Subject: Support Services Minutes
Date: June 16, 2009

Attendees: Patty Itchoak, Barbara Brown, Jenny Myrick, Ginny Schlichting, Colleen
               Abrams, Jan Vohden

I.   Reviewing the forms in UAOnline (LRGP):

-      **Form** – **<u>Review a Student's Advising Appointment History &
       Comments</u>**

       -   Recommending the following updates for SW Programming:

       1.   Change form header of 'Student Appointments' to 'Student
            Appointments – Completed, Upcoming and Other'

       2.   Add a legend for the columns of data displayed:

            C = Comments (If an 'X' is displayed, comments exist)

            ST = Status:
                 C   - Complete
                 N   - No Show
                 R   - Rescheduled
                 U   - Upcoming
                 X   - Cancelled

            RSLT = Results:
                 ADMA – Admission Advising
                 APL   - Academic Appeal/Petition
                 APPT   - Follow Up Appointment
                 CANC   - Cancelled Appointment
                 CARI   - Internship
                 CARJ   - Job Readiness Skills
                 CARP   - Career Planning
                 CARS   - Career Assessment
                 CMJR   - Chose/Chg Major
                 DEGA   - Degree Audit
                 FINA   - Financial Aid Advising
                 FINL   - Financial Aid Appeal Letter
                 GAPP   - Graduation Application
                 LWTH   - Late Withdrawal
                 NSHW   - Appointment No Show
                 PLCM   - Placement
                 PRBS   - Problem Solving
                 PRGP   - Program Planning
                 QSTN   - General Questions Answered
                 REF   - Referrals
                 REG   - Register for Cls/Chg Registration
                 RETN   - Retention
                 RSCH   - Rescheduled Appointment

SSKL   - Study Skills
SSTR   - Success Strategies
TRNS   - Transfer Information
TWTH   - Total Withdrawal

CTY = Contact (Can the system be smart enough to simply show what the student has when they come into this form? I.E., if student shows AAT, ADA and AHP tied to their appointments in this column, it would show in the legend only as:

AAT   - UAA Advising & Testing Advisor
ADA   - UAA Departmental Advisor
AHP   - UAA Honors Program Advisor

If that is not feasible, we may consider creating a new validation table to handle the limited choices of 'Contacts' we want to utilize.

3. Add buttons at the bottom of form of:
   [Advisor Menu]
   [Select Advisee]
   [Add Appointment]
   [Upcoming Appointments]

4. Add information text to the form as follows:

   This displays all appointments (past, current and future) for the selected student. An 'X' in the 1st column (C) means that 'Comments' have been recorded for that particular appointment. You can sort by ST, Appt Date, Purpose, RSLT, Advisor Name or CTY columns simply by clicking on those column headings. . If you want to update/change an upcoming appointment or comment for a student, simply click on that appointment.

5. If an advisor clicks on one of the appointments, it takes them to a form called 'Appointment Details – Create/Change Appointments or Comments – Change Appointment'. Change that form title to be 'Appointment Details – Change Appointment or Comment'. This really does not allow you to add a new appointment but rather make changes to existing ones so the form name is misleading.

- **Form** – **Review My Advising Appointments**

  - Recommending the following updates for SW Programming:

1. When we attempt to modify the comment or update any of the appointment information here, it comes back with 'The selected appointment could not be found', but the changes we made does take place.

2. Add a legend for the columns of data displayed:

       C = Comments (If an 'X' is displayed, comments exist)

       RSLT = Results:

ADMA	– Admission Advising
APL	- Academic Appeal/Petition
APPT	- Follow Up Appointment
CANC	- Cancelled Appointment
CARI	- Internship
CARJ	- Job Readiness Skills
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AAT	- UAA Advising & Testing Advisor
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AHP	- UAA Honors Program Advisor

If that is not feasible, we may consider creating a new validation table to handle the limited choices of 'Contacts' we want to utilize.

3. Add information text to the form as follows:

   This form displays all upcoming appointments for the advisor (those with a 'U' Status). An 'X' in the 1st column (C) means that 'Comments' have been recorded for that particular appointment. You can sort by UAID, Student, Appt Date, Purpose, RSLT, or CTY columns simply by clicking on those column headings. If you want to update/change an upcoming appointment or comment for a student, simply click on that appointment.

4. Change the form name from 'Upcoming Appointments' to 'My Advising Appointments'.

5. Add buttons to the bottom of the form:

   [Advisor Menu]
   [Add Appointment]
   [Advisee's Appointments]

II.   Review the Dept validation table:

It was determined that we want to create a new validation table called STV2DPT that will house only those department codes to be utilized and displayed on these advising appointment forms.

Action Item: Each team member will review the list of department codes (that were attached to the meeting agenda) and mark which ones are valid for use. They will send those to Patty so she can compile that information.

III.   Other:

- Create a validation table for 'College' called STV2COL that will be used for these advising appointment forms.

  Action Item: Patty will work with Colleen on finalizing a valid list that should be used for this new table.

- Security discussion for accessing these forms. Currently, if an advisor of faculty wants Banner access to these forms they need two approval signatures (the user's supervisor and dept chairperson, associate dean, dean or director). The question was posed as to whether that level of security is really still the desire for obtaining this access? Note: in order to grant the person access to these forms on UAOnline, we also needed to ensure they are recorded on the GOAEACC

(Enterprise Access Control) form in Banner. Should we consider allowing any person flagged as an advisor or faculty on SIAINST the ability to use the form in Banner as well as UAOnline? Should we still require the two approval signatures? The team felt it should be changed to that level. Patty will be posing the question again to the full team since we didn't have all members participating in the meeting.

IV.   Next meeting June 30, 2009 at 11am

V.   Meeting adjourned.