

UAN Advising Technology Subcommittee: General Meeting
Wednesday, March 19, 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)
 - b. Registrar updates (Dr. Aaron Marterer)
 - i. Plan Ahead Shopping Cart updates
 - ii. Other?
 - c. Degree Works updates (BJ Beckham)
 - d. Four-Year Advising and Technology (Ali Mathwig)
 - e. Leadership and Technology Innovations in Advising (Mike Dial)
 - i. Data on Strategic Plan Attainment
 - ii. Current/upcoming developments
 - f. Advising Technology updates (Brian Dusel)
- III. Current topics and new topics
 - a. Undergraduate Priority Registration 3.08 Discussion
 - i. Gathering and processing additional feedback from units and colleges
 - ii. Adding concerns to rolling discussion document
 - b. Open forum for member inquiries: voices and visions for our collective attention
 - i. Visible policy clarity on the 2x NO SHOW appointment system restriction
- IV. Concluding thoughts
 - a. Agenda items for April
 - i. April meeting date: 16 or 23?
 - ii. Needs, requests pre-Registration
 - iii. Looking ahead to technology for New Student Orientation 2025
 - b. Other key questions/inquiries to process

April 16 meeting has been rescheduled to April 23 due to Registration.

FINANCIAL AID

- Packages will be sent out April 2.
- Summer semester automated aid process is now available. Will be run after Spring grades post in advance of May 28 deadline.

REGISTRAR

- A Plan Ahead Shopping cart for advisors was demonstrated.
 - Testing and debugging continue. The max number of plans is 5.
 - Degree Works Plans can be used when building the shopping cart.
 - The original restriction for not rolling out the feature has been surpassed. The advisor registration feature was delivered by the vendor, but it lacked desired security controls. A custom approach was needed. Constraints and challenges made it more difficult to develop a rapid solution.

DEGREE WORKS

- A minor upgrade to the software has been completed.
- An issue regarding course descriptions not showing up has been resolved.
- The 2025-26 bulletin has been coded.
- Please continue to monitor Degree Works accuracy and notify the Degree Works team if issues or concerns arise.

FOUR-YEAR ADVISING

- Ali Mathwig is the new Director of Four-Year Advising. There are key considerations:
 - Technology can make our jobs easier if we prepare the workflows in advance.
 - It is important to reflect on the human side of technology implementation.
 - Key inquiry: How do we support advisors with technology?

TECHNOLOGY INNOVATIONS

- Beginning this academic year, the tech committee has been exploring an update to the committee's Strategic Plan document. Data regarding the eight goals has been explored. Interestingly, the original plan has no metrics built in. Therefore, how do we know if we are successful or not? One path forward to improving our work is seeking success indicators.
 - Goal 1: Accurate degree audits—We might consider the number of exceptions being made as an indicator of accuracy. As manual exceptions decrease, the electronic audit may be more accurate. Progress is positive.
 - Goal 2: Accurate advisor assignments—When considering students assigned to an advisor who is in their assigned college, the data seems 98.30 accurate/1.70 possibly inaccurate. Overall, very good.
 - What about major changes that happen between the add/drop deadline and the next semester's activation?
 - There are possibilities to evaluate internal major change processes.
 - Global communications and intervention alerts are also considerations when examining advisor caseload updates.
 - Goal 3: Scheduling advising appointments with Navigate—YES. Goal being met.
 - Goal 4: Co-curricular transcript. YES, all students have access. YES, students have resources and outreach. The 2023 census indicated that approximately 55% of advisors mentioned MyUSC Experience during their appointments.
 - Goal 5: Advising reports and training. V3 reports in Navigate are perhaps more complex. There are new opportunities coming with Tableau. Goal in Progress.
 - Goal 6: Accessing a summary of appointments—For FA 24//SP 25, approximately 91% of appointments were filed, and 9% had no summary for scheduled appointments. No data on drop-ins is available currently. There is room for growth here.
 - Goals 7: Have access to and awareness of advisement and registration tools—USC has met some of its highest first and second year retention goals recently. Doing good work there.
 - Goal 8: Student understanding of advising technology—Many videos have been created and used. Roughly 6,000 students have participated in Advising tools U101 over 3 years to get information and skill building out. Trending in the positive.

- The Academic Advising System Manger will be receiving some work from Michael Philips in DoIT as part of custom applications. Beginning in Spring 2025, there will be meetings every two weeks to discuss on-going projects.
- New Student Orientation news:
 - The Pre-Advising Worksheet (PAW) will be moving into a new form. This is a partnership with Admissions to streamline data collection. Students will complete the form in Slate through Admissions and data will be fed to the advising system.
 - Admissions has much of the PAW's required data already, and this new form will eliminate students' data re-entry.
 - Other Banner data can be pulled automatically.
 - No direct link to the pre-advising form but to the enrollment checklist.
 - Registration for Orientation will also permit access to the Pre-Advising Worksheet. The worksheet is now part of the Enrollment Checklist (an active item to be completed).
 - The new process is eliminating barriers to student completion of processes (e.g. Where does one send transfer credit?). The new form will be clearer. Overall, new modifications will make the process more functional.
 - Locking the form upon review will still be best practice.
 - MAP placement goes live on March 24.
- Data Dashboard for course needs / course demand is now live.
 - Carolina Analytics and Student Core access permissions will currently open this feature.
 - Currently pulling data from two semesters ahead.
 - Training and resources for this feature will be made available in the future.
 - The Course Needs channel in Teams will continue to be used.

ADVISING TECHNOLOGY

- No new updates.
- Please remember to login to applications such as Datawarehouse so that access permissions are retained.

DISCUSSION: PRIORITY REGISTRATION POLICY 3.08

Concerns at present

- Implementation
 - Although the goal of the policy was to reduce priority registration, for CIC specifically more students are registering within the window than anticipated.
 - The process has been confusing because the task force reportedly reviewed only fall tickets. Thus, only Fall time tickets were changed. There were no corresponding changes to Summer, which has caused the difference in ticket times.
 - Advising schedules were already set up in advance of these changes. If solutions or changes were decided upon, these needed to be shared with the advisors earlier so that readjustment could occur. Advising starts in January, but a release of information in Mid-February makes it harder to pivot comfortably.
- Student Experiences
 - Some students have experienced confusion with summer time tickets being different than their fall tickets—even on different days.

- Students in the fall were not aware of these changes in the spring, and advisors also didn't know about the changes in order to signal students ahead of the changes.
- Some students were upset because there was little to no communication before the policy change occurred. This created additional administrative interaction.

Questions that remain

- How do we keep track of seniors who will benefit from the senior priority status? Would that be through a creation of a senior list, for example?
 - This entails a question of definitions. Is a senior determined by credit hours, graduation plan completion, or something else?
 - Does a more accurate degree audit allow for a percentage degree completion definition of senior as opposed to a numerical credit classification? For example, a freshman with dual enrollment credit has more hours than others, but they likely do not have upper-level coursework completed like 2nd semesters juniors would.
- How do we determine in an automated way senior classification?
- When can the new term be activated in SSC? (Not the course schedule data, but the term transition). Normally these happen at the same time, but if they were separate instances, that would make it possible to remove holds earlier and also help with the advisor assignments issue we talked about earlier.
- What are the ways we can help the students? Might we need to start advising even earlier? Issues with holds?
- What is the behind the scenes technology on removing holds in batch, if any? This may improve advisor workflow especially for Summer/Fall holds that need to be released one after another.
- Is there a way to have some kind of general language sent out regarding the time ticket change? → Announcement Posted to Registration Status page on 3/21/25
- Spring registration during master's week: staff with children in local school systems have challenging schedules

Proceeding forward

- There is no longer a single "Registration Week" at USC; instead, there are two weeks of Registration with "priority groups" in both weeks.
- The UAC Registration Help Desk is set to operate during Registration.
- Time tickets ending earlier rather than later (e.g. 5PM) provides time for staff to resolve issues.

Next step considerations

- Sharing feedback with leadership regarding communications and messaging for changes.
- This committee would request changes be made in the future rather than in the present. Generally, university-wide changes are made per academic years (e.g. fiscal years, bulletin cycles). Predictability will help advisors anticipate change, create messaging, and build schedules for availability.
- Understanding the process of time ticket creation and assignment:

NO SHOW appointments clarification

- The scheduling system 'lock out' after two NO SHOWS is for appointments but not for campaigns.