<div align="center">**Advising Technology Subcommittee – January 30th - Minutes**

9:00-10:30

Osborne 107-C</div>

1. **Approval of December minutes**
   a. **Approved by Emily Longshore & Michael Davis**

2. Reviewed December minutes and discussed reasons for meeting.
   a. Stephanie Richards made a note about the Inactive piece within Navigate. Inactive students are still present if you toggle between terms. There may not be a need for the include inactive button.
   b. Brian Dusel made a note about the home screen within Navigate that will allow them to see all their assigned advisee for all terms. If a student is ever moved from their caseload, they can change the term.
   c. EAB home screen comes directly from Banner, so when student leaves, advisors should select the "All Advisees EAB List" The only time advisor is removed is when graduated.
   d. Valeria mentioned that the only issue she has seen are students who are dropped for non-payment, not showing as active for the period in which communications are sent.
   e. **To avoid issues, it is recommended that all advisor assignments be completed one week after drop/add**
3. There is no automatic process for students having their advisement assignment reviewed once a student leaves the University.
   a. Stephanie made a note about the toggles within Navigate.
4. Dr. Epps asked the question about students returning from a semester off and identifying their primary advisor. Advisors have changed departments and switched caseloads. Is there a way to be notified?
   a. Stephanie advised that advisor assignments are done differently. After drop/add there should be more stability within these changes.
   b. Valeria advised that this is most likely a departmental issue.
   c. It was suggested that it could be a recommendation of the committee that there be a **coordinated effort to create advisor assignment workflows within the College of Arts & Sciences.**
   d. Michael Davis mentioned that CAS departments have been told about the process for assignments and there are some that are not following directions.
5. Stephanie mentioned that the recommendations from the committee could be parameters for when advisor assignments are due (i.e. after drop/add date, perhaps a week after drop/add).
6. Can OSP be copied on curriculum changes with the 3OSP attribute or the 3HON attribute. – Registrar question.
7. Strategic Plan for advising and advisor assignments should be considered and vetted by the entire committee.

New Business or concerns

1. Banner - Submit the ongoing issue of advisors being logged out in the system in a short time out period.

Student Educational Planner:

1. We had an abbreviated (by 15 minutes) meeting due to many members of the committee attending another meeting. We discussed brainstorming ideas for the *purpose* for Student Educational Planner.
2. Heidi mentioned that her homegrown system in Nursing is more efficient in terms of speed of moving courses.
3. Valeria's team (HRSM) loves the planner and utilizes the planner. It is an advising tool and has completely replaced the advisement form. Planner is used semester by semester.
4. Stephanie mentioned that many of the first year and second year students are loving the planner but Juniors and older may be a little more reluctant to use the system.
5. Stephanie advised that the planner has cut down on prep time for advisors. There is more time to talk with the student.

BENEFITS of the SEP:

- Using the term note as the advising notes
- Prep time is down for advisors who advise ahead of time
- Beneficial for transfer students and first years with a lot of credit
- A map for students to plan their courses
- Secondary and tertiary advisors on campus are able to see primary advisors advisement to do their advisement.

ISSUES with the SEP:

- Multiple processes for advising and duplicate work
- Planning for courses and predictions is not available

Updates from Brian

- **February 11** – Demo of the App from 9-10am with EAB
- **February 11 - 10-11:30** – Content Build Workshop
- There will be a multi-factor update for syncing calendars
- Only 200 students are without an advisor assignment – a huge improvement from past semesters.

Assigned committee homework: to continue to consider the *purpose and ways to use* the SEP that can be applied campus wide.

Attendees:
Valeria Bates
Heidi Waltz
Emily Longshore
Michael Davis
Pinkney Epps
Stephanie Richards
Lauren Sanborn
Rachel Denmark
Brian Dusel

Upcoming meetings:

- February 21st, 9:00-10:30 – **CLOSE-HIPP, ROOM 583**
- March 20th, 9:00-10:30 – Osborne 107C
- April 17th, 9:00-10:30 – Osborne 107C
- May 15th, 9:00-10:30 – Osborne 107C