NACADA 2006

ADVISING WITH THE SPEED OF TECHNOLOGY

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2006 NACADA ADVISING TECHNOLOGY INNOVATION AWARD RECIPIENT

ELECTRONIC STUDENT ACADEMIC FOLDER (ESAF)
HISTORY OF ESAF

• The Undergraduate University Division serves as the Assistant (Academic) Dean for most freshmen and sophomores. This represents 16,000+ of the 35,000 undergraduate students.

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

• An additional folder was kept by the student’s major preference advisor.

• Many of the materials kept in the folders were increasingly available electronically in various systems.

• UUD advisers are located in 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 ESAF (cont’d)

A New UUD Director is Appointed

• Was the paper folder necessary to advise?

• Could the cost of moving the paper folder each summer be reduced?

• Was it possible to have a paperless or less paper system?
Challenges

• Many units including UUD had their own data collection system or method.

• UUD had the responsibility to forward paper folders to colleges when students became juniors.

• Advising folders were often walked by students from one major to another when students changed majors.

• Mixture of centralized and decentralized advising among the colleges.

• Who would have access to notes kept on a student by a unit?

• All campus advisers were accustomed to hard-copy folders.
Benefits

• Would provide for continuity of advising across the campus.

• All advisors would have access to a complete record when student was not in their major.

• Prevents the loss of folders (by students and staff).

• Eliminate the cost of moving folders by UUD each summer.

• No longer necessary for each unit to keep their own data base.
The Process

• UUD met with other campus divisions that had gone paperless.
• Early meetings with the Registrar’s Office (RO) to explore a partnership.
• Discussion with various technology consultants.
• Realization that a Web-based system would best meet UUD needs.
• Returning to the RO with more specific plan.
• Designing a system and sharing with core colleges.
• Taking design and feedback from the core colleges back to the RO.
• Ongoing RO web application development:
  – Student Information Generator
  – Administrative Action Forms
The Process (cont’d)

• After several years of aggressive web application development, the technical infrastructure to support such a system and 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.

• Representatives of the core colleges came together to review the system specifications and to develop guidelines for using ESAF.

• By August 2005, the 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 effect immediately.

- 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 for 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.

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**Student Academic Folder - Student Authorized Access**

Jane Spartan, Broad College of Business

**Main Menu**

**Friday, 6/23/2005**

**About Student Authorized Access**

Accessing a student's academic folder through this method should ONLY be used if a student is not in your system access and is sitting in front of you requesting an advising session.

If a student does not wish to give you the requested information below, you will not be able to access the student record.

Each and every attempt to access a student's academic folder through this method is recorded and logged for security and audit purposes.

I HAVE THE STUDENT’S APPROVAL TO ACCESS HIS/HER ACADEMIC FOLDER □

<table>
<thead>
<tr>
<th>Student First Name</th>
<th>Student Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PID</th>
<th>Date of Birth (MM/DD/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit
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 SIBINFO 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, spart (A12345670)*
Student1, spart (A12345671)*
Student2, spart (A12345672)*
Student, spart (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>Date/Time</th>
<th>Author(s)</th>
<th>Notes</th>
</tr>
</thead>
</table>
| 6/23/2006 2:58:30 PM    | Jane Spartan, Broad College of Business | **Enrollment Conference, Major Exploration**  
  Student discussed interest in Finance.  
  Suggested Sparty begin taking core business courses and to explore interest further at the business fair.  
  *Copy sent to Student*  
  UN 3 1267-Finance |
| 11/17/2005 10:33:13 AM  | MSU Counselor, Undergraduate University Division | **Degree Check, Professional/Graduate School**  
  student considering law school. student has three letters of recommendation but hasn't taken LSAT.  
  UN 2 5151-No Preference |
| 9/6/2005 9:33:09 AM     | Sparty Counselor, Undergraduate University Division | **Study Abroad**  
  Student interested in study abroad program in Germany.  
  *Copy sent to Student*  
  UN 1 5151-No Preference |
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.
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.
Student Report

“Unofficial, Internal Transcript”
Includes:
- Award History
- Major History
- AOP Placement Scores
- 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>Term</th>
<th>Credits</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>ACC 201</td>
<td>908</td>
<td>FS05</td>
<td>UN 3</td>
</tr>
<tr>
<td></td>
<td>ACC 202</td>
<td>909</td>
<td>SS96</td>
<td>UN 3</td>
</tr>
<tr>
<td>Computer Science &amp; Engineering</td>
<td>CSE 101</td>
<td>964</td>
<td>FS04</td>
<td>UN 3</td>
</tr>
<tr>
<td>Economics</td>
<td>EC 201</td>
<td>906</td>
<td>SS95</td>
<td>UN 3</td>
</tr>
<tr>
<td></td>
<td>EC 202</td>
<td>903</td>
<td>FS05</td>
<td>UN 3</td>
</tr>
<tr>
<td></td>
<td>EC 340</td>
<td>903</td>
<td>FS06</td>
<td>UN 3</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>FI 511</td>
<td>902</td>
<td>FS06</td>
<td>UN 3</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Course Listing by Transfer Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Undergraduate</strong></td>
</tr>
<tr>
<td>Undergraduate credits accepted to date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advanced Placement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attended from 09/03 to 09/04</td>
</tr>
<tr>
<td>3 credits accepted</td>
</tr>
<tr>
<td>PL3 149</td>
</tr>
<tr>
<td>WRA 150</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Macomb Community College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attended from 09/03 to 09/04</td>
</tr>
<tr>
<td>11 credits accepted</td>
</tr>
<tr>
<td>HST 203</td>
</tr>
<tr>
<td>HST GCU</td>
</tr>
<tr>
<td>PL3 103</td>
</tr>
<tr>
<td>PL3 GCU</td>
</tr>
<tr>
<td>SOC 103</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.
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 Admissions Office, Academic Orientation Program (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 student copies read
Campus Impact

• Culture Shock
• Development Phase/Paper to Less Paper
• Introductory Phase
• Transitional Phase
• Evaluation Phase
• Benefits
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
- ???
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Questions?

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