

# Work (Flow)ing Toward Success

Streamlining Major Changes for Student Success

JUNE 2025



## PRESENTERS

# Bailey Raffield

- + CRM Manager
- + Texas A&M University
- + Valdosta, GA



# Allison Beebie

- + Slate Student Success Implementations Strategist
- + Carnegie
- + Plattsburgh, NY



# Agenda

---

**1 Background + Strategy**

---

**2 Process Overview**

---

**3 Slate Build**

---

**4 Future Planning**

---

**5 Q + A**

---



# *Background* + Strategy

Pre-Slate Planning



# Background and Strategy

## Prep for a New Change of Major Process

- + Valdosta's Change of Major Process Before Slate
- + Why We Moved to Slate
- + Pre-Slate Strategy, Planning, and Considerations
- + How To Prep for Slate with Your Team

# *Process* Overview

How Students and Faculty Experience this Process

# Change of Major Request Form

## STEP 1

- + Submitted by student or faculty
- + Accessible on Faculty and Student Portals and on the Student's Person Dashboard
- + Pre-populated read-only fields
- + Entity Scoped Change of Major Fields

All Forms > [Change of Major Request](#)

### Edit Form

Folder Change of Major  
Scope Person

**Here's the information we have on file for you:**

VSU ID:

First Name

Last Name

Email Address

Birthdate

Phone Number (if you need to update this number please contact the Registrar's Office at [registrar@valdosta.edu](mailto:registrar@valdosta.edu))

**Change of Major Request**

Which Major Are You Interested In?

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

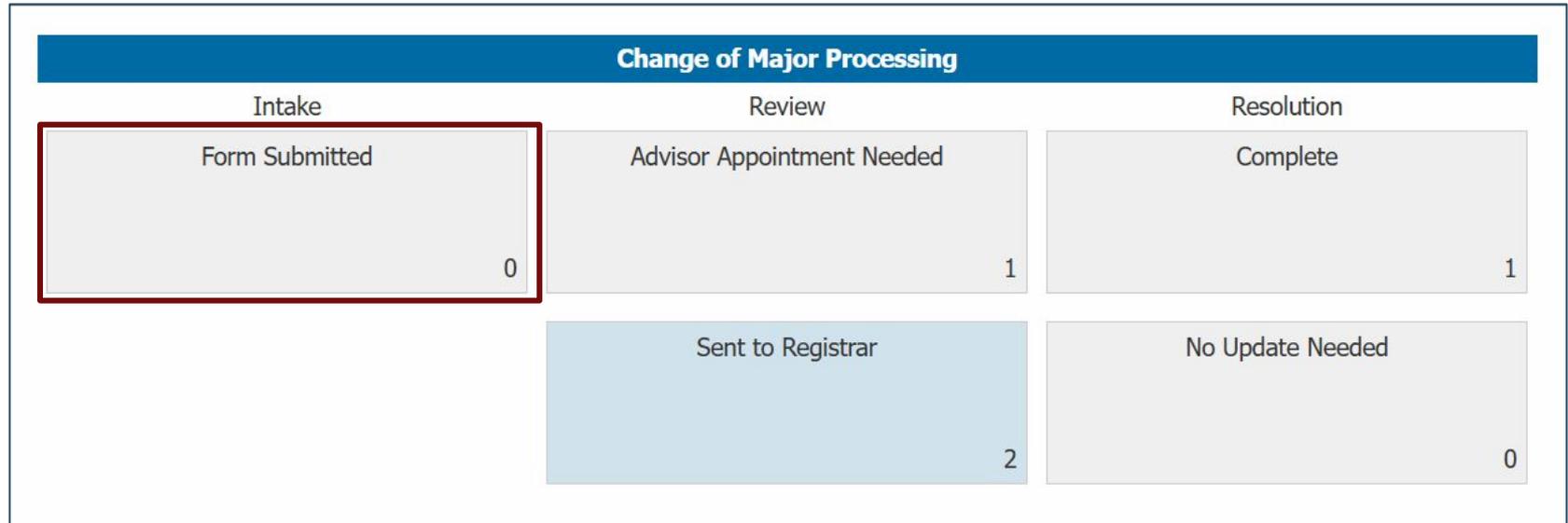
Walk-In Change of Major

Status

# Workflow

## STEP 2

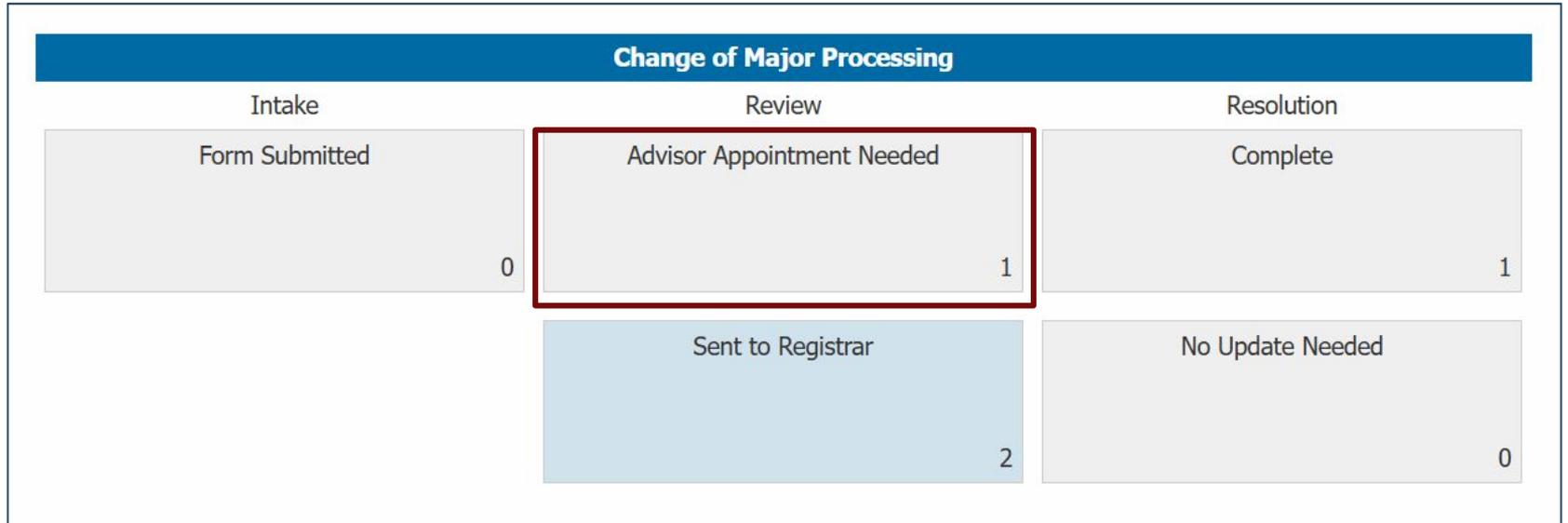
- + Student Enters the Workflow upon Form Submission
- + Manual Triage Review and Assignment to Advisor
- + Notification Email Sent to Advisor and Student



# Advisor Meeting

## STEP 3

- + Student Meets with the Assigned Advisor
- + Advisor Submits Review Form
- + Update, Re-assign, or Close



# Registrar Update

## STEP 4

- + Email Sent to Registrar
- + Registrar Updates Programs in Banner SIS
- + Auto-Submitting Form Closes Request



# Major Updated in Slate

## STEP 5

- + Bin Movement Rule on Registrar Form to "Complete" Bin
- + Major Change in Banner Updates Slate via Overnight Import



# *Behind* The Build

Submission Form | Entity | Workflow | Communications | SIS Updates

# Change of Major Request Form

## Breaking Down the Form

- + Simple Form Flow for Student
- + Allows Students to Verify Current Record Info or Update it Via Email to Registrar
- + Entity Scoped-Fields
- + Options for Mapped/Unmapped Major Field
- + Include/not Include Career

All Forms > [Change of Major Request](#)

### Edit Form

Folder Change of Major  
Scope Person

**Here's the information we have on file for you:**

VSU ID:

First Name

Last Name

Email Address

Birthdate

Phone Number (if you need to update this number please contact the Registrar's Office at [registrar@valdosta.edu](mailto:registrar@valdosta.edu))

**Change of Major Request**

Which Major Are You Interested In?

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

Walk-In Change of Major

Status

# Change of Major Request Form

## Prompt List for Easy Major Selection

**Change of Major Request**

Which Major Are You Interested In?

Major Not Listed Above

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

Walk-In Change of Major

Status

**Edit Field**
✕

---

Status:

Type:

Label: **B I U S**

Hide Label

Placeholder Text:

System Field:

Group:

Unsafe Override:  Enable unsafe import to this destination

Null Handling:  Enable custom null handling

Export Key:

Data Type:

Size:  Expanded width

Prompts:
 

- Accel Pre-Nursing
- Accomplished Teaching
- Accounting
- Administrative Services
- Adult & Career Education
- Adult and Career Education
- Adult and Vocational Education
- Adult Learning & Development
- Amer Sgn Lng/Engl Intrap OC COE
- Amer Sign Lang/Engl Interp-Coe

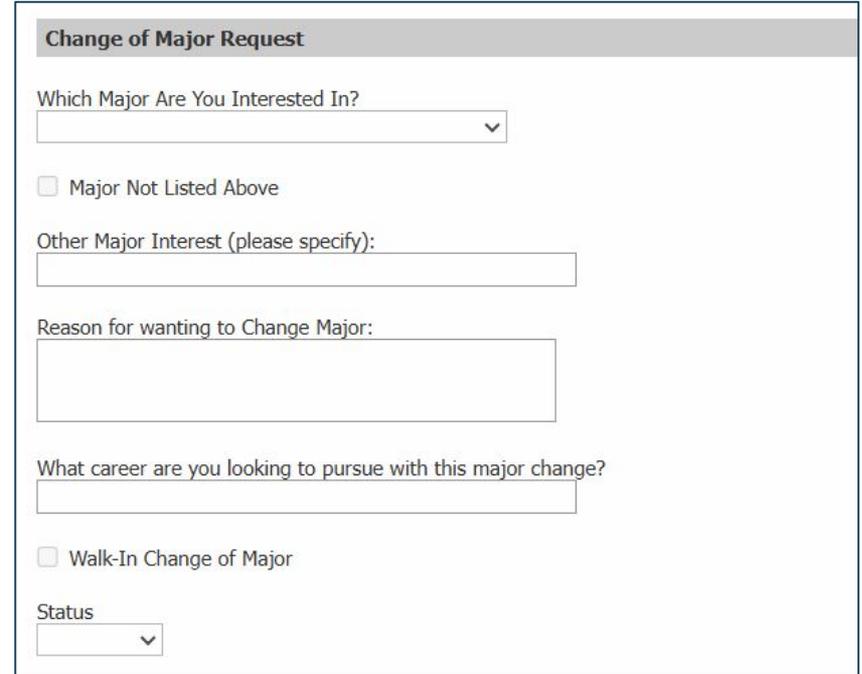
Save
Save as Copy
Delete
Close



## Change of Major Request Form

- + **Reason for Major Change:** Assists with Advisor Assignment
- + **Career:** Helps Advisors Build a Major Change Plan

Mapped Text Fields  
(Entity Scoped)



**Change of Major Request**

Which Major Are You Interested In?

Major Not Listed Above

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

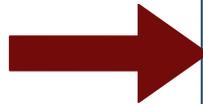
Walk-In Change of Major

Status

# Change of Major Request Form

- + **Walk-in:** Easily Filter Faculty Submissions

Internal Only  
(Indicates Faculty Submission)



### Change of Major Request

Which Major Are You Interested In?

Major Not Listed Above

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

Walk-In Change of Major

Status

# Change of Major Request Form

- + Hidden Status Set from Form Submission
- + Defaulted to "Active"
- + Read-Only

The 'Edit Field' window shows the configuration for the 'Change of Major Status' field. The 'Status' dropdown is set to 'Active'. The 'System Field' is 'Change of Major Status'. The 'Data Type' is 'Text/Unspecified'. The 'Prompts' are 'Active' and 'Complete'. The 'Save' button is highlighted.

**Edit Field**

Status: Active

Type: Select List

Label: Status

Placeholder Text:

System Field: Change of Major, Change of Major Status

Group: 1

Unsafe Override:  Enable unsafe import to this destination

Null Handling:  Enable custom null handling

Export Key: sys:entity:field:change\_status

Data Type: Text/Unspecified

Size:  Expanded width

Prompts: Active, Complete

Save Save as Copy Delete Close

The 'Change of Major Request' form contains several input fields and checkboxes. A red arrow points to the 'Status' dropdown at the bottom, which is set to 'Active'.

**Change of Major Request**

Which Major Are You Interested In?

Major Not Listed Above

Other Major Interest (please specify):

Reason for wanting to Change Major:

What career are you looking to pursue with this major change?

Walk-In Change of Major

Status: Active

# *Entity Build*

Why Did We Use an Entity?

# Change of Major Entity

## Why an Entity?

- + Person-scoped Entity
- + Tracking Changes Over Time
- + Re-use of Major Prompt List
- + Fun Auto-submitting Form Functionality!

**Edit Field**
[Prev](#) [Next](#) ✕

**Details**

Advanced Settings

Display

Notes

Snapshots

Status Active ▾

Scope Related / Change of Major

ID change\_major

Name

Folder Change of Major ▾

Category Other ▾

Field Type Single Value

Prompt ss\_major

Major Changes					
Created Date	Requested Major	Change of Major Reason	Change of Major Career	Reviewer Assigned	Status
<a href="#">Add New</a>					
12/18/2024	Biology	New Career Path	Doctor	Barrie Fitzgerald	Complete
12/17/2024	Computer Information Systems	I no longer like studying environmental science	IT	Carnegie Slate Team	Complete

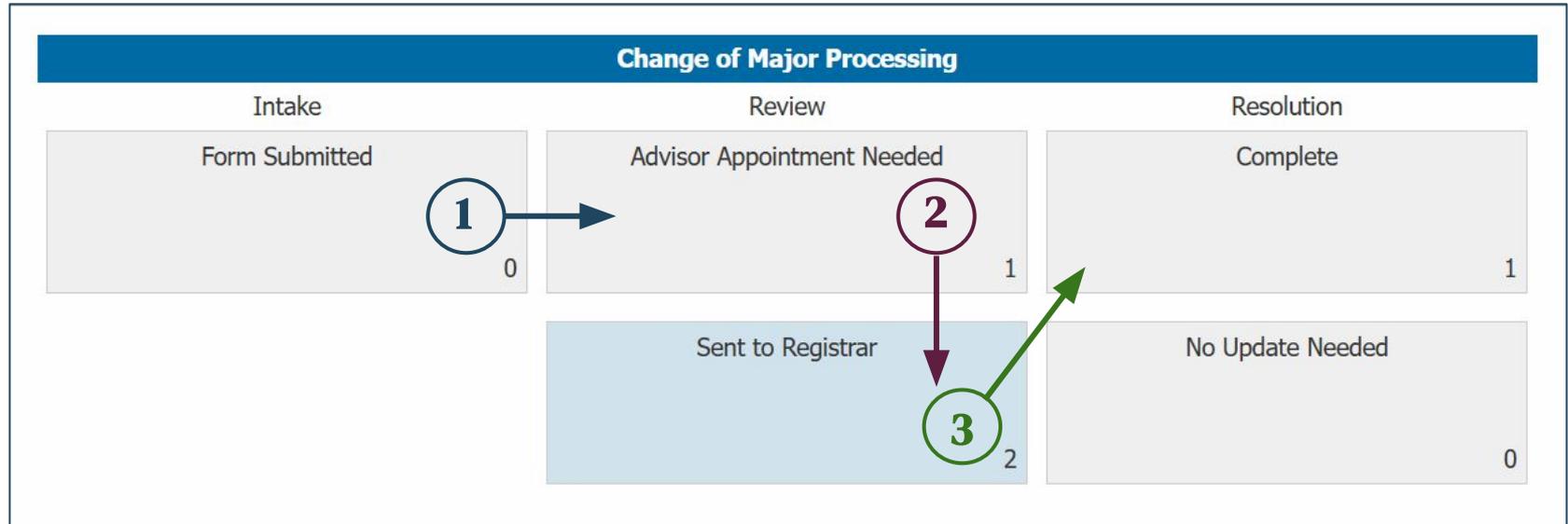
# *Workflow* + Review Forms

Bin Movement | Email Automation | Review Forms

# Workflow

## Bin Movement

- + All Review Starts in "Form Submitted" Bin
- + Simple Workflow with Limited Deviations



# Advisor Assignment Form

## First Stage of Review

- + Triage Team Assigns Advisor
  - + Can be automated!
- + Queue Assignment Rule Adds Student to Selected Advisor's Queue

**Change of Majors - Advisor Assignment**

Advisor Assignment  
 ▼

Comments to Advisor (optional):



# Email to Student

## Meet with Your Advisor

- + Sent Upon Advisor Assignment
- + Button Directs Student to Assigned Advisor's Active Scheduler Portal

**Change of Major Processing**

Review

Advisor Appointment Needed 1

Sent to Registrar 2

## Change of Major Next Steps:

Hi Bailey,

The next step in your Change of Major Request is to **meet with your advisor, Alicia Roberson**, to discuss the proposed alterations to your academic program(s).

Please click the button below to schedule your appointment and select "Major Change" as your appointment topic.

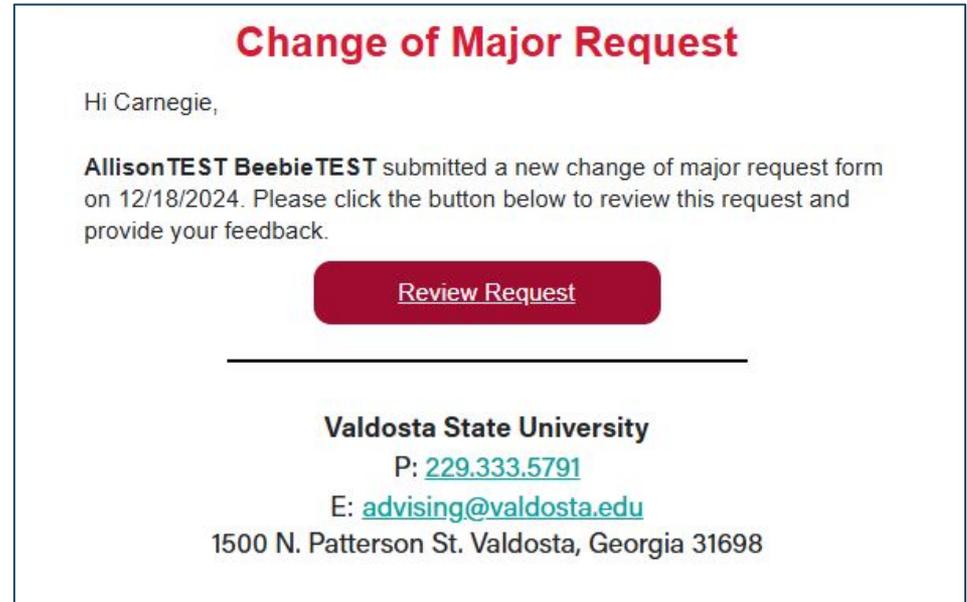
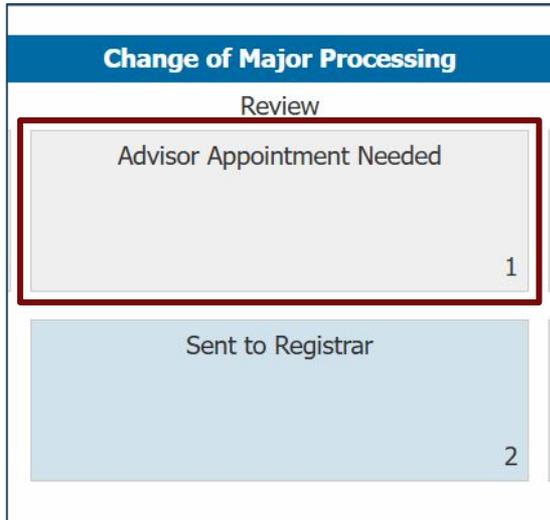
[Register for Advising](#)

Kind regards,  
University Advising

# Email to Advisor

## Review your Assigned Student's Request

- + Sent Upon Advisor Assignment
- + Button Directs Advisor to the Reader to Review Student's Change of Major Request



# Major Assignment Form

## Completed by Assigned Advisor

- + No Major Change Needed
- + Update Major/Concentration/Minor
- + New Change of Major Advisor

**Change of Major - Major Assignment**

**Change of Major Processing**

Update Needed

No Major Change Needed

Update Major/Concentration/Minor

New Change of Major Advisor

Change of Major Processing		
Intake	Review	Resolution
Form Submitted  0	<div style="border: 2px solid #800000; padding: 5px;">                     Advisor Appointment Needed  1                 </div>	Complete  1
	Sent to Registrar  2	No Update Needed  0

# Major Assignment Form

## No Major Change Needed

- + Bin Movement to "No Update Needed"
- + End of Review
- + Status Marked as Complete

**Change of Major - Major Assignment**

---

**Change of Major Processing**

Update Needed

No Major Change Needed

Update Major/Concentration/Minor

New Change of Major Advisor

Change of Major Processing		
Intake	Review	Resolution
Form Submitted  0	Advisor Appointment Needed	Complete  1
	Sent to Registrar  2	No Update Needed  0



# Email to Student

## Change of Major Complete

- + Sent **The Day After** a Student Moves into any Bin in the Resolution Column **AND** Their Request has a Status of "Complete"

Resolution	
Complete	1
No Update Needed	0

## Change of Major Complete!

Hi AllisonTEST,

Your change of major request has been completed!

Kind regards,  
University Advising

---

**Valdosta State University**  
Main Campus: [229.245.4378](tel:229.245.4378)  
North Campus: [229.249.2624](tel:229.249.2624)

# Major Assignment Form

## New Change of Major Advisor

- + No Bin Movement
- + Re-Assigned to New Advisor for Review
- + Email Sent to Student and Advisor

Change of Major Processing	
Review	
Advisor Appointment Needed	1
Sent to Registrar	2

Change of Major - Major Assignment
Change of Major Processing
Update Needed
<input type="checkbox"/> No Major Change Needed
<input type="checkbox"/> Update Major/Concentration/Minor
<input checked="" type="checkbox"/> New Change of Major Advisor
New Change of Major Advisor Assigned
Barrie Fitzgerald ▼
Reason for New Advisor
Barrie - sending Allison to you for further change of major processing.

# Major Assignment Form

## Update Major/ Concentration/ Minor

- + Choose Update Level(s)
- + Add/Remove Major/Concentration/Minor
- + Send to Registrar

**Change of Major Processing**

Review

Advisor Appointment Needed

1

Sent to Registrar

2

**Change of Major - Major Assignment**

**Change of Major Processing**

Update Needed

No Major Change Needed

Update Major/Concentration/Minor

New Change of Major Advisor

Update Level (select all that apply):

Primary Major/Concentration/Minor

Secondary Major/Concentration/Minor

Tertiary Major/Concentration/Minor

**Current Primary Programs**

Major: Computer Information Systems - Online College

Concentration: Biology

Minor: Addiction Studies

New Primary Major\*

New Primary Concentration\*

New Primary Minor\*

Remove Programs

Remove Current Primary Concentration

Remove Current Primary Minor

\*If no change, please leave blank.

Send to Registrar

# *Email Automation* + SIS Import

Registrar Email | Auto-Submitting Form | SIS Import

# Email to The Registrar

## Upon Advisor Submitting Their Update Form

- + Outlines Changes to Be Made in Banner
- + Registrar Updates Banner SIS
- + "Complete Request" Button Triggers an Auto-Submitting Form in Slate

### Change of Major Notification:

#### Student Details:

+

**Student:** AllisonTEST BeebieTEST ([abeebie@carnegiehighered.com](mailto:abeebie@carnegiehighered.com))

**VSU ID:** 555810797

**Advisor:** Carnegie Slate Team ([security@underscorehighered.com](mailto:security@underscorehighered.com))

**Request Submitted Date:** 12/18/2024

#### Current Academic Programs:

**Major(s):** Computer Information Systems

**Concentration(s):** Biology

**Minor(s):** Addiction Studies

#### Requested Updates:

**Remove Primary Minor:** Addiction Studies

**New Primary Major:** Math

**New Primary Concentration:** N/A

**New Primary Minor:** N/A

Complete Request

\*By clicking the "Complete Request" button you are acknowledging that the above update has **already been completed in Banner.**

# Auto-Submitting Form

## Submitted via Button in Registrar Email

- + Matches on Correct Entity Row
- + Updates Status to "Complete"

### Edit Form

Folder	Change of Major
Scope	Person

**Saving...**  
**Update in progress. DO NOT navigate away or close this window.**

Entity GUID

Update Status

Custom Script  
(will show on the next slide)

Hidden!  
(Status Defaulted to "Complete")

# Email to The Registrar

## Recipient List

+ Entity Matching + Button URL

**Edit Part**

Status: Active

Name: edit2

Source: Subquery Export

Type: Dependent subquery

Output: Concatenate

Row Separator: \n = New Line; \t = Tab; \\ = Escaped Backslash

Row Offset: 1 Row Limit: 1

Export Separator:

Exports: [Export](#)

Form Link

Student GUID

Entity GUID

https://apply.valdosta.edu/register/?id=85c066cb-7d17-4912-b31c-abd9e...

&person=

Person GUID

&sys:entity:id:4a2a7b72-2d4f-4447-a2dd-d346d7677cf5=

eguid

**Edit Part**

Status: Active

Name: eguid

Source: Nested Subquery Export / edit2

Type: Dependent subquery

Output: Concatenate

Row Separator: \n = New Line; \t = Tab; \\ = Escaped Backslash

Row Offset: 1 Row Limit: 1

Export Separator:

Exports: [Export](#)

Change of Major GUID

Filters: [Filter](#) [NOT](#) [\(](#) [OR](#) [\)](#) [Join](#)

Join: [Change of Major](#)

Sorts: [Sort](#)

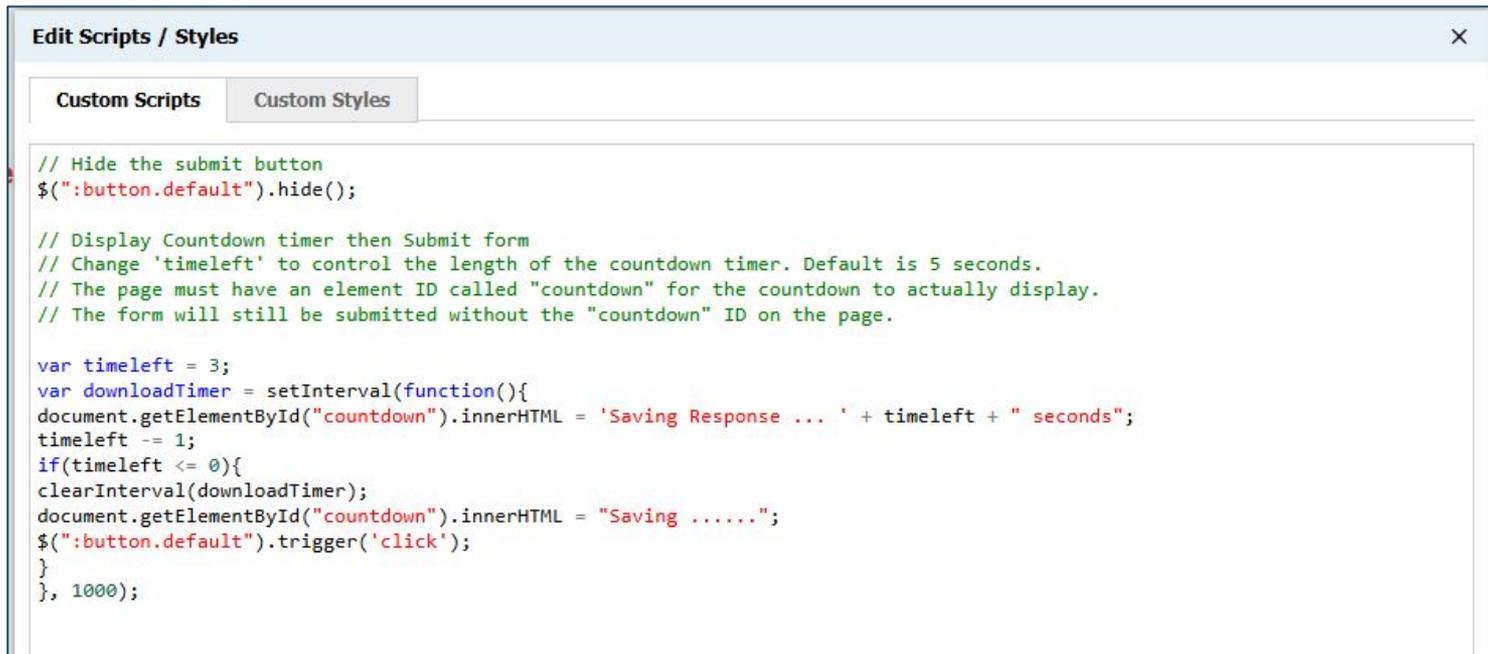
Change of Major Created Date desc

[Save](#) [Delete](#) [Cancel](#)

# Auto-Submitting Form

## Custom Script

- + Add to "Edit Scripts / Styles" → "Custom Scripts" on Form



```

// Hide the submit button
$("#button.default").hide();

// Display Countdown timer then Submit form
// Change 'timeleft' to control the length of the countdown timer. Default is 5 seconds.
// The page must have an element ID called "countdown" for the countdown to actually display.
// The form will still be submitted without the "countdown" ID on the page.

var timeleft = 3;
var downloadTimer = setInterval(function(){
document.getElementById("countdown").innerHTML = 'Saving Response ... ' + timeleft + " seconds";
timeleft -= 1;
if(timeleft <= 0){
clearInterval(downloadTimer);
document.getElementById("countdown").innerHTML = "Saving .....";
$("#button.default").trigger('click');
}
}, 1000);

```

# SIS Import to Update

## Leverage Pre-Existing SIS Source Formats

- + Nightly Updates to the Following Records
- + Person Scoped Major, Minor, and Concentrations

Source Formats

SS - Student File

Format	csv
Status	Active
Type	One-Time / Differential
Remap As Of Date	2024-11-13
Remap Status	Active
Scope	Record
Unsafe	Yes (will update records with active applications)
Update Only	No (will create new records)
Dedupe	All rows will be eligible for record creation
Web Services	<a href="#">View</a>

Sources

Created	Filename	Folder	Imported
05/12/2025	student_info_202505120404.csv		15973/15...
05/11/2025	student_info_202505110405.csv		15973/15...
05/10/2025	student_info_202505100413.csv		15973/15...
05/09/2025	student_info_202505090209.csv		15867/15...
05/08/2025	student_info_202505080406.csv		15867/15...
05/07/2025	student_info_202505070404.csv		15843/15...
05/06/2025	student_info_202505060403.csv		15818/15...
05/05/2025	student_info_202505050401.csv		15690/15...
05/04/2025	student_info_202505040403.csv		15690/15...
05/03/2025	student_info_202505030425.csv		15690/15...

BeebieTEST, AllisonTEST

Dashboard | Timeline | Research | Profile | Materials | Early Alerts | Registration History | Student Schedule | Student Success Details | In Case of Emer

Student Success Dashboard

Primary Major: Computer Information Systems

Major 1 Concentration(s): Biology

Major 1 Minor(s): Addiction Studies

VSU ID: 555810797

Cumulative GPA: 3.5

Primary Advisor: Kelsey Griggs

Success Coach: Lauren McCullough

Classification: Freshman

Academic Standing: Good Standing

SAP Status: Academic Plan

Student Modality: No Online

Advising Status:

VSU Email: [abeebie@vsu.edu](mailto:abeebie@vsu.edu)

Holds:

FERPA Indicator:

Add New Note | Add Early Alert | SFASTCA | SGAADVR | SOAHOLD | SSASECT | SFAREGS | SGASTDN | DegreeWorks

Search...



# Future Planning

## How Can We Improve this Process Moving Forward?

- + Build A More Robust Entity
  - + Additional Prompt-Driven Fields
  - + Change of Major Custom Tab
  - + Entity Rules

# Questions + Conversations



# Thank You

---

## **Bailey Raffield**

Texas A&M University

*CRM Manager*

[bgraffield@tamu.edu](mailto:bgraffield@tamu.edu)

---

## **Allison Beebie**

Carnegie

*Slate Student Success Implementation Strategist*

[abeebie@carnegiehighered.com](mailto:abeebie@carnegiehighered.com)

