

Session 6 - Student: Academic Advising Degree Audit and Ed Plan



Date: Tuesday, April 12, 2022 / repeat Thursday, April 14, 2022

Time: Tuesday 1:00pm – 2:45pm /repeat Thursday 2:00pm – 4:30pm

Anthology

(Counselor Session)

Session 6. Counselor Functionality		Comments
1	Provide an overview of Academic Advising tools from the Student and Advisor perspective – 15 minutes	
Advisors - Access and Processes		
30	Demonstrate the advisor's ability to view student data, e.g., class schedule, academic history, test scores.	
31	Demonstrate the ability to record advising data, e.g., confidential notes. Show how notes can be viewed (or note) based on types and permissions	
32	Demonstrate the ability to record special needs or referrals for students, e.g., tutoring and/or student-athlete status.	
36	Show how probability scores can be used to identify students to send "kudos" – and to provide support	
34	Demonstrate the ability for faculty to identify students who might be at risk and make a referral. Additionally, demonstrate how and when the student or support team member will be notified.	
33	Demonstrate the ability to identify students who might be at risk, including information about the associated issues. Demonstrate the ability to track and support such students in an ongoing manner.	
40	Demonstrate the ability to assign advisees to academic advisors with various parameters, e.g., pathway, class year, major, special programs.	
41	Demonstrate the ability to assign advisees to multiple advisors, mentors, or counselors	
42	Demonstrate the ability to identify cohorts, e.g., probation, suspension, honors, dean's list, and send them relevant notice	
Current Student Case Management		
35	Demonstrate the capabilities to identify and provide support to students	
37	Demonstrate segregation of information related to FERPA or financial aid and how to only show data to those groups that need it.	

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38	Show how faculty or Advising staff can log a manual interaction.	
Appointments		
27	Demonstrate the ability for students to schedule counseling appointments online through self-service	
28	Demonstrate the ability to use various media for appointments – e.g., Zoom, chat, Skype, etc.	
26	Demonstrate the ability for Counseling to configure available appointment times for students	
29	Demonstrate the ability to auto-remind students of their appointments – e.g., 24 hours prior and send campus map.	
Student Experience		
43	Demonstrate the student's ability to apply for graduation via web self-service. Include diploma mailing address, diploma name, ceremony attendance, etc.	
39	Space for comments that students can also view (to-do list, referrals, etc); separate from a counseling notes section that is only viewable by counselors	
8	Demonstrate the ability for student to view and revise their educational plan and then auto-notify counselor/advisor to review and "approve" the plan	
2	Demonstrate a student's view their own degree audit and educational plan via web self-service – in addition to running "what if..." scenarios	
Degree Audits and Ed Plans Configuration and Maintenance		
4	Demonstrate how degree requirements are entered and maintained for the degree audit. In particular, demonstrate the use of templates to streamline the definition of requirements for various academic programs	
3	Demonstrate how catalog rights can be locked for a degree audit.	
12	Demonstrate creating a new ed plan using a blank template with ability to pull required courses based on program of study selected and GE pattern indicated and download and/or connect to assist	
18	Demonstrate the ability to input GE areas as opposed to specific classes (i.e. CSU GE B2)	

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5	Show how non-course requirements are created – e.g., community service hours	
22	Demonstrate the ability to access state-wide taxonomy of programs in addition to local programs of study	
6	Demonstrate both waivers and substitutions for a particular degree requirement	
50	Demonstrate how course substitution is handled including workflow to faculty.	
7	Demonstrate the ability to auto-populate recommended placements on educational plan based on self-reported high school data or assessment test data	
9	Demonstrate the ability to support multiple type of ed plan (Financial aid, Veterans, Credit, Noncredit)	
10	Demonstrate the ability to select catalog years when developing a plan	
11	Does the option exist to use a blank template versus auto population	
13	Demonstrate the ability to add/delete semesters (and make other edits as a counselor is creating a plan)	
14	Ability to copy a plan and make edits	
15	Be able to lock an ed plan (student can't change an approved plan)	
16	Demonstrate the ability to create an educational plan for one or more semesters – e.g., from the upcoming term to four semesters out	
17	Demonstrate the ability to create/save/retrieve/edit multiple education plans for an advisee	
19	Demonstrate the ability to write text for a course entry (generic text option, i.e. Major Elective)	
20	Demonstration how the properties of course in ed plan are displayed (GE vs major vs elective)	
23	Show all classes in college catalog, not just those that are being offered in a particular term	

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24	Demonstrate the ability for classes listed in next semester's educational plan to auto-register during the student's registration window if registration is pre-authorized by the student.	
21	Ability to indicate goal at SRJC and for transfer (major and institution, if applicable)	
25	Show how Degree Audit and Ed Plan data can be used to inform class scheduling for future terms	
37	Demonstrate segregation of information related to FERPA or financial aid and how to only show data to those groups that need it.	
51	Demonstrate a transfer credit module.	
Graduation Processing		
49	Demonstrate how degrees/certificates are awarded.	
47	Demonstrate the process for auto-awarding of degrees and certificates for students.	
44	If the student has not met or will not meet all requirements for graduation by the date the student applied to graduate, demonstrate how the student is notified of the requirements they are lacking for graduation.	
48	Demonstrate how to cancel an application for a degree or certificate, including cancel or defer date.	
45	Demonstrate the ability to print a commencement program with a list of graduates – or to transmit the data to a printing company	
46	Demonstrate the ability to print diplomas and certificates – or to transmit the data to a printing company.	

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Evaluator's Name:

Evaluation Form
Perceived Strengths of Vendor Solution:
Perceived Weaknesses of Vendor Solution:
Additional Comments:
Acceptability of Vendor Solution: ___ Yes ___ No