School Contact Meeting
July 14, 2016

Attendees: Kathryn Brice, John Higgins, Lisa Howdyshell, Sheila Tolley, Travis Boyd, Martha Ann Toms-Farmer, Tracy Mourton, Janelle Jennings, Tracey Doniel, Sheilah Sprouse, Amanda Crombie, Marcia LaFleur, Briana Reid, Sally Armentrout, Terri Smith, Andrew Breen, Rebecca Garver, Isaiah Behnke, Barbara Dudley, Barbara Graves, and Jason Dugas

- **Student Financial Services**
  - **SFS bills & due dates:**

<table>
<thead>
<tr>
<th>Program</th>
<th>Bill Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrads and Grads</td>
<td>7/19/2016</td>
<td>8/17/2016</td>
</tr>
<tr>
<td>Medical School</td>
<td>7/5/2016</td>
<td>8/3/2016</td>
</tr>
<tr>
<td>Law School</td>
<td>7/26/2016</td>
<td>8/24/2016</td>
</tr>
<tr>
<td>Darden On-Grounds (Class of 2017 and Class of 2018) and Ph.D.</td>
<td>7/19/2016</td>
<td>8/17/2016</td>
</tr>
<tr>
<td>Darden Executive MBA (Class of 2017 and Class of 2018)</td>
<td>7/12/2016</td>
<td>8/10/2016</td>
</tr>
<tr>
<td>Darden Global Executive MBA Class of 2017</td>
<td>9/20/2016</td>
<td>10/19/2016</td>
</tr>
<tr>
<td>Darden Global Executive MBA Class of 2018</td>
<td>7/12/2016</td>
<td>8/10/2016</td>
</tr>
</tbody>
</table>

- **Student Health**: [Health Insurance Waiver program](#). Below is a complete timeline of information:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 11, 2016</td>
<td>Date that the online waiver site opens to students.</td>
</tr>
<tr>
<td>August 15, 2016</td>
<td>Date that coverage begins for students enrolled in the Aetna Student Health Insurance plan.</td>
</tr>
<tr>
<td>September 16, 2016</td>
<td>Deadline by which students must waive coverage by filing a waiver in the online waiver site.</td>
</tr>
<tr>
<td>September 23, 2016</td>
<td>Deadline by which a student can appeal the decision if their waiver is denied.</td>
</tr>
<tr>
<td>September 29, 2016</td>
<td>Date that UVA will post the Aetna Student Health Insurance plan annual premium of $2,735 to the SIS accounts of students who have failed to submit adequate documentation or whose health plans were determined not to provide comparable coverage.</td>
</tr>
<tr>
<td>October 31, 2016</td>
<td>Deadline by which students must pay the annual premium for the Aetna Student Health Insurance</td>
</tr>
</tbody>
</table>
plan if they did not successfully waive coverage.

August 14, 2017

Date that coverage ends for students enrolled in the Aetna Student Health Insurance plan.

- Degree candidates with balances email went out Wednesday, July 13th
  - 124 candidates with outstanding balances
  - Bills due by Monday, August 1st

- Rebecca – SIS Milestones Page Overview

### Milestones

Milestones are activities that can be recorded to track students’ completion of non-coursework degree requirements. They are used primarily to record thesis and dissertation titles, but additional milestones have been identified that departments may track as needed.

These milestones are printed on the Official Transcript, Unofficial Transcript, and Academic Requirements Report:

<table>
<thead>
<tr>
<th>CODE</th>
<th>MILESTONE TITLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPSTONE</td>
<td>Capstone</td>
<td>Capstone</td>
</tr>
<tr>
<td>MTHDEF-1ST</td>
<td>Masters Thesis Defense 1st Com</td>
<td>Masters Thesis</td>
</tr>
<tr>
<td>MTHESISDEF</td>
<td>Masters Thesis Defense</td>
<td>Masters Thesis</td>
</tr>
<tr>
<td>PHDDEF-1ST</td>
<td>PHD Defense 1st Completion</td>
<td>Doctoral Dissertation</td>
</tr>
<tr>
<td>PHDDEFENSE</td>
<td>Doctoral Dissertation Defense</td>
<td>Doctoral Dissertation</td>
</tr>
</tbody>
</table>

These milestones are printed on the Unofficial Transcript and Academic Requirements Report:

<table>
<thead>
<tr>
<th>CODE</th>
<th>MILESTONE TITLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMPTHESIS</td>
<td>DMP Thesis</td>
<td>DMP Thesis</td>
</tr>
<tr>
<td>MTHESISLIBRA</td>
<td>Thesis Submitted to Libra</td>
<td>Masters Thesis Submitted to Libra</td>
</tr>
<tr>
<td>PHDLIBRA</td>
<td>Dissertation Submitted to Libra</td>
<td>Doctoral Dissertation Submitted to Libra</td>
</tr>
</tbody>
</table>

Access to milestones is granted based on the milestones that have been created for specific careers, programs/schools, and plans/majors.
Entering Milestone Information

1. **Navigation:** RECORDS AND ENROLLMENT > ENROLL STUDENTS > STUDENT MILESTONES

Enter Search Criteria and click Search.

If the student does not have any milestones in SIS, the message, “No Matching values were found.” will display. Click on the **Add a New Value** tab and enter the student ID, Career, and Program.

If the student already has an existing milestone, the Student Milestones page will appear. See Adding an Additional Milestone.
2. **Student Milestones**

Enter the following information in the **Milestone Detail** area when necessary:

- **Effective Date** – let system default today’s date
- **Milestone Copy** – **DO NOT** click the Milestone Copy button. This will copy every milestone in the SIS to this student’s record
- **Milestone** – either MTHESISDEF (thesis) or PHDDEFENSE (dissertation) or search for the milestone that matches the milestone in brackets [ ] on the student’s AR report

- **Milestone Number** – let system default
- **Milestone Level** – enter Milestone Level if it is referenced on the AR report
- **Milestone Complete** – current status of milestone
- **Academic Plan** – optional: enter Academic Plan for which the milestone applies
- **Description/Formal Description** – let system default
- **Milestone Title** – thesis or dissertation title, for example, using mixed capitalization or a notation for any other milestone entered
  - Use correct mixed-case capitalization
  - Do not enter carriage returns or new lines within the milestone title; the system will automatically line wrap as needed
  - Do not enter double spaces (e.g., after colons)
  - The system will allow entry of letters with accents, but not special characters, foreign languages, scientific symbols, etc.
  - The Milestone Title for CAPSTONE, MTHESISDEF, and PHDDEFENSE will print on the student’s official transcript
  - The Milestone Title for all milestones will print on the student’s Academic Requirements report
  - **Note:** Milestones are limited to 254 characters in length. For longer titles, contact UREG to have the title entered as Transcript Text.

- **Comments** – for departmental/school use but may appear on Student Self Service if the Hide Comment on Stdnt Self-Svc box is not checked. At this time, Milestones are not displayed in Student Self Service.
• Manage Milestone Documents – allows documents to be attached to the milestone

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity_Property.Sync_process.docx</td>
<td>Thesis proposal</td>
<td>View</td>
</tr>
</tbody>
</table>

• Term Required, Date Required, Anticipated Term, Anticipated Date – optional
• Transcript Level – let system default
• Print Milestone Detail – let system default
• Advised by Committee – check box if committee has been created for student, the look up committee

3. In the Advisors section, enter any additional information about the milestone that is needed.

• Attempts Allowed - leave blank
In the Attempts section, enter the Milestone Complete status:

- **In Progress** – for thesis and dissertation titles, or if the milestone is being recorded while in progress
- **Completed** – if the milestone is done (capstone, dissertation, and thesis titles appear on the official transcript when the milestone is marked “Complete”)

Click “Save”.

Adding an Additional Milestone

1. If a student already has a milestone record in SIS and additional milestone must be added, check the Academic Program to verify that “Program Not Active” is **not** noted.

2. If “Program Not Active” appears, you must add a new milestone record [[RECORDS AND ENROLLMENT > ENROLL STUDENTS > STUDENT MILESTONES]], Add a New Value, selecting the student’s current program.

3. Adding a milestone to a student’s record for the program that is not active will satisfy the Academic Requirements report, but it **will not allow** the student to submit thesis or dissertation information to Libra.

4. To add an additional milestone for a student who is active in the Academic Program listed, first add a row at the top level with a new Effective Date. Then, add a row at the lower level and enter the second milestone. **DO NOT** type over an existing milestone.
Updating an Existing Milestone

1. To update an existing milestone title or status when the Effective Date is not the current date but is a date in the past, add a row at the top level with the new effective date. Then, edit the milestone title and/or status and click “Save”. DO NOT type over an existing milestone.

Using Correct History

1. To update an existing milestone or add a new milestone when the Effective Date is the current date, click on the Correct History button. Then, update/add the milestone and click “Save”. DO NOT type over an existing milestone.

When to use Correct History:

a. The Effective Date is today’s date and you need to change the Milestone Complete status.
b. The Effective Date is today’s date and you need to add another milestone.
c. The Effective Date is today’s date and you need to correct the Milestone Title.
d. The Effective Date is today’s date and you need to attach a file.
Troubleshooting Milestones

1. Attempted to add a new milestone for a student who already has a milestone and received this message:

   ![Message]

   **Cause:** You tried to add a new milestone in the Milestone Detail area without either adding a new Effective Dated row or clicking on Correct History.

   **Solution:** Add a new row if the Effective Dated row is NOT the current date. Use Correct History only if you are adding a new milestone AND the Effective Date is the current date.

2. Attempted to change the Milestone Complete status and received this message:

   ![Error]

   **Cause:** You tried to change the Milestone Complete status without either adding a new Effective Dated row or clicking on Correct History.

   **Solution:** Add a new row if the Effective Dated row is NOT the current date. Use Correct History only if you are adding a new milestone AND the Effective Date is the current date.

3. Typed in a milestone name and received this message:

   ![Message]

   **Cause:** You tried to enter an invalid milestone name.

   **Solution:** Create an Academic Requirements (AR) report to find the correct name of the milestone.
4. Academic Plan is listed as Not Active and cannot save.

![Academic Plan Overview](image)

This message is displayed:

![Message](image)

Cause: The student has changed his/her plan.

Solution: Delete the Academic Plan code. The milestone should not be deleted since it is a part of the student’s Academic History.

Additional questions/issues with milestones?

Email [srsupport@virginia.edu](mailto:srsupport@virginia.edu) or [acreq@virginia.edu](mailto:acreq@virginia.edu)

- **Graduation**
  - **May Diplomas:**
    - All schools except Law shipped June 16
    - Law diplomas shipped June 27
    - Diploma Questions:
      - When will I receive my diploma?
      - Delivery takes up to 8 weeks for domestic and 12 weeks for international
      - Sent via USPS and there is no tracking data
- Returned or undeliverable diplomas:
  - Graduate receives an auto-generated email requesting an updated address
  - Shipped from our office once we receive the new address
- **August Graduation**
  - Apply to graduate deadline was July 1
  - Dissertation titles should be entered by July 31
  - Degree candidate list that includes program, majors, and subplans will be provided to School Contacts on August 8th.
    - Confirm list and return to Kathryn for degree conferral
  - Degree conferral begins August 10
  - Diplomas will be ordered on August 12
    - Diploma mailing addresses should be updated by August 10 to ensure proper delivery

- **Orientation**
  - The waitlist removal process will run the morning following enrollment at orientation for students that have erroneously placed themselves on a waitlist
  - Through the first two orientation sessions there have been no student who have waitlisted themselves – thank you all for your work on this!!

- **Enrollment**
  - Open enrollment begins Wednesday, August 3rd
  - Max credit limit increases Thursday, August 4th
    - College of Arts and Sciences: 15 -> 17
    - Commerce: 17 -> 19
  - Reserve capacities for College courses expire on August 4th

- **The RECORD**
  - The deadline has passed for schools to make changes to their section of the Record directly in Acalog. That information must be sent through UREG now for updating. Any outstanding changes must be submitted to UREG prior to the beginning of Fall classes.
  - Please make sure the disclaimer is on all webpages with degree information as soon as possible
    - "The information contained on this website is for informational purposes only. The Undergraduate Record and Graduate Record represent the official repository for academic program requirements. These publications may be found at [http://records.ureg.virginia.edu/index.php](http://records.ureg.virginia.edu/index.php)."

- **Schedule of Classes**
  - When scheduling your classes, please ensure that the following information is entered in its entirety:
    - Days & Times
    - Room
    - Instructor
    - Meeting Dates
      - If this information is not entered and a student drops the class, the tuition will not recalculate
Dynamic Dating

Process Overview
The Dynamic Dating process allows for the creation of add/drop/withdrawal deadlines on a class-by-class basis. UVa has one dynamic dating session (DD1) and one dynamic dating rule (DD1). The process to create dynamic dating requires that:

- A dynamic dating rule has been created
- Courses are identified in the Catalog with the dynamic dating rule, or the rule is attached to the individual class section
- Class sections are scheduled in the dynamic dating session
- Process to generate dynamic dates is run, either in batch or manually by individual section(s)

Note: If a class is scheduled in the DD1 session and the dynamic date rule has not been attached, the add/drop deadlines default to the Regular/Session 1 dates.

1. Dynamic Dating Rule Set Created
Note: The rule is created in the SIS by the SIS office.
The Dynamic Dating 1 rule set is:

- **First date to enroll**: 9999; this allows students to enroll as of their enrollment appointment or the Open Enrollment date regardless of when the class starts

- **Last Date to Enroll**: 21 days after class start

- **Last Wait List Date**: 1 day before class start

- **Last Date to Drop**: 1 day after class end

- **Drop Action Dates**:
  - **Delete Factor** (drops not visible in student schedule): 2 days before class start
  - **Retain Factor** (drops visible in student schedule): 1 day before class start
  - **Penalty Factor** (drops result in W grade): 1st day of class

- **Cancel & Withdrawal Dates**:
  - **Cancel Factor** (withdrawals not visible in student schedule): 2 days before class start
  - **Withdraw w/o Penalty** (withdrawals visible in student schedule, but no W grade): 1 day before class start
  - **Withdraw w/Penalty** (withdrawals result in W grade): 1st day of class
## 2. Dynamic Dating Rule Set in Course Catalog

The **Dynamic Class Date Rule** can be attached by UREG in the Course Catalog. The rule should default for all courses scheduled in the NOCR career, but for other, non-SCPS courses, UREG will enter the rule as needed.

**Navigation:** CURRICULUM MANAGEMENT > COURSE CATALOG > COURSE CATALOG

![Course Catalog Screenshot]

<table>
<thead>
<tr>
<th>Course ID:</th>
<th>U2/3E6D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>10/18/2011</td>
</tr>
<tr>
<td>Status:</td>
<td>Active</td>
</tr>
<tr>
<td>Description:</td>
<td>Curric Inst &amp; Class Assessment</td>
</tr>
</tbody>
</table>

**Course Offering**

- **Course Offering Nbr:** 1
- **Catalog Nbr:** 6603, PSED
- **Course Approved:** Approved
- **Allow Course to be Scheduled:** Yes
- **Catalog Print/Unprint:** Yes
- **Print Instructor in Schedule:** No
- **Schedule Print:** Yes
- **Schedule Term Roll:** Yes
- **Use Blind Grading:** No
- **GL Interface Required:** No
- **Split Ownership:** No

- **Academic Institution:** University of Virginia
- **Academic Group:** SCPS
- **Subject Area:** PSED, PS-Education
- **Campus:** SCPS,
  SCPS Campus
- **Academic Organization:** SCPSD
- **Academic Career:** Dean of Continuing & Prof Studies
- **Academic Term:** Graduate
- **Course Typically Offered:** Yes
- **Tuition Group:** Yes
- **Dynamic Class Date Rule:** DD1, Dynamic Date 1
- **Allow OEE Enrollment:** Yes
3. Class Sections Scheduled in Dynamic Dating Session

Class sections for which dynamic dates are required must be scheduled in the DD1 session. The Start/End Dates must correspond exactly to the first and last class meeting dates.

**Navigation:** CURRICULUM MANAGEMENT > SCHEDULE OF CLASSES > MAINTAIN SCHEDULE OF CLASSES

For the add/drop deadlines to calculate correctly, the Start/End Date values must correspond exactly to the first and last class meeting dates.

*Note:* A warning message will appear if there is no Dynamic Class Date Rule in the corresponding Catalog entry. This is your cue to attach the rule at the section level.
4. Generate Dynamic Dates by Class Section

If UREG has set the dynamic date rule in the Course Catalog (step 2 above), the rule will be applied automatically and a nightly process scheduled by the SIS will calculate the dates for the individual class sections. If when scheduling a class in the DD1 session you get the warning that there is no dynamic date rule in place, the rule must be attached at the section level. (You will also want to have UREG add the rule to the Course Catalog for future offerings.)

1. Navigation: CURRICULUM MANAGEMENT > DYNAMIC DATES > CLASS SECTION DYNAMIC DATES

Identify the course for which Dynamic Dates need to be calculated. Enter the Dynamic Class Date Rule of DD1 and then click the “Calculate Dynamic Dates” button.
2. The system will calculate and display the dynamic class dates for the class. **Note:** The First Date to Enroll will be blank.
3. Individual deadlines can be overridden by clicking the corresponding “Override” box and entering the desired deadline.
5. Generate Dynamic Dates in Batch

*Note:* This batch process is run nightly by the SIS office, and is described here only for reference.

Dynamic dates must be generated before course enrollment begins for the term, and any time thereafter that an additional class is scheduled in the DD1 session. Dynamic dates must be regenerated for a class if the start or end dates are changed.

1. **Navigation:** CURRICULUM MANAGEMENT > DYNAMIC DATES > GENERATE DYNAMIC CLASS DATES

   Enter the run control parameters. Various values can be entered to limit the courses for which the process is run. Term is required.

   - **Term**
   - **Session:** DD1
   - **Campus:** leave blank
   - **Obey Dynamic Date Cal Required:** unchecked

As desired, the process can be run for an individual class, Campus, Subject Area, Catalog number range, or date range.
2. On the next page, verify that the Server Name is set to “PSUNX” and check the Select box next to the “Dynamic Date Generation” line.

Click “OK”.