SSC SWAT Team Meeting Agenda
April 26, 2016 · 11:00 AM · Regents Room

Technical Updates from EAB

- Foundation platform: refreshed major code look-up
- Campus platform: snapshot of recent student activity
- Campus platform: logging email activity

SSC Campus Implementation

*Phased Implementation Updates* (see pages 2-8)

*Frequently Asked Questions (FAQs)*

- Draft answers (*see pages 9-10*)
- Note-taking resources (Example: Penn State University)

*Training*

- Train-the-Trainer: May 19th
  - Sandbox access and training resources coming from EAB
- Initial User Training: June 7th & 8th
- Inventory of Training Needs
  - Volunteers interested in leading initial user training: Joel, Terry, Angie
  - Case studies or exercises to be included (waiting for examples from EAB & UW-Oshkosh)
  - Print or online resources that may be needed:
    - Side-by-side comparison of primary advising functions in each platform
    - Identification of known issues
      - Minors for returning special students with completed UWM undergraduate degree

*Campus-Wide Campaigns Check-In*

- Encouraging Advising Engagement
- Engaging Stop-Out Students

*Open Forum*

*Future Agenda Items*

- Logging NSO/TASO activity in the platform
University of Wisconsin-Milwaukee’s Implementation Strategy

April 21, 2016
## Confirming Key Milestones

Set Target Dates in Order to Manage Pacing and Expectations

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Planned Date</th>
<th>Dependencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Go-Live</strong></td>
<td>June 20&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Successful training onsite and successful site walkthrough</td>
</tr>
<tr>
<td>Configurations &amp; Permissions Final in Production Site</td>
<td>Mid June</td>
<td>Production Site available</td>
</tr>
<tr>
<td><strong>Training Onsite</strong></td>
<td>June 7&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Successful site walkthrough, users activated</td>
</tr>
<tr>
<td>Training Site Walkthrough</td>
<td>Late May</td>
<td>Files loaded, site validated</td>
</tr>
<tr>
<td>Configurations &amp; Permissions Final in Training Site</td>
<td>Late May</td>
<td>Site shell available, Application Administrator in place</td>
</tr>
<tr>
<td><strong>Specialist Training</strong></td>
<td>May 19&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Specialists are selected, participate in webinar series and complete eLearning Modules</td>
</tr>
<tr>
<td>Application Administrator Training</td>
<td>May 5&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Training opportunity on the backend of the site for Application Administrators</td>
</tr>
<tr>
<td>Data Validation &amp; Signoff on Test Site Build</td>
<td>Late April/Early May</td>
<td>Data complete and users validate site</td>
</tr>
<tr>
<td><strong>Implementation Strategy Webinar</strong></td>
<td>April 21&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Completed today</td>
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# What We Heard: Advising, Tutoring and Support Services

## Current Practices
- Primarily professional advising with students assigned to advisors alphabetically.
- Scheduling: phone, front desk, drop-ins, filling out forms/sign-in sheets, online scheduling (Schedule Once, Cattrack).
- Notes and information on students stored in numerous technologies (SSC, Cattrack, PAWS, Mapworks, Outlook, paper files).
- Referrals: no way to close feedback loop with other offices or staff – triaging students to correct contacts.

## Challenges
- With different technologies and notes in different tools, cannot see notes from others in central location.
- No synonymous way for students to schedule appointments with advisors.
- No easy way to know if student went to referral.
- Not a standardized approach on campus for notetaking and storing student information.

## Opportunities
- **Scheduling**: coordinated by central system where advisors can input individual availability.
- **Kiosks**: can be utilized at advising centers to assist with check-in, increase reporting ability.
- **Notes**: can be in one central location and follow the student.
- **Referral**: outcomes can be more transparent.
- **Early Alerts**: can be utilized by faculty/staff across campus to report on student risk.
UWM’s Phase 1 Approach - June

Features and Users involved in Summer 2016 Go-Live

**Groups Moving Forward**

**User Base**
- All Current SSC Users
  - Professional Advisors
  - Faculty Advisors
- Athletics

**Platform Functionality**

**New Features & Functions**
- Advising Management
  - Expanded Student Profile Page
    - Career explorer
    - Reports/Notes
    - Unofficial transcript
  - Watch lists and saved lists of students
  - Advanced Search
  - Advising Notes/Summary Reports
  - Email communication with student
  - Advisor calendar integration

- Advising center/kiosk
- Advisor Scheduling
- Student Scheduling
- Appointment Campaigns
UWM’s **Phase 2** Approach – July/August

Features and Users involved in Summer 2016 Go-Live

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**User Base**
- All Current SSC Users
  - Professional Advisors
  - Faculty Advisors
- Athletics
- Tutoring (PASS)
- Financial Aid
- Instruction

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**Groups Moving Forward**

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**Platform Functionality**

**New Features & Functions**
- **Tutoring Management**
  - Kiosk/Check-In to track student attendance
  - Tutor Scheduling
  - Student Scheduling
  - Summary Reports
  - Reporting
- **Alerts and Case Management**
  - Issuing Alerts
  - Managing Cases
  - Alerts and Cases Reporting
- **Professional Staff**
  - Progress Reports
UWM’s **Phase 3 Approach - Fall**

Features and Users involved after Summer 2016 Go-Live

**Groups Moving Forward**

**User Base**

- All Current SSC Users
  - Professional Advisors
  - Faculty Advisors
- **Athletics**
- Tutoring (PASS, Athletics, School/College)
- Financial Aid
- Instruction
- Faculty
- Student Support Offices
- Library

**Platform Functionality**

**Features & Functions**

- **Athletics**
  - Travel Letters
  - Study Hall
  - Tutoring
Building, Configuring, Validating

What You Need to Know about Getting Your Site Up and Running

Priority Considerations

Permissions and Configurations:
- Complete permissions document.
- Complete SSC configurations- Site Language document.
- These decisions will be input into the UWM training site, so that they can be vetted by early users (specialists, leadership team)
- They will be maintained by the application administrator.

Application Administrator:
- Will manage overall site configurations and user activation and permissions
- Will have time with Consultant for configuration / permission demos and training
- Will be the main contact with EAB Tech Support
- Should be involved in all implementation conversation going forward

Test v. Training v. Production Site:
- Test site will be the initial build and validation site
- Test site will become your Training site, which is always available
- Site Language Configurations, Permission, and Availability **will not be automatically copied** from Training site to Production site
- Production site is your final, Go-Live site.
General/Accessing the tool FAQ

What is the EAB?
Established in 2007, the Education Advisory Board is a trusted advisor and performance improvement partner to 1,000+ colleges and universities across North America and Europe. They are the parent company that developed the Student Success Collaborative. See more at https://www.eab.com/about-us

What is the Student Success Collaborative (SSC) Campus Platform?
The SSC Campus platform will be implemented in June 2016, replacing the SSC Foundation platform which was piloted at UWM in 2013 and fully implemented in 2014. Its capabilities include storing student notes, running reports of targeted student lists, scheduling student appointments, creating coordinated student referrals, tracking campaigns, generating progress reports (formerly "early alerts"), and so much more!

How do I get access to the SSC Campus Platform for myself or others in my office?
Contact your school/college SWAT Team representative.

How do I log in to the SSC Campus Platform?
See https://ssc.advisory.com/gsrc/login to log into the SSC Campus Platform. The SSC uses the 1Login system, so your epantherid and password will be used.

How often is the data in the SSC Campus Platform updated?
Data in the SSC is pulled from the UWM Data Warehouse nightly. Any changes made to a student's record in PAWS will be reflected in the SSC the next day.

Use of Tool FAQ

Which students are available to view in the tool? When does a student become available to view in the tool?
All undergraduate students (first degree, second degree, post-bac, and special students) are in the SSC. Students are active for 4 years after their final active term. A new UWM student will appear in the SSC the day after they are matriculated. The SSC does not currently support graduate students.

How do I search for students in the tool?
Students can be searched by last name, first name, or UWM Campus ID#.

How do I create a student worklist?

How do I schedule an appointment using the tool?

How do I refer a student to another campus office?

How do I view a progress report for a student?

What does a student have access to in the tool? Will they be able to see everything that I can?
ANGIE
Are student notes subject to FERPA and Open Records laws?
CLARE

What is a “campaign”? How do I create one? How are outcomes tracked and measured?
TERRY

How are student milestones determined? How is a student’s overall risk determined?
Student milestones are determined by each school and college. If you are interested in reviewing or reevaluating your students' milestones, see your S/C SWAT Team representative.

A student’s risk score is a qualitative measure determined by the EAB Risk Model, which incorporates over 20 data points on a student’s record, including but not limited to: attempted/completed credits, cumulative/term GPA, high school factors (school size, GPA, ACT/SAT scores), and demographic information. Based on the EAB algorithm, a student will then be classified as low, moderate, or high risk. This information is only available to professional staff; a student does not have access to their own risk score.

Who or what determines how much access to data I have in the tool?
The SSC identifies 7 different "roles" within the tool, which depend on your job responsibilities. If you are interested in how these roles are determined, see your S/C SWAT Team representative.

Are trainings available?
Yes... TBD

Who can I contact if I have additional questions about the tool?
Your S/C SWAT Team representative should be your first contact. If they are unable to satisfy your request, contact Joel Spiess at jspiess@uwm.edu.