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University Advisors' Network
Wednesday, May 16
9:30-11:00am
Hollings Library, Cooper Library

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Members: Kathy Anastes, Valeria Bates, Ed Black, Rebecca Boyd, Claudia Carriere, Shelley Dempsey, Brian Dusel, Chrissie Faupel, Libby Foreman, Gwen Geidel, Dawn Hiller, Sara Jusiewicz, Stephen Lowe, Renee McGinnis, Matt Miller, Drew Newton, Gina Polizzi, Claire Robinson, Sonya Singleton, Paul Stoltzfus, Jan Smoak, Nancy Tolson, Heidi Waltz, and Amanda Zeigler

Absent: Joseph Askins, Patricia Armstrong, Kay Banks, Claudia Benitez-Nelson, Rebecca Boyd, Claudia Carriere, Shelley Dempsey, Pickney Epps, Amber Fallucca, Meghan Fields, , Andre Grant, Loren Knapp, Helen Le, Janis Leaphart, Aaron Marterer, Meredith McNeice, Bethany Naser, Kristi Niro, Connie Outen, Ruth Patterson, Edith Pietrykowski, T'Kara Richardson, Kathy Smiling, Amanda Therrell, Donna Watson, and Jeff Wilson

Guests: Tara George, Samantha Malpass

Approval of April minutes. Approved with correction in the Advising Technology section discussing workflow – should be 62,298 appointments which include advising, capstone, study abroad, OSP, etc.

9:30 am	Welcome & approval of March minutes	**Claire Robinson**

9:35	DegreeWorks Student Education Planner	**Donna Watson**
		Valeria Bates

- Unfortunately, Donna was absent due to illness
- SEP will be a fluid plan of 12 semesters
- There will be a Planner Tab when you open a student's audit at the top
- There will be 3 templates - student, advisor, locked one
- To start use the locked plan
- It will always open to the calendar view
- When ready to add classes to the plan, you will change to the Edit view
- You can click on the option of Course and put in an actual course or Placeholder and put in for instance Carolina Core- AIU since there are many choices
- The minor grade will not populate but you can add that to the entry, but it does not show in the Calendar view.
- You can also add Note to the course if there is specific information needed.
- The soft launch will be June 12th.
- All colleges will be July 16th
- FYA will build out the first year of a student's record.
- Registrar making templates for each major and each bulletin year.
- The registrar needs the following questions answered –
  - Designated contact to coordinate advisors
  - Validation of templates

- o Coordinate approvals
- o Direct contact to Tara which should be the same individual for DegreeWorks
- Question of the difference between the Major Maps and the SEP – if it was to look like the Major Map then that would be the Advanced plan instead of the Fluid. The advance would require more maintenance on the advisor end when changes are made.
- Template is simply the major, degree, and catalog year – checking spelling
- The plan is in DegreeWorks once the student registers and pays fees to the university then they have access.
- Probably 2 years out – can we think of a way for the Gateway students to use this. Currently they are using the major maps and the bulletin for advisement
- Chemistry is concerned that after the FYA builds out the first year that the faculty advisors may not continue to build it.
- It was asked if extra semesters can be added if needed – Yes, we can re-order terms, get rid of old ones, and start new ones

There are some work flow questions that all will need to answer –

-What training is necessary for advisors to use SEP?

A Training Guide and training videos are planned.

-Will only your first-year advisors use SEP, or will all advisors use it?

-How will you use SEP?

-Will you build a plan for all students?

-Will you build the complete plan all at one time or semester by semester as you complete advisement with the student?

-Will you build the plan in the summer when students attend their first orientation or in the fall when you are preparing for their first advisement session?

-What is the order for implementing the different degree programs in your college? Determine your starting point.

-Are transfer students different from Freshmen in relation to SEP? How?

-Who is considered the Primary advisor?

-Which advisors will have locking capabilities (sort of the same as who can make exceptions in Degreeworks)?

-Who is going to be the "liaison" or contact person determining the approval list for advisors? For HRSM, that's Kathy Smiling; for Education, that's Donna Watson.

-Possibly a Phase 2 question: How will dual and double majors and special programs be reflected in SEP?

- When we promote this to students, we are calling it - Planner

10:30   2018 Advisor survey – technology results
- We survey the advisors every 2 terms and the alternate year the students are surveyed
- This survey was focused on technology
- The results will be posted in PowerPoint format to the UAC website
- Some of the questions –
  - o Can a student schedule an appointment with a secondary major advisor? We can go into INB and assign a secondary major advisor, but it will not show in SSB or DW. It will show in EAB
  - o How do fix the appointment as not showing when they did? Go the action on the appointment list and make a notation or just save and change the date and time
- Currently looking into Non-degree students being in Pathfinder
- What does the UAN plan to do with this information?
- How do advisor roles influence usage of technology?
- Consider relationships between "workflow" and "functionality"
- How do we engage more advisors into the software?
- What are our communication barriers?
- What are the goals of advising technologies?

10:40   EAB Pathfinder Goals
- Goal 1 – improve student advising experience by a common scheduling and tracking
- Goal 2 – supply technology that improve the advisor user experience then improve workflow access to comprehensive data
- Goal 3 – promote student responsibility in scheduling and attending appointments
- Goal 4 – assist in coordinated care network approach as it relates to student messaging, outreach, and referrals

10:45   UAN member updates
- May 18th 2 pm Lean Major Change Process presentation
- Other summer training opportunities listed on the back of the agenda