Approaching “85 hours”/other trigger

Penultimate Semester

Final Semester

Hobson Admin

START

Query to identify students that are 85+ hours, 75% progress toward graduation AND have not submitted their intent to graduate

Submit “Intent to Graduate” form (online) incl. 2 degrees/2 majors if honors/distinctions
Go to URL

Confirm personal info and regalia

Identify students who filed for next semester graduation; develop preliminary checkout

Penultimate Semester:
Contact faculty advisor for names of departmental or college honors and honors program for university honors students

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment

Address Exceptions with Student and/or Advisor

Note: any impact on plan to be updated in DW; also inform Commencement

Grad Analyst

To Page 3

Student

Penultimate Semester:
Contact faculty advisor for names of departmental or college honors and honors program for university honors students

Query to identify students that are 85+ hours, 75% progress toward graduation AND have not submitted their intent to graduate

Identifies students* approaching/eligible to file “Intent to Graduate” stage – should graduate end of the current semester; Continually reflect Degree Plan v Actual including the analysis of courses planned (and how they are scheduled) relative to the time remaining to graduate. KEY PRACTICE Monitor DW metrics early (e.g. plans not updated for x mos)

Send message based on DW report of eligible students

Send message to students who have not filed and/or confirmed regalia (can also ask regarding 5th year plans)

Continually reflect updated enrollment status, grades earned, changes to degree plan

Hobsons CRM

Degree Works Banner

Each college should/can have college-specific criteria signaling intent to graduate (e.g. consistent min rqmt of 90 hours, then additional reqmts per college)

Run batch report at end penultimate semester with final grades (to determine commencement eligibility)

Run batch audit comparing plan to actual; ASAP after deadline for w/d from any class

4/6/2011
Final Semester leading up to Commencement

Student

Graduation Analyst

Run reports to identify: commencement eligibility

Enter graduation with distinction, honors & outcome status codes in Banner

Run report Initial Commencement List

Email ineligible students

Receive names for all confirmed students (have filed intent to graduate and have not fallen off track) including honors graduates

Create program with list of names

Send message and survey to student

Update information on the program

Commencement

Send reminder message to students based on outcome status "PN" regarding final semester transfer credits

Continually reflect updated enrollment status, grades earned, changes to degree plan

Hobsons CRM

Continually reflect Degree Plan v Actual including the analysis of courses planned (and how they are scheduled) relative to the time remaining to graduate

Degree Works Banner

Confirm name and complete survey; confirm attendance

To Page 4
Graduation Certification/Graduation Checkout - "TO BE" Process

Final Semester

Student
- From Page 4: Complete classes
- Walk and receive folder

Faculty
- Enter grades (Due 3 days after end of semester)
- Submit Revised & Incomplete grades ASAP

Grad Analyst
- Review report from DW and update Banner (AD to GR); update all awards, distinctions
- Receive final semester transfer credits; update degree records for changes (until X date)
- Notify disqualified (DQ) students – email, letter, etc.
- Update Banner Codes

Commencement
- Liaise with Vendor to print Program
- Coordinate Commencement

Registrar
- Register for make up class
- Cycle repeats for student to graduate later-e.g. next semester

Run certification list by college (from Banner) PDF format
- Email when done

Request Final graduation report

Degree Works Banner Hobsons CRM
- Reflect latest degree plan and actual (ongoing)
- Reflect latest grades, GPA and degree status (ongoing)

From Page 4

To Page 5

4/6/2011
Graduation Certification/Graduation Checkout - "TO BE" Process

Certification

After (early next semester-----→)

Graduation Analyst
- Verify report for:
  - honors
  - incomplete grades
  - double degrees...
- Update Banner & Certification List

If change is received after X date, route to Registrar to update Banner + graduation list

Dean
- Email PDF Banner report
- Certify (sign) Graduation List- 3 copies

Vice Provost

Registrar
- From Page 4
- Receive approved list and update Banner after X Date

Approve Additions/Deletions requests

Commencement Coordinator
- Check, then order diplomas
- Receive diplomas; check to their list

Print Labels

Update clearinghouse

Degree Works Banner

Reflect latest degree plan and actual

Maintain late Updates and Report edits

UPDATE (3)
- Periodically

Verify report for:
- honors
- incomplete grades
- double degrees...
- changes only

Print Labels

Maintain late Updates and Report edits

File copy in college

Changes only

Receive Certified Diploma

END

Student

Receive Certified Diploma

END

END

END

END

END
Process Name: Graduation Checkout TO BE
Process Step: Outline of new process
Frequency: Process starts when freshmen/transferring students complete their first degree plan at U of M

NOTE: This page served as a tool to support the team’s efforts in designing the TO BE Process – it is therefore not a summary of the final design.

Underclass

- “90 hours”
  - Send coursework completed at previous institution (during application/registration)
- Final Semester
  - Meet with Advisor; submit any coursework completed outside of UM ASAP
  - Initial updated plan in DW based on updated information
- Commencement
  - Monitor progress toward declared major
  - Document substitutions in DW to trigger an updated plan
- Graduation
  - Automated reminder to student; flag for advisor to follow up with student
  - Student should take pre-orientation assessment to facilitate major direction
- After
  - Coach student to enter some major versus undecided

On-Track:
- following the plan set for them; degree audit is accurate
- Unique: Double majors, students who change majors,
- Exceptions: not following plan, late final grades,

Degree Works

- Banner
  - Generate Degree Plan (initial plan) based on declared major
  - Plan is updated and distributed based on actual courses taken
  - System prompts the student when eligible (e.g., 90 hours)
  - DW gives estimated graduation date based on the plan at all times; system also provides commencement with an estimated number of graduates

Hobson generates communication to students with
- Grades are captured in Banner

Electronic Proof of course, grade

Confirm personal info and regalia

Put on commencement hold – waiting on: Confirmation of enrollment

Put on Certification hold – waiting on: Certification of final grades for external courses

Text

4/6/2011
Process Step: Tracking the degree progress of each student to enable them to checkout/graduate as planned

**Frequency:** Process starts when freshmen/transferring students complete their first degree plan at U of M.

**Underclass stage – from first semester enrollment to end of sophomore year (approx.)**

- **Student:**
  - Admitted, enroll, provide transfer credits (if any)
  - Receive message
  - Create initial Degree Plan; update plan
  - Continue to earn grades, always update plan

- **Academic Advisor:**
  - Get advice
  - Coach students to declare a major
  - Get advice

- **Graduation Analyst:**
  - Email, SMS, Facebook, UM Portal, etc.

- **Hobsons CRM:**
  - Across the UM, auto create message to all students without Initial Degree Plan

- **Degree Works Banner:**
  - Auto create Initial Degree Plan from template (if major declared)
  - Near end of 1st semester

- **Hobsons CRM:**
  - Send periodic messages to check Degree Plan vs. Actual, provide any new transfer credits, consult with Advisor re degree changes etc.

- **Degree Works Banner:**
  - Continually reflect updated enrollment status, grades earned, changes to degree plan

- **Hobsons CRM:**
  - Continually reflect Degree Plan v Actual: analysis of courses planned (and their schedule) relative to the time remaining to graduate; enter 2nd degree, double major...

**Note:**
- this could be one person playing both roles or could be two roles

**CC:**
- Advisor

**At each session, always ask if plan needs updating**

**Update Plan**

**Update Grades**

**To Pg 2**
Notes on TO BE Process:

IDEAS from AS IS
1. How to continually update the student’s degree plan to reduce risk of delayed graduation
2. Implement procedural requirement for student and academic advisor to regularly validate degree/course data (e.g. at each advising session).
3. How can Admissions staff improve quality of data regarding choice of Catalog?
4. Are current filing dates for Intent To Graduate optimal? (e.g. are they too early, could they be changed?) YES- see flow in new process, start earlier by monitoring if Degree Plans exist and if they are being updated periodically
5. What behavior changes could improve students’ ability to meet deadlines? (e.g. once we have dealt with those who did file on time and in full, we will then turn to those that are late, incomplete and that may mean…….).

Types of Students:
On-Track: following the plan set for them; degree audit is accurate – they should not require much attention until final semester thru degree certification
Unique: Double majors, students who change majors, - watch that their degree plans are accurate so they stay on track
Exceptions: not following plan, late final grades, - use exception reports to minimize levels, plus policy enforcement to deal with cases

ASSUMPTIONS:
1. Final course review focuses only on the final, previously unaudited coursework.
2. Course substitutions and notes must be taken (e.g., any English 2000 level class) are entered into system (and automated if possible)
3. What if DW says “it’s ok, but the Grad Advisor overrules” - DW rules needs to be updated to prevent these false positives
4. Through academic policy or systematic review of attributes, we will be able to ascertain coursework as part of DW
5. UM will assume the student does NOT have proof of an external class until they prove they have it.

WHAT IS DIFFERENT:
1. There is no need to maintain multiple paper filing systems in offices to track student’s degree progress; the source of data will be Degree Works, supported by Banner.
2. Students, Graduation Analysts and Academic Advisors will have access to the same data source-Degree Works.
3. Commencement Office will rely on the system data and work done by Graduation Analysts to coordinate commencement and diploma printing and distribution.

Questions:
1. Do others need access to DW (e.g., AA)?
2. Can DW reflect unique situations like double major, 2 degrees
3. Can Banner use different codes in SGASTDN? See below
4. Does U of M need to discuss policy re final semester transfer credits and whether to treat as Late Certs
5. Policy-why is the 45 day period for I-grades? Note only a handful of Is are graduating

Other:
1. Do roles between grad analyst and advisor cross over?
2. There s/b a feedback loop to Admissions if there is a policy update required regarding course that should act as a substitutes.
3. How do we define on track...is it a function of the worksheet and the plan?
4. Polly idea – create SUGHT record automatically (need to read external files); CHANGE status from pending to awarded automatically-this automation could save even more time if it can be implemented.
Notes on TO BE Process:

TYPICAL UNIQUES
1. 2 majors (Banner does not show if student is doing a whole 2\textsuperscript{nd} major in SGASTDN- same codes vs. separate codes))
   - 2 degrees
   - concentration
2. transfer classes – from another school, 5\textsuperscript{th} year student with one degree back for a 2\textsuperscript{nd} degree
3. outside licensing requirements (e.g. teaching certification)-with test scores
4. Substitute classes in a major-in regular

NEXT STEPS
Complete draft of TO BE; Len to Cathy by Sun nite; circulate to project team- 1 week review
Hold a Conf call/gotomeeting for revisions/edits Feb 7; finalize To Be/sign off.
Identify Policy Issues; List ideas for Banner changes; List ideas for DW implementation
Report back to PMG; communications plan for U of M incl. To Be Enablers and Next Steps
High level project plan-tie to DW impl plan
   - incl. KT and her tech colleague looking at Grad checkout process fit with DW
Plan DW training (KT) Feb 7->
Review DW Degree Requirements and sign off
Trend of Number of Certified Students (Graduated) by College or School

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<th>May-08</th>
<th>Aug-08</th>
<th>Dec-08</th>
<th>May-09</th>
<th>Aug-09</th>
<th>Dec-09</th>
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Average Number of Graduated Students by College/School

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<th>Summer</th>
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<td>1850</td>
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Graduation Certification/Graduation Checkout - "TO BE" Process

START process

Intend To Graduate

BANNER INB

BANNER SSB

BANNER FINANCIAL

Matrix

Manual step

DEGREE WORKS

College of Ed Database

Hobsons CRM

Text-pain point, other info

Text

No

Text

Go to Page x

Pain #1

Decide

Yes

No
Across the UM, auto create message to all students without Initial Degree Plan

Send periodic messages to check Degree Plan vs. Actual, provide any new transfer credits, consult with Advisor re degree changes etc.

Send message based on DW report of eligible students* (written by Advisor? - TBD)

Send message to students who have not filed and/or confirmed regalia (can also ask re 5th rye plans)

Send reminder message to students who have final semester transfer credits

Send reminder message to students who have final semester transfer credits

Data from DW with null value

Data from DW

Data from Commencement database

Data from Banner students who file to graduate for that semester

Page 3

Do we need this step? Duplicate Page 4