Summary of functionality loss at go-live of RamPortal
Date: Last updated January 2024

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 **waitlist** 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	Ongoing. High Priority
Student Records	**WRITE Survey:** 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	**Pre-requisites for Fall 2024:** 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	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.

	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.		
Registration	**Music mass enrollment in private lesson classes**: 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	**Co-Curricular Transcript:** RamPortal does not have a native way of tracking student non-academic learning and produce a transcript to reflect those records.	We are working on archiving co-curricular transcripts of existing student for their record to mitigate risk while a new transcript solution is identified. We do anticipate that there may be a gap in our ability to produce new transcripts for students. This shift will also add cost and resources to the implementation.	Ongoing. No timeline identified.
Accounts Receivable	**Part of term (session) billing:** 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.	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.	Ongoing, will take several years.
All	**Hold Challenges:** There are challenges with the way Banner manages holds:	WCU is able to use the NEN/NEW hold for fall 24 registration in Banner because	Ongoing. Working now to identify a

	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 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.	there are no prior term registrations occurring in Banner during the fall 24 registration cycle. Ellucian is working on a new impact that allows for drop and prevents add. This will be available in 2025.	temporary solution for Winter/Spring 25 registration that will begin in October 24
Student	**Posting AP Credits**: 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.	Currently working with Ellucian on a process for utilization. Fall 2024 Update: 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.	Ongoing.
Student Records	**Cancelled Classes:** 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.	We are working on a solution that will again require more staff and manual intervention to catch these inaccuracies and resolve them. Fall 24 Update: Academic departments have been given instructions on how to drop students from classes prior to cancelling a class.	No further action planned. Ellucian has indicated there is no further option for this requirement.

		The Registrar's office runs a manual process to look for instances in which students are registered in cancelled classes.	
Student Records	**Transfer Evaluation & Notification**: 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.	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. 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. 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). Fall 24 Update: This work is ongoing and on-track to be implemented in early fall 2024	Ongoing
Student	**Students Intended Load:** 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	**Form of Study:** 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	We are working on a solution. It will not be available for fall 2024 registration Fall 24 Update: Our goal is to have an interim solution in place for the winter/spring 25 registration process.	Ongoing. Actively in solutioning.

		no native functionality in banner for this.		
Student	**Change of major workflow:** 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. Fall 24 Update: 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.	Ongoing. An electronic Banner workflow will be highly complicated, per Ellucian, and is likely to take significant time.
Student	**Change of grade workflow:** 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 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. The Banner workflow is anticipated to be ready no later than December 2024. Fall 24 Update: A banner workflow is in development however has significantly limited functionality since historical class rosters are not in banner. Therefore, 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.	In active development. Anticipated by December 2024.

Enrollment Management (EM)/Student	**Plan Changes prior to start at WCU:** 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.	We will work on reports to identify any discrepancies between majors in Slate and Banner so they can be manually updated.	Medium
EM	**Re-Admit Application:** 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.	We will continue with our paper-based application and utilize the Banner Quick Admit process until the Slate application is live. Fall 2024 update: The Slate re-admit application is on the list for redevelop to support the Fall 2025 readmit cycle	Medium Ongoing
EM	**Test Scores:** 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.	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)	High
EM	**Reverse Transfer:** WCU is now collecting Reverse Transfer information on the Common Application for Transfer students.	The development to load this data from Slate into a delivered Banner pages is still in-progress.	Ongoing. Medium.
EM	**Military data from Admissions:** 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 information but have not yet loaded this data.	We are finalizing development and validation and expect to have this data in Banner by early summer 2024. Fall 2024 Update: Develop to bring this information in from UG and GR applications has been completed and is in place. Migration of data from myWCU to RamPortal for current student (i.e. students	Completed

		admitted prior to fall 2024) is still ongoing.	
EM	**Undergrad first gen data:** 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.	Students who indicate they first gen in Navigate will be extracted and loaded into Banner. Fall 2024 Update: 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.	Low
EM	**Graduate accelerated application:** 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.	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. Fall 2024 Update: A Slate form will be used to generate the Accelerated applications in Slate, and then be loaded into Banner. Development Ongoing.	Low Ongoing
EM	**Undergrad relationship/parent data**: Currently WCU loads parent data provided on the undergraduate application into a custom data within myWCU. We are not currentlying loading this data into RamPortal.	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.	Low. No current work being explored.
EM	**External school and degree information:** RamPortal doesn't store students' previous school/degree information as clearly as myWCU does making storing/viewing prior schools and dates of attendance difficult.	WCU is working on a tool to convert historical data and fall 2024 applicant data.	High. Working to get data in place by Fall 2024 snapshot
Student Registration	**Course Repeat:** Ramportal does not provide the student with an	We are working on a solution that will email the student	Medium. Active

	informational message when a course is registered as an additional attempt	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.	development underway.
Student Registration	**Career Repeat:** 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	**Apply Aid to University Housing:** Currently WCU has a process where students can automatically apply refunds and financial aid funds to pay for their USH housing costs. **B**anner 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	**Academic Standing:** myWCU utilizes what-if tools in calculating standing (such as with NG grades).	The Registrar's office and The Graduate School will use reports from myWCU to apply	Report development is underway.

	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	academic standing in Banner for 2024 and to manage the what-if rules.	No further action is planned for improved automation.
Student Registration	**Drop with consent:** 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	**Ethnic code:** 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. Fall 2024 Update: Students will have self-service access to make these updates effective 8.19.24	Complete
Student Records	**Military Data capture:** 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.	Low
Student Records	**Mass Update / Remove Attributes/Cohorts/Alt Pins:** Need a mechanism for updating/removing students attribute, cohorts or alternate pins	Will manage manually until we have a tool.	Low
Student Records	**Enrollment Verification:** 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. Fall 24 update: Ellucian was unable to offer any solution. WCU developers created a report that will be accessible to students in mid-August.	Near completion

All	**Reporting** – 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.
Student Registration Monitoring	**SAS Dashboards –** 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	**Security –** 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.	Long-term WCU will be exploring a fine-grained access tool in Banner to better manage security, but that will not be in place in 2024.	Medium
Student Records	**First-Year student Placement Portal:** 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	Medium
Student Registration	**First Year Scheduling for Fall 24:** in myWCU we have functionality for departments to indicate their preferred schedule for incoming	Manual block scheduling for fall 24 admits utilizing some	Medium.

	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.	tools – such as datasheets – out of myWCU	
Student Records	**Navigate Reimplementation:** 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.	Navigate reimplementation will begin in spring 24 and will be completed by August 24. Fall 24 update: 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.	Underway.
Student Records	**Building transfer equivalencies**: In December 23 we had to **t**emporarily 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. We are reimplementing our transfer equivalency process in OnBase in spring & summer 24	Equivalency creation will be paused until Summer 2024. Fall 24 update: This pause is expected to extend through the fall semester due to vendor delays in implementing the new process to post student transfer credits.	Medium. See this communication for more details.
Student Records	**Pause in Posting Transfer Credit to student records:** 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.	The dates are still being finalized. It is anticipated to be mid-March to mid-April. Fall 24 update: 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.	Low
Student Records	**Enrollment Overrides:** Banner does not allow for department chairs to issue enrollment overrides such as closed-class or prerequisites.	WCU is aiming to create a process by which department chairs can create overrides. This tool is not expected to be	Complete

| | | available at the start of fall 24 registration

Fall 24 update: Effective April 2024 department chairs, graduate coordinators, SSCs had access to issue overrides. | |
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| Student Registration | **Swapping Classes:** 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). | We will be training students and advisors on the new process of doing both a drop and add transaction. | No further action planned. |
| Student Registration | **Course planning/Shopping Cart:** 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 enrollment start date. There is a tool in Degree Works that we are working on aiming to implement at a basic level. | 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. | Ongoing. |
| Student Records | **Student change their graduation term:** 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 | **Additional data in Class Roster:** 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 |
| Student Records | **D2L Integration:** 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. | High |
| All | **Parent Portal:** Authorizing Parents/Guardians to review the students' records based on what | WCU will be configuring the new system to able students to authorize Parents/Guardian | Medium |

	the student authorizes. Students will be able to authorize Parents/Guardians to review and pay changes on the student's account	access to a limited data (Class schedule, Grade, Financial aid) This data is view only , a Parent/Guardian will not be able to update Fall 24 update: The development of this actively underway and expected during the fall 24 term.	
Student Records	**Chair Remove Advisor Hold:** 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 Fall 24 update: Ellucian has not offered any functionality to meet this need. WCU continues to explore alternative systems to help mitigate this need.	Medium
Student Records	**Advising Notes:** 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.	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 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	Ongoing to achieve historical note attachments.

		before we remove faculty/staff access to view advising notes in myWCU.	
General Education Courses that haven't gone through revalidation	Effective fall 2024 courses that did not complete general education revalidation will no longer carry the general education attribute for any students. 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	No further action planned.	Low. No further action being taken
Reporting	**SAS Dashboards:** Academic & 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. 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.	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. Please reach out to Megan Jerabek (mjerabek@wcupa.edu) with your data needs and to get access to the teams site.	High. Additional resources have been secured to assist with the snapshot and dashboard rebuild.
Student Records	**Program Name Change:** 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	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.

	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.		
Student Accounts	**Part of term tuition Due Dates:** 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. 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	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	**Non-degree application process:** Historically, the students apply for non-degree enrollment via a myWCU application. That application needs to be rebuilt in our transition our of myWCU.	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.	Ongoing.
Student Accounts	**Staff Access to bill:** 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 exist in RamPortal, so staff outside of the Bursar's Office will not be able to see the student bills at this time.	The Bursar's office and AES is working on identifying how best to create an overview of a student accounts for staff to access and proper training on account information. We need to work outside of what Ellucian delivers, so this will take some time and is not anticipated for the start of the Fall 24 term.	Ongoing. Medium
Student Accounts	**Paid Indicator (i.e. CN):** Right now in myWCU we have a	WCU is actively working on how to display a paid indicator	Ongoing. High.

	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 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.	on student records for staff to access. This is planned for fall 24 term.	
Financial Aid	**Financial Aid packaging timeline:** 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 once a day.	At this time Ellucian does not offer any option to increase the frequency of posting aid to bills.	No options available at this time.
Student Accounts	**Tuition & Fee Refunding:** 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.	Ongoing. High
Student Records	**Signs of engagement:** Historically WCU had robust data analysis to measure student	WCU is rebuilding our engagement datasets. The fall 24 approach will be highly	Ongoing.

	engagement particularly at the start of term. Data was gather, 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.	manual as we rebuild this dataset in SAS.	
Student Record	**Post Enrollment requirement checking:** 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.	Ongoing.
General Person Record	**Common Matching on person records and duplicate records:** 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	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. As of August 24, we've exhausted the use utilization of common matching. Our next step is to identify alternative technology that can help us with filling in the holes in this logic.	Ongoing. High

	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.		