Implementing Advising Technology

Summary:

Johns Hopkins University utilizes numerous technologies to support various processes and services related to advising. Current software tools used to support academic advising include “Student Information System (SIS, self-managed by the institution), Degree Audit (by Conclusive Systems), Early Alert (Starfish by Hodson’s), Course Scheduling for Students (semester.ly), Blackboard, and an Electronic Document Management System for student advising files for Arts & Sciences and Engineering Advising Office Staff (OnBase by Hyland)” (*Advising Technology, p.1*). In addition, a variety of online appointment scheduling systems (Calendly, ADVITE, Starfish, etc.), survey platforms, Google and Microsoft Forms, and departmentally created Excel sheets are used to work with students.

While several tools are used to support the work of advisors, there is no comprehensive technology plan that is coordinated among the Krieger School of Arts and Science (KSAS) and Whiting School of Engineering (WSE). This lack of technology plan “contributes to the inconsistent use of technology by all advisors, incomplete implementation of existing tools, limited integration between tools, and inadequate training of advisors” (*Advising Technology, p.2).*

As a result, the EAA Technology Implementation committee was tasked to conduct an advising technology needs assessment and acquire the resources to meet those needs by addressing the five items below.

1. Define advising technology.
2. Create an advising technology delivery plan and ensure the tools support the mission and learning outcomes of academic advising.
3. Establish training programs/resources for advising technology.
4. Establish an assessment plan of the training options and effectiveness of advising technology.
5. Imagine a budget and staffing plan to support advising technology.

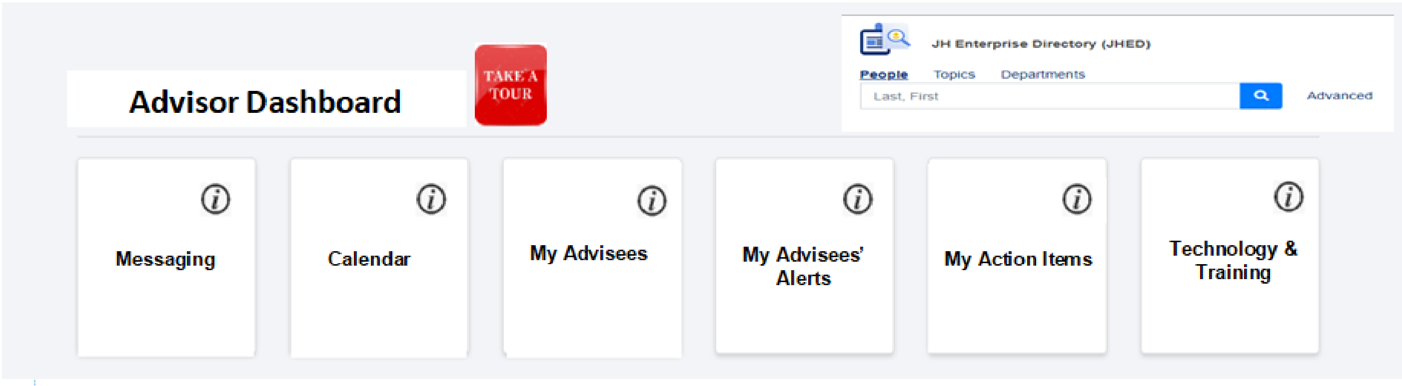
1. <u>Defining advising technology:</u>

Advising technology is an interface(s) used by an advisor to make some type of transaction on the students’ records and allows students to interact with their advisors. Advising technology should be effectively shared among various offices across the university, integrated seamlessly with the different software tools that are currently being used, and easy to navigate by all users. Thus, the committee recommends creating an advising dashboard that is fully integrated with the current software tools to meet the needs of both our students and advisors.

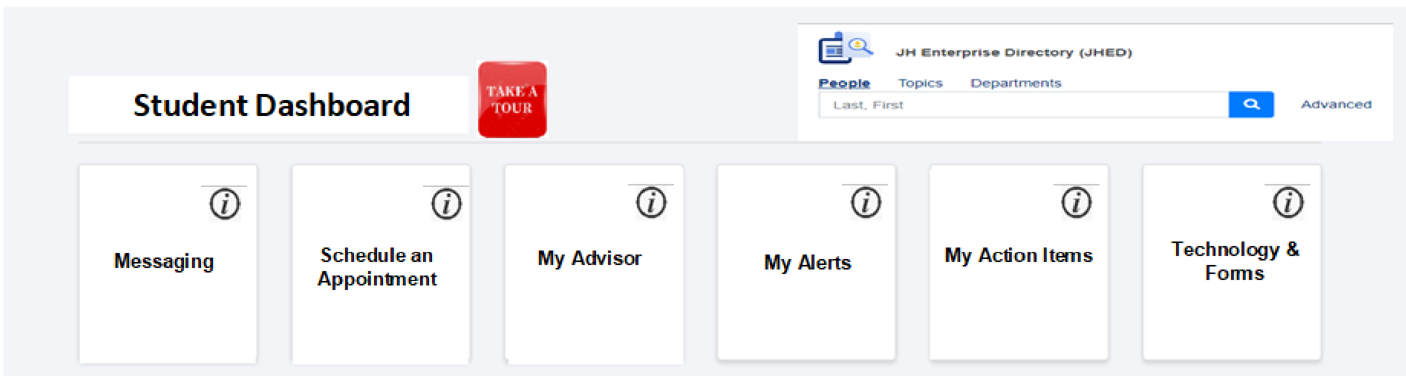
2. <u>Advising technology delivery plan:</u>

The advising dashboard serves two different populations- advisors and students. Hence, two separate but similar dashboards need to be created.

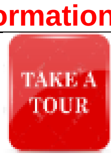
Advisor Dashboard: Current and new advisors should be automatically enrolled in this new integrated and centralized dashboard (see below for an example). However, advisors will not have the ability to access students’ information until the appropriate training has been completed. See #3 for more information on training.



Student Dashboard: Hopkins students will be automatically enrolled in a dynamic and centralized advising dashboard (see below for an example). This platform should be easy and seamless for the students to navigate.



The chart below outlines the detailed information of each tab on the advising dashboards.

Advisor Dashboard	**Student Dashboard**
The various advisors who would have access to this dashboard are DUS, Academic Program Coordinator/Administrator/Manager, Faculty Advisor, Professional Advisor, Case Managers, etc. **Depending on the role, the ability to see some of these categories/information will vary.**	
 Advisors can click on the icon to take a self-guided tour of the dashboard.	 Students can click on the icon to take a self-guided tour of the dashboard.
 Advisors can click on the icon to view a short video about how to navigate the tab.	 Students can click on the icon to view a short video about how to navigate the tab.
Messaging Tab Advisors can chat with advisees. There should a notification setting (like app notifications on phones) to receive email notifications	**Messaging Tab** Students can chat with advisors. There should a notification setting (just like app notifications on phones) to receive email notifications

if someone left a message on this tab. Settings could range from immediate or daily notification. Ability to obtain a weekly summary.	if someone left a message on this tab. Settings could range from immediate or daily notification.
Calendar Tab Advisors can set their calendars so that students can schedule an appointment. The calendar needs to be integrated with Outlook/Google/etc. (a calendar that advisors use as the primary source). Advisors should have the authority to accept appointments to make sure that it is appropriate. The advisor should have the ability to schedule an appointment on an ad hoc basis in case students request one via chat or email- setting might be different between faculty advisor vs professional advisor The calendar should have the following settings: a. various interval settings, allowing for 5-minute increments b. various student cohorts' appointments, such as academic probation, advisee list, first-year, Success Coach program, etc. c. various appointment formats, such as virtual, in-person, phone, etc. d. ability to create week/month/semester schedule with drop-in hours/office hours e. have a built-in buffer time f. generate multiple automated reminders, but allow advisors to set the setting so that it could be between one hours to 24 hours before the appointment g. only show when the advisor is available to meet with the student	**Make an Appointment Tab** Students can schedule an appointment with their advisors here. The calendar should be integrated with Outlook/Google/etc. (a calendar that students use as the primary source). Students should be able to see all the available appointments and request an appointment with people within their network (i.e., DUS, Academic Program Coordinators/Administrators/Managers, faculty advisor(s), professional advisor(s), case manager, etc.) Students will receive a confirmation of their appointments, depending on how the advisor set it up (ranging from one to 24 hour before the appointment). Students should have contact information for people outside of their network and be able to request an appointment. For example: - DUS of other departments for major/minor exploration - Counseling Center - University Experiential Learning - Study Consulting Program - Study Abroad Office - Disability Support Services - Office of International Services
My Advisees Tab This is where advisors can view all of their assigned advisees. Advisors should be able to: a. Search b. Sort and run reports by names, YOS, academic standing status (academic probation, LOA, etc.), major, minor, graduation list, various alerts c. Change the role between DUS and faculty advisor Advisors should see their students' following information: a. Picture of the advisee	**My Advisor Tab** This is where students can view all of their advisors in their network. Students should be able to view advisors' following information: a. Picture of the advisors b. Directory information - Name - Title - Academic relationship to the student - Contact information: Email/Phone number/Zoom link/Office hours c. A link to request an appointment with advisors Students who wish to disclose SDS accommodation to their advisor should be able to do so here.

b. Directory information (i.e., email, phone number, address (limited access depending on advisor role) c. Advisee’s network (DUS of the program, Academic Program Coordinators/Administrator/Manager of the program, faculty advisor, professional advisor, case manager) d. Ability to view all SIS holds, such as Advisor Alert, Registrar’s Hold, etc. e. Ability to view student’s SDS accommodations (if advisee opt-in to share) f. Ability to access SIS to view grades/enrollment/schedule g. Ability to access Degree Audit h. Ability to access Early Alert system i. Ability to access OnBase file h. Ability to access student’s profile/e-portfolio to view extracurricular activities, resume, and other items advisees want to share with advisors (perhaps connect with Handshake or AEFIS) i. Ability to send dynamic but mandatory questionnaire (or request to complete/update e-portfolio) to students depending on their YOS, pre-professional, graduate school-bound, etc.)	
My Advisee’s Alerts Tab This is where advisors can view all of their students’ alerts. Advisors should be able to: a. Search b. Sort and run reports c. Change the role between DUS (should be able to see all students in the department) and faculty advisor Alerts advisors should see: a. Early alerts- academic related, such as in danger of failing and class attendance. A certain advisor should have the ability to close the “loop” so that notifications are sent to alert raiser b. Early alerts - Non-academic related, such as behavioral/mental/physical and financial concerns c. Advisor Alerts d. Degree audit notification (if/when it is set up) e. List of students who failed to register f. At-Risk alerts generated by Discourse Analytics or other software g. Depending on the role of the advisor, the ability to place ad hoc alerts on student	**My Alerts Tab** This is where advisees can view their alerts. Alerts should have detailed descriptions and how they can be resolved. Alerts students should see: - Advisor Alerts - Registrar’s Hold - Financial/Student Account Hold - Pre-grad alert - Apply for graduation alert - Time conflict between classes

<table>
<tr><th>My Action Items Tab</th><th>My Action Items Tab</th></tr>
<tr><td>This is where advisors need to take some type of action. This could be linked (and appear on) with My Advisee’s Tab as well.

Depending on the role, the actionable items are:
a. Major & Minor addition approvals (DUS, Academic Program Coordinator/ Administrator/Manager)
b. Exception requests
• Credit Overload Requests
• Late Add Request
• Late Drop Request
• Late Withdrawal Request
c. LOA requests (case managers and professional advisors)
d. Satisfactory Academic Progress Appeal
e. ROTC
f. OIS forms (CPT, OPT, etc.)
g. Transfer and Study Abroad course evaluation forms
h. Any other processes that require the advisor’s approval in the workflow</td><td>This is where advisees need to take some type of action.

All the required training and the associated due dates as incoming first-year students:
• Lab Safety Training
• Sexual Assault Prevention
• Academic Integrity Training
• Opioids Epidemic Education & Awareness
• Bystander Intervention Training
• Identity & Inclusion Workshop
• Math and language placement exams

Other items that students must act on, such as:
- Mandatory advisor meeting(s)
- Junior Clearance
- Applying for graduation</td></tr>
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Technology & Training Tab

This is where links to various advising technology and training could be accessed.

Technology	Training
SIS (prod and/or self-service), depending on the role of the advisor	✓ Must receive certificate
Degree Audit	✓ Must receive certificate
Starfish	✓ Must receive certificate
OnBase, depending on the role of the advisor, there will be Unity Client and/or links in SIS	✓ Must receive certificate
Blackboard	✓ Must receive certificate
OneDrive	✓
Teams	✓
Handshake/AEFIS	✓
	FERPA Must receive certificate
	Suicide Prevention Workshop Must receive certificate
	Identity & Inclusion Workshop Must receive certificate
	How to mentor and advisor students training

Technology & Forms Tab

This is where links to various advising technology and commonly used forms could be accessed. The forms should be grouped into several categories, such as Registrar, OIS, Financial, Academic Exceptions, etc.

There should be a workflow for all the forms. If the form needs advisors' approval, it should appear on the advisor's **My Action Item Tab.** The advisor should be able to send the completed form to the appropriate offices, such as the Registrar, OIS, Study Abroad, etc.

Technology	Forms
Self-Service SIS with training	All the Registrar's Forms (i.e., Add/Drop, Interdivisional Registration, Adding/switching/dropping of Majors/Minors, Graduation Application, etc.)
Degree Audit with training	Satisfactory Academic Progress Appeal Form
Blackboard with training	FERPA form
OneDrive with training	OIS forms (i.e., OPT, CPT, etc.)
Teams with training	ROTC form
Math and Language Placement Exams	Study Abroad Pre/Post Approval Form
Handshake with training	Transfer Course Pre/Post Approvals
	Exception Request Forms
	LOA Request Forms

Common Resources Tab

This is where advisors can view various campus resources. They should be grouped in some category and reviewed annually for accuracy.

- University catalogue (https://e-catalogue.jhu.edu/)
- SEAM (https://support.sis.jhu.edu/case/)
- Campus Partners (https://studentaffairs.jhu.edu/resources/categories/first-year/ i.e., Counseling Center, Student Outreach & Support, Student Disability Services, Official of International Services, etc.)

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3. Establishing training programs/resources for advising technology:

Currently, there is no uniform training for advisors regarding the effective use of technology tools available to them. “Required training that does exist is limited to an online FERPA training module required before being given access to the SIS” (*Advising Technology, p.2*). Thus, the committee recommends creating an “Advisor Development Program,” which offers four different tracks of training depending on the advisor’s role. Advisors must complete the training within their designated track to be gain access to their students’ information. These training could be housed in myLearning site so that advisors can easily register and track their progress. See below for an example.

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Course Name		Status	Completed Date	Expiry Date	Total Time	Certificate
FERPA		Complete	5/27/2021			
Prod SIS		Complete	06/03/2021			
Self-Service SIS						
Blackboard		Complete	06/15/2021			
Starfish						
Degree Audit						

Track 1: Advisors who serve in tertiary role (i.e., case managers, Hop-In, Jump, etc.) will need to obtain all the following certificates/training:

- FERPA certificate
- Suicide Prevention Workshop certificate
- Identity & Inclusion Workshop certificate
- How to mentor and advise students training
- Understanding the university resources training
- Basic overview of the Advisor Dashboard

Track 2: Faculty members who will serve as faculty advisors must earn all the certificates for Track 1 as well as the following certificates/training:

- Understanding the degree requirements training
- Basic training of the Advisor Dashboard:
    - SIS certificate
    - Blackboard certificate
    - Starfish certificate
    - Degree Audit certificate

Faculty advisors who go beyond the training for Track 2 should be recognized and rewarded. In addition to the advising award ceremonies, such as KSAS' Undergraduate Advising Award, KSAS' Graduate Advising Award, and WSE's Advising and Mentoring Award, individual departments should consider providing monetary incentives and/or use the certificate obtainment for promotion and/or salary consideration.

Track 3: Director of Undergraduate Studies and/or staff advisors (i.e., departmental advisors and academic program coordinators/managers) must earn all the certificates for Track 1 and 2 as well as the following certificates/training:

- Understanding the university's policies and procedures training
- Intermediate training of the Advising Dashboard:
    - Self-Service SIS certificate
    - Prod SIS certificate
    - Blackboard certificate
    - Starfish certificate
    - Degree Audit certificate

Track 4: Professional academic advisor must earn all the certificates for Track 1 through 3 as well as the following certificates/training:

- Other unique responsibilities as a professional academic advisor training
- Advanced training on the Advising Dashboard:
    - Self-Service SIS certificate
    - Prod SIS certificate
    - Blackboard certificate
    - Starfish certificate
    - Degree Audit certificate
    - OnBase certificate

Professional academic advisors "report that the university rarely acknowledges the range of responsibilities in their advising roles. This lack of acknowledgement and recognition for the scope of advisors' work creates the impression that the advising role is devalued, and the work underappreciated" *(Sindt & Weise, 2020, p.7).* Similarly, department staff advisors and academic program coordinators/managers are rarely recognized on their advising responsibilities. Thus, there should be a separate award ceremonies for KSAS and WSE staff advisors, academic program coordinators/managers, and professional academic advisor. In addition, monetary incentives, promotion, and/or salary increase should be considered if advisors have obtained certificates and training.

4. <u>Establishing an assessment plan of the training options and effectiveness of advising technology:</u>

The designated staff members (see #5 for more information) should develop an assessment plan to obtain the following information: the user experience of the advising dashboard, the usage of the training, and the effectiveness of the technology training.

- The user experience of the advising dashboard can be obtained with a survey after a user logs into the dashboard for the first time. Some of the questions could include:
    - How easy was it to navigate the advising dashboard?
    - Which features do you like about the advising dashboard?
    - If you could change one thing about the dashboard, what would it be and why?

- The usage of the training could be tracked by the number of training registrations and completions on myLearning site. This will also allow a representative from each school to track who has satisfied the required training and eligible to become an advisor. Furthermore, on the advising dashboard, the number of clicks and views of the videos using the  icon can be tracked. Tracking this information will be important as it may indicate additional training materials may need to be created.

- Assessing the effectiveness of advising technology training can be more challenging. However, one way to measure this is to have advisors complete an assessment after each of the technology training. Some of the questions could include:
    - How do you move a course in Degree Audit?
    - How do you release an Advisor Alert in SIS?
    - When do you raise an In Danger of Failing flag in Starfish?

5. <u>Imagining the staffing needs to ensure smooth enforcement of the recommendations:</u>

The amount of time and effort needed to create, maintain, and train advisors/students on the advising dashboard will be tremendous. There is a need for an independent office that is not part of the Homewood Student Affairs, SEAMS, or the Registrar's Office that will serve the needs of the advisors from both schools. These positions should be housed in the provost's office so that they have the authority to make decisions and are able to represent both schools. At a minimum, there could be at least six positions to address the following:

- At least two staff members will be responsible for all the technical aspects of creating, implementing, and maintaining the advisor and student advising dashboards.
- At least two staff members will be responsible for all aspects of the training. They will be responsible for creating short videos on the advising dashboard when users click the icon ⓘ. They will also be responsible for creating, updating, and maintaining the training under the Advisor Development Program tracks. These staff members should be available to provide online and in-person instructions to onboard new advisors when needed. Having designated staff members to create the training materials assures that advisors of various levels are receiving the same information across the two schools.
- At least two staff members will be responsible for creating an assessment plan to evaluate the effectiveness of the advising technology (refer to #4 for more information). These staff members will track the number of certificate/training registrations and completions. They will survey the users and usage metrics of the advising dashboards.

Committee Members:

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References:

Sindt, K & Weise, J (2020). *Excellence in Academic Advising Comprehensive Report*.

EAA Technology Committee (2019). *Advising Technology.*