

Student Experience Team

Project Description

Improve student experience, reduce confusion, improve efficiency of support requests for front line (tier 1) support, create a universal support framework and language for support staff at the university

My Role

Creator /
Co-Project Manager

The Challenge

After seeing recurring frustration in communications between support requests passed between teams, an opening to discuss with an ally on an academic unit arose, allowing us to identify her team's frustrations and questions and ways we can help delivery better support and referral to other university departments.

New Student Checklist: Process Worksheet – for Tech Service Center (TSC) support

Send corrections, edits, feedback to Crystal Hines

What? Task student must complete	Why? Basics on what to expect, overview, etc.	When? ETA for completion, for user or other party	Who? Information owner	How? What is required for a student to complete this task? Access necessary, etc.	Resources & Notes Anything else to know...	Banner forms Required forms highlighted in red. Other forms listed for information / support
1 View your Financial Aid information in MyCU	To access MyCU, users must have a G#. They will need their MyCU PIN, which can be obtained via MyProfile. MyProfile is used to create and manage account credentials for both MyCU (requires G# and PIN to access) and Network accounts (e.g., which use your username to login, jssouth or cchilmanet). First-time MyCU / Follow the process to Reset MyCU PIN to get temporary PIN for new access.	Financial Aid receives a report on admitted freshmen. Award is ran, if possible. Student receives a postcard, text, and email indicating they must go to MyCU to view their FA award. Calls to the student from Financial Aid occur weekly thereafter to follow-up and check in with the student. Students can access MyCU to view Financial Aid information when they are ADMITTED, but not DEPOSITED.	Financial Aid	<ul style="list-style-type: none"> Students may access MyCU and view Financial Aid information after application and award has been completed by the Financial Aid (row 1) <ul style="list-style-type: none"> MyCU is accessible once a G# is assigned and FA award info is added for the user. New students who have not deposited will only be able to view Financial Aid information. Once they have deposited, they will be able to access/view more information in MyCU. (row 2) 	<ul style="list-style-type: none"> MyProfile: New account creation Reset your MyCU PIN helpful info for first-time users and all others Navigate MyCU <p>No information is accessible to those who cannot access the Banner forms housing this information (e.g., Tech Center, other support staff that may be on the receiving end of support calls)</p>	<p>ROARMAN: Financial Aid award summary</p> <p>TSAAREV: Check student account</p> <p>SAAADMS: Student deposit</p>
2 Pay your student deposit	Student deposit status is used to unlock a variety of processes for students. If there are issues with access to resources, accounts, tools, etc. please confirm the student is showing DEPOSIT = TRUE	Deposits are paid online via the web form (or in person) to CashNet (Blackboard ToolsAct app). The paid deposits are entered into TSAAREV each morning by Liana Parks or Sarah Tzeng from Finance / Student Accounts (Finance). The posting from TSAAREV to SAAADMS does not appear to be immediate.	Finance / Student Accounts	<ul style="list-style-type: none"> Can be paid in person in Finance office (L200) Or paid via the online form via the payment form. 	Students do not need access to MyCU to pay their deposit. https://www.cu-portland.edu/admission/deposit-online	<p>TSAAREV: Student account</p> <p>TSAAREV updates should trigger SAAADMS to update DEPOSIT value</p> <p>SAAADMS</p> <ul style="list-style-type: none"> DEPOSIT = TRUE <p>25 = unpaid</p> <p>35 = paid</p>
3 Register for classes	All first-time resident students must register with an Academic Advisor in-person in Hagen Center, over the phone or must request to be auto-registered. Returning students will be given a registration PIN for use in MyCU by their Academic Advisor		Student Affairs / Academic Advising	<ul style="list-style-type: none"> Advising appointment with Student Affairs, Academic Advisor (row 3) Returning students: MyCU account access (row 1) 	Returning students must have a registration PIN provided by Academic Advisors from registration appointments, which will be needed in MyCU during registration.	<p>SAAADMS</p> <ul style="list-style-type: none"> DEPOSIT = TRUE <p>SLARMAP: Room and Meal Plan app</p> <p>SLARASG: Room assignments</p> <p>SLAMASG: Assign students meal plan</p>

Page 1 of 8

Image: First page of New Student Process Worksheet (internal use process map)

Brief Summary

Worked with stakeholders in Finance, Student Affairs, Registrar, Admissions, and more to map out the student journey for each process a student must complete, ensuring visibility of all intersecting pieces. Improvements to the student support experience and better understanding of the internal timeframes for each team's work, leading to more patience, communication, and team work, were amongst the positive outcomes of this project. Developed relationships with key stakeholders in other departments and teams around the university to better understand the processes involved in various student processes, forming the "Student Experience" project, a holistic approach to serving students and fellow employees better.

Developing new support processes and universal framework for onboarding students, through their entire student journey, by working with all stakeholders around the university to outline their processes and workflow so each member of our each team / department could better visualize their place in a student's experience and ensure support routing to the proper unit for assistance was engaged.

Approach

Teamed with a director from an academic department to work together on combating issues with onboarding and support, jumping onto a checklist project started by her project team and building the project and its internal counterpart from our many meetings and investigations.

Through networking and compassionate inquiry, with the aim to simply understand them better, we met with stakeholders from all affected teams and departments. We observed their work and asked how we can help.

We discussed process issues, grievances, things my team may be able to help with and pitched my idea for universal support framework, built on my teammate's checklist to get students on the same page from an onboarding new student perspective, as well.

Goals and Objectives

- Outline the student journey (user journey mapping)
- Improve student onboarding experience
- Increase communication between teams (reduce siloing)
- Understand processes from other teams as they relate to timelines and

- expectations for users in terms of account creations, next steps, etc.
- Adopt a universal framework and language for supporting and onboarding students
- Before strategic shift for university board, this universal framework was intended to be shared and adopted by any other team interfacing with students at our school

Ideation/Design

- ***Establish and adopt a universal framework and language for supporting and onboarding students***
- ***New students and returning students provided a concise checklist*** that linked to instructions and relevant forms for each action necessary for students to complete.
 - Lists every action needed to get onboarded successfully and through the census period (first 10 days of each term)
 - Printable, but also mobile friendly
 - Could be sent to academic advisor for discussion
- ***An internal process worksheet that matched step-for-step each component of the student checklist*** was created for internal stakeholders on various teams, indicating what team handles the action and the timeline for turnaround.
 - Information such as Banner forms to locate helpful data was identified through meetings with other teams and relationship building to understand team workflow for Finance, Academic, and more.

Outcomes & Accomplishments

Before the first phase of the project had even been fully-implemented, the initiative was already fostering goodwill among coworkers and smoothing out bumps in support delivery for various teams.

- Staff that had previously been confused about where a student with a certain type of problem should be referred now had a concise reference worksheet that used their common internal language to ensure students were sent to the correct department the first time.
- Created what was referred to as "the first" student journey roadmap folks helping with this project had seen — matching step-for-step with the student checklist to ensure we were speaking the same common language

and could communicate about bumps effectively and realistically.

- Created a special Microsoft Teams workspace for us to have quick access to real-time communication for support to help one another in times of crisis,
 - e.g., if a piece of technology breaks, I could alert the entire Student Experience Team so they also knew when Student Accounts began receiving calls about it and Academic Affairs, etc.
- Student frustration was reduced, collaboration and communication among staff increased (as well as morale!), and plans for further development of these initiatives together for other user types were in discussion.