

UAN Advising Technology Subcommittee: General Meeting
Wednesday, April 23, 2025 | 9:30 – 11:00 AM
Location: Teams

Meeting Agenda

- I. Welcome and Checking In
 - a. How are we doing?
 - b. What is there to celebrate?
- II. The Round Table
 - a. Financial Aid updates (Joey Derrick)
 - i. News to share
 - ii. Questions from the committee
 - b. Registrar updates (Dr. Aaron Marterer)
 - i. News to share
 - ii. Questions from the committee
 - c. Degree Works updates (BJ Beckham)
 - i. News to share
 - ii. Questions from the committee
 - d. Leadership and Technology Innovations in Advising (Mike Dial)
 - i. News to share
 - ii. Questions from the committee
 - e. Advising Technology updates (Brian Dusel)
 - i. News to share
 - ii. Questions from the committee
- III. Current topics and new topics
 - a. Undergraduate Priority Registration 3.08 Discussion
 - i. Questions and feedback about the registration experience
 - ii. Preparing communication to leadership: elements to highlight
 - b. New items?
- IV. Concluding thoughts
 - a. Agenda items for May
 - i. Meeting: Wednesday, May 14
 - ii. Current needs, requests
 - iii. Looking ahead to technology for New Student Orientation 2025
 - b. Other key questions/inquiries to process

GENERAL REGISTRATION COMMENTS

- We successfully made it through Registration.
- The experience was chaotic at times due to seniors.
 - How do we identify seniors?
 - Students who are one class behind are not coded as a senior. Example: an Honors student who is in 3+3 program with 87 credits does not meet the senior threshold, but that student definitely has scheduling needs.
- Minor student confusion due to time ticket changes: “My friends are all registering today. Is my ticket right?”
- Course information and restriction lists: students are starting to learn where to look for troubleshooting.
 - What’s a student attribute?
 - How do we clarify messaging on field of study errors?

FINANCIAL AID

- Important Dates
 - AY 25-26: Awards on April 4th. 10% increase in FAFSA filers over 2023-2024.
 - 26% increase in students who can award; FAFSA simplification act has been paying off.
 - 46,000 notification awards were sent out to prospective students also
 - Summer 2025
 - 04/28 – Last date for professional judgements (modifications to FAFSA)
 - 05/01 – Last run of Pell and Direct Loans for Fall/Spring
 - 05/05 – Last run of disbursement (post awards on student accounts)
 - 05/06 – First half of summer awarding chain (aid periods, budgets, summer fee reductions); scholarships begin loading
 - 05/10 – Last day for Federal Work Study (FWS) students to work for AY 24-25 (not summer FWS students)
 - 05/15 – Run SAP (Satisfactory Academic Progress)
 - 05/15 – After SAP, run remaining second half of summer awarding chain
 - 05/17-18: Major update weekend for Banner
 - 05/28 – Summer payments are due
- CPoS is running in the background.
- A significant number of federal student loan borrowers are going into default after delinquency. For individuals with student loans, please pay close attention to loan portals and servicer information, especially if using public service loan forgiveness programs.

REGISTRAR

- New electronic workflow to be built in Banner (e.g. forms for incomplete grades)
 - Moving from simple to more complex interactions, considering automation
 - Consideration for all 8 campuses
- Registration Exception Form: Dean's signature has been removed.
- SERF: request to remove dean's signature for transient enrollment; academic bulletin policy maintains dean's signature required so this will now go to the Scholastic Standards for Academic Changes Committee within Faculty Senate.
- The Priority Registration taskforce had a committee meeting on 04/23/2025 (Josh Weakland and Dr. Claire Robinson are advising representatives)
- Banner is having some administrative work on courses done in the background.

DEGREE WORKS

- No new updates
- Preparing for CPoS run
- Question: After closing a submitted curriculum ticket, what are the next steps for comments or to do referencing?
 - Tickets have IDs on the backend.
- Question: Can the GFL bar look like the AIU bar?
 - Presently, no: The GFL block has complex coding and logic due to so many options.
- Question: Can closed curriculum tickets have a summary?
- To filter In Progress and Pre-Registered classes, we can use the check boxes to avoid a large list of three semesters are currently active (e.g. SP 25 plus SU 25 plus FA 25)
- Can an accelerated master's block be added to DegreeWorks?
 - Discussions are happening to review this idea and understand how it might work).
- DW has the option to hide courses and perhaps provide a link for large blocks. Colleges would need to provide feedback and have a consensus for advanced changes.

TECHNOLOGY INNOVATIONS

- Advising system manager: bi-weekly meetings with IBM, Michael Philp (Core Applications Manager).
- There has been a backup of projects. The tech side of database management has 3 people with numerous applications they oversee. In Spring 2025, projects focused on Orientation were in process.
- SERF updates will return over SU 25.
- Curriculum tickets concerns can be sent to Mike.
- Best place to track these changes is the tech ticket system. Remember to make the invisible visible.
- CRM Advise related news
 - Ellucian conference attendance: CRM Advise, updates to Banner and DegreeWorks and new functionalities to learn about. Banner has a new ability to bulk in, delete, assign advisors. “All students with X assignment go to Y advisor.”
 - NRI alerts can be closed dynamically with CRM advise after the student registers.
 - Technical kickoff meeting for CRM Advise at USC has been held.
 - Next there will be an early engagement planning workshop where a small group from Ellucian will learn about specific USC advising workflow
 - June meeting (discovery and training workshops)
 - We’re ahead of schedule with CRN Advise!
- Carolina Analytics/Tableau (data visualization program). Course needs dashboard access for all is coming soon.
- Working on a product for advisors to gather important data in one location.
- Pre-Orientation Advising worksheets (final modifications being done on 4/23/25)
 - 532 worksheets submitted for the 4 pilot colleges.
 - Issue: Early Transfer Advising is beginning but PAW, we cannot see what they submitted.
 - Student facing side has been moved to Slate. There is a data share agreement that has limited technical steps. This will need follow up.

ADVISING TECHNOLOGY

- No additional news to report at this time.

OPEN DISCUSSION

- How do we define a senior?
 - By entry term (in a four-year institution context): A senior is a student entering semester 7 or 8. Transfer students would need to be considered.
 - By an eligible to register student list
 - By credit hours: This can reflect the privilege of performance and opportunities in high school
 - By Degree Works or percentage completion
 - If a student is in a different major from their entry major, they are further away from completion, but they have credit hours.
 - DW’s measured percent completion does not include fall through but does include majors and minors.
 - Question: What are the percentages that have been assigned to different areas of DW?
 - By requested status: Military-affiliated students often request their status with official paperwork. For transfer or accelerated program students, could this be a Banner status?

- Does a reconfiguring of registration miss the point? There is still a need to overall enrollment management so that we have enough seats for enrolled students. Time tickets are less of an issue if seat availability were less of an issue.
- Seat availability
 - Course Needs Dashboards and SEPs will help us move forward in meeting seat availability
 - Questions: What is the reality of enrollment management? Can representatives speak to this? Are there more students than we have seats for?
 - There is a committee on course availability that has been meeting over a year. There are pro-active efforts at work: “Course Enrollment Student Planning Experience Committee”
 - There is more institutional leadership attention to course availability. So many issues are interrelated.
 - There is also a need to hire more faculty to teach those classes. Faculty hiring is a longer process.
 - Concern: Sometimes enrollment issues flow to advisors who cannot provide recourse. Questions of registration become moot if enough seats for all students are available.
- Improvements in Error Ribbons for Field of Study
 - When students experience the field of study error, they see messaging about majors and minors. Within the restriction table, students might see a long list of codes. How can that error be improved visually, linguistically?
 - One major source of student confusion is “I’m X minor, so I should be able to get in” but it’s an X major tagged class.
 - Can we segment the list that appears in the restrictions tab?
 - Key Points: Messaging is tied into Banner’s data table and Self Service’s hard coding. Messaging must make sense for every campus every level.
 - Question: Can the minor codes on the restrictions tab have the words MINOR in them?
 - The minors have an M code. This is the easiest way to identify a minor restriction.