2006 AACRAO Technology Conference

Virtual Advising Folders: How to go Paperless...
...or at Least Paper-Less!

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History of Advising at MSU

• All freshmen and sophomores are advised by the Undergraduate University Division (UUD), representing 16,000+ students. Approximately 35,000 undergraduate students in total.

• A folder was kept for each student containing information such as grade reports, academic progress plans, and various ‘notes’.

• The folder did not contain all needed information when advising. Advisors had to access several systems, along with the folder, to have the complete student academic picture.

• UUD advisers are located across several advising centers across campus. Students can request advising at any location; however, the student’s folder was housed in the center nearest his/her residence hall.
History of Advising at MSU
(cont’d)

- Upon admission to upper school, the student’s folder was sent to the college, e.g. Arts & Letters.

- If a student changed majors, the folder was often given to the student to walk it to the new college.

- If a student wanted to explore a new major, the consulting adviser did not typically have access to the student’s folder or other systems and, therefore, did not have a complete picture of the student’s academic history.

- Students could “shop” around campus for different answers.

- Advisers were not always aware of what another adviser may have discussed with a student.
The Beginning of Change

• For several years, UUD looked for ways to create a ‘virtual’ advising folder but the technical infrastructure to support such a system did not exist.

• After several years of aggressive web application development, the Office of the Registrar (RO) was finally in a position to work with UUD in creating the university’s first virtual advising folder.

• In May 2005, the RO sat down with UUD to discuss possible systems.

• Leveraging the technology from several successful web applications, the RO immediately began working on a new system.

• Numerous advisers, including the Directors of Undergraduate Student Affairs from several large colleges, came together to assist in defining system specifications.

• By August 2005, the **Electronic Student Academic Folder (ESAF)** was launched with immediate success across campus.
The Launch of ESAF

• On August 15, 2005, the Electronic Student Academic Folder (ESAF) was announced to Deans, Directors, Chairpersons, and the RO Listserv.

• UUD, the College of Communication Arts and Sciences, and the Broad College of Business chose to implement the system fully in Fall 2005 and ‘go paperless’.

• A demonstration was scheduled welcoming all who wished to attend. The room held several hundred and was standing room only.

• UUD sponsored several ‘hands-on’ computer lab demonstrations.

• In the first month:
  - 6,500 “folder” views
  - 148 different users logged in representing every college and major academic unit at the university
  - 3,500 notes saved
The RO Website

Home to...

• Academic Calendar
• Academic Programs
• Descriptions of Courses
• Instructor Systems  
  – class lists, grades, etc
• Schedule of Courses
• Various Online  
  Administrative and Academic Forms
• Student Information Generator

So? Advisors were familiar with our systems...
Welcome to the ESAF

- Authorized users login with MSU NetID and password.

- Access granted by the College Security Administrator in a secure online application.

- Access changes take immediate effect.

- Student record access limited by college and department (and sometimes major) registered in security system.
Don’t Forget FERPA!

First, a reminder of the responsibilities that come with accessing student data: a link to MSU’s FERPA and privacy guidelines page.
ESAF Guide

Guide drafted by an Advisory Committee of several key advisers from across campus.

The Guide includes:
- The Goal of the ESAF
- Note-Taking Guidelines
- When/How to Use the Note Feature
- Student Authorized Access Explanation
- Note Type Glossary
What Can I Access?

- Authorized users can view system access at any time.
- Student ID Image Policy for review.
Student Authorized Access

• Advisers can access the folder of a student not affiliated with the college, department, or major of which they have security access by providing several identifying points of data.

• The advisers must have the student’s permission.

• Access to the folder is logged and only available for the current advising session.
Find a Folder

Search by Student Name or Number

To view a student academic folder, enter the PID or Student Name in the boxes below and click on the search button. Search results are limited to your system access.

Search by PID
(Student Number) - or -

Search by Name
First
Last

Search

Not Found...

Searched SISINFO database for
First Name: spar
Last Name: xxx

Either the student was not found or the student is not within your access level.

If you believe the student you searched for is valid within your access level, but the student has not been active within the last two years, please use the Restore a Folder function to view the student's information.

More than one match...

More than one student matched your search criteria. Please select a student to continue.

Student0, Spar (A12345670)*
Student1, Spar (A12345671)*
Student2, Spar (A12345672)*
Student, Spar (A12345678)

* Indicates only an application was found - no enrollment records
Sparty Student's Folder

Student Summary Information
(as defined by advisers)
- Academic information for most recently enrolled term
- ID Image
- “Hot” link to email address

Folder “Tabs”
- Notes
- Academic Progress Plans
- Confidential Messages
- Student Report
- Application Data Sheet
- Course Listing
- Credits & GPA Summary
- Degree Reports
- Other Academic Forms
- Archived Images
Notes

- Each note must have at least one category or ‘type’ identified.
- Note types and definitions were developed by the advisory committee.
- Student can be ‘copied’ on the note – keeps student ‘in the loop’.
- Advisers can include his/her ‘signature’ in the copy to the student.
- Permanent Note - submits note to the student folder.
- Prep Note – most often used by advisers to prepare for appointments. Prep notes are temporary and only visible to the ‘creating’ adviser.
- Temp Notes – most often used by advisers when dealing with a sensitive situation. Temp notes are temporary and only visible to the advisers in the ‘creating’ college.
Notes (cont’d)

- Permanent notes and Temporary notes within the adviser’s college are displayed in reverse chronological order.
- The student’s level, class, and major at the time of the note submission is saved.
- Links to the student’s copy are provided, if appropriate.

<table>
<thead>
<tr>
<th>Student Notes</th>
<th>Main Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6/23/2006 2:58:30 PM</strong> Jane Spartan, Broad College of Business</td>
<td></td>
</tr>
<tr>
<td>Enrollmnet Conference, Major Exploration</td>
<td></td>
</tr>
<tr>
<td>Student discussed interest in Finance.</td>
<td></td>
</tr>
<tr>
<td>Suggested Sparty begin taking core business courses and to explore interest further at the business fair.</td>
<td></td>
</tr>
<tr>
<td>Copy sent to Student</td>
<td></td>
</tr>
<tr>
<td>UN 3 1267-Finance</td>
<td></td>
</tr>
<tr>
<td><strong>11/17/2005 10:33:13 AM</strong> MSU Counselor, Undergraduate University Division</td>
<td></td>
</tr>
<tr>
<td>Degree Check, Professional/Graduate School</td>
<td></td>
</tr>
<tr>
<td>student considering law school. student has three letters of recommendation but hasn’t taken LSAT.</td>
<td></td>
</tr>
<tr>
<td>UN 2 5151-No Preference</td>
<td></td>
</tr>
<tr>
<td><strong>9/6/2005 9:33:09 AM</strong> Sparty Counselor, Undergraduate University Division</td>
<td></td>
</tr>
<tr>
<td>Study Abroad</td>
<td></td>
</tr>
<tr>
<td>Student interested in study abroad program in Germany.</td>
<td></td>
</tr>
<tr>
<td>Copy sent to Student</td>
<td></td>
</tr>
<tr>
<td>UN 1 5151-No Preference</td>
<td></td>
</tr>
</tbody>
</table>
Academic Progress Plans

- The Academic Progress Plan (APP) was added in January 2006 – just prior to annual enrollment.
- The APP allows advisers to store recommended course work.
- Student copy can be reviewed at any time by student – useful during annual enrollment.
- Future enrollment from student information system, if found, preloaded into form.
Academic Progress Plans
(cont’d)

Warning!

Valid course and seat count checks.

Adviser can override warning.

- After submission, Adviser can access a ‘print friendly’ version of the form.

- During AOP (Academic Orientation Programs), APPs can be sent to enrollment lab printers.
### Academic Progress Plans

#### Student Academic Progress Plans

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC 340 003 3</td>
<td></td>
</tr>
<tr>
<td>EC 331 002 3</td>
<td></td>
</tr>
<tr>
<td>FRN 336 001 3</td>
<td></td>
</tr>
<tr>
<td>ITL 202 002 3</td>
<td></td>
</tr>
<tr>
<td>MTH 116 003 3</td>
<td></td>
</tr>
<tr>
<td>STT 315 021 3</td>
<td></td>
</tr>
</tbody>
</table>

Total Credits: 15-16

Copy sent to student

### Academic Progress Plan - Academic Orientation Program

#### FS06

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC 340 003 3</td>
<td></td>
</tr>
<tr>
<td>EC 331 002 3</td>
<td></td>
</tr>
<tr>
<td>FRN 336 001 3</td>
<td></td>
</tr>
<tr>
<td>ITL 202 002 3</td>
<td></td>
</tr>
<tr>
<td>MTH 116 003 3</td>
<td></td>
</tr>
<tr>
<td>STT 315 021 3</td>
<td></td>
</tr>
</tbody>
</table>

Total Credits: 12

#### SS07

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITL 309 007 2</td>
<td></td>
</tr>
<tr>
<td>MGT 469 005 3</td>
<td></td>
</tr>
<tr>
<td>MEC 247 012 2</td>
<td></td>
</tr>
<tr>
<td>MEC 375 001 3</td>
<td></td>
</tr>
</tbody>
</table>

Total Credits: 15

Comments:

### Academic Progress Plan - Academic Orientation Program

#### SS07

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITL 309 007 2</td>
<td></td>
</tr>
<tr>
<td>MGT 469 005 3</td>
<td></td>
</tr>
<tr>
<td>MEC 247 012 2</td>
<td></td>
</tr>
<tr>
<td>MEC 375 001 3</td>
<td></td>
</tr>
</tbody>
</table>

Total Credits: 13

Comments:
Confidential Messages

Using the Confidential Message Board: A method of sending secure, confidential messages to students.

- Student receives email stating “A Confidential Message is waiting for you.”
- Student logs in to a secure application on the RO web site to access message. Students should be comfortable with the RO site.
- Once student accesses the message, the ‘Date Read’ is recorded, allowing the adviser to see that the student has received the message.
- If message not ‘read’, reminder sent one week later.
“Unofficial, Internal Transcript”
Includes:
- Award History
- Major History
- AOP Placements
- Admission Application Data
- Course Listing
Admit Reports & Application Data

- Admit Reports for College, Department, and/or Major can be generated by term and/or specific dates.

- Adviser can ‘click’ on student number in resulting data to open specific student’s Application Data Sheet.
Course Listing

Summary of student courses by subject area.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Course</th>
<th>Section</th>
<th>Term</th>
<th>Level</th>
<th>Credits</th>
<th>RR</th>
<th>H</th>
<th>Title</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>ACC 201</td>
<td>008</td>
<td>FS05</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>H Principles of Financial Acct</td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>ACC 202</td>
<td>009</td>
<td>SS96</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>H Principles of Management Acct</td>
<td>3.0</td>
</tr>
<tr>
<td>Computer Science &amp; Engineering</td>
<td>CSE 101</td>
<td>064</td>
<td>FS04</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>Computing Concepts/Competencies</td>
<td>4.0</td>
</tr>
<tr>
<td>Economics</td>
<td>EC 201</td>
<td>006</td>
<td>SS95</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>Introduction to Macroeconomics</td>
<td>2.5</td>
</tr>
<tr>
<td></td>
<td>EC 220</td>
<td>001</td>
<td>FS05</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>H Microeconomics &amp; Public Policy</td>
<td>2.5</td>
</tr>
<tr>
<td></td>
<td>EC 340</td>
<td>003</td>
<td>FS06</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>H Survey of Internal Economics</td>
<td></td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>FI 511</td>
<td>002</td>
<td>FS06</td>
<td>UN</td>
<td>3</td>
<td></td>
<td></td>
<td>Financial Management</td>
<td></td>
</tr>
</tbody>
</table>

Details of accepted transfer credit by institution, including pending and accepted credits.

<table>
<thead>
<tr>
<th>Course</th>
<th>Term</th>
<th>Credits</th>
<th>Title</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Transfer Course Credit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate credits accepted to date: 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLS 149</td>
<td>US94</td>
<td>3</td>
<td>Govt &amp; Politics of the World</td>
<td>T</td>
</tr>
<tr>
<td>NRA 150</td>
<td>US94</td>
<td>4</td>
<td></td>
<td>WVR</td>
</tr>
<tr>
<td>Macomb Community College</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attended from 04/01 to 06/04</td>
<td>11 credits accepted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HST 283</td>
<td>US94</td>
<td>4</td>
<td>U.S. History Since 1876</td>
<td>WV</td>
</tr>
<tr>
<td>HST 284</td>
<td>US94</td>
<td>2</td>
<td>General Credit-Undergraduate</td>
<td>TKW</td>
</tr>
<tr>
<td>PLS 109</td>
<td>US94</td>
<td>3</td>
<td>Intro to Amer Natl. Government</td>
<td>T</td>
</tr>
<tr>
<td>PLS 109</td>
<td>US94</td>
<td>1</td>
<td>General Credit-Undergraduate</td>
<td>T</td>
</tr>
<tr>
<td>SOC 109</td>
<td>US94</td>
<td>4</td>
<td>Introduction to Sociology</td>
<td>T</td>
</tr>
</tbody>
</table>
Credits & GPA Summary

Full student history of credits and GPA term-by-term for each student academic level.
In May 2006, Degree Reports were launched using extracted data from the Degree Audit system.

Advisers can select various reports based on current needs.

Specific student degree work, e.g., substitutions, must still be done in Degree Audit system.
Other Online RO Systems

- Links to other student specific online Academic Forms.
- Access granted to adviser through student folder.
Archived Images

Certain documents from the Admissions and Registrar’s Office imaging solution are made available in the folder.

Student Academic Folder - Archived Images

Jane Spartan, Broad College of Business          Friday, 6/23/2006

About Archived Images

- The images displayed through this system are made available by the Office of the Registrar and the Office of Admissions & Scholarships in compliance with the Family Educational Rights and Privacy Act (FERPA) and MSU’s Guidelines Governing Privacy and Release of Student Records.
- The images are available for your use only and are not for redistribution.
- The images will always be available to authorized users here. Therefore, it is not necessary to print, save, or copy the images.

I have read, understand, and agree with the above statements.

Name: Sparty Student
PID: A12345678
Level Class: UN 3
Major: 1267-Finance

The following image(s) were found.
To view an archived image, click on the link. The image will open within a PDF file.

Admissions - College Transcripts (12 pages)
My Prep Notes/APPs

- Advisers can access their saved Prep Notes and APPs through the system main menu.
- Saved preps can be accessed and submitted to folder or deleted.
My Signature

• For use when ‘copying the student’, the adviser can save a ‘signature’ in the system.

• Signature can be plain text or HTML.
AOP Lists

• Formerly distributed by the Admission Office, AOP lists can now be generated at any time.

• Additional features include direct student folder access, viewing degree reports, and sending email to students.
System Statistics

- 480 active users in 22 major academic and administrative units
- 186,500 folders accessed
- 55,000 notes
- 10,000 APPs (since Jan 06)
- 98 signatures
- Copy to student
  - 22,100 notes
  - 5,100 APPs
- 90+% of copies read
Campus Impact

• **Paper**: UUD has gone completely paperless and greatly improved turn-around time in student services at multiple locations across campus.

• **Environment**: The College of Business was able to remove eight 5-drawer file cabinets and completely renovate the Undergraduate Advising Center into a more relaxing, inviting location.

• **Communication**: Communication Arts & Sciences sent all end-of-term warning letters to students via the ESAF’s confidential message board. This not only gave advisers the ability to track message receipt, but the speed in communication gave students more time to work with advisers prior to the next term.

• **Efficiency**: Information can be accessed more easily in the ESAF than in hard-copy folders. Most, if not all, information is in one location. “We can concentrate on more ways to serve students.”
Campus Impact (cont’d)

• **Consistency**: The electronic folder ‘follows’ the student throughout his/her academic career, increasing consistency in advising.

• **Awareness**: The ESAF improved FERPA awareness and compliance, bringing further clarity to what constitutes a student’s education record.

• **Even the Toughest Critics**: Many advisers were against going electronic (not as efficient, won’t have everything I need, etc.). However, after many ‘just tried it once’, they never left.

• **Nothing is Perfect**: There have been amazingly only a few complaints: system time out, screen size limitations.

• And of course, additional feature requests…
Future Plans

- Degree Audit
- Degree Data Query Builder
- Additional forms, e.g. Probation Conference Worksheet

- Integration with other units and their forms, such as Study Abroad
- Stylized text, spellchecker
- System ‘tweaks’, e.g. being able to ‘copy’ another adviser on a note
- ???
Questions?

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