

Support Services Minutes  
January 10, 2012

Attendees: Patty Itchoak (UAA), Sarah Smith (UAF), Linda Hapsmith (UAF), Brian Brubaker (UAA)

1. Feedback on testing of new forms in UAOnline (LRGP):

So far everything is looking pretty good. Russell from Statewide was going to update a few more items and Patty will alert the team when those are there and ready to test.

2. Identify Department and Colleges codes we want in drop down menu:

Linda from UAF will be talking with their Registrar on which ones should be used. Patty will gather some of that information for UAA.

Patty mentioned that she has put a notice out to the BST that we want to use a field on the STVDEPT and STV\_COLL validation tables where we can identify easily those that will be indicated in the drop down menu. As of today, she has heard no objections to that plan of strategy.

3. Review current 'Purpose' and 'Result' codes to determine if others need to be added based on what UAF collects on their Academic Advising Interaction Form:

Purpose Code	Add/Update	New Description
H	Update	Study Skills/Learn Assist
P	Update	Program/Academic Planning
1	Add	Petition
2	Add	Student Athlete Advising
3	Add	Prior Learn Assessment

Result Code	Add/Update	New Description
PLCM	Update	Placement Test
PRGP	Update	Program/Academic Planning
SSKL	Update	Study Skills/Learn Assist
ATHP	Add	Athletic Plan
<b>PET</b>	<b>*Add</b>	<b>Petition</b>
SAEX	Add	Study Abroad/Exchange
<b>CANC</b>	<b>*Remove</b>	<b>Cancelled Appointment</b>
<b>NSHW</b>	<b>*Remove</b>	<b>Appointment No Show</b>
<b>RSCH</b>	<b>*Remove</b>	<b>Rescheduled Appointment</b>

\*Currently 'Petition' is part of the APL result code for 'Academic Appeal/Petition'. We need to have a larger discussion with the team to see if 'Petition' could be split out from APL and be a separate results code. Currently 684 appointments have been coded with the APL result code. **Will have this as a agenda item for our next meeting.**

\*These have not been used very much and we could simply use the 'Status Codes' of X, N and R to accommodate recording this information. Patty will be running a list to identify the appointments that had these result codes and ensure they are coded with the appropriate status before removing these Result Codes from the system. The status codes will be tracked in the output reports that can be run.

**Action Item:** Create a 'cheat sheet' type of form that would provide examples as to when to use one of the Purpose and Result codes. For example, if you use the new 'Prior Learn Assessment' purpose code, that would be for things like CLEP Tests, Credit by Exams, etc.. Patty will get one started and the team can work on filling out the details on those that need some better explanation.

#### 4. Discussion on 'Contact' information:

The original concept of tracking the 'Contact' information on appointments was to visibly see where the student has gone to, whom they met with, and how often they met. It then gives the advisor an opportunity to look over what those contacts work with the student on, see any comments that were made, etc.

It was decided we should try to narrow down the list of contacts. Patty recommended we simply request that a new validation table be created to accommodate this, or add an additional column of data to STVCTYP that we could utilize to narrow down the list, similar to how we plan to use a field in STVDEPT and STVCOLL to reduce the list of those codes in the department and college drop down menu.

**Action Item:** Patty will put together a Task Request seeking to get this accomplished.

#### 5. Other Items:

- a) Suggestion to have the **Primary Major, Degree, Campus Affiliation, and Educational Goal** displayed as information text in the first top block area of the Appointment Details screen. This does not have to be in place before we move what we have already into UAOnline PROD but would be an enhancement:

## Appointment Details - Create or Change Appointments/Comments

Use this to add new appointments for a student. After you enter an appointment, hit the 'Save Changes' button. It will take you to the form where you can verify you've entered the appointment information correctly.

\* - Indicates a required field.

<p><b>Student ID:</b></p> <p><b>Student Name:</b></p> <p><b>Status:*</b></p> <p><b>Appointment Date:*</b></p> <p><b>Appointment Time (From):*</b></p> <p><b>Appointment Time (To):*</b></p> <p><b>Contact:</b></p>	<p>(Select a Value) ▾</p> <p>January ▾ 10 ▾ 2012 ▾</p> <p>12 ▾ 00 ▾ AM ▾</p> <p>12 ▾ 00 ▾ AM ▾</p> <p>(Select a Value) ▾</p>	<p>Major: ANTH</p> <p>Degree: BA</p> <p>Campus: UAA</p> <p>Educational Goal: Bachelor</p>
<p><b>Advisor ID:</b></p> <p><b>Advisor Name:</b></p>	<div style="background-color: black; width: 100px; height: 20px; margin-bottom: 5px;"></div> <hr/>	

b) Add fields to record up to three 'Goals' and 'Referrals' on the Appointment Details screen in UAOnline in addition to the existing Banner forms. They would be optional fields to utilize and the team could create validation tables housing the choices that could be utilized. More discussion will need to take place with the full team before proceeding. **Will have this as an agenda item for next meeting.**

c) Question regarding the security to access these new screen in UAOnline. Patty was not sure if the access was tied to the Banner Security we currently have assigned to Advisors who have access to SOA2PPT, SOA2APT, SOA2CMT, SOR2APT, SOR2PPT, SOR2CMT forms in Banner, or whether it is simply that the person as an active 'Advisor' flag setting on SIAINST. Those in attendance felt that as long as the advisor has gone through FERPA training and is designated as an active advisor on SIAINST, that they should be allowed to utilize this capability in UAOnline. Discussed getting a online tutorial developed that the advisor can watch and see how to use the screen appropriately on UAOnline. The tutorial when completed could either create a certificate or notify the registrar or security coordinator for the campus so appropriate recording of that training could be done and if additional security needs to be assigned.

**Action Item:** Patty will verify how the security is working in UAOnline and let team know.

d) Question about the difference between using the appointment screens versus DegreeWorks in recording notes, comments. Want to ensure that it is clear as to which one is appropriate to use and when. Since notes are viewable in DegreeWorks to students, Linda was thinking very concise notes could be used

there, while more detail comments and notes can be housed in the appointment screens.

6. Next meeting is February 14<sup>th</sup> at 11am.