

Annual AQIP Action Project Update Report

Title: Implement and assess effectiveness of a parent portal as a proxy access of student information

Category: 3 Meeting Students' and Other Stakeholders' Needs

Timeline:

Project Kickoff: September 1, 2012

Target Completion: January 31, 2014

1. Describe the past year's accomplishments and the current status of this Action Project

NMU implemented a parent portal option, Proxy Access, in the student information system. Implementation of this software provides a solution to parents who request protected information from the University, as well as to students who are looking for an easy way to share information with their parents, by giving students more control over their own academic record. As a University, we are required to protect the student's record. However, there are times when that becomes a hindrance to both the student and their parents as they try to access and share information. This system allows student to share as much or as little information as they want to with their parents (and others) and take the University out of the "middle man" role. It also gives the students the ability to update and/or take away that access instantaneously at any point in time.

This system will conform to FERPA, help protect the student's User ID, password, and personal Identification Number. In the past, many students simply provided their parents this information so the parent(s) could access the desired information. With the implementation of Proxy Access, the student no longer needs to provide this personal, confidential identifier information; they can simply grant their parents (and others) access to the desired information.

Research

Over the past year, Registrar staff and Information Technology (IT) staff researched the Ellucian Proxy Access system. This research included investigation and understanding functionality of the options and the team conducted the following activities:

- Identified four other Michigan schools using a parent portal (Michigan Tech, Western Michigan, U of M-Flint and Oakland University) and investigated their practices.
- Reviewed examples from three schools outside of Michigan - Appalachian State, Virginia Union University and LeHigh University.
- Purchased and reviewed workshop materials presented at the National Ellucian Summit conference by K. Davidson (Rose-Hulman Institute of Technology).
- Studied the Ellucian Proxy Access handbook and accessed and learned the functionality of Banner screens related to Proxy Access.

Implementation

Through the research, it was discovered that IT staff would need to install a new application server (Oracle Fusion Middleware) prior to the implementation of Proxy Access. Oracle Fusion Middleware was a major change from the old server, involving many new pieces of software, most of which required a great deal of reconfiguration. Getting the settings correct and functionality working properly were complicated and time consuming. Our IT staff completed this process on December 6, 2012.

An implementation schedule was followed in a timely manner.

- April 17, 2013 - The Registrar and IT staff jointly implemented the acquired software and the system was put into a test environment. Multiple Registrar and IT staff conducted the testing.
- May 14, 2013 – The Coordinator of Parent Orientation received information about the Proxy Access system and its uses for inclusion in a presentation to parents during the New Student Orientation program.
- May 16, 2013 – The Director of Orientation received similar information for distribution to students participating in the required New Student Orientation program.
- May 22, 2013 – Key Student Services staff received an email providing them with an outline of the system and steps on how to access it.
- May 28, 2013 - The system went live in the production environment, with additional testing conducted by Registrar staff and involving staff, students and parents.
- May 30, 2013 – A demonstration of the system was given to invited attendees from stakeholder groups: Dean of Students, Orientation, Admissions, Housing, Academic and Career Advisement Center, Student Service Center, Graduate Studies and Financial Aid.
- June 6, 2013 – Faculty received an information email at the start of the summer orientation program and another will be sent prior to the start of the academic year. It is felt that if faculty receive requests from parents asking questions about their student's record, it would be helpful to be able to inform parents of this option.
- June 18, 2013 – Registrar's website <http://www.nmu.edu/records/node/85> includes description of the new proxy access, instructions for students and parent login.

2. Describe how the institution involved people in work on this Action Project.

The Registrar and Assistant Registrar provided leadership for this project, working closely with several staff from Information Technology. Once the research was complete and a plan of action was established, Registrar staff and IT staff met on a weekly basis to monitor progress, identify questions and issues, problem solve and plan for the next steps.

Other stakeholders involved in the project, primarily for input and feedback, were the Dean of Students/Coordinator of Parent Orientation, Director of Orientation, Director of the Academic and Career Advisement Center, Director of Financial Aid and Manager of Financial Services. These groups were consulted and updated periodically. The Help Desk staff was notified of the new system in preparation for requests for help.

Representatives of parent and student stakeholders were involved in system testing prior to full implementation. Their feedback was utilized to update wording within the system in and in the automated email content to clarify areas these stakeholders found confusing. It was also used in the creation of informational pieces, such as the Orientation handout and the introductory website, which is still being developed.

3. Describe your planned next steps for this Action Project.

Introduction to Students and Parents

Now that the system has been created, tested, and implemented, the next step is to introduce it to students and parents. During the summer months, this will happen primarily through the New Student and Transfer Student Orientation Programs. Orientation staff was trained on the system and hands-on practice will be included in an Orientation session when students have a laptop. On the first day of each orientation session, staff will show the students how to get to the link to access the proxy system and explain how the system works. The Coordinator of Parent Orientation will include information about the system during a parent session the following afternoon. Parents will be encouraged to follow up with their son/daughter about it and discuss whether or not the student has or will be granting access. As part of their orientation packet, both students and parents will be provided with information on the functionality of the system, its benefits and steps for setup.

Continuing students will be notified of the system in last summer, prior to their arrival on campus and again shortly after their arrival. A variety of means will be used to communicate this information to these students including information in the Registrar's Update (sent to all students a few days before classes begin) and via a Student Announcement (through the Dean of Students office). In addition, it will be included in the Parent Partnership newsletter so parents of continuing students are aware of the system as well.

Measuring Effectiveness

The project will be considered a success if it can operate properly and gain interest of students and parents to meet a target participation of 25% of all new students and 10% of continuing students by December 2013. Other measures on usability and satisfaction that need to be more carefully determined include Orientation feedback, features selected by adopters, problems/questions on system use, actual usage statistics and sustained use.

4. Describe any "effective practice(s)" that resulted from your work on this Action Project.

An Assistant Registrar responsible for academic records and technical support was identified as the project coordinator. The project coordinator took responsibility for coordinating research efforts, tracking the project's progress, scheduling meetings and assigning tasks. A small work committee was formed, comprised of the project coordinator, the registrar and a representative of information technology. While others were brought into the project as needed for information, assistance and feedback, we found that keeping the primary work group small allowed us to communicate and act quickly and efficiently.

Weekly meetings were scheduled to monitor progress and identify action items for the upcoming week. Timelines were established and deadlines were set on things such as the installation of the required server, having Proxy available on the test system with enough time to thoroughly test it, getting communication to Orientation staff, scheduling a demonstration for key student services staff and going live with the system.

Testing included students, office staff, parents, and individuals not at all connected to NMU to give us a variety of perspectives. The feedback from those not connected to NMU in any way was especially important and helpful, as all systems and information were new and unfamiliar to them.

5. What challenges, if any, are you still facing in regards to this Action Project?

The challenges at this point will be to effectively communicate this information to students and parents and to get students to access and utilize the system. Communication to new students will not be as difficult since Orientation makes them a captive audience. Continuing students are much more challenging to reach. We need to make sure they are aware of the service and see value in participating. Getting information to the parents of both new and continuing students will be key to the successful implementation of this program. Feedback from both students and parents during the first three Orientation sessions will be an early indicator of interest in and satisfaction level with the service. As informal feedback is gathered and questions arise, we will update and fine-tune the amount and type of information being provided.