

UNIVERSITY ADVISING NETWORK

ADVISING TECHNOLOGY SUBCOMMITTEE

Fall 2019 Updates



COMMITTEE CHARGE & MEMBERS

FALL 2019

COMMITTEE CHARGE

- Implement, evaluate, and enhance current and new advising technologies including Self Service Carolina, DegreeWorks, EAB, and BTCM (My UofSC Experience).
- Provide recommendations for advisor and student workflow. Propose needed training(s) and/or advising resource materials.
- Offer enhancement recommendations to vendor(s).
- Reviews and utilizes data and/or assessment from students and advisors related to advising technology.
- Provides a report on the state of advising technology to UAN and other stakeholders every semester.
- Create a strategic plan for advising technology use (target deadline is May 2020)

COMMITTEE MEMBERS & MINUTES

Rachel Denmark (Honors), Co-Chair	Rebecca Boyd (CAS)	Paige McKeown (First-Year Advising, UAC)
Lauren Sanborn (Education), Co-Chair	Michael Davis (CAS)	BJ Beckham (Registrar)
Brittain Goff (DMSB)	Pinkney Epps (OSP)	Claire Robinson (ex-officio)
Lauren Stefan (DMSB)	Allison Harper (ASPH)	Brian Dusel (ex-officio)
Emily Longshore (DMSB)	Heidi Waltz (Nursing)	Tara George (DegreeWorks consultant, ex-officio)
Rachel Acosta (CIC)	Valeria Bates (HRSM)	Matthew Dreitlein (EAB Consultant, as needed)
Lisa Pierce (CEC)	Stephanie Richards (HRSM)	Pam Bowers (BTCM leader, as needed)
Janis Leaphart (CAS)		

Meeting minutes can be found on the [University Advisor's Network](#) webpage

FOCUS AREAS

Overall Ideal Advisor Workflow Recommendations

EAB Navigate

- Best Practices for Notetaking

DegreeWorks

- Best Practices for using the Audit

PREPARING FOR THE ADVISING SEASON

Best Practice Recommendations

THE FOLLOWING PRACTICES ARE RECOMMENDED BEFORE THE START OF THE **ADVISEMENT SEASON**:

- Advisors should email advisees prior to start of advisement to explain how the advisement process works and advisement policies specific to the college/department
- Advisors in each department/college should meet as a team prior to the start of the advising season. The team should:
 - Review curriculum
 - Review college and campus policies
 - Discuss DegreeWorks audit and any common/shared issues
 - Create calendar of events
- Create appointment availability using EAB Navigate
- Advisors are encouraged to create, update, and review EAB Navigate watchlists for tracking advisees
- Prompt students to review their audit prior to appointment
- Pre-advise students as necessary

IDEAL ADVISING WORKFLOW OVERVIEW

Technology Emphasis

IDEAL ADVISING WORKFLOW OVERVIEW

*The following practices are recommended **before** the start of the **advisement appointment**:*

- Review student audit for accuracy
- Review SSC transcript for course enrollment
 - (24-hour delay for information to transfer to DegreeWorks)
- Review EAB Navigate notes

*The following practices are recommended **during** the **advisement appointment**:*

- Use template note or checklist to guide conversation in appointment
- Remove advisement hold
- Submit needed Alert(s)
- Ensure student understands where s/he is in the program and what's needed for graduation
- Ensure student understands how to access advising information through advising technology

*The following practices are recommended **after** the **advisement appointment**:*

- Submit curriculum changes
- Create EAB Navigate appointment summary note
- Make needed exceptions
- Follow up with student as necessary

ADVISEMENT CHECKLIST EXAMPLE

SCHC Honors Advising			
Information			
Name:			
USC ID:			
Major Change	Yes	No	
SCHC Transfer	Yes	No	
Pre-Professional			
Meeting Honors Progression	Yes	No	
Probation	Yes	No	
GPA:			
Intended Graduation Date:			
Advisor Appointment Checklist			
DegreeWorks			
EAB Report on Appt.			
SEP-Honors Plan			
Upload Advisement form in EAB			
Sent advisement sheet to Student Services			
Follow-Up Email			
National Fellowships			
BTC Petition			
Research			
Study Abroad			
Internship			
Major Change			
Career Center			
Other:			
Referrals			
Major Change			
Withdrawals (Kay)			
Pre-Professional			
Student Success			
Career Center			
BIT			
Other:			
Additional Notes			

SCHC Course and Registration Appointment Guide
<p>Before the Appointment, Open the Following Websites:</p> <ul style="list-style-type: none"> • Enter student ID (Banner or VIP) in Self-service Carolina for specific student • SCHC course webpage • Major Map repository • Navigate (for entering notes) • Update Honors Plan in Degree Works
<p>In the Appointment</p> <ul style="list-style-type: none"> • Introduction (student and advisor) • Review the student's current Honors progression, noting remaining requirements and highlighting Beyond the Classroom if it has not been fulfilled. • Register the student for courses, checking to make sure the selected class is appropriate for student's major and/or Honors requirement. • Discuss, advise and make action steps regarding concerns (honors progression, GPA/Probation, BTC) • Take notes for Report on Appointment. • DegreeWorks
<p>FINAL NOTES TO STUDENT</p> <ul style="list-style-type: none"> • Reminder about BTC or anything you noted in the appointment. • Show the student their schedule on my.sc.edu: add/drop or on student concise schedule. This ensure you did register the student for the Honors class. • Remind the student about being advised by their major advisor and the date to enroll in their non-honors classes. The registration ticket time should be visible in my.sc.edu in the Student section by selecting registration status. . • If student needs to add a class, tell them what to send you. <ul style="list-style-type: none"> ○ Student ID # ○ Class Title and Section: SCHC 350 Roman Empire ○ CRN: 52345
<p>After the Appointment</p> <ol style="list-style-type: none"> 1. Submit the Honors Advisement sheet to Student Services. 2. Upload the Honors Advisement sheet as a Note in Navigate. 3. Complete the Report on Appointment. 4. Update Honors Plan in Degree Works. 5. If student plans to leave/withdraw from Honors College or University, contact Kay.

EAB NAVIGATE

General Notes & Report Summary Notes

GENERAL NOTES

*General notes are not tied to a specific student appointment or event. These notes should be used for **general record keeping**. Notes can be made visible to students when the advisor opts to make them viewable.*

General Notes may include the following:

- **Important e-mail correspondences**

- Changes to course schedule
- Student requests

- **Student Forms**

- Senior Checks
- Study Abroad
- Special Enrollment Forms
- FERPA Forms
- Athletic Certifications
- Grade Forgiveness Form – SCHC form

- **Make Notes visible to students as appropriate.**

- **Advisor discretion should be used when documenting the following:**

- HIPPA and Health related correspondences
- Mental Health Concerns
- Concerns about professors or professionals on campus
- Student Disability Resource Center documents and correspondences

- **General Notes are viewable to all faculty and staff with access to the EAB platform.**



South Carolina

REPORT SUMMARY NOTES

*Report Summary Notes are tied to a specific student appointment or event. Report Summary Notes should include **advisor transactions and session highlights**. These notes cannot be made visible to students.*

Report Summary Notes may include the following:

- **Referrals**

- Disability Resource Center
- Counseling Center
- Withdrawal
- Suggested language when discretion is needed: “Student disclosed a personal issue and I made a referral to the appropriate campus resource.”

- **Session Notes**

- Topics discussed including but not limited to course recommendations, graduation timelines, future goals and plans, campus involvement, financial concerns and scholarships, interest in major change, etc.
- Student attributes such as preferred name and pronouns of student, student’s personal background information, and any characteristics that the advisor would like to remember about the student.

- **Report Summary Notes are viewable to all faculty and staff in the EAB Advising Care Unit.**

EXAMPLE

Include information and action items for the student and possible consequences of not following advice given.

WRITE	DO NOT WRITE
<p>Student needs to take the Foreign Language Placement exam before spring course registration. Must complete foreign language over the next two semesters to meet program requirements and graduate on time.</p> <p>Discussed the importance of submitting the online Grade Forgiveness form for ENGL 101 as soon as the final grade is posted. Calculated GPA and student must maintain X.XX GPA to progress in major.</p> <p>Reminded student that by taking only 12 credit hours this semester, she will need to take 3 credits over the summer to meet the credit hour requirement for the LIFE Scholarship.</p>	<p>Student has been putting off the Foreign Language Placement exam for two years. Most likely won't place out of any courses and could be here another semester as a result.</p> <p>He most likely won't get the GPA needed to stay in the program, even with grade forgiveness.</p>

DEGREEWORKS

Best Practices for Audit Use

DEGREEWORKS AUDIT

*The following practices are recommended **before** the start of the **advisement appointment**:*

- Instruct students to review their audit prior to the advising appointment
- Encourage students to identify a list of courses they are interested in taking based on remaining requirements
 - Suggest students review the “Registration Checklist” Format option in addition to viewing the audit
- Review audit for accuracy and make any needed corrections
 - Review exceptions
 - Review fall-through courses to ensure they are not degree applicable
 - Review curriculum and catalog year
- Check student’s GPA
- Anticipate possible questions the student might have during the appointment

*The following practices are recommended **during** the start of the **advisement appointment**:*

- Educate students on how to use the audit
- Ensure students know how to access their DegreeWorks audit
 - Review applied exceptions
 - Emphasize the importance of “Process New” when viewing the audit
 - Clarify different categories of requirements (major, minor, Carolina Core, etc.) and explain if the course can meet more than one requirement
 - Demonstrate how to view course descriptions
 - Empower students to use the audit to answer questions they have regarding their degree course requirements

*The following practices are recommended **after** the **advisement appointment**:*

- Process needed exceptions
- Enter course recommendations as a note if not using the Student Education Planner
- Freeze the audit

TO BE CONTINUED

- EAB Navigate App
- MyUofSC Experience
- Student Educational Planner

THANKS!

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