Technical Updates from EAB

- **Foundation platform: refreshed major code look-up.** Our major table has not been auto-updating every night in the data extract. Tom and EAB are working to have this resolved by the end of the month. The campus platform should include all plan types, whether they are major (MAJ) with academic requirements in our SIS or preparatory (PRP) plans. This will ensure all plan types (such as the pre-health in L&S) are included in the platform and can be used as filters when creating lists.

- **Campus platform: snapshot of recent student activity.** EAB reports that the platform will *not* have a quick snapshot of recent activity on the student’s landing page. Besides the emails sent to students on the Conversations tab, all other activity with the students (notes entered, summary reports entered, student check-in at different support offices, student alerts and cases) can all be found on the Reports/Notes tab of the student’s profile. Each is ordered in chronological order which makes it easy to see when the last visit to the support center was versus the last advising appointment.

- **Campus platform: logging email activity.** While advisors will be encouraged to utilize the email feature in the platform so emails with students are automatically synced/logged in the platform, we recognize that this approach may not capture 100% of emails. A workaround is to create “Advised: Email” as a reason that can be selected when an advisor chooses to “Report on Advising” or complete a “Summary Report.” This way email activity can still be included in metrics. Gesele mentioned that she will be working with the Provost to outline expectations of use that will be shared campus-wide.

- **Question for Emily:** What about email that advisors start from their smartphone? Is there an app for the platform? Joel will inquire.

SSC Campus Implementation

*Front Desk Inventory Survey* (see pages 3-4)
We reviewed the survey Brennan has drafted that will be sent to the SWAT Team and Integration Team for completion. Units that are missing and/or need to be added to the first question: Athletics, Financial Aid, PASS, College of Nursing, MEBO.

*Phased Implementation Updates* (see pages 5-11)
We reviewed the slide deck from the EAB that outlines our major milestones moving forward. Following the meeting, Clare inquired with Joel about moving up Athletics so they can launch with the fall term. Joel will follow-up with Gesele, Brennan, and Emily.
Frequently Asked Questions (FAQs) (see pages 12-13)
Thank you to James, Clare, Angie, and Terry for preparing draft answers and researching EAB resources that we can connect to. Joel will work with Gesele and Brennan to start getting these posted to the Web. Joel will also draft some information about note-taking based on resources from Penn State University and UW-Madison.

Training
- Train-the-Trainer: May 19th
  - Sandbox access and training resources from EAB were shared via email from Joel.
  - Members are asked to login and explore as their schedule permits before our meeting on 5/3. Reviewing findings, concerns, etc. will be the focus of that meeting.
- Initial User Training: June 7th & 8th: Registration via SignUpGenius.com (see page 14)
  - The focus of this training is advisors and those with advising functionality/permission in the platform.
  - We are hoping to distribute the training invitation and registration link by Friday, April 29. Recipients will include advisors with a caseload, AAPC, and ASALC. Angie will share the list of advisors with a caseload (as maintained by the Enhancing Advising Committee) with SWAT Team members to ensure we have as accurate of a list as possible.
  - SWAT Team members are encouraged to forward the invitation to those few people in their units who are not advisors but who would benefit from being trained as an advisor. If we have an abundance of open seats after two weeks of open registration, we can then advertise to the greater campus community.
  - Joel will ask Brennan to limit the 6/7 1PM session to 20 individuals, as the Financial Aid staff will plan to attend this training. Once Cindy has a final number of attendees from FA, she will communicate that to Brennan so the capacity can be adjusted if necessary.
  - Initial users who do not currently have access to the Foundation platform will need to have an account created prior to training. Joel will follow-up with Gesele and Brennan about this.
  - Gesele has asked the Provost to provide lunch for SWAT Team members leading the training on these days.
- Inventory of Training Needs
  - Volunteers interested in leading initial user training: Joel, Terry, Angie
  - Case studies or exercises to be included (recently shared via email from Joel)
  - 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: No major discussion about these campaigns.

- Encouraging Advising Engagement
- Engaging Stop-Out Students

Open Forum: No items were discussed.

Future Agenda Items
- Logging NSO/TASO activity in the platform
The purpose of this survey is to gain information about what a student experiences when checking in for an advising appointment in your academic unit. This information will be used to ensure your SSC Campus Front Desk and Kiosk accounts are set up to meet your unit's needs and to provide training to the staff members who will be utilizing it.

What is your academic unit?
- Academic Opportunity Center
- African-American Student Services
- American Indian Student Services
- College of Engineering and Applied Science
- College of Health Sciences
- College of Letters and Science
- Global Studies
- Helen Bader School of Social Welfare
- Honors College
- Lubar School of Business
- Peck School of the Arts
- Roberto Hernandez Center
- School of Architecture and Urban Planning
- School of Education
- School of Information Studies
- Southeast Asian-American Student Services
- Student Support Services

What is the name, title, and email of the individual/individuals who supervise your academic unit's advising office front desk/reception staff?

Name

Title

UWM Email

What is the general email account for your academic unit's advising office?

What is the phone number students call to schedule an advising appointment?

Who works the front desk/reception area in your academic unit's advising office?
- Student staff
- Full-time staff
- Student and/or Full-time staff
- Students come directly to their advisor's office and do not check in

How many staff members are employed by the front desk/reception area in your academic unit's advising office?
- 0 staff members
- 1-3 Staff members
- 3-6 Staff members
- 6+ Staff members
When a student arrives to your academic unit's advising office for a scheduled appointment what is the check in procedure? Please include information about:

- any documents/forms students are given at check in
- how advisors are alerted to a student's arrival
- any tracking system (Excel, Catracks, etc) that may be used by your staff to check in students

When a student arrives to your school/college advising office for a walk-in session what is check-in procedure?

Do students receive any standardized message or survey from your unit after an appointment? What system does your unit use? Who distributes it?

Any additional information or considerations the SSC Leadership Team should be aware of as it relates to your academic unit's advising office and it's check in procedure?
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(^{th})</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(^{th})</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(^{th})</td>
<td>Specialists are selected, participate in webinar series and complete eLearning Modules</td>
</tr>
<tr>
<td>Application Administrator Training</td>
<td>May 5(^{th})</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(^{st})</td>
<td>Completed today</td>
</tr>
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</table>
What We Heard: Advising, Tutoring and Support Services

Current Practices

• Primarily professional advising with students assigned to advisor 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

---

**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

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Page 7 of 13
UWM’s **Phase 2** Approach – July/August

Features and Users involved in Summer 2016 Go-Live

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

**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

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

### Groups Moving Forward

### 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.
SSC Campus Initial User Training

The UWM SSC SWAT Team will be sponsoring the initial user training for the SSC Campus on June 7th and 8th. Training will be led by members of the SWAT team with support from EAB Consultants Emily Sentz and Jade Lynn. All sessions will be held in NWQD 1990. Please sign up for one three hour session.

If you are unable to attend a training please contact your School/College SWAT representative to set up a one on one training.

Additional open lab trainings will be held throughout the summer offering help with specific functionalities within the system. Dates and topics are to be determined and will be communicated at the initial user trainings in June.

More information about the SSC Campus Implementation can be found on our website:

http://uwm.edu/academicaffairs/academic_priorities/student-success/student-success-collaborative/

Location: NWQD 1990

Created by: Brennan O’Lena

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<th>Available Slot</th>
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<td>9:00am - 12:00pm</td>
<td>SSC Campus User Training (35)</td>
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<tr>
<td></td>
<td></td>
<td>SS Campus User Training (35)</td>
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<tr>
<td></td>
<td>1:00pm - 4:00pm</td>
<td>SSC Campus User Training (35)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Users who have no experience with UWM’s current version of the SSC product are encouraged to attend this session.</td>
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<tr>
<td>06/08/2016 (Wed.)</td>
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