

Subject: Support Services Minutes
Date: November 16, 2004

Attendance: UAA – Patty, Marian, Tara
UAF – Sharon, Colleen
UAS – Barbara
SW – Patrick, Melody, Janet

1. BST approval of new forms:

SOA2APT, SOA2PPT and SOA2CMT – all were approved for programming at the BST meeting on 11/4/04. They were ranked in the following order to be completed: SOA2APT (1st), SOA2PPT (2nd) and SOA2CMT (3rd).

2. Discussion of new forms with SW programmers:

What problem are we trying to solve with this process? *Not really a problem to solve, but looking for a single place to record appointments and contacts made by advisors and the students they were held with.*

Is it to have an appointment scheduling system similar to MeetingMaker? *Not really, though the reports that will be generated could produce a schedule report that the advisor can use to see appointments coming up.*

Is it to have a contact history on a student? *Yes, and that is the most important item to capture.*

Is it to produce counts on Advisor, Advising Method and Contact Type? *Yes*

Those are the only required fields in both forms. *Yes*

Is it to see the productivity/accountability of the advisors? *Yes*

If it's to get some metrics on advisors, could you foresee wanting to send out a survey to the students finding out if the appt met their needs? Was the advisor knowledgeable? Is there something that should be changed to make the appts more beneficial? *Team did not respond to this question.*

For Process Flow:

If a student comes in to make an appt, who greets them and makes the appt? Is it a student receptionist who has a rotating list of advisors to be assigning appts or are advisors taking turns at pre-determined times to sit and deal with students as they come in? *Both, depending on the particular office and how they are structured to handle appointments. The advisor could easily enter in the appointment into Banner directly or the receptionist could have the authority to assign appointments to the advisors in her department.*

On soa2ppt, under the 'All Appointment Contacts' box: Are all historical contact types to be listed here or only contact codes that generate an additional appt/contact? *Only contact types that are linked back to specific result codes on the STVRSLT table which are flagged to automatically be generated will be shown in this area. We were thinking this could be an optional entry, but upon further discussion with team, we could simply make it a rule when setting up result codes that if we want the contact type to be captured when the result is entered, we will flag that on STVRSLT. Patrick said he will get back with the team and let us know if they can also make entering the contact type optional.*

If it's historical and included interviewers for each contact, there would be a trail to ask additional questions of the last interviewer if the student thought they heard something a certain way that doesn't seem logical. Right now the two parts are disconnected. The appointment block only shows the

current appt and advisor. *They should not be disconnected. The Contact Type should show historically all the contacts the student has met with.*

We can accommodate the non-Banner person. What type of information do you foresee needing for a non-Banner person? Address? Phone? Email? DOB? Mjr/Degree interest? What information would you need for a report or to search on? *There is concern about obtaining enough information that Banner needs to avoid duplicate pidms in order to accommodate the collection of all this additional information. A minimum is that we MUST collect SSN and DOB before a person is created in Banner. Not sure if we will get users to enter in this type of information and not sure how it would all work also with the future development of a UAOnline entry capability. Marian Mitchell is meeting with a group of advisors this Thursday and will ask them about this non-Banner student tracking. Whether it is important to track more than what the form is set to do or whether they want to be able to tie the appointment information back into Banner if the person actually becomes a student, and what type of information should we want to track. There must be an understanding that if we decide to track additional information on these non-Banner students, then someone is going to have to enter the data into the Banner system (address, ssn, dob, phone, email, mjr/degree interest, etc.). Note: What we have proposed on the SOA2APT form was are initial vision of what we only wanted to collect on these non-banner students. Marian will report back to the team on her findings November 30, 2004.*

There are some differences between the forms that I wasn't sure about since they write to the same table. In the base table sorappt, the columns are currently defined as required?

This is a non-question, Patrick and his staff spoke more about this and understand the issue better.

3. Discussion of draft reports SOR2APT and SOR2PPT and other....

These revised reports were sent out 11/3/04 to the team. UAS, and UAF approved the changes made. UAA needs to give their input. If all approved, Patty will get the task requests to the BST meeting on 12/2/04. Request that UAA send their approval in by email.

Patty has yet to develop the draft 'Comments' report and hopes to have that to the team for the next meeting for review and discussion.

4. Next meeting: November 30, 2004 at 11am.