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)
    - 3 small group discussions
    - Discussed best practices for "before", "during", and "after" in the advisor's workflow
    - Large group discussion
    - 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:
    - Review curriculum
    - Review college and campus policies
    - Discuss DegreeWorks audit and any common/shared issues
    - 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