, as well. There is also a phone symbol if it is recommended, based on the risk factors, that the student also receive a phone call. Advisers can also include a link to a survey in their message; upon completion of the survey, the student would receive a customized list of resources depending on how they answered the questions. Tina Falkner indicated the future plan is for this system to be part of the adviser portal previously discussed.

Vickie Roberts asked if CLA has seen an improvement in students' performance because of this system. It was also asked if there is a sense of how many students decided to drop the course versus stick it out after receiving the alert. CLA has seen a shift in the number of students who drop the course, rather than receive a failing grade. In broader terms, the primary desired outcome of the alert system (regardless of whether the student turns the

grade around or withdraws from the class) is that students develop strategies for future success.

Tina Falkner asked what the college is hearing from students. Lonna stated that some find it helpful, others do not.

Laura Ericksen asked who has access to view the adviser notes. All CLA advisers have access to all CLA students.

Jennifer Engler asked if advisers have access to see survey remarks. The answer is no, the surveys are anonymous.

Linda Norcross noted that there are often situations where 5 or 6 students will express frustration about an instructor. Survey information might shed light as to whether multiple students are having the same issue with an instructor.

Tina Falkner noted that it is a high priority for ASR to enhance the current midterm alert system but it is still in the discovery phase. Jackie Carlson asked who the representative from Duluth is; Vickery French is the representative.

**Minnesota Transfer Curriculum/IUT discussion:** Kasi Williamson noted that students transferring from one University campus to another can qualify for the Minnesota Transfer Curriculum (MnTC). To do this, a student needs to have home campus note the MnTC on their transcript. If transferring from MnSCU, the student will have to contact registrar's office at his or her home school.

Jackie Carlson noted that the Duluth campus has had at least 5 requests from students to have Duluth put the statement on but based on classes taken at other institutions. Margo Mueller stated that we are certifying that the student has completed the MnTC at the Duluth institution.

Mary Ellen Shaw asked if a student who transfers in from non-University program has semester to complete missing courses to qualify for the MnTC. Paula Brugge noted when students transfer in, he or she should complete the MnTC before transferring in; however, Admissions has said a student has one term to complete one course. If they don't, Admissions will review course by course.

Kasi Williamson stated that ASR would like to add contact information for students to call at each campus for getting this notation put on the student's record.

It was asked if there was a list of courses that count for MnTC; this list is on the Admissions Web site, but all the information is also in CAS.

Jennifer Engler noted that OFYP know about this particular information, specifically in terms of how it might affect their online orientation.

**Senate Committee on Educational Policies (SCEP) update:** Tina Falkner noted that she is still meeting with a group to discuss the Senate policies and reorganize them and put them in clearer language. The group will be convening after the new semester starts. Tina noted that there are policies that still some language about coefficient of completion, and asked if anyone still uses this for graduation. No one indicated they still use this. Tina said the group wants to see if this is something that should still be included in the undergraduate catalogue so the group may be hearing about this further. Tina asked the group to note if there are areas missing, areas that people think overlap and contradict each other, or areas that are just confusing.

It was noted that someone has been going through number of credits for their classes and determining the number of 50 minute hours they meet; this is very confusing. It was requested that the policies be easier to find. If a policy can't be located in the interim, please contact Tina at [rovic001@umn.edu](mailto:rovic001@umn.edu).

**Dealing with residency issue discussion:** Pat Sherman from the College of Biological Sciences (CBS) brought up a concern about residency; specifically, taking courses in the college you're going to graduate from and how this counts for residency. The question was: how are colleges are defining half of upper division credits in the major requirement. Jan O'Brien noted that in Carlson, they calculate an average of credits across majors. Margo Mueller noted that APAS could help with this. Once it is determined what is considered upper division coursework, we can show it on APAS. It should not matter what the major is; it will be different for each, but when looking at the degree program, OTR will need to know what is considered a major course, whether inside CBS or outside CBS, for example. Pat Sherman asked how much latitude colleges have in defining this. Tina Falkner noted the latitude is in "at least" half. Or, it can be waived.

It was asked if, so long as there is language within a policy indicating there is an exception, policies can have exceptions. The answer is yes; if there is language indicating an exception can be made to a policy, an exception is possible (the example of "D grades in the major" policy was cited). Chris Schlichting noted that some departments waive requirements as a form of exception. Laura Ericksen noted in the Institute of Technology, they ask students to petition the college and student services will write a letter of support if appropriate.

Frank Blalark noted there are approximately 29 policies and the 30<sup>th</sup> is the undergraduate 29 policies. Some are procedural and some are guidelines; there is work being done to make policies clearer and consistent. Teresa Fruen asked if, for example, in a case where a D grade is approved inside the major, is there central documentation; the answer is no.

**Repeat transfer courses and transfer credit totals:** Paul Brugge alerted the group to a change that Admissions hopes will allow APAS transfer and transcript transfer credits agree more often. The University transcript can make some distinction with regard to transfer credits that have been identified by UMTC equivalencies. Previously, APAS would only allow a single course to transfer if the student had repeated the course at their

transfer institution or taken the same course at different transfer institutions, thus only calculating one course in terms of total transfer credits. However, the transcript would show all credits that transfer, making students think they had more credits than they do. Now, the University transcript only counts one of those courses just like APAS does. This change has been in effect since October 2007. Cindy Salyers asked if this change will affect students who were already here. The answer is no; however, if new coursework comes in and we run their transfer credit again, it will fix it. Linda Norcross asked if a student takes two transfer courses identified as equivalent, which one counts; the last transfer course taken counts (the same as the UMTC repeat course policy). Rare exceptions are made to this. Pat Sherman asked if this means colleges no longer need to send course repeat forms. If the course does not have a University equivalency, a course repeat form would need to be completed.

**Special exam form:** Vickie Roberts and Kasi Williamson spoke to the group about an upcoming change to the special exam form. The new fee process allows for a \$50 per credit special exam fee to be posted directly to a student's account. The fee is optional; colleges may decide whether or not to charge it. But in order to charge the fee, the college offering the exam must officially request the fee. Colleges and departments should define the internal process through which the fee will be charged to the students' accounts. All credit exam fees for a term must be posted in a timely manner so that students are billed within the same term. See the [billing schedule](#) for details. Once the student has completed the exam, the department completes the form, it goes to the student's college office, and it gets turned in to OTR.

It was asked where is the money that is charged gets assigned; it is charged to the student and assigned to the college where the exam is given.

Linda Norcross asked how the student knows whether or not he or she is going to be charged; Kasi answered that where the student signs the form, it tells them that a fee may be charged, that they should ask the department offering the exam whether there is a fee and what it will amount to, and that if there is a fee, it will appear on their bill and they will be responsible for paying it.

Mary Ellen Shaw noted that, specific to her college, it has not been clear what to do with students who have taken language credits beyond what they are required to do. It was noted that students are not charged for retroactive language credits.