

RAC/PRAC  
April 3, 2006

**Present:** Gary Andersen, Kevin Atkins, Jackie Carlson, Nicki Cook, Pam Cook, Janet Crittenden, William Dana, Laurie Gardner, Kit Gordon, Sarah Groskreutz, Carol Gross, Emily Holt, Lucy Hartel, Sarah Hosfield, Sara Johnson, Kitty Jones, Pam Klopffleisch, Jennifer Koontz, Aileen Lively, Margo Mueller, Jessica Murra, Kathy Nolan, Linda Norcross, Ingrid Nuttall, Jan O'Brien, Kelly Qian, Lonna Riedinger, Genny Rosing, Cindy Salyers, Fran Schirmers, Chris Schlichting, Amy Winkel

### **Introductions**

**Announcements:** Emily Holt announced that eDegree training would be provided at the end of April or beginning of May. Kit Gordon noted the sooner a date can be determined, the better because registration and degree clearance are both near.

Sue Van Voorhis introduced Kelly Qian and Kevin Atkins as new members of the OESS web development team; they will be working on projects in conjunction with Shawn Schindlbeck.

**Review of March minutes:** There were no changes to the March 2006 minutes.

**PeopleSoft 8.9 update:** Aileen Lively provided the group with an update on the status of the PeopleSoft upgrade. Two weeks worth of testing has been completed; although system problems slowed testing efforts, everything is now going well. The Business Analysts and all those engaged in testing are making progress, finding defects, reporting them and having them fixed in a timely manner. The team is behind on testing but anticipates it can get caught up. To a certain extent, everything is going better than anticipated and double testing as previously planned may not be necessary. Jackie Carlson is assisting with web testing; William Dana is spearheading the web testing efforts.

Sue Van Voorhis noted an Oracle tools upgrade was conducted and this had an impact on the retrofitting of modifications. However, staff are working with developers and modifications are getting fixed quickly.

Drew LaChapelle anticipated no issues with the availability of UM Reports because of the upgrade.

**Grad planner:** William Dana provided the group with an update on the status of the Grad Planner project. The project team took a step back to look at where data is retrieved to populate Grad Planner; previously, PCAS was going to be used, but the team ran into roadblocks and decided to look at APAS to see if a better data set could be used. Significant progress has been made and it has been determined Grad Planner will be able to use requirements for students for their bulletin year. Margo Mueller has been critical in this process.

The team is currently gathering requirements for Phase I. The main purpose of the first Phase is to provide students with a tool that is easy to use and that they will want to use. Advisers will also be able to use Grad Planner to view and comment on advisees' plans.

Kitty Jones asked if there is an ETA for Grad Planner. William Dana responded it is too early to know this; at the last RAC meeting, Linda Ellinger had mentioned January 2007 as a tentative possibility. Sue Van Voorhis noted the team really needs to get through functional design; development time can then be assessed and this will lead to a better ETA.

**Student Roster report demonstration:** Cindy Salyers provided the group with a demonstration of the Student Roster report. This report was demoed in January 2006 but is now available. Everything underlined in the report is a link that will allow users to see the desired students. Because of the size of the college, CLA really cannot look at all its students at one time. When looking at the main report, users do not need private student data access; this allows administrators who might not have access to private student data to look at statistical information. Wherever a user chooses to drill in, he or she will go to the filtered report. Users must have private student data access to use the detail report.

When viewing a filtered version of the Student Roster Detail, set filter boxes back to "all" to get back to a list of all students. "All" in the filters means all students in the original data set that the user prompted, such as all history Bas or all students in the Honors advising community. There is a lot of information on this report, some of which any individual may not need to see every time; users can hide columns to narrow down the view. Users can still filter the data in the report even if they have hidden that particular column. Columns will stay hidden until the user goes back in and resets it. Cindy Salyers asked the group to remember which columns they hid as the report will continue to hide those columns until the user changes this feature.

Cindy Salyers also noted a new column that had been added on exempt 13 credit status for both kinds of exemptions, temporary and permanent. Laurie Gardner asked if the 13 credit exemption information was located on the individual report. Cindy Salyers replied this report is the first place where it has been added. IMS can look at adding elsewhere to help advisers.

Cindy encouraged the group to take a look at the Help document; it includes helpful information about columns, uses for the reports, filtering and FAQs. Selecting the ribbon icon at top right of page will bookmark the page; whatever page is bookmarked will have the criteria saved with updated information. That is, prompt values will be saved but the data will be refreshed.

**My Advisees Registration Appointment Times demonstration:** Amy Winkel provided the group with a demonstration of the My Advisees Registration Appointment Times report. Users can link to the report from the UM Reports Search Page or use the link from My Active Advisees Index. This report provides advisers with a list of students with appointment times for the most current term for which IMS has appointment time

information. There is not a term prompt; this report will yield the most recent information for fall and spring terms, not summer. Additionally, this report shows holds, enrollment status, email addresses and FERPA information. The check box functionality is also included.

**No Enrollment report enhancements:** Cindy Salyers showed the group the No Enrollment report and asked if there was interest in adding students' registration appointment time data to this particular report. This report is designed to be run after the queue to see which students have yet to enroll. Especially with early fall registration, it can be used to encourage students to register earlier. Right now, this report includes students who have not registered and those who have canceled completely. There is a different complete cancel report.

Jackie Carlson noted if the filters could be included, the queue time information would also be useful.

Jan O'Brien asked if students who are on a leave of absence can be shown as such in this report. This would help advisers so they do not concern themselves with these students' registrations. Linda Norcross echoed that the leave of absence information would be helpful. Cindy Salyers stated she would verify, but she did not believe students on a leave of absence were included in the report.

Update 4/8/06: Cindy Salyers has confirmed that students on leave of absence are excluded from the No Enrollment report.

Jan O'Brien also asked if it could be shown when a student has not registered because of a suspension. If the college has placed a P3 suspension hold, the report will pick that up.

Also, Jan O'Brien asked if there was a way to flag students who are studying abroad. Cindy Salyers asked how these students could be identified. Sarah Groskreutz noted that in the near future, students who are studying abroad will be identified in PeopleSoft with a study abroad program code. Linda Norcross asked if this would be a student group; no, it is a separate code. Sue Van Voorhis asked if this was just for the study abroad office; for right now, it is just for the study abroad office. Cindy Salyers asked if this included all students who had ever engaged in a study abroad or was only for students currently on a study abroad; this is still being decided. Sue Van Voorhis asked if this was for all campuses; yes, it affects all campuses. Information regarding this will be provided at the next All Campus meeting.

Kitty Jones requested the Registration Appointment Times report show what specific holds are on the report rather than just showing a student has a hold. Cindy Salyers explained the Registration Holds report on My Advisees shows specific holds. She also said that the No Enrollment report—which lists the registration holds—can be run before the queue; and the report can be prompted by advising community.

**Dual program and Probation report issue:** CSOM contacted Cindy Salyers with an issue involving a student with program plans in both IT and CSOM who was on probation. Because IT was the primary college on the student's record, the probation did not display for CSOM. The Probation report can be changed; however, IMS wanted to raise the issue with RAC first to determine how many may be in a similar situation. Cindy asked if there was a policy regarding this or if colleges have discussed how to handle probation for students in two colleges.

Lonna Riedinger noted that the process works fine the way it is.

Jess Murra noted it would be "messy" to have both colleges have access.

Jan O'Brien noted CSOM was planning on talking with other colleges because there likely are not a lot of students affected by this issue. It would be helpful if there was some indication on the report but colleges should also be communicating with one another. If a student is taking classes in the college that did not initiate the suspension, that college should still be aware of the student's status.

Sue Van Voorhis asked if there is currently a report for students in dual programs. Cindy Salyers replied there is not, but such a report could be made. This information is on the student roster, but that information is by primary program. Sue Van Voorhis asked if this was the first time this has happened; it has not come up before.

Linda Norcross asked for clarification that, if there is a suspension, the student is suspended from both colleges; this is correct.

Cindy Salyers noted, if a college discontinues a student, this does not discontinue the student in the dual program. A P3 hold would prevent a student from registering, but would not discontinue him or her.

Sue Van Voorhis noted this should not be a high priority right now and recommended the group wait for CSOM's research to be complete before the issue is revisited. Cindy Salyers indicated she would run a query to see the kind of numbers involved.

**Freshman packaging:** Kris Wright updated the group on the status of freshman packaging. Packaging began two weeks ago and is on track. The Office of Student Finance is packaging with Founders, meaning packages will look a little different. Students receiving Founders are not being informed of exactly what kind of aid they will be getting. The plan is to package as many students as possible in June rather than July. The packages look good; one third of freshman who received PEL will benefit from Founders. Some students will be receiving as much as \$7K in gift money.

**Probation update:** Sue Van Voorhis provided the group with an update on how probation will work for summer term. Mark Taylor disseminated information that stated students should not be suspended following spring term and simultaneously be permitted to enroll in summer coursework. If, after spring term, a college feels a student can

improve his or her GPA by enrolling in summer coursework, the college should not suspend after spring. If there is no chance the student will be able to improve his or her GPA with summer coursework to delay suspension, the college should suspend after spring term. An update on this issue will be provided at the May RAC meeting.

Sue Van Voorhis asked the group to remember that, although college name changes July 1, 2006, everything will be effective for fall 2006. Diplomas for spring and summer will still be under previous names.

**Strategic positioning:** Sue Van Voorhis noted there are lots of reports coming out regarding the strategic positioning process. Sue asked Vice Provost Craig Swan what his top priorities are and he indicated the Student Information Systems Working Group (SISWG), chaired by Tina Falkner, is his top priority. This group will continue to meet and produce good work

Tina Falkner noted the SISWG report has been sent out to group members for comment. Vice Provost Swan has seen the report and the group has continued to meet; recently, they looked at what advising tools are being used in CHED. Ultimately, SISWG is looking at options for creating a central advising “toolkit” or tool with electronic notes that are easy-to-use, that is searchable and flexible enough for colleges with different reporting needs. The group is meeting every two weeks and is working on revising its report; the group has also talked about creating summary pages in PeopleSoft for advisers.

Sue Van Voorhis noted that Vice Provost Swan had asked if there was a way to put a chart together outlining all the tools. Tina Falkner noted she is working on this.

Sue Van Voorhis noted the single enterprise group is still looking at creating a process to identify whether or not a tool or process is “single enterprise.” This will involve the Office of Continuous Service and Improvement. This group will also work with the best practices group. A high level process document is currently being finalized; not just systems, but also processes are being incorporated. A final approver with authority to determine whether or not something is a single enterprise has not been determined.

**New Veteran initiatives:** Janet Crittenden provided the group with an update on behalf of Mary Koskan on the One Stop’s Veterans initiatives. Six months ago, One Stop began looking at processes in terms of how Veterans are certified; it was decided these processes need to be improved. Governor Pawlenty’s commitment to improve service for Veterans in general—not just financial—aligned with One Stop’s evaluation of its own services.

One initiative has been the creation of a checklist system to help Veterans from the moment they come into One Stop until they receive their money. If they have problems, Veterans are not assessed late fees.

Another initiative has been the creation of Veterans' web pages on the One Stop website ([http://onestop.umn.edu/onestop/Registration/Veterans\\_Certification.html](http://onestop.umn.edu/onestop/Registration/Veterans_Certification.html)). Different chapters are highlighted with specific information regarding what Veterans need to do to certify; quick links for outside agencies are also included. Students can also go online and monitor their pay. It is still taking about 10 weeks for Veterans to get money, but the Veterans Administration is also working on their end.

A third initiative has been the creation of a new Veteran's newsletter; the newsletter will be distributed quarterly, right before registration each term, beginning this week. Four, Veterans-specific topics have also been added to the Ask One Stop feature on the One Stop website; these questions will be added as new questions are asked.

Six new brochures have also been created, one for each of the chapters. Also, the University will be hosting an information session by the Veterans Administration on April 20, 2006.

Pam Cook asked if this meeting will be campus wide so college reps could attend. Janet, Crittenden will provide Ingrid Nuttall with information regarding the session to send out on the RAC listserv.

Linda Norcross asked if the Veteran population at the University is known; Janet replied about 400 students.

Jackie Carlson asked if there is a difference between the certification Veterans complete on the web and the certification taken care of at One Stop. Janet replied that for some of the chapters, Veterans have to go in once a month and certify their enrollment.

Sue Van Voorhis asked if the information session would cover the new state bill; no, it is mainly for Veterans who will be at some point receiving 1607 benefits. The Veterans Administration was very excited about all the work One Stop had already done and asked the unit to talk about these initiatives at their June annual meeting.

**Tuition refund appeals:** Janet Crittenden distributed a revised tuition refund appeal form. Recently, the committee which receives these forms worked with Dr. Gary Christensen at Boynton to come up with standard wording for the form. Students will have to sign this form; the goal is to eliminate unnecessary running back and forth in the gathering of medical information on the appeal forms. The form should be available on the web this week.

Jackie Carlson asked if there were any issues encountered with HIPAA in the creation of this form. No issues were discovered; working with Boynton and having the student sign the form eliminated this.

Kitty Jones asked what happens with these forms after they have been reviewed. These forms get imaged and stored in separate file only certain people can look at.

Kitty Jones asked if the cancellation is retroactive, do students still need a 13 credit exemption form. The answer is yes, they still do. One Stop is really trying to encourage students to talk to instructors, to see if they can take an "I" rather than withdrawal.

Jackie Carlson asked if the August 31 deadline was a firm deadline; it is a firm deadline.

Linda Norcross asked if students are ever given refunds for a single class; Janet Crittenden replied this is a truly rare occurrence.

**Non-degree students requesting graduate credit:** Janet Crittenden distributed a handout highlighting the accomplishments of the graduate non-degree credit option to-date. A new initiative is an email to be sent in July to undergraduate students taking non-degree graduate credit information them of the different options.

Someone asked who she should contact with questions about what this email will say. Sandy Britsch is the contact for this project.

**Credit card update:** Kris Wright informed the group that progress is being made on this project. There is still some debate about whether issue requiring approval need to go to the Regents. Hopefully, all remaining issues will be resolved by May. Carolee Cohen is taking a look at what it will take technically to roll this project out in December 2006.

Sue Van Voorhis noted that AACRAO is in two weeks and many OESS staff will be gone. However, staff attending AACRAO will still have access to email and voicemail.