

## Summary of functionality loss at go-live of RamPortal

Date: Last updated April 2025

**What:** In WCU's move to RamPortal, there are needs to limit the scope of functionality available at our initial go-live in order to manage project scope and risk. **This document is intended to summarize what current functionality (available in myWCU) that will not be available in RamPortal during our initial go-live.**

**It is our intention to work to introduce these missing tools over time as we continue to iterate on our system.**

In instances in which the Banner software does not, to the best of our knowledge, have the ability to offer the functionality, that is also noted.

### Notification of Loss:

Workstream	Functionality	Next steps	Status
Student Registration	Banner's <b>waitlist</b> functionality does not automatically enroll students from the waitlist into the class when a seat becomes available. Instead students receive an email letting them know a seat is available, and if they do not register within a given time period they are removed from the waitlist. This does not align with WCU's commitment to access and we believe it would perpetuate equity gaps.	WCU is working with Ellucian on an immediate solution for March 2024 that would allow the registrar's office to enroll students from the waitlist into the course. <u>Fall 24 Update:</u> Waitlists are available to students and are manually managed by the Registrar's office. Development on a more automated solution is ongoing with Ellucian <u>Spring 25 Update:</u> The Registrar's Office spent over 375 hours processing waitlists for spring 25 classes. This is unsustainable, so we went to the banner delivered model- in which students enroll themselves in a class when offered a seat of the waitlist- for summer/fall 25 registration.	Development with Ellucian for an automated process is ongoing. Ellucian is experiencing resource constraints which is impacting progress. High Priority
Student Records	<b>WRITE Survey:</b> This survey has been built into myWCU to administer the survey, score the survey, and update student records with the appropriate placement score. RamPortal does not have the functionality to do surveys and scoring.	We are working with the first year writing committee to redevelop the tool in D2L and will be available in April for utilization. Fall 24 Update: The WRITE survey has been created and deployed in D2L. The placement scores are copied into Banner daily.	Complete
Registration	<b>Pre-requisites for Fall 2024:</b> Due to the fact that summer 2024 registration will be governed in myWCU and will not convert to RamPortal until September 2024, any courses students are registered for in summer 2024 that are prerequisites to their Fall 24 classes, the RamPortal system will not natively recognize that the student has completed the prerequisites. Students may get inaccurate prerequisite errors when they register for fall 24 classes.	This issue is isolated to our first registration-term in RamPortal and is not anticipated to perpetuate. The registrar's office will monitor prerequisite errors in RamPortal and manually resolve.	Limited to fall 24 registration. There is a manual process to review/resolve.

Graduation General Education Review	<p>In myWCU the Graduation Tracking page centralized the review of student's status toward graduation requirements. On this page Registrar staff could note what general education requirements were still missing when a student applied for graduation. The information was visible to the department chairperson and advisors. Chairs and graduate coordinators major/minor clearance/deficiency notes were also stored on this page.</p> <p>Banner does not have a similar centralized page/data structure to record status toward graduation.</p>	WCU is working on a structure that would utilize the Degree Audit notes to allow the Registrar staff, as well as chairs/graduate coordinators to record graduation clearance/deficiency status.	<p>Ongoing.</p> <p>For May 2025 degree clearance the Registrar staff as well as grad coordinators/chairs will be putting all graduation deficiency notes in the degree audit notes.</p>
Graduation Clearance Tracking	In myWCU the Graduation Tracking page, had a central place in which registrar staff, and department chairs could note and track student's clearance or deficiency status. It also tracked communications sent to students, diplomas ordered, etc. This information then was easily shared with students for their awareness. This central data source was then used to mass confer degrees, and send student communications.	Banner doesn't have a similar page the tracks students all reviews by multiple parties and centrally shares that information with students. This is significantly slowing down the process for reviewing students for graduation and requiring extensive staff resources. Additionally there is a decrease in proactive communication with students, and chairs due to this limited functionality.	Ongoing
Registration	<b>Music mass enrollment in private lesson classes:</b> there is a process in myWCU that creates private music lesson classes each semester based on the prior term's offering/enrollment, and mass enrolls students into their subsequent lesson. RamPortal cannot mass create classes/enrollment based on a student's prior enrollment	Mass enrollment into courses will be a manual process we will need to work with the School of Music to manage.	Ongoing. Will require more manual efforts.
Student Records	<b>Co-Curricular Transcript:</b> RamPortal does not have a native way of tracking student non-academic learning and produce a transcript to reflect those records.	<p>We are working on archiving co-curricular transcripts of existing student for their record to mitigate risk while a new transcript solution is implemented</p> <p><u>Spring 25 update:</u> A new system has been secured and is in implementation. Student access to myWCU has been removed, and students must request transcripts via the Student Affairs. Team. This shift will also add cost and resources to the implementation.</p>	<p>Ongoing.</p> <p>New system to track co-curricular experiences, build the transcript, and provide student with the transcript is expected to be</p>

			available late spring 2025.
Accounts Receivable	<p><b>Part of term (session) billing:</b> Right now WCU's sets student tuition/fee due dates based on the start date for their courses. As such, students who are enrolled in classes that start late in the semester don't need to pay in full for all courses at the beginning of the semester. This is considered a critical component to meeting student needs. RamPortal does not have the delivered capability to defer charges for late-starting classes.</p>	<p>Ellucian is working a solution to this for delivery in 2025/2026. In the interim WCU needs to consider how best to not penalize students for balances.</p> <p><u>Spring 25 update:</u> Ellucian was unable to identify a solution in time for summer 25 billing. Work is ongoing with the hope to have a pilot in place for Fall 25 billing.</p>	Ongoing, will take several years.
All	<p><b>Hold Challenges:</b> There are challenges with the way Banner manages holds: Effective term: Currently, WCU holds are term-based, so there is a start term and end term. For example, the advisor hold (NEN) when applied in October for spring registration would prevent students from registering for spring classes but wouldn't stop students from registering for the current fall term. Ellucian does not do term-based holds so the advisor hold applied for spring would impact students' ability to add/drop all courses</p> <p>Impact: Currently, WCU most often has a hold that prevents registration but allows students to drop classes. This is to ensure we center student-success and don't lock students into courses via a hold that prevents them from dropping. Ellucian doesn't have a hold that stops adds, but allows drops.</p>	<p>WCU is able to use the NEN/NEW hold for fall 24 registration in Banner because there are no prior term registrations occurring in Banner during the fall 24 registration cycle.</p> <p>Ellucian is working on a new impact that allows for drop and prevents add. This will be available in 2025.</p> <p><u>Spring 25 update:</u> Ellucian has provided an overview of their development decisions on a new hold impact. Unfortunately, it doesn't serve WCU Needs. The hold impact that allows drops but not adds can only be overridden by faculty or staff. If a student has the hold, the student will not be able to drop courses in self-service, but faculty and staff can without using an override (if permitted)</p>	<p>No action at this time.</p> <p>WCU has developed new hold business processes to adjust to the Ellucian limitation.</p>
Student	<p><b>Posting AP Credits:</b> currently WCU is able to mass-post AP test scores to student records and award credit. This automated process allows us to quickly award credit to students for their prior learning, and update their class schedules to ensure they don't duplicate courses they have completed test credits for. Banner does not have a mass-post process which would result in us updating student records on an individual basis.</p>	<p>Currently working with Ellucian on a process for utilization.</p> <p><u>Fall 2024 Update:</u> For the Fall 24 students, AP scores were loaded into myWCU and then copied over to Banner. WCU still needs to develop a mass load process for Banner.</p>	<p>Ongoing.</p> <p>Spring 25 Update: Validation of development is in progress. Expected completion by July 2025 when bulk scores are expected.</p>

Student, Faculty, Staff easy view of add/drop deadlines	<p>When we went to sessions within terms, we created a myWCU page where users could see what courses they are registered for and the corresponding add/drop, course withdraw, session withdraw deadlines. This is intended to allow for transparency in a multiple session environment.</p> <p>Banner doesn't have an equivalent page.</p>	AES is developing a page in Banner to display these academic calendar dates for use in summer 2025	Top. Considered critical as we move to a 21 part of term summer.
Student Records	<p><b>Cancelled Classes:</b> In banner departments can cancel classes in which students are enrolled and it does not automatically drop students from the cancelled class. This can result in inaccurate registrations that negatively impact student schedules.</p>	<p>We are working on a solution that will again require more staff and manual intervention to catch these inaccuracies and resolve them.</p> <p><u>Fall 24 Update:</u> Academic departments have been given instructions on how to drop students from classes prior to cancelling a class.</p> <p>The Registrar's office runs a manual process to look for instances in which students are registered in cancelled classes.</p>	No further action planned. Ellucian has indicated there is no further option for this requirement.
Student Records	<p><b>Transfer Evaluation &amp; Notification:</b> WCU's strong commitment to transfer student recruitment requires us to do a formal evaluation of transfer credits as soon as a student submits their admission application. Other schools do not do evaluations until a student is admitted or matriculated. Banner does not allow us to post credits to student records until the student is matriculated.</p>	<p>We are working on a solution that would allow us to offer students formal transfer course evaluations within three days of admissions to WCU as is our current practice.</p> <p>In myWCU we could offer evaluations to students who have applied (and are not yet admitted). This functionality does not exist in RamPortal and a solution has not yet been identified.</p> <p>Providing evaluations for admitted students will take considerable work for WCU. It will be needed when we start Fall 25 admissions process (approximately September 2024).</p> <p><u>Fall 24 Update:</u> This work is ongoing and on-track to be implemented in early fall 2024</p> <p><u>Spring 25 update:</u> Automated evaluations of transfer credits is in place for Admitted students, and current students.</p> <p>Still to develop: automated notifications to students and advisors when evaluations are done; and we are</p>	Ongoing

		currently not doing evaluations for applicants.	
Student	<b>Students Intended Load:</b> Currently WCU asks students to indicate the number of credits they intend to enroll in each semester. This is used for Enrollment Management planning, and we connect with students who are under-enrolled to help them get to their intended number of credits. There is no native functionality in banner for this.	We are working on a solution. It will not be available for fall 2024 registration	Ongoing. Low-priority
Student	<b>Form of Study:</b> Currently we allow students to indicate if they are planning to take a semester off and engage in other activities (such as internship, study abroad, etc.). We use this for Enrollment management planning, and then use this data to coordinate communication to student. There is no native functionality in banner for this.	We are working on a solution. It will not be available for fall 2024 registration	Low-priority. No activity underway.
Student	<b>Change of major workflow:</b> Currently WCU has a workflow in myWCU where students can request change of major that then goes through a workflow review/approval process and automatically updates student records in myWCU. Banner does have workflows to accommodate this, but they will not be developed when we go-live with student records	WCU will continue to utilize the myWCU change of major process through the end of summer 2024.  <u>Fall 24 Update:</u> WCU will utilize an electronic form/workflow in OnBase for the 24-25 academic year. This will provide students with an electronic form to complete requesting a change of major, then will have an OnBase workflow to solicit departmental review. The changing of major and advisors in RamPortal will be a manual process for the Registrar's office and the time to record will be extended.  <u>Spring 25 Update:</u> The OnBase student form & workflow are now available. Work has begun with Ellucian to build this workflow in RamPortal to speed up the processing time once a change has been approved via workflow.	Version 1: Complete  Version 2: Just begun. An electronic Banner workflow will be highly complicated, per Ellucian, and is likely to take significant time.
Student	<b>Change of grade workflow:</b> Currently WCU has a workflow in myWCU where faculty can submit change of changes. These go through a workflow review/approval process and automatically updates student records in myWCU. Banner does have workflows to accommodate this, but they will not be	WCU will continue to utilize the myWCU change of major process through the end of summer 2024.  The Banner workflow is anticipated to be ready no later than December 2024. <u>Fall 24 Update:</u> A banner workflow is in development however has significantly limited functionality since historical class rosters are not in banner. Therefore,	Completion anticipated April 2025.

	developed when we go-live with student records	<p>banner doesn't know who taught historical classes and what students were enrolled. So the form faculty complete will require more fields to be completed. Change of grade will be student based, instead of class roster based.</p> <p><u>Spring 2025 Update:</u> A RamPortal workflow is in place for grades issued Fall 24 onward. Active development is underway for a change of grade workflow for courses prior to fall 24. Go-live anticipated in April 25.</p>	
Enrollment Management (EM)/Student	<p><b>Plan Changes prior to start at WCU:</b> Currently WCU has a process that notifies the Registrar's Office when a student changes their major with Admissions after matriculation so the student record can be updated. This functionality does not exist within our iDate to Banner integration.</p>	<p>We will work on reports to identify any discrepancies between majors in Slate and Banner so they can be manually updated.</p> <p>Spring 25 Update: Curricula changes are being brought over via the Slate integration to the Application and Student record</p>	Complete
EM	<p><b>Re-Admit Application:</b> Our goal was to implement an electronic Re-Admit application as part of our SIS modernization project; that is still our intention but it will not be ready for go live.</p>	<p>We will continue with our paper-based application and utilize the Banner Quick Admit process until the Slate application is live.</p> <p>Fall 2024 update: The Slate re-admit application is on the list for redevelopment to support the Fall 2025 readmit cycle</p>	Medium Ongoing
EM	<p><b>Test Scores:</b> Currently WCU loads test scores for applicants into both Slate and myWCU. We are working to load applicant test scores from Slate into Banner. This is not currently ready but is expected to be completed by late spring 2024.</p>	<p>Banner has a delivered process that will be leveraged to load student test scores from external agencies. Placement scores (Write Survey, Mathematics, and Foreign Language will be ready)</p> <p>Spring 25 Update: We are now loading SAT, ACT, WRITE, and Math placement scores</p>	Complete
EM	<p><b>Reverse Transfer:</b> WCU is now collecting Reverse Transfer information on the Common Application for Transfer students.</p>	<p>The development to load this data from Slate into a delivered Banner pages is still in-progress.</p>	Ongoing. Medium.
EM	<p><b>Military data from Admissions:</b> Currently military data collected on the student application is loaded into a custom myWCU page. We have created custom fields in Banner to store this</p>	<p>We are finalizing development and validation and expect to have this data in Banner by early summer 2024.</p>	Completed

	information but have not yet loaded this data.	<p><u>Fall 2024 Update:</u> Develop to bring this information in from UG and GR applications has been completed and is in place.</p> <p>Migration of data from myWCU to RamPortal for current student (i.e. students admitted prior to fall 2024) is still ongoing.</p>	
EM	<p><b>Undergrad first gen data:</b> Undergraduate applicants can indicate they are first generation students. We will be loading this information to the student record in the form of a cohort via our iData integration. This development is still underway.</p>	<p>Students who indicate they first gen in Navigate will be extracted and loaded into Banner.</p> <p><u>Fall 2024 Update:</u> FirstGen cohort code is being populated on for UG applicants upon matriculation. Migration of data from myWCU to RamPortal for current student (i.e. students admitted prior to fall 2024) is still ongoing.</p>	Low
EM	<p><b>Graduate accelerated application:</b> Currently WCU deploys an Activity guide to undergraduate accelerated students in their final semester at WCU to collect the necessary to create their Graduate application for the accelerated program. This functionality does not exist in Banner.</p>	<p>We will use the existing WCU process to create Accelerated Applications for Fall 2024 . We will then leverage a Slate form to create these applications for future admit terms.</p> <p><u>Fall 2024 Update:</u> A Slate form will be used to generate the Accelerated applications in Slate, and then be loaded into Banner. Development Ongoing.</p>	COMPLETE
EM	<p><b>Undergrad relationship/parent data:</b> Currently WCU loads parent data provided on the undergraduate application into a custom data within myWCU. We are not currently loading this data into RamPortal.</p>	<p>There is an existing Banner table WCU can leverage to store this data but we are still reviewing if/how this data is being used.</p>	Low. No current work being explored.
EM	<p><b>External school and degree information:</b> RamPortal doesn't store students' previous school/degree information as clearly as myWCU does making storing/viewing prior schools and dates of attendance difficult.</p>	<p>WCU is working on a tool to convert historical data and fall 2024 applicant data.</p> <p><u>Spring 25 Update:</u> Prior college and high school data is being populated in Banner via the Slate integration. This went into effect for the Spring 2025 applicants. There are still conversations in-progress regarding the GPA being brought over from the Undergraduate Slate. And development is still required to bring over the combined/average transfer GPA.</p>	High.

Student Registration	<b>Course Repeat:</b> Ramportal does not provide the student with an informational message when a course is registered as an additional attempt	We are working on a solution that will email the student informing that the registration is a repeated course <u>Fall 24 Update:</u> We aim to have a manual process to identify repeat rule registrations in place for winter/spring 25 registration. This process will have the Registrar's Office manually email students and advisors when a student enrolls in a course they are not eligible for due to repeat policy. It will ask the student & advisor to resolve the miss-registration.	Medium. Active development underway.
Student Registration	<b>Career Repeat:</b> RamPortal does not have a native way of restricting the registration of a course that exceeds the career repeat limits.	The Registrar's Office will have a report to manually review career repeats and student outreach will occur to solve the issue. <u>Fall 24 Update:</u> We aim to have a manual process to identify repeat rule registrations in place for winter/spring 25 registration. This process will have the Registrar's Office manually email students and advisors when a student enrolls in a course they are not eligible for due to repeat policy. It will ask the student & advisor to resolve the miss-registration.	Medium. Active development underway.
Financial Aid & Accounts Receivable	<b>Apply Aid to University Housing:</b> Currently WCU has a process where students can automatically apply refunds and financial aid funds to pay for their USH housing costs. <b>Banner</b> does not have a native way to allow for this.	Working with Ellucian to develop an integration that would help to allow students to allocate funds to their USH costs.  We anticipate that at initial go-live we will have a tool that will require manual intervention from the WCU staff.	July 24 WCU built a process using Onbase to meet this student need.  Development with Ellucian for a more sustainable solution is ongoing.
Student Records	<b>Academic Standing:</b> myWCU utilizes what-if tools in calculating standing (such as with NG grades). These what-if standing rules are not available in Banner. Additionally, academic Standing for Summer 24 and Spring 2024 will be calculated and processed in myWCU and then need to be manually updated in Banner. Academic standing for Fall 2024 will be processed in Banner	The Registrar's office and The Graduate School will use reports from myWCU to apply academic standing in Banner for 2024 and to manage the what-if rules.	Complete



Student Registration	<b>Drop with consent:</b> Doesn't have a tool to require consent to drop a class. This is used for courses that are requirements for students. A good example is the FYE class.	Not anticipated to be available for Fall 24 registration. The Registrar's Office will build reports to monitor enrollment in these courses.	Medium
Student Records	<b>Ethnic code:</b> WCU has a self-service tool where students, staff and faculty can self-indicate and update their ethnicity.	Working on building a self-service tool. Will not be available at go-live in March.  <u>Fall 2024 Update:</u> Students will have self-service access to make these updates effective 8.19.24	Complete
Student Records	<b>Military Data capture:</b> WCU has detailed military data for students to indicate their service connection We have rebuilt this data structure in Banner, but do not have a way for students to indicate their service history via self-service tool.	Working on converting military data from myWCU to Banner, how to keep the data updated while we are running both myWCU and RamPortal through summer 2024. Working a tool so students can update this information via self-service.  <u>Spring 25 update:</u> Military data is being brought over via the Slate integration to Banner. Development of self-service page for updating this data is in-progress, expected in Fall 25.	Low
Student Records	<b>Mass Update / Remove Attributes/Cohorts/Alt Pins:</b> Need a mechanism for updating/removing students attribute, cohorts or alternate pins	Will manage manually until we have a tool.	No further action planned.
Student Records	<b>Enrollment Verification:</b> Local Print - Students need to start verifying enrollment basically when enrollment opens for the future term through drop/add	Ellucian is working on a solution proposal. Possible to have a solution during Summer 24.  <u>Fall 24 update:</u> Ellucian was unable to offer any solution. WCU developers created a report that will be accessible to students in mid-August.	Near completion
All	<b>Reporting</b> – The bulk of existing reports and reporting functionality will not be available at go-live. Reporting tools such as PS Query do not have direct analogs in Banner and reports or communications built on Word documents used in Bi Publisher will also need to be reworked.	Essential reports have been identified and are being developed using the tools available in Banner. Ad hoc reporting may be possible from other tools which need to be reviewed.  Training will need to occur for end users to access reporting tools. <u>Fall 24 update:</u> Due to challenges with building and user access to reports in Banner/Argos, WCU is leaning into utilizing Navigate for user reports. These reports will rollout throughout the fall semester.	Ongoing.

Workflow Dashboards	When approvers received workflow requests in myWCU.- such as change of grade and change of major- there was a tile in which they could monitor requests received, processed, etc. Right now the workflows are only providing users with an email notification and not a dashboard	AES needs to investigate how to establish a reviewer dashboard.	
Data Conversion Cleanup	As WCU utilizes Banner we are identifying inconsistencies and inaccuracies of data that was converted from myWCU into Banner. Cleaning up data inconsistencies is critical to ensure accurate student records and to prepare for the myWCU database decommissioning.	Issues exist with former student program (major/minor) information; courses counting in attempted credits; moving second degree students to the second career level	Top priority as we decommission myWCU
Student Registration Monitoring	<b>SAS Dashboards</b> – SAS Dashboard are currently connected to the myWCU database to indicate admitted, active, and/or registered students. The database of this historical database is being rebuilt off of the banner data structure.	The SAS dashboards will be inaccurate beginning March 2024 in looking at information for Fall 2024. It will not show admitted, active or registered students for Fall 24.  <u>Fall 24 update:</u> The fall enrollment dashboard was launched in July. IR continues to rebuild other dashboards with Banner data.	High
All	<b>Security</b> – WCU has detailed level user access that will not be in place at go-live. For example, Banner doesn't give access to add/remove hold by hold type; or ability to override enrollment by override type.		No further action planned.
Student Records	<b>First-Year student Placement Portal:</b> We are working on rebuilding the placement portal in Banner.	Delay in rollout for Fall 24 admits. <u>Fall 24 update:</u> Rebuilding the placement portal in Banner will be a spring 25 project  <u>Spring 25 update:</u> The placement portal is in develop and anticipated to be deployed to students via Navigate.	Medium. Planned completion April 25
Student Registration	<b>First Year Scheduling for Fall 24:</b> in myWCU we have functionality for departments to indicate their preferred schedule for incoming students (i.e. prototypes). And then produce personalized data sheets for students that gives staff critical information necessary to build a first-semester schedule. Neither of these tools will be available in RamPortal for summer 2024.	Manual block scheduling for fall 24 admits utilizing some tools – such as datasheets – out of myWCU  <u>Spring 25 update:</u> Data from RamPortal and Navigate will be combined in an excel file for departments to utilize to build first year schedules.	Medium.

Student Records	<p><b>Navigate Reimplementation:</b> Navigate is currently pulling data from myWCU to provide information about students and class registration. We need to reimplement Navigate to connect to Banner database. Navigate will not accurately show fall 24 class registration information until the reimplementation is complete.</p>	<p>Navigate reimplementation will begin in spring 24 and will be completed by August 24.</p> <p><u>Fall 24 update:</u> Reimplementation occurred at the end of July 24. At this time we are working at fine-tuning the data in Navigate for the start of the fall semester.</p>	Complete
Student Records	<p><b>Building transfer equivalencies:</b> In December 23 we had to temporarily stop the building of new transfer credit equivalencies. This pause is necessary as we move our equivalency database from myWCU to RamPortal, and rebuild the process by which chairs denote equivalency decisions in OnBase.</p> <p>We are reimplementing our transfer equivalency process in OnBase in spring &amp; summer 24</p>	<p>Equivalency creation will be paused until Summer 2024.</p> <p><u>Fall 24 update:</u> This pause is expected to extend through the fall semester due to vendor delays in implementing the new process to post student transfer credits.</p> <p><u>Spring 25 update:</u> During the summer 25 the Registrar's office will begin to manually build equivalencies established from transfer credit appeals. There continues to not be an automated process to review and build equivalencies.</p>	<p>Medium.</p> <p>See <a href="#">this communication</a> for more details.</p>
Student Records	<p><b>Pause in Posting Transfer Credit to student records:</b> In order to accommodate our conversion of student data from myWCU to RamPortal, we will need to pause the evaluation and posting of transfer credit for a period of time. The date of this pause is still TBD but will likely fall in February and/or March 24.</p>	<p>The dates are still being finalized. It is anticipated to be mid-March to mid-April.</p> <p><u>Fall 24 update:</u> No further pause is expected for the 24 admissions cycle. We anticipate a pause at the beginning of September, before the start of the 2025 admissions cycle for transfer students.</p>	Resolved
Student Records	<p><b>Enrollment Overrides:</b> Banner does not allow for department chairs to issue enrollment overrides such as closed-class or prerequisites.</p>	<p>WCU is aiming to create a process by which department chairs can create overrides. This tool is not expected to be available at the start of fall 24 registration</p> <p><u>Fall 24 update:</u> Effective April 2024 department chairs, graduate coordinators, SSCs had access to issue overrides.</p>	Complete
Student Registration	<p><b>Swapping Classes:</b> Banner does not have a delivered process to allow students to swap classes (i.e. drop one class and add another in a single transaction).</p>	<p>We will be training students and advisors on the new process of doing both a drop and add transaction.</p>	No further action planned.
Student Registration	<p><b>Course planning/Shopping Cart:</b> Banner does not have a native tool in which students can plan their class schedule (i.e. save the classes/sections they wish to enroll) prior to their</p>	<p>Aim to implement a non-template Student Educational Planner tool for March 2024 to allow for a basic schedule planning tool for fall 24 registration.</p>	Ongoing.

	enrollment start date. There is a tool in Degree Works that we are working on aiming to implement at a basic level.		
Student Records	<b>Student change their graduation term:</b> Banner does not have a delivered functionality to allow students who have applied for graduation to update their graduation term.	Thinking about a new process for students.	Low
Student Records	<b>Additional data in Class Roster:</b> Currently faculty can see the following information on the class roster that are not available in the banner class roster - paid status, clearance exp, credit load, cum credits, GPA, pronouns.	We are assessing which data elements are still needed and will determine how best to get this data to faculty.	Low  High priority for faculty to see student clearance information in rosters. Work underway so this is in place for Fall 25 classes.
Student Records	<b>D2L Integration:</b> In rebuilding the integration to D2L there will be considerable effort to get back to current state. We anticipate manual intervention will needed initially for sending staff for D2L Training, student enrollments into non-courses D2L shells, and monitoring the removal of students from courses when they drop the course.	Working on manual interventions while we mature the integration.	Complete
All	<b>Parent Portal:</b> Authorizing Parents/Guardians to review the students' records based on what the student authorizes. Students will be able to authorize Parents/Guardians to review and pay changes on the student's account	WCU will be configuring the new system to able students to authorize Parents/Guardian access to a limited data (Class schedule, Grade, Financial aid) This data is view only , a Parent/Guardian will not be able to update  <u>Spring 25 Update:</u> WCU has hit considerable hurdles in implementing Parent Portal. Ellucian has advised that WCU will need to rebuild its entire user experience interface to make parent portal work. WCU is exploring more robust, manageable third party options.	Medium
Student Records	<b>Chair Remove Advisor Hold:</b> There is no delivered functionality to allow a department chairperson to remove advisor holds	WCU is review how best to manage Advising hold, for this registration cycle advisor will be able to release the hold  <u>Fall 24 update:</u> Ellucian has not offered any functionality to meet this need. WCU	Medium

		continues to explore alternative systems to help mitigate this need.	
Student Records	<b>Advising Notes:</b> Currently the myWCU advising notes allows advisors to attach documents to notes to share with students. Attachments are not an option in RamPortal advising notes.	<p>We believe that attachments will be less frequently needed because of the new Degree Audit that replaces the DPR. Many of the attachments from advisors were copies of the DPR. Additionally, advisors can attach items to the Navigate appointment summary report if sharing a document with a student is critical</p> <p>We have heard that some of the documents attached to advisor notes in myWCU are important to retain. Unfortunately, there is not mechanism to migrate attachments into RamPortal. Therefore, we are actively looking into where else we can store attachments for reference. This exploration is underway and we will aim to have an alternative location before we remove faculty/staff access to view advising notes in myWCU.</p>	Ongoing to achieve historical note attachments.
General Education Courses that haven't gone through revalidation	<p>Effective fall 2024 courses that did not complete general education revalidation will no longer carry the general education attribute for any students.</p> <p>This is a change in the current process because students who were admitted prior to revalidation can currently see courses that weren't revalidated as meeting their general education requirements in myWCU</p>	No further action planned.	Low. No further action being taken
Reporting	<p><b>SAS Dashboards:</b> Academic &amp; Enterprise Systems and Institutional Research is working to rebuild our admissions and enrollment snapshot processes off of RamPortal data. This RamPortal datasets will then feed into the SAS Dashboards.</p> <p>At registration go-live for fall 2024, March 2024, we do not expect that the SAS dashboards will be available to monitor fall admissions and enrollment.</p>	<p>In the interim we will producing data sets for departments to use and sharing them via our RamPortal teams site with department chairs, graduate coordinators and deans. These data sets will provide some of the basic data to help monitor student registration, for the purposes of promoting student success and monitoring/adjusting course offerings.</p> <p>Please reach out to Megan Jerabek (mjerabek@wcupa.edu) with your data needs and to get access to the teams site.</p>	High. Additional resources have been secured to assist with the snapshot and dashboard rebuild.

Student Records	<p><b>Program Name Change:</b> Majors: Historically in myWCU when a program changes its name (example if “Environment Studies” changed to “Environmental Science”), the name change would be effective based on conferral term. So students who graduated prior to the name change would still see “Environmental Studies” on their transcript. Banner does not have that capability. So when the program name change occurs, it would apply to all current and former students.</p>	At this time Ellucian hasn’t offered any solution. WCU is looking to see if there is a way to work with the transcript producer vendor to print the former name on a former students’ transcript	Ongoing. Low.
Student Accounts	<p><b>Part of term tuition Due Dates:</b> In myWCU we were able to issue tuition due dates based on a class start date. For example, if a student was enrolled in a class starting in October, they would get a due date two weeks prior to that October class start date. Banner cannot issue due dates based on class start date, therefore all tuition is due at the start of the semester, not the start of the class.</p> <p>This may influence student enrollment decisions. They may opt to enroll closer to a class start date to avoid having to pay several months in advance of the course</p>	This has been escalated with Ellucian and we continue to encourage them to identify an alternative approach, but none have been offered	Ongoing. High.
Student Records	<p><b>Non-degree application process:</b> Historically, the students apply for non-degree enrollment via a myWCU application. That application needs to be rebuilt in our transition our of myWCU.</p>	The application is being rebuilt in Slate (the same system used for degree-seeking applications). This rebuild is ongoing with a planned launch for the winter/spring 25 registration cycle.	Complete
Student Accounts	<p><b>Staff Access to bill:</b> In myWCU staff in service offices (such as ASA, Registrar, Deans Office, etc.) had view only access to student bills to be able to see basic student account information. No similar overview pages that breaks down charges, payments, financial aid, and refunds with totals exist in RamPortal, so staff outside of the Bursar’s Office will not be able to see the student bills at this time.</p>	The Bursar’s Office hasn’t requested any further access to bill information be extended	No Further Action planned
Student Accounts	<p><b>Paid Indicator (i.e. CN):</b> Right now in myWCU we have a positive service indicator (i.e. CN) that indicates if a student is in paid status for a semester. This indicator is shared broadly across campus, including inclusion in the class</p>	WCU is actively working on how to display a paid indicator on student records for staff to access. This is planned for fall 24 term.	Complete

	roster. This helps many staff and faculty raise student awareness of their payment status. This helps refer students to the Bursar's office and prevent cancellation. While the bursar's team is tracking a student's payment status the indicator is not well-imbedded within the system for other staff/faculty to access.	<u>Spring 25 Update:</u> The Student Advisee Detail report has Paid (CN) Indicator information available to faculty and staff.	
Financial Aid	<b>Financial Aid posting anticipated aid:</b> In myWCU financial aid packaging updated on the student bill in real-time. So as loans and scholarships were added, or updated based on changes in registration, they would appear on the bill near immediately. Banner does not have the ability to do real-time updates of financial aid on the student bill. Instead these updates are made only after running disbursement	At this time Ellucian does not offer any option to post anticipated aid in real time	No options available at this time.
Financial Aid	<b>Processing Loan changes with ELM Integration</b>	Having processing tracking loan increases and reallocations within periods due to limited support for this integration with no updates since 2012	
Financial Aid	<b>Unique Student SAP Calculation</b>	Ellucian does not offer a page to show individual student SAP data that helps staff counsel on the specific credits needed to earn SAP by seeing what was used in the unique calculation	
Financial Aid	<b>Ability to compare ISIR records</b>	In our legacy we could flip through multiple ISIR records that were loaded to compare and contrast data listed on ISIR. We can see a log of what is loaded but can only view current record now.	
Financial Aid	<b>Review Award Activity</b>	Ellucian does not offer a unique page to track fund code specific activity to track student/AD changes which helped to drive our revised financial aid offer letter logic in PS. Instead all activity is tracked on one page ROILOGA which is difficult to query and built actions on	
Student Accounts	<b>Tuition &amp; Fee Refunding:</b> Banner doesn't offer the same levels of specificity with refunding in instances in which universities have flat rate tuition, as we do for full-time students, and instances that offer parts of term. WCU is finding examples in which its current adjustment policies aren't able to be automatically enforced. This presents risks in regards to ensuring adequate refunds for students.	WCU worked extensively to mitigate the instances of inaccurate refunding and has limited these to just a few scenarios. We are working now to identify the frequency of these instances to propose next steps for fall 24.	Resolved



Student Records	<b>Signs of engagement:</b> Historically WCU had robust data analysis to measure student engagement particularly at the start of term. Data was gathered, calculated, and analyzed in myWCU to give an overview of students' engagement. This looked at items such as myWCU last login date, D2L Last login date, analysis of class attendance data offered by faculty, start of term task engagement, etc. Banner doesn't have native tools to store these data elements and analyze them.	WCU is rebuilding our engagement datasets. The fall 24 approach will be highly manual as we rebuild this dataset in SAS.	Complete.  Improved: Signs of engagement information have also been added to navigate for easy access.
Student Record	<b>Post Enrollment requirement checking:</b> Historically myWCU assumed successful completion of current courses when a student goes to enroll in a subsequent course in a sequence. Banner makes the same assumptions. The process Banner uses to then confirm if a student completed the prerequisites doesn't provide the same level of details as myWCU. For example, the process doesn't indicate which prerequisite the student isn't meeting. Additionally, the process ignores any instance in which a student was issued any time of override for the course.	WCU is working on building custom reports to help us identify instances in which a student isn't meeting a course prerequisite. This process will be fully manual, and we aim to have it in place prior to the start of the spring 25 term.	Complete. The new tool is considerably more limited than the myWCU version. No further development planned at this time.
General Person Record	<b>Common Matching on person records and duplicate records:</b> When we are ingesting student applications into Banner, a common matching job runs to see if that applicant already has a record in Banner. This job is important to preventing an individual from getting multiple IDs. If the common matching job finds a record for that applicant, it will use the existing ID. The banner common matching rules do not have the same level of specificity we are used to in myWCU. This is creating a large number of duplicate IDs – i.e. applicants who already have records in Banner but the common matching job isn't matching the application to that existing record, and therefore creating a new record for the student.	WCU worked both with Ellucian and other PASSHE schools to streamline the common matching rules to the extent possible to limit the creation of duplicate records for an individual.  <u>Spring 25 Update:</u> WCU escalated this issue within Ellucian, and was able to make adjustments to our common matching rules to reduce errors. At this time few issues exist.	Monitoring.
PA TRAC Equivalency data	All PA Schools are required to have course equivalency information in the PA TRAC data base and website. Historically WCU shared this data via a	WCU is working to rebuild this data set from RamPortal.	Top Priority for Spring 25



	file from myWCU where we stored all our equivalencies with other schools.		
Effects all areas	Database Refresh: In the Ellucian managed cloud environment the university only gets two database refreshes per month. We use these to keep our test, training, development databases updated with production data. In myWCU we had a database (QA) that was refreshed nightly which helped to allow offices to test new functionality, validate data, and access data.	WCU has established a standard refresh schedule to help ensure database availability.	No further action possible without significant additional costs.
Student Records	Chairs do not have access to issue enrollment overrides for level. In myWCU we graduate coordinators for our accelerated programs had access to issue level overrides to allow undergraduate students to register for approved graduate courses.	We believe this can be achieved via fine grain access control role.	Resources need to be allocated to this work. Ongoing
Student Registration	In myWCU students who met the GPA requirement had access to enroll in more than 18 credits (i.e. complete a term overload). The system would ensure the student indicates they agree with the policy and cost of over-enrollment; allow the student to self-service complete the over-enrollment; and notify the advisor.		Ongoing. In development for use in Spring 26 registration.
Student Self-Service SSN Update	In myWCU students had the ability to add their SSN to their record via self-service. The secure page allowed students to provide the SSN, then validated it against the database to ensure that SSN doesn't apply to anyone else. It would then update the student record immediately. This was critical to the university's compliance with federal tax requirements and providing students with 1098T information	Currently utilizing a OnBase form to collect this data and update student records accordingly	Complete