

Subject: Support Services Minutes
Date: June 1, 2010

Attendees: Jenny (KOC), Barb (KOC), Lillian (UAF), Marian (UAA), Brian (UAA), Sandy (MSC), Ginny (UAF), Patty (UAA)

- I. Director Linda Hapsmith (UAF Academic Advising Center) will talk with us about the AdvisorTRAC product they currently are using:

Due to being called up for jury duty, Linda was not able to attend this meeting. Lillian sent an email stating that according to Linda, AdvisorTrac is \$1200 a year for all of UAF but probably would be more for all of UA. It is a product of Redrock software.

- II. Other discussions:

- Patty mentioned that she sat in on a TutorTrac web demo last week with the Director of Native Student Services at UAA. It is a web-based product and allowed the user to schedule appointments and make notes; it had 'privileges' that could be assigned to people to allow them to look at other appointments and comments; worked with Outlook calendar; had some reports – all similar to how the Banner forms and reports work.
- Patty mentioned that she spoke to Vara Allen-Jones (Associate VC Academic & Multicultural Student Services) regarding whether there is still support of the idea of tracking advising appointments; who met with a student and the reasons and outcomes and that other advisors can see the trail of appointments a student has made and who they met with etc... She said it is still a HIGH priority and they totally support this endeavor.
- Patty mentioned that she met with an Advising Group at UAA on May 19th trying to understand why the use of the Banner appointment/comment forms that were developed have not been utilized very well over this past year – basically trying to understand what may be causing the lack of use. Some quick stats about the form utilization were as follows (MSC has been diligent in using these forms since 2005 and is the area that utilizes it more than anyone followed by UAA Advising & Testing then KOC. At one point we had UAA College of Education; Honors Program; Community and Technical College; College of Hlth & Social Welfare and College of Arts & Sciences utilizing these forms):

Jan-Dec 2005:

Total Advisor Appts Complete:	476	
Total Individual Students:		107
Total Advisors:	9	

Jan-Dec 2006:

Total Advisor Appts Complete:	2647	
Total Individual Students:		378
Total Advisors:	24	

Jan-Dec 2007:		
Total Advisor Appts Complete:	5096	
Total Individual Students:		429
Total Advisors:	26	
Jan-Dec 2008:		
Total Advisor Appts Complete:	5739	
Total Individual Students:		522
Total Advisors:	27	
Jan-Dec 2009:		
Total Advisor Appts Complete:	5100	
Total Individual Students:		624
Total Advisors:	19	
Jan-May 17, 2010:		
Total Advisor Appts Complete:	1361	
Total Individual Students:		46
Total Advisors:	13	

The following comments were made by the attending advisors regarding the existing Banner appointment form difficulties or concerns:

- a) Forms are difficult to make corrections on; they have to delete the whole thing
- b) Need to have more codes to utilize; some are not sufficient to use; some seem redundant
- c) Didn't realize there was Banner forms to record appointments
- d) Training is needed on these forms
- e) Faculty advisors don't use Banner – need this functionality in UAOnline
- f) Users are putting some notes in DW which that software does not have the functionality to track outcomes and some notes are not applicable to be used in DW, ie., job readiness, agency planning, problem solving, financial aid appeal letter, study skills, etc...
- g) Simplify it more

Marian mentioned that the information shared with the advisors during that meeting was quite helpful to many in that they realized that there are resources that are available to them and understanding that DW is really not the applicable place to record advising type notes into if they are looking for tracking outcomes.

This team of advisors are to review the codes and suggest additions, changes or deletions; provide a list of items that would make utilization of the Banner forms more user friendly; review the 'User Guides' to make suggestions on what we should 'ADD' to make them more useful.

Action Item: Patty will share this information with this team once it has been compiled.

- Sandy from MSC mentioned that their testing center is using a product called TimeTracker but it is not the type of retention or follow-up tool she said would be useful. It does allow the student to make their own appointments and it interacts

with Outlook calendar. Mentioned they had looked at AdvisorTrac at one point but it had an issue with the firewall which might be none relevant now.

- Majority of the team feels that the most important item is to have the ability to track appointments that have been made and be able to see who the student has met with and any notes that will help them better serve the student along with pulling out the data from these appointments to understand purposes, results and frequency of appointments conducted, etc. The next desirable item would be an easy way to schedule appointments but that is a secondary issue compared to 'tracking' those appointments that have been made for outcome purposes. They don't want multiple products to utilize for performing this function and support utilizing the endeavor of getting the forms in UAOnline for utilization.

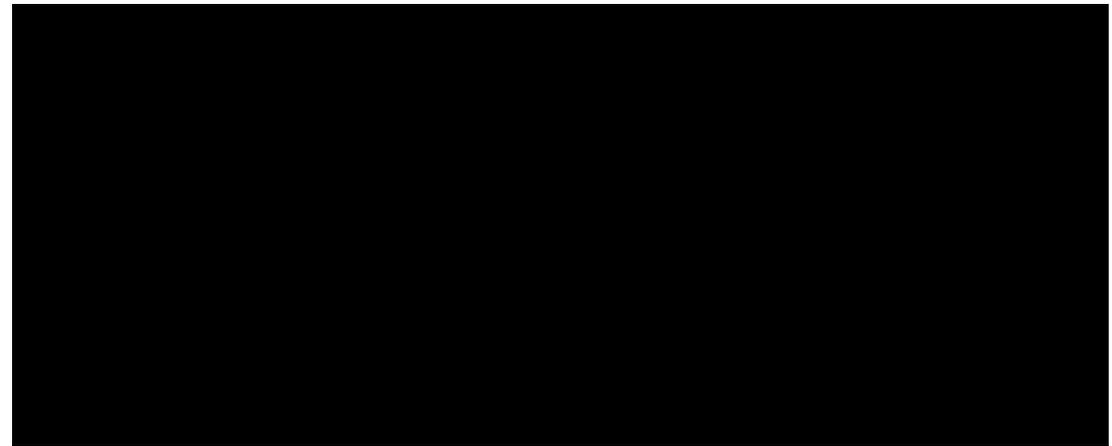
Patty mentioned that at last week's BST meeting, they were trying to identify about 3 items that they could send to SungardHE to do the actual work on. She was able to get our UAOnline development pushed into this endeavor and has sent Mary Gower information on the original Task Request we had put together and the follow up testing notes we had compiled in trying to get a package that works well for us in UAOnline.

Brian Brubaker mentioned that there were a lot of things we wanted the programmers to fix on the UAOnline form development which Patty did acknowledge was still part of the list of items we would want 'SungardHE' to handle if they do in fact get charged for handling this development.

Suggestion was made to develop a survey asking academic advisors questions on what they feel are important elements that they need for handling advising appointments.

Action Item: The team needs to develop the questions for this survey. Patty will get an email out to the team to start getting that information collected.

- Team asked if the students who fill out a 'Pre-Advising Prospect' form via UAOnline Prospective Students were getting pushed into Banner on a consistent basis. Patty said she would check with the office responsible for doing that to find out the answer. That function is critical for getting the UA ID number generated for these new students so recording of their appointment can be made in Banner:



Action Item: Patty will check with the area responsible for pushing these students into Banner to find out the frequency of those.

- Team would like to see a couple of demos on other appointment/scheduling software such as Starfish, SARS and maybe TutorTrac. We can hold demos during our regularly scheduled workteam meetings throughout the summer.

III. Next scheduled meeting falls on July 6th which is a university holiday.

Action item: Patty will send out a message to the team on other dates that we might utilize for our July meeting.

IV. Meeting adjourned.