Bridging the Gap
Student Information Systems
“The future is now – join us on the journey.”
Agenda

• Situation
• Strategy
• Implementation
• Risk Management
• Transformation
• Discussion
Benchmarking the student experience

**Overall Services Benchmark**
- **Learning**: 65
- **Usability**: 49
- **Rating**: OKAY

- “It’d be great to have only one place to go for everything.”

**Admissions & Onboarding**
- **Learning**: 63
- **Usability**: 51
- **Rating**: OKAY

- “Although the multiple systems can be a challenge to learn...they are of great use for immediate information.”

**Registration & Enrollment**
- **Learning**: 57
- **Usability**: 44
- **Rating**: OKAY

- “I think integrating the class schedule and course registration is feasible...”

**Financial Aid & Scholarships**
- **Learning**: 59
- **Usability**: 51
- **Rating**: OKAY

- “[It] can be very nerve-wracking when you are a freshman in need of financial aid to start school and you have no idea where to look.”

**Billing & Payments**
- **Learning**: 54
- **Usability**: 45
- **Rating**: OKAY

- “I think there’s just way too many websites...for instance CARS being separate from Finaid being different from Bearfacts.”

**Advising & Planning**
- **Learning**: 54
- **Usability**: 46
- **Rating**: OKAY

- “There are far too many separate websites...one for finding classes, one for putting together a mockup, one for registering...”

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**Grading Scale**
- **Terrible**: 0-10
- **Poor**: 11-20
- **Okay**: 21-40
- **Good**: 41-60
- **Excellent**: 61-100
Go-Live Dates

Go-Live 1 - June 2, 2015
Go-Live 2 - Aug 18, 2015
Go-Live 3 - Dec 15, 2015
Go-Live 4 - Feb 2, 2016
Go-Live 5 - Mar 22, 2016
Go-Live 6 - Aug 2, 2016 *
Go-Live 7 - Aug 29, 2016 *
(* Projected Dates)

SIS Project
High-Level Timeline

Go-Live 1 (June 2015)
- SLATE:
  - Outreach

Go-Live 2 (Aug 2015)
- ACADEMIC: ADMISSIONS:
  - Reading & Scoring
  - SIR Graduates
  - SIR Law
  - CAMPUS COMMUNITY:
  - Creating & Maintaining Persona Data
  - SIS for CS
  - Application
  - Pre-Audit Norms
  - STUDENT RECORDS:
  - Catalog & Schedule
  - Defining and maintaining Course Requirements

Go-Live 3 (Dec 2015)
- ADMISSIONS:
  - Admissions (Final to CS)
  - Early Admissions (Slate & CS)
  - CAMPUS COMMUNITY:
  - Enrolling & Maintaining Information
  - Creating & Maintaining Organization Data
  - SIS for FA
  - Student Financials:
  - Budgets
  - Cal Grant
  - Verification
  - Packaging
  - SIS for FA
  - Imaging

Go-Live 4 (Feb 2016)
- ADMISSIONS:
  - Admissions (Final to CS)
  - Early Admissions (Slate & CS)
  - CAMPUS COMMUNITY:
  - Enrolling & Maintaining Participation Data
  - Delegated Access
  - STUDENT RECORDS:
  - Room Scheduling (Series 2)

Go-Live 5 (March 2016)
- ADMISSIONS:
  - Dashboards
  - Academic Planner
  - College Scheduler
  - Applications:
  - Finalization (Grad)
  - Imaging
  - LIBRARY UNDERGRAD
  - YIELD
  - Division Release (Selection)
  - STUDENT FINANCIALS:
  - Student Records
  - Imaging

Go-Live 6 (Aug 2016)
- Academic Advising:
  - Advising
  - Student Records:
    - Student Person Party
  - Financial Aid:
    - Loans
    - Tuition Calculation
    - Billing
    - Cashier

Go-Live 7 (Aug 2016)
- Academic Advising:
  - Advising
  - Data Warehouse:
    - Student Financials
  - Enroll
  - Student Residency
  - SIS for SF
  - Financial Aid:
    - Enroll Students
    - Maintaining Student Residency
    - Student Financials

* Functionality released in phases
Processes included in SIS

Admissions
1- Outreach
2- Applications
2- Prelim Norming
3- Reading and scoring
3- SIR Graduate
5- Selection
5- Yield
5- SIR Undergrad
5- Clearing
7- Transfer Admissions

Student Financials
3- SIR Deposit
5- Maintain Receivables
5- 3rd Party Billing
5- Tuition Calculation
5- Billing
5- Cashiering
5- General Ledger
5- Payment Plans
6- Refunding
6- Taxes
7- Collections

Financial Aid
4- Aid Year Setup
4- ISIR Load
4- CAL ISIR
4- Methodologies
4- FA Term
4- Budgets
4- CAL Grant
4- Special Aid Programs
4- Verifications
4- Packaging
4- Imaging
4- Scholarships
5- Loans
5- Satisfactory Academic Progress
6- Disbursements
6- Return to Title IV Aid

Students and Academics
2- Catalog & Schedule 2016
2- Defining and Maintaining Course Requisites
3- Room Scheduling (Series 25)
5- Enroll Students
5- Maintaining Student Residency
5- Transfer Credit Articulation
5- Preparing for a New Term
5- Managing FERPA
5- Student Indicators/Groups
7- End of Term Processing
7- Graduating Students
7- Enrollment Reporting
7- Processing Transcripts
7- Verifying Enrollment

Academic Advising
5- Dashboard
5- Student Planner
5- Workflow
6- Appointments
6- Shared Notes
7- Academic Progress Report (Degree Audit)
Timeline and methodology: Phased go-lives

1. June 2015
   - Academic advising

2. Aug 2015
   - Student records
   - Financial aid

3. Dec 2015
   - Student financials
   - Student self-service

4. Feb 2016
   - Academics
   - Admissions
   - Courses and classes
   - UG admissions outreach
   - UG applications
   - UG reading & scoring, grad SIR
   - UG selection, yield, SIR
   - Finalization (clearing), reporting
   - Room assignments

5. Mar 2016
   - SIR deposit
   - Undergraduate financial aid
   - Grad student awards and hiring; loans
   - Enrollment, budget and payment, delegated access
   - Advising appointments
   - Reporting
   - Enrollment, workflow, planner, flags

6. Aug 2016
   - Billing and payment
   - Refunding, taxes
   - Collections
   - Advising appointments
   - Return to Title IV
   - Disbursements; SAP

7. Sep 2016
   - Academic Progress Report (Degree Audit)
   - Enrollment reporting, transcripts
   - Grades, transcripts
   - Transfer eligibility
   - Advising appointments
   - Advising appointments, notes
   - Undergrad onboarding
Executive Steering Committee

Harry LeGrande
(Co-Chair)
Vice Chancellor, Student Affairs

Cathy Koshland
(Co-Chair)
Vice Chancellor, Undergraduate Education

Larry Conrad
Associate Vice Chancellor, Information Technology and Chief Information Officer

Rosemarie Rae
Associate Vice Chancellor, Administration and Finance and Chief Financial Officer

John Wilton
Vice Chancellor, Administration and Finance
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Bridging the Gap

Fiona Doyle (Co-Chair)
Dean, Graduate Division

Bob Jacobsen (Co-Chair)
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Rachelle Feldman
Assistant Vice Chancellor/Director, Financial Aid

Anne De Luca
Associate Vice Chancellor, Admissions and Enrollment

Jenn Stringer
Associate CIO, Educational Technology Services

Andrea Dooley
Assistant Vice Chancellor & Chief of Staff, Student Affairs

Joyce Sturm
Director of Financial Operations

Project and Risk Management PMO, Implementation Partner, External Quality Assurance
Risk Tracking and Risk Management
Engagement with campus community
Advising Team Outreach
to gather degree requirements
Student experience: Design studio workshops

Academic Planning and Enrollment

Funding and Paying for my Education
Transforming the student experience

“It would be great to go to one place for everything...”
Change Management & Project Management

Current state

Transition time

Future state: New SIS

Solution is defined, developed, and delivered effectively (Technical side)

Solution is embraced, adopted, and used effectively (People side)

= Success
Example: Simplified Graduate SIR & Onboarding
Benefits and opportunities for departments

• Curriculum management
  – More accurate information on class demand
  – Ability to finalize schedule later

• Enrollment management
  – Class sequencing
  – Prerequisites
  – Wait Lists

• Student information visibility
  – Appointment and funding visibility for graduate students

• Advising
  – Campus-wide advising records, including status and notes
  – Degree planning
  – Degree audit
Key department-level policies to be defined

Processes:
• Waitlist management
• Prerequisite enforcement
• Exceptions to degree plan

Questions:
• How strictly are these enforced?
• Who makes the decisions for exceptions?
First budget call, then schedule classes
Discussion

Planning for departmental readiness
Discussion

Identifying additional needs of departments
What metrics are meaningful to you?
Other slides