



Student Information System Visioning for CHES

Adopted by the CHES Board of Directors

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Global:

First priority is the student's experience and how can we streamline their interactions with the colleges, and aid them in term over term, year over year persistence and achievement of their academic and workforce goals. As decisions are made, first and foremost will it positively impact the students' experience. This is job one.

Second priority is improving the administrative process – which should dovetail well with improving the student experience. Expect that CHESS will use automation, administrative workflow and rules-based transactions to ease the administrative burden, and alert faculty and staff to important information or appropriate changes in various statuses. The system will maintain the accuracy of student accounts and assure financial aid compliance. As the institutions share more and more, processes will also be developed to monitor and maintain checks and balances between the institutions. The system will provide access to information in a timely and cost-effective manner. As processes become aligned, individual college brands, culturally importance language, and unique focuses of communities served will be honored. The system should do the heavy lifting, saving time for the institutional teams and offices to directly work with and otherwise serve student outcomes. If any process or design decision will positively impact the student, though potentially be harder administratively, the decision should be made that favors the student experience.

Financial Aid processes, efficiency and service are very critical to each of the CHESS institutions, and future visioning will be a significant focus on enhancing the work in this area in order to dramatically transform both the student and administrative experiences.

Student Experience:

Improve the student experience by increasing modernization, accessibility, and mobility resulting in higher student outcomes and performance metrics, such as increased enrollments and better student retention, completion and workforce placement

The ideal solution will enable students to see and engage in opportunities across colleges and universities while ensuring that all activities are recognized for each institution's record of student information. All processes should primarily center on a student life cycle rather than an administrative life cycle

Students will have the opportunity/be able to take courses from any CHESS college when a course is not available at their home college

Four-year institutions in CHESS become transfer destinations of choice for students at CHESS community colleges

Students stay on track by finding courses even when a course at the home institution is not offered during a given term

All Student actions, inquiries, document loads, transactions, registration, payments can be completed on tablets, phones and computers



Proactive student communications are developed to keep the students on track, and look seamless to them.

Deliver targeted outreach and engagement throughout the full student lifecycle. Enable interactions across channels and devices (including mobile devices).

Student can pay for all (credit) courses enrolled in one transaction, regardless of CHES institution. (This is noted as credit, since non-credit, workforce and corporate training are not current capacities in the Workday solution. However, once “extended education” or similar functionality is available, this goal holds true for credit and non-credit.)

Note: Currently this reflects credit courses and programs, however the overall CHES goals include the unification of credit and non-credit, workforce and corporate training records into registration, records, education plans, advising, financial aid (as appropriate) and billing/cashiering long-term.

Long-term: CHES wishes to transform academic capacity and faculty experience as well. In order to leverage faculty talent, the institutions want to be able to share instructors across local course offerings and permit the instructor to see a unified course roster, as well as permitting an ease of interacting with multiple LMS solutions to maintain course information and enter and post grades, regardless of which “home institution” the student belongs.

Administrative Process:

Increase institutional productivity, efficiency, capacity, collaboration, and access to data and reporting by aligning business processes consistent with the independent HLC, program accreditation and individual college governance

Share staff and skillsets across institutions during project implementation and on-going system maintenance to address significant difficulties of hiring specialized technical talent across the state to assist other institutions while their vacant positions are filled to prevent delays in continued service to students, faculty, and staff

Contain technology costs and leverage economies of scale by using a single cloud/SaaS system, allowing for modern technology currency and reducing the need for many third-party systems.

Support student and faculty engagement regardless of college, university, or course type (credit, non-credit, continuing education), and provide internal and external engagement and communications with all constituencies through a common single set of tools to ensure effective and compelling communication and interactions.

Establish a student’s “home institution” for purposes of Registration, Financial Aid and Student Accounts, Advising, etc. Establish Financial Aid consortium agreements for aid for other CHES institutions.

Establish an automated revenue and fees distribution method when students enroll at another CHES institution (available for review and finalization prior to automated transaction debiting/crediting AR)



Dramatically eliminate or reduce third-party bolt-on solutions (there is a different list at each institution).

Create overall institutional process alignment of $\pm 60\%$ *** - some areas may be higher; some areas may be lower ***Through the Workday SIS pre-planning and alignment phase – the implementation teams will document process alignment so the project leadership can define an acceptable overall percentage to achieve.

Create ease in sharing employees, backstopping each other, even temporarily.

Create a paperless environment

Accommodates the NM common student identifier – one student ID number (STARS ID) across the state of NM.

Address FERPA needs and develop a process and procedure that accommodates sharing data across institutions.

Recruitment and Admissions:

Student Experience:

Student can submit one admission application for more than one CHES institution (check all that apply or similar function) and all supporting documentation are submitted by the student once and appropriately available to each college – including transcripts. (Also see academic records and advising below).

Rapid and helpful initial acknowledgement of application receipt (or partial completion with encouragement/resource recommendation as needed) to student. Perhaps a single unified immediate response that “x, y, z CHES institution(s) (as student checked all they wished to apply) thanks you for your application, and each will be in touch.” Then each college follows up individually.

Clear and not overwhelming communication to student on next actions required – delivered via applicant’s preference – text, email, etc. This means students are not bombarded with multiple requests from CHES colleges to send each of them transcripts, test scores etc. that students must collect and load multiple times.

Manage the Student Recruiting and Enrollment Management process – including targeted outreach, campaigns, events, proactive and reactive communication to increase application submission yield. Dovetail the recruitment process with the financial aid estimated aid process. (Question – Will CRM functions be accommodated in Workday? To what level?)

Administrative Process:

Develop a single unified core admission application with available branching for special programs (Nursing, etc.) and individual institutional data needs.



Based on utilizing an automated response to receipt of application and a unified request for required documents – transcripts, test scores, etc. - establish triggers for each college to notify them that materials have been received. Also have automated detailed reminders scheduled to applicant listing specific items that have not yet been received.

Manage the student testing process: Import test scores (such as ACT, SAT, AP, IB, Accuplacer, TOEFL, IELTS, GED, etc.) Allow for modifications or changes in testing types, or changes in scoring within existing test types, etc. as changes occur in the higher education environment. Assure testing results can be used for registration pre-requisite checking, as appropriate for the student.

Define program-specific applications

Support Dual Enrollment processes, data exchange, etc.

Establish institutional specific rules to determine full or contingent admission to a program.

CNM's institutional requirements may then require an interface to Salesforce, and other institutions may need supplemental solutions and/or interfaces as well.

Curriculum/Catalog and Scheduling:

Student Experience:

CHES institutions have the option to share programs and courses

Create a year or more of the schedule in advance- (Aided by Ad Astra room scheduling and its platinum analytics functionality to understand historical demand and view as course registration demand indicates need to open or close sections.)

Administrative Process:

Pull the waitlist statistics from prior terms forward for schedule planning (this data should not be deleted) so is it easy to understand, were there enough section offerings, and did everyone who wanted or needed a course get in?

Interface Workday's Course planning, the LMS and Ad Astra (or another room scheduling product) to improve facilities management, historical course section planning and aid in monitoring registration activity to open or close sections to assure maximum enrollment.

Support the defined common course numbers from the HED "course guide manual" (except in the areas CTE, Engineering, CIS, which have not been defined as yet for HED). Building on HED's common course number effort, maintain the common course numbering system, and ensure that any new courses are assigned a common course number.

Supports Nursing shared institutional requirements



Support the optimization of rooms/labs, facilities and faculty within course section planning and in-process term adjustments

Faculty credential tracking is supported with the opportunity to share across CHESS institutions. If a credential is evaluated, that faculty record is appended and a full repository of credentials is established over time and is imbedded in Workday.

Support the capacity to report on the productivity of faculty

Registration and Academic Records: (Currently this reflects credit courses and programs, however the overall CHESS goals include the unification of credit and non-credit, workforce and corporate training records into registration, records, education plans, advising, financial aid (as appropriate) and billing/cashiering long-term.)

Student Experience:

Efficient, clear understandable registration process on tablets, phones and computers.

Register directly from degree audit or academic plan.

Search for courses based on program, academic plan, subject and/or day/time of offering. Sortable by topic, time, modality, course or subject, course #.

Clearly show student's potential course schedule to avoid overlaps so the student can plan with other commitments, distance to travel between campuses and/or work schedule.

Student registration compiles with their Financial Aid eligibility, or helpfully notifies student which course(s) do not comply

Student can complete a secondary search of courses needed for program or from academic plan at another CHESS institution (delivery modality may be a critical factor), and register for that course in the same registration session.

Be able to register for a course at another CHESS institution in order to be able to meet the student's educational goals in a timely fashion – particularly if the course is not offered in a timely way for the student at their home institution.

If the student's degree/academic/education plan is defined, **automatically generate and propose a student's schedule** based on the student's stated parameters – days of the week, mornings/afternoons/evenings, etc. Permit the student to accept as proposed, or make changes.

Student submits prior work and/or academic transcripts once and it/they are appropriately available to each college for processing – admissions, registration, degree audit, etc.

Student can view their entire set of academic history completed at any CHESS institution – unofficial transcript or printable record.



A Student's full academic history from any CHES institution is available to automatically check for pre-requisite checks in Registration, Education Plan fulfillment and degree audit requirements completion.

Students do not have to send academic transcripts to any other CHES institution.

Administrative Process:

Pro-actively outreach to students who have not registered for next planned term – integrate advising, Financial Aid and other student success resources to retain student.

Institutions define how waitlists are managed and who from the waitlists gets priority so colleges have options to select who is offered off the waitlist. Some programs or courses may have a designee decide who comes off the waitlist rather than “a first come first served approach”, thus permitting, among other things, those who are close to graduating have priority to get the course in time to meet their graduation term goal. Also want the system to notify that there is a need to open more sections (may be a capability from the scheduling solution). Would like students on waitlist to be informed of course availability at another CHES institution if another section will not be opened at their home institution.

Complete student/learner record is all in one place - Academic, courses, CPL, transcripts, prior work, CE, co-curricular, internships, job placement, employer work opportunities

(Question – can there be a capacity to import non-credit, workforce and corporate training records from a third-party solution into Workday in the near term?)

Each institution maintains its own separate official academic transcript.

Supports Veterans Administration services - including application for benefits, outreach and tracking of institutional services, verification for federal and state aid, disbursement and end-of-term reporting

Real-time data exchange with the LMS to reflect all changes to student registration, faculty grading, student accommodations, etc.

Integration developed with Continuing Education/Workforce Development/ Corporate Training solution (goal is to ultimate migrate to unified capabilities within enhanced Workday solution)

Integration developed with LACES (Literacy, Adult and Community Education System) (this is a required system with the State of NM.)

Advising and Academic/Education Plans:

Student Experience:

Develop easy to understand student pathways with milestones that are also rendered in graphical/diagram format.

A student's Academic/Education Plan complies with their Financial Aid awarding criteria.

Provide students with a unified tool to track and monitor academic progress toward their academic goals, and be available on their mobile devices.



Student submits academic transcripts and/or credit for prior learning documentation once and it/they are appropriately available to each CHESS college for processing.

Students and advisors to be able to run what-if program evaluations within and between any CHESS institution – using Degree Audit functionality and applying the full student’s academic history, model the progress toward complete “if” the student decided to change programs.

Pro-actively outreach to students who have completed degree/certificate programs but who have not applied for degree conferral, with step-by-step easy process to graduate.

Support and expand Guided Pathway programs and/or other transformational initiatives

Supports full spectrum of student support services tracking - advisors can provide assistance with housing, child care, behavioral health, etc. .

Student alert mechanism securely permits input from numerous sources – faculty, staff, advising, all administrative offices – and automated triggers (lack of attendance, missed payments) to alert to potential academic, financial or other personal challenge that could jeopardize a student’s enrollment or completion. Also establish positive alert mechanisms that are targeted and specific to individual students, (perhaps tracked in predictive analytics) – completed achievements, etc.

Administrative Process:

A student’s full academic history from any CHESS institution is available to automatically check for pre-requisite checks in Registration and degree audit requirements completion.

Course transfer is automated by the system, honoring the core/general education NM HE transferability. If an external course is evaluated and matched with another CHESS institution’s course, that record is appended and a full repository of course articulation agreements and equivalencies is established over time and is imbedded in Workday. This will also include transfer courses evaluated from outside CHESS institutions. The goal is to cross-list as many eligible courses within the catalog as possible. (Individual student exceptions and overrides continue to be student-specific, and do not populate the CHESS library, though the exception is available to any CHESS institution for its review to affirm or decline for that student.) For non-CHESS institution courses – each institution continues to evaluate separately. Note: Recommend a process be established to hold a periodic cross-institutional review to determine if equivalencies should be added to library to further serve students transferring in. The goal is to determine whether a course meets a program requirement and can be automatically considered as part of program pathway.

Establish a policy and review process similar to course transfer eligibility (see above) for CPL (credit for prior learning) and work-based learning credit a student gets at one institution to determine if it is accepted by the other CHESS institutions and/or applied within specific institutional program requirements, so that this data can be shared across institutions as well.

Students and advisors (advising staff and faculty) are able to run what-if program evaluations within and between any CHESS institution – using Degree Audit functionality and applying the full student’s academic history, model the progress toward complete “if” the student decided to change programs.



Supports “reverse transfer” processes

Connect advisement and the LMS – streamline faculty communications and reduce duplicate work for faculty advisors.

Leverage caseload management functionality to track advising outcomes.

Increase connection for faculty efficiency and communication – created interfaces between the LMS, CRM, other systems that faculty use

Student Accounts and the Business Office –

Student Experience:

Provide a streamlined and understandable electronic invoices and payment process to students.

Provide clear invoicing for a change in billing due to change in registration, etc.

Provide unified student billing if a student takes a course at another CHESS institution.

Clearly show dispersed and estimated Financial Aid so the student has a clear picture of costs covered and FA money due directly to them.

Ease and security of cashiering/payment process on tablets, phones and computers.

Ease and flexibility to establish payment plans that suite the student’s financial needs.

Direct payment of eligible bookstore charges via Financial Aid via timely interface to Bookstore systems.

Long-term – Unified, detailed invoicing and cashiering/payments for credit and non-credit courses combined.

Administrative Process:

Provide unified student billing if a student takes a course at another CHESS institution. Administrative process transfers tuition/fee revenue to that institution.

Ease and flexibility to establish third-party payees to support a company’s or other third party’s sponsorship of an individual or group of students.

Support unique tuition and fee programs – for example, Clovis has a Textbook Affordability Program where textbook fees are built into tuition

Supports the option of standardizing holds cross-institutionally – similar standards for placing holds and releasing holds.



Financial Aid –

Create an efficient and responsive Financial Aid process lifecycle for students by investigating and organizing the future administrative work to positively impact the student experience.

Items that are likely to be considered include:

Student Experience:

ISIR drawdowns (for more than one institution) and all supporting documentation (including tax records) are submitted by the student once and appropriately available to each institution.

Establish triggers and automatic notifications to assure timely information is enabled for students and departments – i.e. – when a student drops below eligibility requirements (e.g., credit hours or GPA) for a certain aid, scholarship, or grant.

Administrative Process:

+/- 90% (need to finalize through the Workday pre-planning process) alignment on institutional business processes – uniformity of Financial Aid can make this more likely.

Establish rules to manage ERP processing – e.g., rules to determine full or contingent admission to a program, or if a student meets the eligibility criteria for a scholarship.

Establish a certification date for attendance, and then the enrollment data for that student is automatically updated so students don't get into an over-award situation.

Develop a common award letter, scholarship application, financial aid form, awarding and packaging approaches

Identify strategies to increase the FASFA/Pell application yield – proactive communication to make sure the student completes the applications.

Support lottery and opportunity scholarship processes

Reporting:

Administrative Process:

Centralize a Data Reporting Office as a shared service for development of IPEDS, HED eDEAR, and National Student Clearinghouse, etc. and other standardized reporting. The data and reports are owned by the college, so reports must be verified and certified by the college before they are submitted to the relevant agency. Staff in the centralized office will receive FERPA training and will sign confidentiality agreements. Data from one institution cannot be shared with another institution without prior written consent from the college that owns the data.



Elements that will not change at member institutions:

As processes become aligned, individual college brands, culturally importance language, and unique focuses of communities served will be honored.

Changing the academic calendars – no requirement to align term start/end, holidays, breaks, etc.

No change to college's academic plan – (i.e. – CNM is on trimesters and other current members are on semesters)

The NM HE core/general education curriculum transferability will be honored

Each college will maintain its own official transcript for academic work completed by each student at their institution

