

PENNSTATE



Course Substitution Request System Progress Update

Hendrick Best Practices for
Adult Learners Conference

May 12th 2015



Panelists

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Altoona Campus

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World Campus

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University Park

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Our Presentation

- Why are we here?
- Our journey...
- The new workflow application...
- Panel discussion

Transfer Credit Evaluation...

- PSU admits over 4,000 transfer students annually, 50% begin at a Commonwealth campus.
- 250,000 previously earned credits are entered onto student transcripts annually
 - 64% (162,000) from advanced standing students
 - 22% (53,000) from first-year students
 - 14% (35,000) from PSU students who transfer courses from other universities and colleges
- ISIS currently documents the evaluation of 413,951 courses
 - 87% are evaluated as general credits
 - General Credits = course substitution requests

Existing State...

- Transfer evaluation is mandated by Penn State policy, with implementation defined by each college.
 - Information silos between colleges.
 - Mix of systems and manual processes.
 - Different forms and submissions methods.
 - Paper and process intensive.
 - No consistent visibility into approval status.

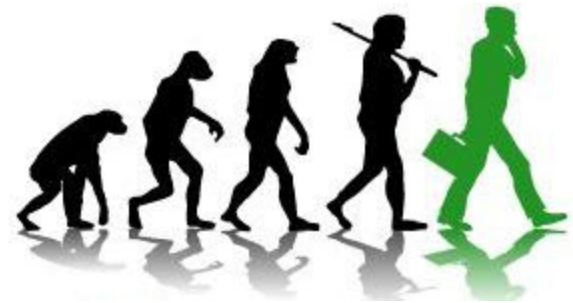
Desired State...



- A community of volunteers driven by business requirements designing a flexible solution that follows policies, not mandates methods.
- Remove silos to improve the efficiency and consistency of process.
 - Consistent decisions and notifications for students.
 - Use a common workflow system to improve visibility
 - Enforce institutional rules for access to information.
 - Colleges control exceptions approval for their majors.
 - Access to enter or approve substitutions
 - Workflow design for different exception types.
 - *A student interface (planned), enabled per college*

Our Journey...

- An active community with a voice
- A flexible iterative design process
 - Wireframe and brainstorm overall functionality
 - Biweekly progress demonstrations
 - Wireframes and concepts
 - New candidate releases
 - Iterative feedback loop
 - Compromise on functionality
 - Don't compromise on quality or integrity



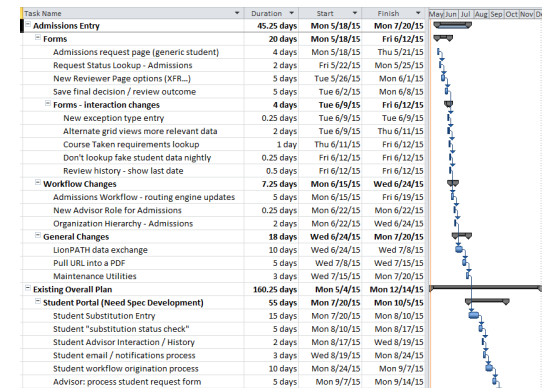
Tenets for Success...

- Plan long term, and design releases using a series of short sprints, with frequent feedback from the working group.
- Work with partners to adjust timelines for scope changes
- Never underestimate the importance of refining the scope, or maintaining schedule



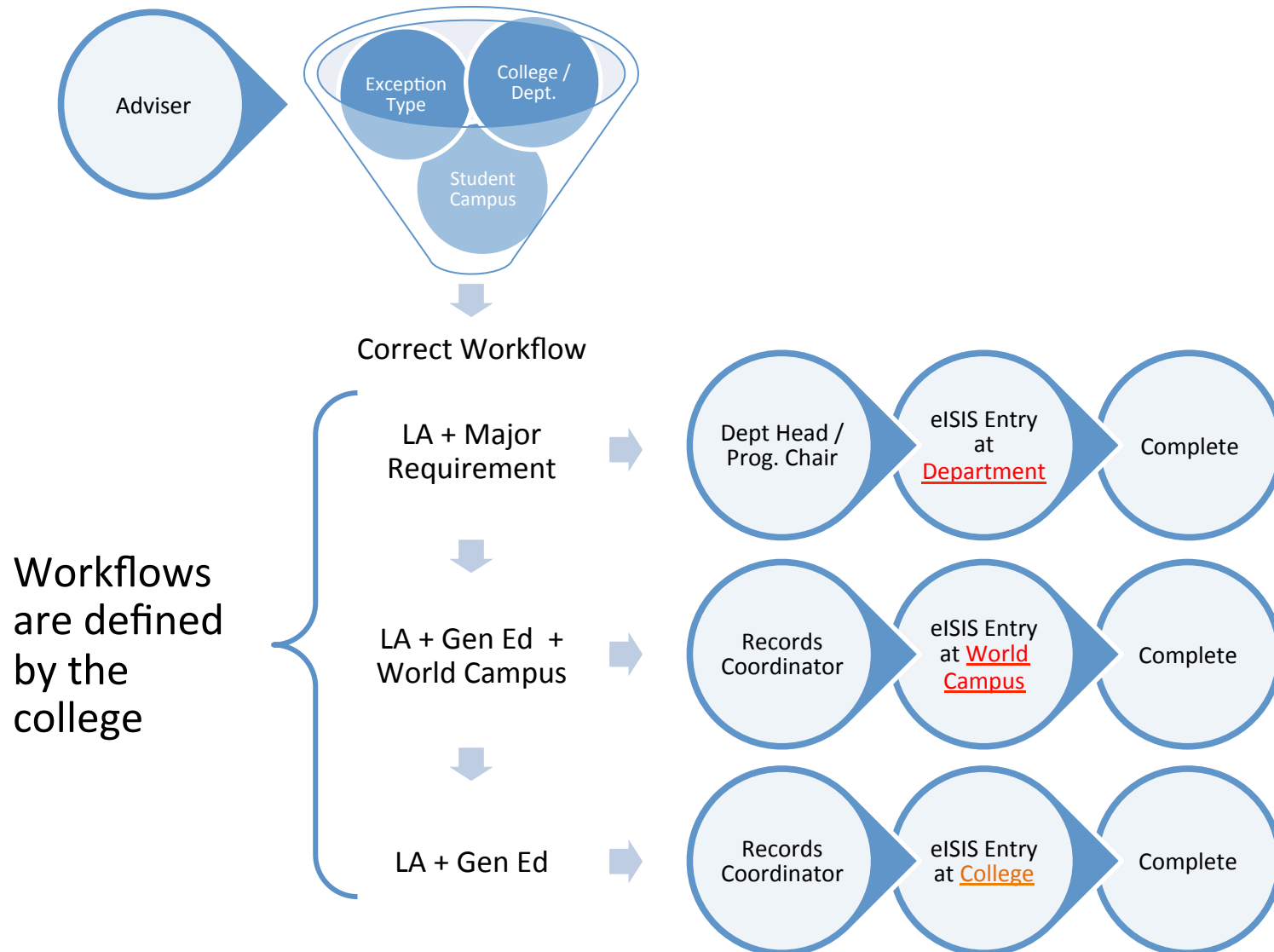
Future Plans...

- Continued deployment
- Admissions LionPATH review processes
- LionPATH integrations
- Evolve automatic substitution and denial
- Committee review improvements
- Student Interface



Task Name	Duration	Start	Finish
Admissions Entry	45.25 days	Mon 5/18/15	Mon 7/20/15
Forms	20 days	Mon 5/18/15	Fri 6/12/15
Admissions request page (generic student)	4 days	Mon 5/18/15	Thu 5/21/15
Request Status Lookup - Admissions	2 days	Fri 5/22/15	Mon 5/25/15
New Reviewer Page options (XFR...)	5 days	Tue 5/26/15	Mon 6/1/15
Save final decision / review outcome	5 days	Tue 6/2/15	Mon 6/8/15
Forms - Interaction changes	4 days	Tue 6/9/15	Fri 6/12/15
New exception type entry	0.25 days	Tue 6/9/15	Tue 6/9/15
Alternate grid views more relevant data	2 days	Tue 6/9/15	Thu 6/11/15
Course Taken requirements lookup	1 day	Thu 6/11/15	Fri 6/12/15
Don't lookup fake student data nightly	0.25 days	Fri 6/12/15	Fri 6/12/15
Review history - show last date	0.5 days	Fri 6/12/15	Fri 6/12/15
Workflow Changes	7.25 days	Mon 6/15/15	Wed 6/24/15
Admissions Workflow - routing engine updates	5 days	Mon 6/15/15	Fri 6/19/15
New Advisor Role for Admissions	0.25 days	Mon 6/22/15	Mon 6/22/15
Organization Hierarchy - Admissions	2 days	Mon 6/22/15	Wed 6/24/15
General Changes	18 days	Wed 6/24/15	Mon 7/20/15
LionPATH data exchange	10 days	Wed 6/24/15	Wed 7/8/15
Pull URL into a PDF	5 days	Wed 7/8/15	Wed 7/15/15
Maintenance Utilities	3 days	Wed 7/15/15	Mon 7/20/15
Existing Overall Plan	160.25 days	Mon 5/4/15	Mon 12/14/15
Student Portal (Need Spec Development)	55 days	Mon 7/20/15	Mon 10/5/15
Student Substitution Entry	15 days	Mon 7/20/15	Mon 8/10/15
Student "Substitution status check"	5 days	Mon 8/10/15	Mon 8/17/15
Student Advisor Interaction / History	2 days	Mon 8/17/15	Wed 8/19/15
Student email / notifications process	3 days	Wed 8/19/15	Mon 8/24/15
Student workflow origination process	10 days	Mon 8/24/15	Mon 9/7/15
Advisor: process student request form	5 days	Mon 9/7/15	Mon 9/14/15

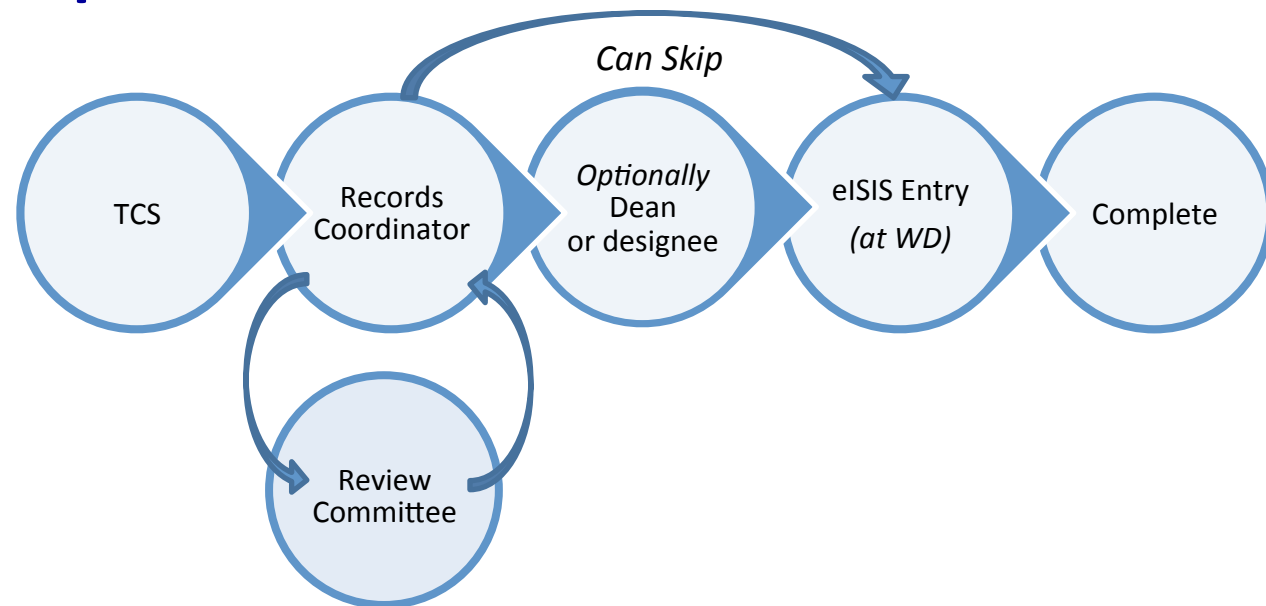
Determining a Workflow



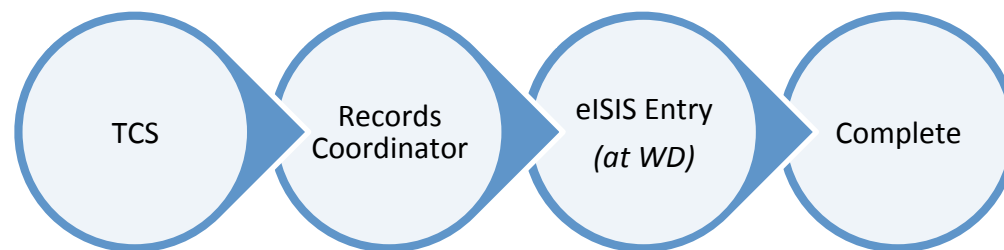
Workflows

World Campus

From
University
College



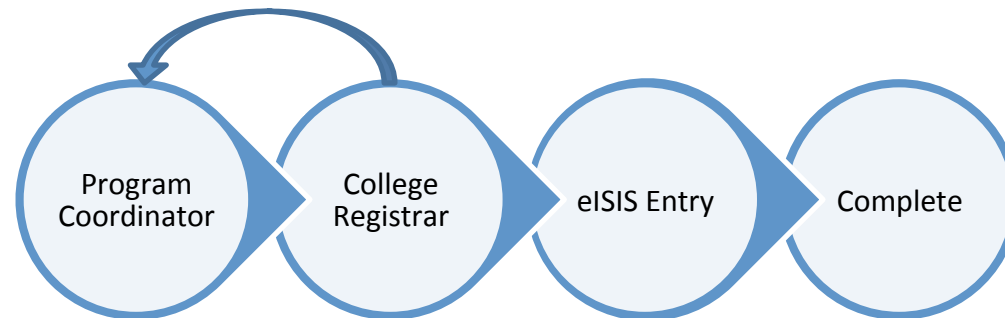
From
Liberal Arts
(Gen Ed)



Workflows

Altoona College

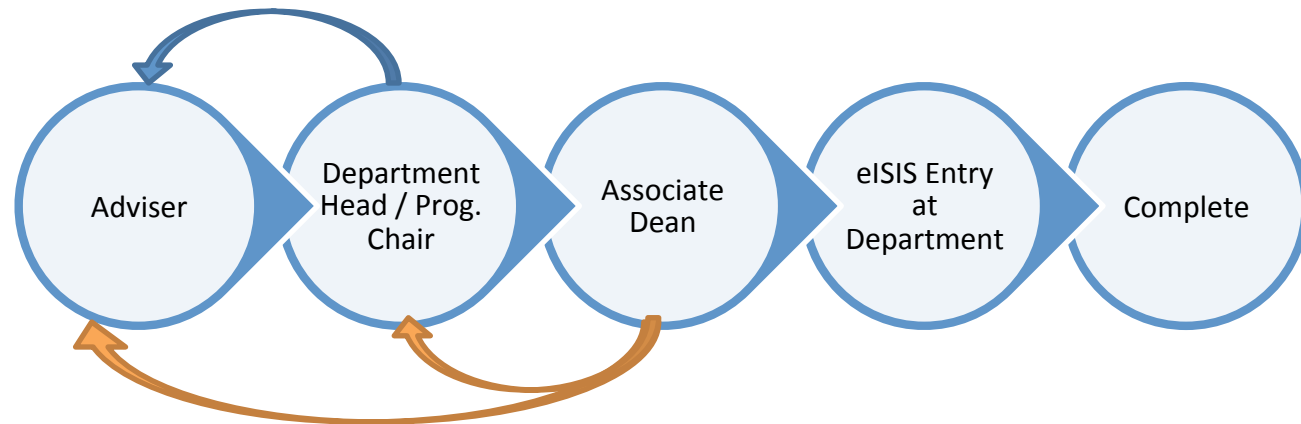
Altoona



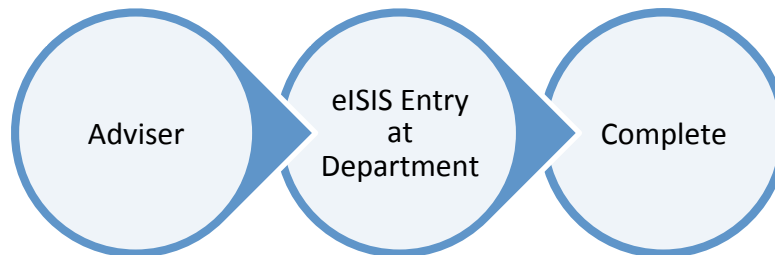
Workflows

Eberly College of Science

Default



Language
3/6/9
Fast Path



Questions?

Timing?

- Penny – 10:30-10:40
- Brian – 10:40-10:45
- Scott / Panel – 10:45-11:05
- Q & A – 11:05 – 11:15