Barbara Noble

Senior Associate Registrar/ Interim University Registrar
Office of the University Registrar
bjnoble@ucdavis.edu
530-752-8481
Meeting Tips cont.

- In an effort to keep this meeting a reasonable length and for all presenters to get their messages heard, please email all your questions to:
  
  **bjnoble@ucdavis.edu**

- Once we compile all the answers to your questions we will post them to the OUR website accessible for everyone.

Meeting Tips

• This meeting is sponsored by the Office of the University Registrar for the purpose of informing the campus of important changes or new developments that might impact their work

• OUR partners join with us in bringing the campus important information

• We conduct these meetings in Fall and Spring

• Anyone needing to be added or deleted from the meeting invite list should send me an email with your request

• These power point slides are posted to the OUR website after the meeting for anyone who needs or wants to reference them for some reason. You will find them on the Faculty/Staff tab under Useful Resources
OUR Staffing Changes

• Julie DiMuro retired → Call Ali Cordone
• Karisa Asato moved to Enterprise Student Applications → call Colin Goulding or David Garrison
• Susan Towne retired → Bibi Tarin
• Sara Roscoe-Smith, resigned → Holly Schroder
• Elias Lopez went to CSU Sonoma → Barbara Noble
Doug Berman
Associate CIO for Enterprise Student Applications
University of California, Davis
Information and Educational Technology
daberman@ucdavis.edu
530-304-0336

Brad Harding
Program Director
Enterprise Student Applications
University of California, Davis
bmharding@ucdavis.edu
530-752-2847
Departmental Liaison Meeting
IET Enterprise Student Applications
September 12, 2017

• ESA Organization Overview
  • Staff, Location, Portfolio (ISS, Banner Team, OUR Technology Services, OASIS, MyUCDavis)

• ESA Projects and Initiatives
  • Banner Stabilization and Banner 9 Upgrade
  • OUR Initiatives (e.g. Grade Change API)
  • OASIS Status and Support
  • MyUCDavis Status and Support
David Garrison

*Project Director & Policy Analyst*
Office of the University Registrar

dmgarrison@ucdavis.edu

530-752-0216
My Degree and Graduation

David Garrison, EdD
Staffing Changes for My Degree

Karisa Asato has left the My Degree team to take a job in IET. Congratulations Karisa!

Colin Goulding will be on vacation for the remainder of September. (Please be patient if I am slow to respond!)

Heather Redmon has graciously been providing support to the program. Thank you Heather!

We will be hiring a temporary staff member to help support the program, and examining what we want the position Karisa vacated to look like moving forward.

Please send questions about My Degree to mydegree@ucdavis.edu
My Degree is now open for use by all undergraduates. We have been doing a “soft” roll-out over the summer.

We have marketed it to incoming Freshmen, and will begin marketing to all undergraduates when Fall Quarter begins.

We will be sharing our email to students with advisors for review before we send it.

http://mydegree.ucdavis.edu
Advisor Names in My Degree

If your name is not displaying correctly on exceptions and notes that you initiate in My Degree, we can now fix this.

What you need to do:

1. Check your name in My Degree by leaving a note or making an exception in the test system.

2. Be sure that your name is how you want it to be in the Campus Directory. If it is not, update it there.

3. Email us at mydegree@ucdavis.edu and state that you would like your name updated to match the campus directory. Please include your name as it currently is in My Degree, as well your name as you would like it to display.
We worked with the vendor and created an alternate way for the Topical Breadth block to apply courses.

For this block, and this block only, each requirement can only contribute a maximum of 20 units towards the overall 52-unit requirement. If an individual requirement is using more than 20 units, the excess units not being applied to the overall 52 are noted.
Catalog Year Change Tool

Available to My Degree users with exceptions access.

This tool may not work right away for incoming students because certain Banner records have not yet been generated for them. In these cases, email mydegree@ucdavis.edu and we can change it for you in Banner.
New Reports Available

We have created a new Exceptions report and Roles report for My Degree.

The Exceptions Report allows users to view exception lists in a variety of searchable ways, including by user, student ID, for a period of time, by degree status, exception type and college.

The Roles Report allows users review roles that are assigned to all users.
Sharing Block

We have created a “Sharing Block” that will appear when a student has multiple majors. To allow a class to share between these majors, simply use an Apply Here exception and place the class in the sharing block. This will allow you to closely control classes that share between majors. We will be adding this to our documentation.

NOTE: students with majors in two different degrees (AB and BS in different colleges) will not have this block because these majors are on separate audits. We are working on a solution to better control sharing in these situations.
Some Other Changes

International status is now a searchable criteria.

Directory Confidential and All Records Confidential status now is displayed at the top of the My Degree audit.

Senior Residency now calculates correctly.

Currently working on implementing the Planner function of My Degree, a block to display pass/no-pass classes, a calculation for non-standard courses, the Financial Aid module, graduation certification tools.
Upcoming Onboarding Trainings

November 7, 2017  2:00-5:00 PM  Hoagland 268
December 5, 2017  2:00-5:00 PM  Hoagland 268
January 2, 2018   2:00-5:00 PM  Hoagland 268

Seats are currently available for all sessions. Sign up at https://lms.ucdavis.edu
Moving Forward

Please continue to transfer exceptions over from Degree Certification to My Degree.

As new advisors come on-board, please spread the word about My Degree, the available trainings, and have them contact us about access. Currently our access control is separate from OASIS.

Please also let us know if you discover any problems with degree requirements or have any questions.

mydegree@ucdavis.edu
Graduation

This year we were able to process the Spring graduation list three weeks earlier than scheduled! Thank you Jennifer Rutherford!

You may have heard of an issue with some student minors, which led to some retroactive degree corrections – however this was an OASIS problem and not related to our processing. We have worked with IET to correct the problem for the future.

Send questions regarding graduation to reggraduation@ucdavis.edu
Heather Redmon

Business Process Analyst
Office of the University Registrar
hmredmon@ucdavis.edu
(530) 752-2976
Transfer Equivalency Project Overview

- Evaluation of courses from other UCs and CSUs to determine transfer equivalencies to courses at UC Davis
- Department chairs and their delegates decide if the equivalency is approved
- Equivalencies are now stored in Banner
  - The course equivalency will then apply to all incoming transfer students who transfer the course to UC Davis
Since the project began in March of 2016, there have been 1,701 course equivalencies entered into Banner from UC and CSU campuses!

- This is an increase of 900 since the Spring Liaison meeting.
- When a UC or CSU course is automatically equivalent in Banner, the transfer course will show in My Degree to complete requirements.
- Transfer equivalencies also hope with satisfying prerequisites.
Reminders

- Transfer Equivalencies = Less work for everyone!
  - Allows for Transfer Summary automation
  - Students will see how their transfer credits apply to their UC Davis degree requirements sooner in their first term
  - Advisors will not need to request the same courses be reviewed by the department over and over again
  - ONE and DONE! Approve it once and it is approved until next review cycle
Send Approved Transfer Equivalencies

Please send approved transfer equivalencies to

hmredmon@ucdavis.edu

OR

transferequivalencies@ucdavis.edu
As of Sept. 8, 2016 we had processed 2132 students with 4141 individual institution records
As of Sept. 8, 2017 we have processes 5295 students with 9185 individual institution records
I would like to thank everyone who helped to make this possible:

- Jennifer Rutherford
- Colin Goulding
- Karisa Asato
- David Garrison
- Kaila Balancio
- Lenna Crabbe-Charlesworth
- Janett Escobar
- Teresa Olsen
- (and me)
Kaila Balancio

Analyst
Office of the University Registrar

kebalancio@ucdavis.edu
530-752-4706
Automated Prerequisite Checking Update

Kaila Balancio, ICMS Analyst
Current Status

• Starting with Fall Quarter 2017, Automated Prerequisite Checking in Schedule Builder is fully implemented for all colleges.

• By default, it will be “on” for all undergraduate courses for future terms (including summer sessions).

• A training video and other resources have been added to the prerequisite webpages to assist with the process.
  • http://registrar.ucdavis.edu/faculty-staff/prereq-check/index.cfm
Known Issues/Concerns

• Equivalent courses are not currently being checked by the system.
  • Hybrid ‘Y’ courses and Online ‘V’ courses included

• Some students are contacting the Registrar’s Office to dispute denied petitions. We have advised them to speak with their instructor for their concerns. They are also directed to work with their academic major advisor if they need to readjust their schedules.

• Once the instructor drops the student through Photo Rosters, that student can no longer register or waitlist for the course again.
  • The only way to add the student back in to the course is through a PTA.
Future Development

• System ability to recognize equivalent courses for prerequisites

• Messaging and communication tools for the instructor and student regarding petitions or commenting on a petition.

• A survey will be sent out around the 20th day of instruction for the campus to provide feedback.
Chris Thielen
Information Systems Supervisor
University of California, Davis
cmthielen@ucdavis.edu
530-752-8800
IPA 2017 Update

Christopher Thielen, DSS IT
What is IPA?
Refresher: What is IPA?

- Online tool for course planning, teaching calls, enrollment analysis, support calls (TAs), and budgeting.

- A la carte: use as many or as few features as you like, in any order, e.g. use the teaching call without the course planner.

- Continually evolving: new features suggested by users (you!) are engineered into IPA.
Why use IPA?
Why avoid IPA?
Why use avoid IPA?

• I enjoy using a lot of paper and painstakingly typing hand edits back into Excel.

• I enjoy having multiple copies of my schedule floating around the shared drive in many different formats.

• The hundreds of back and forth e-mails about trivial tweaks to the schedule brings me joy.

• I think computers are a fad.
State of IPA 2017
State of IPA 2017

- 40% of Subject Codes planned in IPA
- 45 Course Schedules started
- 61 Workgroups provisioned
- 1675 users with access to the system
- 205 users logged in within the last few months (seasonal usage)
State of IPA 2017

• Major changes since 2016: Instructional support module (TA call, AI planning) complete. Budget tooling in beta. IPA customer support desk established.

• 449 bugs squashed, 311 enhancements added.
IPA In Action
IPA In Action

• Plan three courses for the fictitious “Department of Paranormal Activity”.

• Put out an instructor call.

• Plan lecture times around instructors’ schedule.

• Put out a TA call.

• See what it costs.
How to Start Using IPA

• E-mail ipahelp@ucdavis.edu with the name of your department.

• We will provision your data and offer on-site training in addition to being available by e-mail, phone, and screen sharing to help whenever necessary.

• If you have any questions or ideas, please don’t hesitate to drop us a line!
Ileana Acevedo
Manager, Accounting & Financial Services
University of California, Davis
iyacevedo@ucdavis.edu
530-752-5873
Student Accounting

FALL 2017 Departmental Liaison Meeting

Ileana Acevedo
Manager of Student Accounting
Students and Staff

Please click HERE to log into your account.

Authorized Users

Log in for parents or others who have been granted access.

*Email: 

*Password: 

Login

Forgot your password?
Have a temporary password emailed to you.

Welcome

Welcome to University of California - Davis Student Account Suite. This 24x7 service lets students and their families view bills, make payments, and manage the student account.

Parents, guardians, or employers require student permission through the student's authorized user process. If you have any questions about the system, please send an e-mail to MyAccount@ucdavis.edu.

Student Account Suite Features

- Student Account Center
- Check your balance.
- Make a payment towards your balance.
- View your payment history.
- Store your payment methods for quick and easy payment.
- As a student, provide permission to others (parents, employers, etc) to view your bill and make payments.

E-Billing
- View and print your billing statement.
- Set up your bills to be paid automatically.

Payment Plan Management
- Enroll in a payment plan so you can pay your balance in installments.
- View your current payment plan status.
- Make a payment toward one of your installments.
- Schedule future installment payments.
Financial Responsibility Agreement

• Since November 2016, before students can access MyBill for the first time each academic year, they need to complete the consent.

By clicking “I Agree” below, you acknowledge that you have read, understand, and consent to the terms of this agreement, as applicable. By clicking “Deny Consent”, you acknowledge you have read and understand items # 1-8 but do not consent to electronic communication listed on items # 9-11.
MyBill New Look

**Announcement**
This is the test environment, which is connected to Banner TEST
For Student Accounting use only.

If you haven't signed up for Direct Deposit, please visit our website at http://directdeposit.ucdavis.edu

**Student Account**
- Balance: $5,023.13
- Estimated Financial Aid: $1,450.00
- Balance Including Estimated Aid: $3,573.13

**Payment Plans**
- Test Summer Session 1, 2017: $1,309.92
- Charges Not Included in Plan: $2,263.21

**My Profile Setup**
- Authorized Users
- Auto Bill Pay
- Notifications

**Statements**
- Your latest eBill Statement
- Statement (4/27/17)
Authorized Users

Student can provide permission to others (parents, employers, etc.) to view their bill and make payments.

From this page, you can give others (parents, employers, etc.) the ability to access your account information. In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), your student financial records may not be shared with a third party without your written consent. Adding an authorized user is your written consent that an individual may view your account information and make payments on your behalf. Please note that authorized users DO NOT have access to your stored payment methods, academic records, or other personal information.

Add Authorized User

E-mail address of the authorized user:

Would you like to allow this person to view your billing statement and account activity? Yes No

Would you like to allow this person to view your payment history and account activity? Yes No

Continue Cancel
• Statements are **courtesy** electronic billings that are issued on the 22\textsuperscript{nd} of each month.

• They are **static** and, therefore, do not reflect charges and payments made directly after that billing period.

• If new fees or payments post to the account in between billing statements the information will reflects on the Account Summary of MyBill.
Student Bill Payment Options

All fees are due on the 15th of each month

In-Person
Payments can be delivered to the Cashier & Payment Solutions Office at 1200 Dutton Hall

By Mail (USPS)
Cashier & Payment Solutions Office
University of California, Davis
PO Box 989062
West Sacramento, California 95798-9062

Online / Electronic Payments
E-check – Free of charge
Discover Card - $12 convenience fee
Wires
Fall Fee Payment Deadline
Friday, September 15, 2017

Drop for Non-Payment
Monday, September 18, 2017
Student Financial Aid Refunds

Fall Refunds available September 25, 2017

• Direct Deposit
  • http://directdeposit.ucdavis.edu

• Paper Checks
  • Available in our office
EXTENDED HOURS AND SERVICES

First Week of Fall Quarter Hours
• September 25th – 28th
• 9:00 am – 4:30 pm

Daily Checkwrite
• September 25th – October 6th
Financial Holds

• ZA – Past Due Balance*
• ZB – Pre Banner Balance*
• ZD – Long Term Loans*
• ZU – A/R Bad Debt*
• ZZ – ACH Payment Rejected (3 Returned Checks)*
• ZF – Exit Interview
• ZT – Non Resident Glacier Documents

*** No other departments should remove these holds. ***
Fee Remission

2017-2018 Fee Remissions

Fee remissions are a benefit of being employed at least 23% for the whole quarter in an eligible title code. Fee labor contract, TA fee remissions remain at 100% of Tuition (formerly Educational Fee) and Student Services Fee (formerly Registration Fee) for FY17-18. Fees are subject to change without notice.

<table>
<thead>
<tr>
<th>Resident Fees 2017-2018: Full-time graduate status</th>
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<tr>
<td>Quarterly Fees:</td>
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<td>Fee Remissions for residents:</td>
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<th>Non-Residents 2017-2018: Full-time graduates</th>
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<td>Quarterly Fees:</td>
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<tr>
<td>Fee Remission for non-residents:</td>
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<td>Winter</td>
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<td>Spring</td>
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* For a complete determination of quarterly fees, please visit the UC Davis Student Fees page. A student with a GSR appointment at least 23% or more is eligible for a GSR fee remission at the TA rate. Please do not give this appointment combination for less than the whole quarter.

- Fee Remission Benefit will not post in the student’s account until the student is completely hired and appointment posted to PPS.

- Student is responsible to pay fees not covered by fee remission or other awards.
Non-Resident Tax

• Non-Resident Students will receive a 1042S for scholarships or grants paid over their qualified fees

• Taxes will be withheld from the payments

• Students will have to register on Glacier

• Hold will be placed on accounts until they complete the process

• Questions can be directed to: glacier-help@ucdavis.edu
Student Accounting

Contact Us

Hours: Monday - Friday 10AM - 4PM
Address: 2100 Dutton Hall | Davis, CA 95616
Phone: 530-752-3646
FAX: 530-752-5718
Email Student Accounting

View Our Staff List
Thank You!
Deborah Agee

Director, Financial Aid Office
University of California, Davis
dgagee@ucdavis.edu
530-752-2396
Brendan Livingston

Director, Enrollment Management Analytics
University of California, Davis
bslivingston@ucdavis.edu
Admissions Update

Liaison Meeting 2017
Incoming Freshmen

 Applicants
  70,952

 Admits
  30,943

 Enrollment
  5,800-6,000

Applications From Around the World
Incoming Transfers

Applicants: 16,820
Admits: 10,354
Enrollment: 3,350-3,450

Transfers from Community Colleges
Incoming Freshmen

First Generation
- 41%

Low Income
- 31%

Underrepresented Minorities
- 34%

Academic Indicator
- GPA (Weighted): Average 4.00, 25% - 75% Range 3.85 - 4.16
- SAT Score: Average 1270, 25% - 75% Range 1150 - 1370

Incoming Transfers

First Generation
- 52%

Low Income
- 31%

Underrepresented Minorities
- 32%

Academic Indicator
- GPA (Transfer): Average 3.40, 25% - 75% Range 3.17 - 3.62
Differences in Divisions Across Time

% Low Income of Freshmen (Self Reported)

- HARCS
- CBS
- CAE
- SOCSC
- COE
- MTH

Year
Ethnicity Transition Across Time
Incoming Student Communications

• A list of all Admits/SIRs is being provided to each college every Monday morning until the first day of instruction.

<table>
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<tr>
<th>College</th>
<th>Contact Person</th>
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<tbody>
<tr>
<td>Agricultural &amp; Environmental Sciences</td>
<td>Jennifer Jackson</td>
</tr>
<tr>
<td>Biological Sciences</td>
<td>Maria Saldana-Seibert</td>
</tr>
<tr>
<td>Engineering</td>
<td>Mary Ramirez</td>
</tr>
<tr>
<td>Letters and Science</td>
<td>Brenna Dockter</td>
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Major Policy Initiatives

• On May 18, 2017 the UC Board of Regents voted to cap enrollment for supplemental tuition payers at 18% for most campuses
  • Cap is counting 18% of all undergraduate students
  • 2020 Initiative planned for 20% cap

• To meet state funding requirements, the incoming In-State fee payer freshman/transfer ratio must be less than 2:1 systemwide
Question Reminder

• Send all your unanswered questions to: bjnoble@ucdavis.edu
• Please send them to me by end of today, Sept. 12, 5pm
• We will compile questions and answers and post along with the meeting slides on the OUR website under Faculty/Staff
• You can find questions and answers directly at: http://registrar.ucdavis.edu/faculty-staff/qa.cfm
Advising Meeting Reminder

Remember:

Advising Fall Welcome is following this meeting at 11am in this room. Please stay and enjoy this great opportunity.
Thank you for coming!!!