

## **ADVISING LEADERSHIP TEAM**

Wednesday, September 12, 2018

BPA 134

3:00 – 4:30 p.m.

### **Present:**

Vernon Harper, Vikash Lakhani, Lori Paris, Tanya Boone-Holladay, Mark Evans, Liora Gubkin, Lisa Zuzarte, Todd McBride, Yvette Morones, Faust Gorham (Visit), Marta Ruiz

### **Absent:**

Ben Perlado

### **Action Items:**

- V. Lakhani will send out a proposal for Access Privileges- the results will go back to Vikash. He needs the results within two weeks.
- Dr. Harper will work with Vikash to develop a summary, a description the activities that will reassigned to the Academic Schools at the next meeting on September 24<sup>th</sup>.
- Tanya will draft language for Retroactive Withdrawal to be sent for Senate review.

### **Meeting Notes:**

- Meeting called to order at 3:05 p.m.

### **OnBase Group Access Form**

- All Advisors will have view access to OnBase
- OnBase training sessions will be provided for new hires for 1.5 hours during the week of September 17<sup>th</sup> and September 24<sup>th</sup> in WSL 202. (attached)
- Student Assistant will not have access
- Faust presented a model of OnBase outline form. Every department will have their own forms, this will allow us to analyze whether we are spending our time prioritizing correctly.
- Once we go online all forms should be reevaluated.
- Faust states we will evaluate both Petition for Exception and Change of Major. Look at Change of Major form to see if it can be done in Peoplesoft now.
- Faust will come back in one month and would like to bring the team with him.
- OnBase will talk to PeopleSoft.

### **Charge Statement:**

- Updates and suggestions were added to Charge statement, it was added to the ALT website.

### **Errors in evaluations**

- Errors are being looked at to find out why errors are being made.

### **Course substitutions**

- Possibly invite a Chair, Faculty member, Associate Dean, Advisor or staff to attend Department Chair Leadership Council meeting, Kris Grappendorf is a potential invite.

- We need a workflow to work on degree audit
- Workgroup was created within Admissions and Records and Academic Operations to look at the technical side of things.
- Waiver needs to be processed quickly as it could prevent a course substitution.

#### **AARC Restructure**

- Mission and activities will be refocused to Academic Standing/SAP, Undeclared advising.
- Schools will now be responsible for some activities.

#### **Retroactive Withdrawal**

- Forms are coming in without instructor signatures only the Associate Dean signatures. If instructor is not available, you need to have a chair sign off on it.
- Instructor signature is required per the catalog, they can not be processed if the professor has not signed the form.
- Tanya is drafting a recommendation to change catalog language as it relates to retroactive withdrawal.
- Students only have one year to process withdrawals.

**Adjourned**

**4:25 pm**

## Attachment from IT Regarding OnBase

AI Owner	Due Date	Description of Task
Each School	ASAP	Submit completed OnBase Group Access forms and send them to Vikash for approval.
ITS	Today (Done)	Propose two OnBase Training sessions during the weeks of Sep 17 & Sep 24
Each school	ASAP	Share the list of attendees, who are interested in OnBase Training session, to MG
ITS	TBD	Examine two student facing forms to determine next steps for business analysis <ul style="list-style-type: none"><li>- Petition Form</li><li>- Change of Major Form</li></ul>

### Additional details

1. ITS needs the completed group access forms from each school to provide access to the members, prior to scheduled training.
  - a. Please follow the steps outlined in my earlier email dated Wed 09/05/18 @ 10:56 AM. It is also attached here for your quick reference.
2. As requested, ITS is planning to conduct two one-hour training sessions, as listed below:
  - a. Friday Sep 21, 2018 – 9:00 AM to 10:00 AM
  - b. Tuesday Sep 25, 2018 – 1:00 PM to 2:00PM
  - c. NOTE: We can accommodate about 30+ members in WSL-202.
3. Please share list of your department members who need to be invited to the above training sessions, by tomorrow. It would help us for determining the training needs.
4. Faust & I had a brief discussion about the two student facing forms (Petition Form and Change of Major Form) and we have identified an ITS team. The team will examine the forms, identify necessary members from your teams, conduct business analysis with identified members, and identify best possible solution. They will reach out for your assistance.