Advising Technology Workshop Notes

Friday, September 13th

Purpose of Workshop (9:30-9:35)

• Review college visits
• Create ideal advising workflow
• Identify best practices for strategic plan

Summary of College Visits and Findings (9:35 – 9:45)

• Provided brief overview of each college visit

Strategic Plan Creation (9:45-12:15)

• Ideal Advising Workflow (9:45-10:45)
  o 3 small group discussions
  o Discussed best practices for “before”, “during”, and “after” in the advisor’s workflow
  o Large group discussion
  o Discussed and came to a consensus on the practices that should be done by all advisors

Ideal Workflow:

The following practices are recommended before the start of the advisement season:

• Advisors should email advisees prior to start of advisement to explain how the advisement process works and advisement policies specific to the college/department
• Advisors in each department/college should meet as a team prior to the start of the advising season. The team should:
  o Review curriculum
  o Review college and campus policies
  o Discuss DegreeWorks audit and any common/shared issues
  o Create calendar of events
• Create appointment availability using EAB Navigate
• Advisors are encouraged to create, update, and review EAB Navigate watchlists for tracking advisees
• Prompt students to review their audit prior to appointment
• Pre-advise students as necessary

The following practices are recommended after advisement season:

• Administer student experience survey
The following practices are recommended **before** the start of the advisement appointment:

- Review student audit for accuracy
- Review SSC transcript for course enrollment (24-hour delay for information to transfer to DegreeWorks
- Review EAB/Navigate notes

The following practices are recommended **during** the advisement appointment:

- Use template note or checklist to guide conversation in appointment
- Remove advisement hold
- Submit needed Alert(s)
- Ensure student understands where s/he is in the program and what’s needed for graduation
- Ensure student understands how to access advising information through advising technology

The following practices are recommended **after** the advisement appointment:

- Submit curriculum changes
- Create EAB Navigate Report on Appointment
- Make needed exceptions
- Follow up with student as necessary

The following practices require further discussion:

- Best ways to use Drop In Appointments
- Conducting two advisement sessions for all transfer students
- How to use MyUofSC experience in advisement session
- Ability for an email to be sent to student once advisement hold is lifted
- **Create record/time stamp of advising record (question for Degreeworks, can time stamp be created for term note?)**
- Use SEP planner in all colleges/departments

The following practices need further discussion, but are “parked” for now:

- Student profile and risk indicators are not accurate
- Advising theory to guide practice
- Alert process/workflow
- Block advising for faculty (i.e. Biomedical Engineering)
- Appointment length recommendations
- Complicated curriculum
- Size of caseload

**Schedule Fall meetings (12:15-12:30)**

- Sent doodle poll to determine best time for fall meetings. Discussed potential meeting topics.
Agenda items tabled for future meetings due to time

- EAB
  - Notes versus Report Summary
  - Watchlist and reports assist advisor workflow
  - Best practices for making appointments
- Degreeworks
  - Best practices for using Audit – Before, During, and After appointment
  - How should notes at the bottom of the audit be used, if at all
  - Student Educational Planner use
  - Exceptions management