Instantly Connecting
Students with Advisors

Automating and Managing Student Advising Activity

The Student Advising Problem

Research shows that when higher-education students have access to informed advising services, enrollment rates and graduation rates improve. However, access to advisors is not always accessible due to difficulties with traditional methods of communication, such as phone and e-mail. Students who may be desperately in need of advising services are instead met with a difficult obstacle: the inability to access an advisor's available schedule.

Allowing students instant access to an available schedule for advisors

When students complain to administrative staff that they can't get advising appointments in a timely manner, how can administration remedy this problem? How will they know that their efforts are making real change? Fortunately, automated advising appointment management systems exist that can allow visibility, accessibility and accountability. The result is an efficient system that offers students instant access to an available schedule for advisors, allows advisors to manage their schedules and provides access for administrators to view live and historical appointment scheduling activity throughout the organization.

This whitepaper will examine emerging trends in appointment management systems and examine the benefits of integrating business process workflow into a system to manage student advisor scheduling.

Driving Forces Impacting Student Advisor Appointments

Newer delivery models can lower costs

Retention
Timely access to advising is considered to be one of the most effective interventions to improve student retention. A small positive change in the retention rate can result in significant improvements in revenues for the institution.

Other Forces
Additional drivers toward automating academic advising include the growth in demand for higher education, student frustration, disenrollment, financial constraints on institutions, advisor inefficiency and advisor accountability. A lack of meaningful reporting for management tends to drive management toward automation.

Challenges

Adoption
In our experience, the appointment management system can be readily adopted by students and administration. There can be some initial resistance among advisors, but this can be overcome by meetings that clearly outline the benefits and goals of the new system as well as proper training of how to use the new system.

Integration

To maximize the effectiveness of the academic advising system, integration with the existing student information system is required. Ideally, the new system would integrate with current legacy systems. If not, the vendor should be experienced in integrating multiple systems.

With the current economic climate, higher education institutions may face financial constraints. Newer delivery models, such as SaaS (Software as a Service), can provide low upfront costs. Ongoing costs may be just a few cents per transaction (appointment).

A Brief History on the Evolution of Academic Advising

Starting from the "collegiate way"

American higher education evolved from the English system in what was known as the "collegiate way." During the 18th century, students and faculty often shared the same residence. This resulted in a close relationship between students and their instructors. Advising happened as a natural course of being in such close association.

In the 19th century, as higher-education institutions proliferated and evolved, academic advising groups started to secure their space in higher education. Faculty within specialized curricula consulted with students and advised them on the classes they needed to take.

During World War I, the U.S. Army began testing recruits and placing them in various roles depending upon their skills and intelligence. Universities took note of the benefits and created vocational guidance centers that utilized occupational assessments to assist in advising students. From this point, advising evolved quickly to focus on self-direction of the student with the educators acting as mentors.

Today's advising services incorporate features from a combination of previous models. Although testing is still fundamental, today's model relies more on outcome-based results emphasizing validity, efficiency and accountability, but still includes testing as a baseline to advising.

The Solution

Visibility and accessibility to available advising appointments is essential

To improve advising performance and student outcomes, some higher-education institutions are looking to a comprehensive advising management software solution.

Visibility and Accessibility

In order to provide a responsive advising solution, student visibility and accessibility to available advising appointments is essential. The system should show students only the available time slots and no information regarding any current appointments. The system should allow advisors to manage and post their available schedule online for easy student access. The student should be able to quickly access advising pages, view an available appointment schedule and book an appointment. The booking should be seamless: the available slot should be instantly removed and the advisor should be able to see with whom they have an appointment. Students and advisors should have the option of receiving confirmations and reminders in a variety of formats (e-mail, SMS text, etc.).

Meeting Advisors' Needs

The advisor's view of the system allows advisosrs to set up their schedule online and manage what times are available for student bookings. Once the schedule is set up, advisors can passively or actively monitor their schedule to see who has booked an appointment with them.

Importance of the Advising Record

Much like an electronic medical record gives physicians comprehensive views of a patient, the advising record gives advisors and staff a comprehensive record of the advisee. The benefits of creating and maintaining an electronic advising record are significant for the student, advisors and the administrative staff.

The advising record gives advisors and staff comprehensive views of the advisee

The advising record tracks the entire history of advising, which is accessible by the student and/or advisor during and in between visits. The advising record also allows for continuity of advising. Should an advisor need to be changed, the comprehensive record of advising activities, scores and follow-up information provides an excellent starting point for the new advisor. The new advisor now has a complete view of the student's advising history and response to advising recommendations.

The advising record also provides advising managers a tool to assist in evaluation of advising staff performance. The manager or administrative staff user may review reports on advising availability and activity.

Tracking: Creating the Advising Record

Once the student arrives for the appointment, the advisor has the option of checking the student into the system and creating a visit. The advisor also has the option of creating template-driven advising notes during the actual visit. If any testing results or other supporting documents become available, they may be uploaded into the system.

"Over 80% of our students now use the online system"
Janet Kalunian, Boston College

The advisor may choose to flag the student with one or more defined "diagnoses" such as Academic At Risk, Athlete, etc. In concluding the visit, the advisor may also create and assign template-driven follow-up instructions for the student. The notes may be printed for the student to keep or be made available to the student upon logging into the system.

In order to facilitate the generation of documentation, the advisor should be able to create, edit and store templates for the advising notes and follow-up instructions. Once the visit is complete, if the advisor and student agree on a follow-up appointment time, the advisor may book the next appointment.

Follow-Up

Prior to any follow-up visit, the student and advisor may access the system and review the follow-up instructions. If needed, the student may respond to a questionnaire or evaluation form. The advisor may review the progress notes that they, or another advisor, made during the previous visit, and any associated flags (diagnoses) or uploaded materials.

Adoption

In our experience, adoption of the new system by students has been rapid. Janet Kalunian, Boston College, Associate Director for Academic Operations states: "Over 80% of our students now use the online system to schedule their appointments with advisors — which has made a positive impact on them and our office operations." Adoption by advisors has been rapid, once the benefits and operations of the system have been discussed.

Key Benefits

A number of significant benefits exist for all parties involved in making and managing advisor appointments when utilizing an academic advising management system:

Significant benefits for students, advisors and staff

For Students

Students now have a convenient, online method of viewing an advisor's available schedule and booking an appointment. The student receives a confirmation of the appointment as well as reminders. Confirmations and reminders may be conveniently loaded into various third-party programs, including Microsoft Outlook and Google Calendar. Additionally, students may receive SMS text messages to their mobile phone. Students may also access the system to review their history, assignments and follow-up instructions.

For Advisors

Advisors have an enterprise system to post and manage their available schedule. When the student arrives for the advising appointment, the advisor may check them in and start a visit. During a visit, the advisor may upload any documents, designate problem types, create template-driven progress notes, and follow-up instructions, as well as book future appointments.

For Staff

With the new system, the administrative staff now has a powerful tool to view live and historical appointment scheduling activity throughout the university. Administrators may view the live schedule and access reports on advising activity by department, by student or by advisor. Administrative staff may view historical data and spot trends in advising appointment activity. Staff may also pull standard and customized reports on demand or on a predefined delivery schedule. Based on security settings, staff may be able to drill down to see advising details.

For Everyone

Responsive academic advising can be a fundamental part of a student-withdrawal-intervention program. If the withdrawal process is lengthened and academic advisors have contact with the student, withdrawal rates have dropped.

What to Look for in a Solutions Provider

Experience is key

When selecting a solutions provider to supply an appointment management system, be sure to consider the following:

Experience
Look for experience in supplying student advisor scheduling in large multi-centered institutions as proof the system can manage your needs. Consider the various integrations that the system has with legacy software.

Arrival Management Module
If your organization utilizes an advising center or takes walk-in appointments, having an arrival management module creates efficiencies for staff and advisors. The arrival management solution should be able to allow a receptionist to view statuses of all arrivals, scheduled appointments and the live availability of each advisor.

Reminders
Confirmations and reminder services should be a configurable feature that is available to students and advisors alike. The messaging service should allow multiple formats such as email, SMS text and perhaps even voice reminders. The messaging service should also notify students and advisors if a cancelation or other scheduling change takes place.

Single Sign On
Single Sign On allows multisystem logon via the student portal. The feature should function to log into the advising and scheduling systems with logging into the portal. This creates a single login point and avoids requiring students or staff to login multiple times.

Document Handling
It is often desirable to attach supplementary documents to the student's account. The system should allow uploading of supporting documents in multiple formats. In addition, if you allow online student self scheduling, it may be desirable to allow students to upload documents during the booking process. These documents may then be reviewed by the advisor to determine if they should be retained as part of the record.

Flexible Platform
SaaS (advanced cloud or dedicated) with SAS 70 type II compliance or installed. Conditions may change; make sure the solutions provider can provide any current or future option you may need.

Recurring Appointments
Advisors or students may wish to establish a regular pattern of recurring appointments. If the system allows recurring appointments, students and advisors have a tool to easily manage more complex scheduling tasks.

Role Security
The system should have role-based security to allow administrative staff full access to view live and historical appointment availability and usage. Administrative staff also should have access to various reports to monitor appointment scheduling activity by student, advisor and college.

Confirmations and Reminders
At a set schedule prior to the appointment time, the student will receive reminders about the appointment that include the location, a map and general advising rules. The reminders include a link that can take them back to the system to review the appointment details and allows the ability to cancel or reschedule the appointment based on University rules.

Round Robin Scheduling and Queuing

If you are operating a Student Success Center, or an advising center that takes walk-ins as well as appointments, you should consider a Round Robin scheduling feature. Once the student checks in for a walk-in interview the system can match the student through multiple parameters with the best choice of advisors working that day. The student may then be queued as soon as the advisor is available to see them.

The EZappt Advantage

Experience

EZappt has experience with all types of higher-education institutions, including large multi-centered organizations. EZappt has integrated with the most common systems to allow single sign-on and other features. EZappt's clients include Arizona State University, Boston College and Metro Denver Colleges and others.

Arrival Management

EZappt includes an arrival management tool called the Arrival Dashboard, which allows full visibility and control of the arrival process. For Student Success Centers the system includes student to advisor matching (multiple parameter) and Round Robin queuing.

Reminders

EZappt's confirmation and reminder system creates automated messages for any change in appointment scheduling. EZappt allows users to accept messages as e-mail, SMS text messages and/or automated voice reminders. All users may easily load their appointments into Outlook, iCal, Windows Live, Google Calendar and/or Facebook.

Flexible Platform

The EZappt Campus Appointment Management is available as a secure SaaS (Software as a Service) fully hosted solution or as an installed solution on your organization's infrastructure.

Get More Information
Click Here

Contact

To take the first step toward managing your student advisor appointments, please call 888-709-2778 or e-mail advising@ezappt.com.