

SSC SWAT Team Meeting Minutes

Tuesday, March 22, 2016 · 11:00 AM · Regents Room

Present:	Travis Jones (AOC) Clare Faurote (Athletics) Christine Wolf (CIE) Tina Current (Engineering) Joel Spiess (Health Sciences) Jennifer DeRoche (Letters & Science) Gwyn Wallander (Letters & Science) Ian McLaughlin (Letters & Science) Ebony Cobb (Nursing)	Cindy Reindl (Financial Aid) James Hardy (Business) Nicole Heinen (PASS) Shelly Bednar (Arts) Tammy Taylor (Architecture) Terry Paape (Education) Angie Sadowsky (Information Studies) Gesele Durham (Academic Affairs) Brennan O'Lena (Student Affairs)
Absent:	Andy Van Sistine (Athletics) Dana Northrup (Letters & Science) Aaron Dierks (Honors)	Demetria Anderson (Housing) Tom Lemke (UITS) <i>Social Welfare</i>

Campus-Wide Campaigns Check-In

- [Encouraging Advising Engagement](#)
 - Schools & Colleges who indicated participation at some level: Education, Letters & Science, Health Sciences, Information Studies, Business.
 - Some S/C not able to participate because they have not been logging all interaction with student in the platform since the start of the fall term.
 - Continued challenge with not being able to have students who have applied for graduation being removed from the list. This challenge will be eliminated with the launch of SSC Campus, as users will be able to add this filter to search criteria.
 - Joel will update the instructions for this campaign to reflect this.
 - Engineering & CIE contact all students and encourages advising appointments; not participating in this campaign.
 - Information Studies tweaked the list so that email contact was not considered advising; student had to have had an appointment in order to not make it on the campaign list.
 - Business will use Hyperion as the data source because it allows them to cross-reference with Cattrack data.
- [Engaging Stop-Out Students](#)
 - Joel will contact Emily to request that she pull a campus-wide list of students who fit this criteria on Monday, May 9th and distribute to the SWAT Team for unit-specific action.
 - Concern addressed: The campaign action involves at minimum just one Bcc: email being sent by the advisor to their respective students, and this action can occur during the final exam period (past peak advising season for most units).

SSC Campus Implementation

Training

- Train-the-Trainer (SWAT Team): May 19th
 - We anticipate being able to provide "sandbox" access to the training site approximately one month in advance of this date so SWAT Team members can explore prior to this training.
- Initial User Training: June 7th. *Please inform your unit staff of this date as soon as possible.*
 - Will be facilitated by SWAT Team members with Emily & Jade present in the room to assist as needed.
 - Hoping to receive training materials and script from EAB that SWAT Team member can modify/use as they see fit.
 - Will need to develop an action plan following the May 19th training; who will do what?
 - Faculty advisors can be invited to this day, but many may not be able to attend due to contract. Will need to explore an August training for these individuals.

- S/C Data Manager Training: These individuals should plan to attend the Initial User Training on June 7th.
- Front Desk Training: Need to explore this more, particularly as it relates to student workers.

Phased Implementation (see updated enclosure, page 4)

- Primary Focus now is Phase I, with a launch date of June 20, 2016 (barring any unforeseeable hiccups)
 - Goal: Same access as we currently have with SSC Foundation.
 - Add-ons: Student access; Appointment scheduling through the platform; Kiosk check-in.
- Per Terry's request, Joel will update the Phased Implementation document to include the School of Education's Education Resource Center (ERC) among the list of school-specific tutoring centers in Phase III.
- Concern expressed regarding student check-in at identify-specific centers (e.g. LGBT Resource Center) as it relates to tracking and a student "outing" themselves. The leadership team can begin these conversations now with Student Life.
- Discussion concerning ID swipers to be used for kiosk check-in.
 - Clarification: The swiper is simply a card swiper connected to a USB cord that plugs into an already-existing computer at the reception area (provided by the unit).
 - The implementation leadership team will formulate a plan to identify which units would like to request ID swipers for kiosk check-in.
 - Units who do not utilize the USB swipers will still have kiosk functionality at their computer; they will have to enter IDs by hand.

Permissions Document

- This is our best first guess at how we want permissions to be setup in the platform. These permissions can be changed at any time before or after the launch should we discover the need for change.
- We reviewed the following points of clarification we received from the EAB:
 - Conversations (email) cannot be deleted from the platform, and a user cannot grant another user access to a particular conversation or thread. UWM *will* permit all professional staff users to view other users' conversations, as these exchanges are all part of the student's academic record.
 - Front Desk login can be a shared username or user-specific; this can be determined by S/C. At this time, the EAB cannot offer geo-locking for shared usernames, so anyone with access to the shared username would be able to access the account from any computer at any time. For this reason, we recommend user-specific usernames for the initial launch.
 - There is no limit to the number of roles an individual can be assigned. For advisors that need access to other advisors' calendars (when they back-up the reception operation in their office), they can be granted both advisor and front desk permissions.
- We worked through a few questions regarding specific permissions. No changes will be made to the document based on this discussion.
- Please send any final comments or questions to the implementation leadership by Friday, March 25th. The implementation leadership team seeks to have this document finalized and ready for submission to the EAB by Thursday, March 31st.

Frequently Asked Questions (FAQs)

- Example: [Stephen F. Austin State University](#)
- Questions prepared by James (see enclosure, page 12)
 - James, Clare, Angie, and Terry volunteered to develop answers to these questions and present a draft to the SWAT Team at the April 26th meeting.

Technical Requests

- As we work to manage communication with the EAB during the implementation of the SSC Campus product, until further notice, please bring technical requests to the SWAT Team to be vetted by the group before any requests are sent to the EAB directly.
- Can the student's preferred name appear in the platform?
 - Brennan clarified that this data can be sent in our nightly extract; however, it would replace the legal name in the system. We need to explore this more.

- Reminded us of a previous conversation where we asked about whether or not a note in the system could be made “sticky” so it always appears at the top of the student’s history page. Here the advisor could enter student’s name in use, pronouns in use, name pronunciation guide, etc. Joel will follow-up with Emily regarding this inquiry.
- Is there a way to export a list directly into template tracker formatting? (Great idea, Gwyn!) Joel will follow-up with Emily regarding this inquiry.
 - Related: As you are utilizing the instructions and template trackers for our campus-wide campaigns this spring, please share feedback at SWAT Team meetings regarding these two documents, as the hope is replicate these campaigns in future terms.

Open Forum

- L&S (Ian): Running lists by age and gender (to send targeted messages to specific population, e.g. scholarships for women)
 - Gender is already a filter in the SSC Campus platform.
 - Will need to explore the training site to see if/how we can filter for age. We’re currently sending date of birth to EAB in the nightly data extract. Perhaps we can enter birth year as a filter?
- L&S (Gwyn): Deceased students
 - After the Registrar’s Office has entered the deceased indicator on a student’s record, this indicator is sent to the EAB in the nightly data extract. This indicator then prohibits the viewing of the student’s profile in the SSC platform (but the data is still there should it need to be accessed; EAB could assist with such a request).
 - Joel double-checked one of Tina’s students in the Foundation platform, and the student cannot be searched for; this is good.
- Retention Summit: March 31st (Gesele)
 - Brennan and Joel will co-present regarding the SSC (approximately 10 minutes).
 - Gesele is seeking information regarding campaigns units have run on their own, including follow-up reporting on effectiveness and lessons learned for future use of the tool. Please send any info to her by Friday, March 25th.

Student Success Collaborative (SSC) Campus
Phased Implementation at UW-Milwaukee

Phase	Launch	Area	Offices	Swipers	Functions
I	06/20/16	Academic Advising	Academic Opportunity Center	1	As outlined by permission document
			Center for International Education	1	As outlined by permission document
			College of Engineering & Applied Science	1	As outlined by permission document
			College of Health Sciences	1	As outlined by permission document
			College of Letters & Science	4	As outlined by permission document
			College of Nursing	1	As outlined by permission document
			Helen Bader School of Social Welfare	1	As outlined by permission document
			Honors College	1	As outlined by permission document
			Lubar School of Business	1	As outlined by permission document
			Peck School of the Arts	1	As outlined by permission document
			School of Architecture & Urban Planning	1	As outlined by permission document
			School of Education	1	As outlined by permission document
			School of Information Studies	1	As outlined by permission document
			Roberto Hernandez Center	1	As outlined by permission document
Athletics	Academic Support & Advising	1	As outlined by permission document		
Students	Students		Online scheduling of appointments		
Financial Aid	Advising & Outreach	1	Advisor permission		
All	All		Kiosk check-in		
II	07/31/16	Instruction	All Schools & Colleges		Early Warning / Progress Reports
		Tutoring (PASS)	Panther Academic Support Services		Tutoring functions as outlined by permission document
		All	All		Alerts & Cases
III	01/01/17	Financial Aid	Advising & Outreach		Rollout of FA-specific functionality as requested
		Tutoring (School/College)	Athletics		Tutoring functions as outlined by permission document
			College of Engineering & Applied Science		
			Lubar School of Business		
			School of Education Resource Center		
School of Information Studies					
IV	TBD	Student Support Offices	Accessibility Resource Center		Kiosk check-in; student profile access; view/enter student notes
			Black Cultural Center		
			Bursar's Office		
			Career Planning & Resource Center		
			Center for Inclusive Excellence		
			Lesbian, Gay, Bisexual, Transgender Resource Center		
			Military & Veteran's Resource Center		
			Norris Health Center		
			Student Success Center		
			University Housing		
Women's Resource Center					
V	TBD	Additional Units as Requested	Library		