

UAN Advising Technology Subcommittee: General Meeting

Wednesday, September 3, 2025 | 9:30 – 11:00 AM

Location: Teams

--Meeting Agenda--

- I. Welcome and Checking In
 - a. How are we doing?
 - b. Approval of May 2025 Minutes
- 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. Waitlist and Waitlisting: Clarifying dates and expectations for students
 - i. How long will the waitlists stay "active" for students to continue to wait in line?
 - ii. Is there a period of time before the start of the upcoming semester that the wait lists will "close" so that students are removed from waitlists and encouraged to choose alternate courses and finalize a schedule?
 - b. Undergraduate Priority Registration 3.08 Discussion
 - i. New leadership in Provost's office beginning Fall 2025
 - ii. Revised Letter to Leadership
 - 1. New paragraph with focus on definition of "Senior"
 - 2. Appendix added: Please submit any other impacted student stories to Kerry
 - 3. Any other lasting impressions from Spring to include?
 - 4. One additional global proofreading before delivery
 - iii. Feedback and suggestions for new, missing, or improved ideas
 - c. Best practice for SEP's in degree works?
 - i. Thinking about primary function(s) for this technology. If course projection is a top priority, might it be valuable for advisors to explicitly include "high need" classes to support course projections across campus (i.e.- Business minor classes, HIST 111/POLI 201, etc.)
 - ii. Is there value in the tech committee making a recommendation here?
 - d. New items for the Committee's attention?
- IV. Concluding thoughts
 - a. Agenda items for next meeting
 - i. Current needs
 - ii. Current requests
 - b. Other key questions/inquiries to process

- ❖ May 2025 meeting minutes approved!

FINANCIAL AID

- No major updates today
- Please contact Joey Derrick with any technology-related questions regarding Financial Aid

REGISTRAR

- No major updates today
- Waitlisting: Questions from the committee
 - User Interface: Filtering by “open classes only” currently displays open seats for courses that are open on the waitlist. In other words, Banner shows that a seat is available but it’s currently being reserved for the waitlist.
 - Is it possible to modify this?
 - Students had some confusion during registration over Summer 2025.
 - Unforeseen error: Student was able to add a waitlisted class even though that waitlisted course was in a time conflict with another class. Can this be reproduced?
 - Timing/Registration Culture: Is it possible to close the waitlist a week before classes or the final payment deadline?
 - Removing waitlists at the end of add/drop seems to be too late because students fruitlessly remain hopeful for a class.
 - BIOL had full classes from April all throughout summer. Students who waited for a spot to open were unsuccessful in modifying their schedules.
 - What options are there for deadlines so that students can be more comfortable in finalizing their schedules and advisors can be more concrete in next steps for advising?
 - Such dates would be helpful to reduce uncertainty.
 - Registration for critical classes to create a full schedule does impact tuition bills, students’ payment timing, and occasionally funding that requires full-time status.
 - Issue: One seat open but reserved for waitlist
 - Could the system automatically register students for the class once they are in line?
 - Concern: Students might not be checking their emails for 2 months over the summer.
 - Could it be an auto-add and then an email is sent to notify the student?
 - The student has responsibility to make sure that the add can go through (e.g. maximum hours)
 - Virginia Tech has done this using Banner in the past.
- Other questions
 - In Fall 2025, the WF deadline overlaps with Registration. This is a critical deadline for assistance occurring during another critical period for assistance.
 - What determines WF and Registration date planning?
 - What can be done to provide students and advisors with more support?
 - Is it possible to lift advisement holds earlier than the time ticket release date? Or, is it possible to have holds placed earlier so that they can be lifted earlier?
 - This is because many students are advised well before the time ticket/schedule release date every semester.

DEGREE WORKS

- Naming changes from College of Arts and Sciences to McCausland College of Arts and Science are underway
- Accelerated Master's courses for undergraduate students and CPoS considerations are in process
- Additional DW functionality testing is being planned; please contact BJ for interest
 - Examples: Configuring settings; range of hours; could split Fallthrough credits into Fallthrough included/excluded and then Fallthrough included **becomes** electives
 - USC Aiken is already using Fallthrough as electives
- SCI and GFL blocks are extremely complex coding scripts; there are numerous possibilities to complete these requirements.
- Ideas for hiding, minimizing certain information can also be discussed

LEADERSHIP AND TECHNOLOGY INNOVATIONS

- New Datawarehouse reports soon available
 - Exceptions: quantifying exceptions
 - Overrides: Who's getting overrides?; Registrar does have this functionality currently.
 - SEP choices/SEP placeholders
- Sharepoints can be developed for colleges/units: ASPH recently created one. Please message Mike Dial for details.
- System Manager
 - Advisor directory in System Manager: can now find certain advisors for certain majors/colleges
 - HR tab in Advisor Profile: Tier duties, next promotion dates
 - Advisors who supervise will soon be able to see assigned supervisee's profiles. Currently only Advising Directorate can see this information.
- HRSM Petitions: Trying to automate the college petition process by removing the manual output. Fruitful work continues in this space.
- Digital SERF
 - Coming soon!
 - Routed to advisors currently; option for student services personnel to review is also available
- PAW transitioned to Slate in Summer 2025
 - Strength: gives students ability to stay within one system
 - Concern: students didn't necessarily submit transcript
 - Future work: Considering ways to get transcript data
 - Potential changes: Requesting advisor volunteers to review and update PAW
- SEPs
 - All major map plan templates are available.
 - Customized templates for units are available: MCEC (starting math)
 - Please talk to college supervisor if advisors are wanting to help with custom templates for the college.
- CRM
 - Launching Fall 2025 Pilot
 - Originally wanting to start in early September, but an essential Banner update later this month is needed before CRM can be installed
 - Around October 1 next steps will begin to build out the environment.
 - Around December: Pilot colleges will receive information
 - Early January 2026: Live environment, training workshops
 - Turning on CRM for students officially in February
 - On track for Fall 2026 CRM Advise launch to all colleges

ADVISING TECHNOLOGY

- Advisor assignments are done. If there are any new assignments, please use 2508 term. Please use AppNav and log in.
- EAB Auto text message autoreply
- EAB had a room number issue in student schedules has been fixed.
- Changes to USC's IP—if there are any issues with calendar sync, please disconnect the sync, resynch, and then connection refresh.
- SEPs
 - A group of 8-10 people from colleges have access to update templates.
 - 2025-2026 updates to McCausland templates
- Remember to log into DataWarehouse to retain access.

SEPs - OTHER

- Students are looking at credits at the top of the Plan and are confused when the number does not equal 15,16, 17 hours. This credit total does not match the anticipated number if there are placeholder classes--even if we were to type in the number of credits manually.
 - Sadly this cannot be changed. This is more of a student education question.
- Is there an update on the Course Needs dashboard for seat availability predictions?
 - DoIT is currently navigating directly access.
 - Workaround: Request access to Core Datasets
- When typing in requirements (courses or choices), we often need to wait for the course code to load and then we click on the course itself.
 - Issue: This manual five-seconds wait process is slow.
 - Idea: Can we type in the exact class instead of just the 4-letter subject code?
 - Possible solution: There is a way to echo desired enhancement requests. Please submit a ticket request (enhancement request) for Degree Works.
 - [Advising Tech Tickets](#)
- If there are additional questions about SEPs, please see Brian Dusel.