Online Advising

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Overview

Online advising may seem like an oxymoron. How can advising that provides timely, useful, accurate, consistent, and personalized academic information to students be done online? In the student academic-services arena, campuses are using the Web to admit, register, and advise students; provide financial aid; track academic requirements; and help students graduate. Despite perceptions that online advising is unrealistic, changes in technology and student attitudes, alternative program formats, and the ever-changing advising landscape have allowed online student advising to become increasingly commonplace in higher education, especially for distance learners.

A series of issues are driving the adoption of online advising:

- **Demand for self-service.** Using the Web, students can access data themselves and seek advice from professional staff and faculty members as needed. Self-service is a preferred mode of service delivery for many students.

- **Distance education.** Students who access education from a distance need advising, as well. To be usable for the student, these services often must be available online.

- **Timely, convenient access.** Students often need information at times when college or universities offices are closed. Students also prefer convenient access, available any place and any time.

- **Valuable use of time by advising professionals.** Using information technology to provide students with timely and convenient access to academic information takes the pressure off advisors, who would otherwise frequently have to provide mundane and routine data for students.

The increase in online advising aims to meet student demand and improve customer service. As Levine and Cureton observed, “Students are bringing to higher education the same consumer expectations we and they have for every other commercial enterprise they deal with. Their (and our) focus is on convenience, quality, service, and cost.”

This Research Bulletin examines online advising and the necessary technology and human infrastructure required for successful deployment.

Highlights of Online Advising

Different forms of student advising can be broken down into several categories, each with a range of possible activities to support it. Table 1 identifies some of these categories and corresponding actions that might be made available through online tools.
Table 1. Possible Actions for Various Types of Advising

<table>
<thead>
<tr>
<th>Category</th>
<th>Sample Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman advising</td>
<td>Selecting major, choosing classes</td>
</tr>
<tr>
<td>Financial aid</td>
<td>Financial planning, assistance with application process</td>
</tr>
<tr>
<td>Transfer</td>
<td>Credit transfer, course equivalencies</td>
</tr>
<tr>
<td>Goals</td>
<td>Establishing personal and career goals</td>
</tr>
<tr>
<td>Information transfer</td>
<td>Requirements, rules, procedures, deadlines</td>
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</table>

Many excellent Web-based online advising initiatives focus on specific areas, such as course selection, course transfer, or financial planning. A few examples are presented here, along with a set of principles that other institutions may use to guide their efforts.

**Freshman Planning: A Web-Based Freshman Advising and Registration System**

Several years ago, Brigham Young University (BYU) made the decision to connect new-student orientation with freshman advising and registration. The result was the creation of a Web-based freshman advising and registration system. The guiding principle was to encourage and support academic advising and registration of entering freshmen, through online and related materials. This system helps freshmen look at the “big picture” of their academic careers—understanding what the course requirements are and how they can be met, as well as when courses should be taken.

With a “Freshman Resources for Planning and Registration” packet to guide them, newly admitted students begin the orientation process by logging onto BYU’s student information system. Once they have logged on, freshmen find an array of academic advising resources available to them. The primary features of the system include

- the student’s biographical summary, which lists the major selected and advisement information;
- the assigned registration time;
- a menu of key advising sources;
- five sequential steps to complete the advising process, culminating with registration;
- an option to change major; and
- a textbook reservation form.²
This program at BYU has led to outcomes that can be seen in three areas of academic advisement and transition need for incoming freshmen: (1) effective communication to new freshmen about university expectations (such as required general education core courses); (2) accurate and integrated information about planning and registration; and (3) a Web-based planning and registration system that is easily accessible by all students regardless of time or place.

**Transfer-Student Planning: Automated Transfer Evaluation**

Web technology makes it possible for new and prospective transfer students to acquire course equivalency information in a timely and user-friendly manner. Delays in transfer course evaluations often occur because the process involves multiple offices, such as admissions, registration, records, and the academic department. This lag often leaves students without vital academic information for weeks into their first term, leading to poor academic planning, unnecessary courses taken, and even program changes. Today, what used to take days, weeks, or months may require only a few seconds, depending on institutional policies and procedures. Enabled by Web technology, an automated transfer-evaluation system streamlines the communication of course equivalencies by routing transfer courses to a database of all past and current evaluations. Automated transfer evaluation is a welcome relief to transfer students and their advisors.

One of the premier transfer systems is Ball State University’s Automated Course Transfer System (ACTS). The ACTS interactive Web site permits students to enter transcript data from their current institution and receive two reports in a matter of seconds. The first report details courses accepted and the Ball State course equivalents. The second report, the degree audit, applies the transferable courses to the student’s intended major and suggests courses the student might take at her current institution until the transfer is finalized.3,4

Ball State students also use ACTS to determine course equivalents offered at institutions in their home communities, allowing them to identify course equivalencies for summer enrollment at other institutions. This feature dramatically decreases the need for departmental contacts and permission prior to enrollment.

**Success Center: Moving Beyond Enrollment**

After completing a survey of students, staff, and faculty, Johnson County Community College (JCCC) discovered that what they emphasized was not what constituents said mattered. Student services revolved around enrollment, with a focus on registration rather than on helping students with longer-term life and career planning. As a result of the survey, JCCC redesigned its processes, shifting the emphasis from enrollment to student development, understanding where students are headed and how JCCC can help them reach those goals.

As part of the focus on student development, JCCC created a Success Center that involves students in their own educational and career planning. The Success Center, staffed by trained, knowledgeable, and accessible generalists, is the first stop for new
and prospective students. In this model, technology is used to take information to students rather than forcing them to stand in line, function within restricted times, or compete for processing functions. The Success Center combines technology with academic and career counselors to assist students with academic goal setting, problem solving, and goal attainment.

The Success Center is based on the following themes:

- Student development and shared responsibility in educational planning
- Student needs met in one location where comprehensive information is available
- Extensive and dynamic cross-training of front-line staff
- Comprehensive technology and trained advisors

Based on a student-centered model, all aspects of student services work together to help the students discover, analyze, and implement attainable and relevant career/life plans. The program is collaborative, as well, involving students, staff, and faculty. Web enrollment, e-mail advising, Internet and intranet information sources, and computer-based assessments are all important components of the working model.5

**Individualizing Information: Personalized Service Portals**

The University at Buffalo is among a host of institutions that have effectively implemented personalized Web portals. The creation of MyUB as a personalized Web portal has decreased the distance among students, faculty, and student services personnel, increasing the sense of community.

The goals behind the creation of MyUB include

- Enabling students to find needed information by providing a personalized and customizable portal
- Coaching students from orientation through graduation
- Building awareness of the virtual and physical campus services available to students
- Using MyUB as a proactive university communication tool
- Establishing learner communities and therefore aiding in student retention

MyUB makes it easy for students to find the information they need by providing an easy-to-navigate, personalized, and customizable portal. The portal coaches students from orientation through graduation and builds awareness of the many virtual and physical campus services. For example, in the “Program and Career Planning” section, students can find information about effective time management. A freshman might be presented with information about effective study skills or academic planning, as well. A senior might find information about graduate school or career opportunities. The portal can be
proactive, alerting a student who has an outstanding balance that he will not be able to register until the balance is paid.6

MyUB works as a proactive university communication tool, as well. It delivers information that students might find useful (health and wellness, counseling). It can also provide administrative information to students, allowing for correction of errors (such as an English major who is incorrectly listed in Engineering) and giving students a sense of control over their own information.

### Financial Aid and Academic Planning

Concern over student debt levels motivated the development and implementation of an obligatory planning process for applicants to BYU who contemplate long-term borrowing. Poor academic choices can cost students thousands of dollars and place them in financial jeopardy after graduation. The Financial Path to Graduation, developed by the Financial Aid Office at BYU, is a nationally recognized Web-based program that uses a seven-step procedure to encourage students to anticipate and plan for the entire academic enterprise. All freshmen who apply for financial aid receive a “Financial First Aid Kit.” Included in this packet is a workbook and a 30-minute video that outlines the process and provides instruction on how to access the Internet and the Financial Path to Graduation.

The process starts with the formalization of an academic plan. The Path then requires the student to learn and exercise several basic principles of personal finance in order to determine a level of borrowing that is appropriate for the student’s academic career. Data is submitted to the financial aid office over the Internet.

Bad or inaccurate academic information has financially burdened students, families, and the financial aid office by making it necessary to find financial aid resources for students who may have made poor or uninformed decisions. All students seeking long-term loans are required to submit both a financial and an academic plan.7

The Path has been operational for three full processing years. Individual counseling sessions, with an accredited financial counselor, provide students with an opportunity to be instructed in a range of personal finance issues, as well as more realistic academic planning. Providing good academic advising by associating costs with academic decisions assists the student and adds value to the efforts of the financial aid office.

### What It Means to Higher Education

Information technology can complement the institution’s goal of encouraging students to be self-reliant, while freeing service providers to help students make informed, responsible decisions and set realistic goals.8 However, this requires institutions to consider their readiness to move into online advising and take the appropriate steps to ensure a solid plan is developed. Following are steps essential to successful projects.
Establish a Plan

In an effort to plan strategically and systemically for online advising, institutions might consider Peter Drucker’s five major areas of focus. Figure 1 illustrates the sequence of questions to ask in strategic planning. Rather than beginning with “structure” or “practices,” Drucker begins with the customer—in the case of higher education, the student. The sequence of these questions is important. Unfortunately, in higher education the sequence of program planning is sometimes the opposite of Drucker’s suggestion.

**Figure 1. Sequence of Questions to Ask in Strategic Planning**

<table>
<thead>
<tr>
<th>Customers</th>
<th>Services</th>
<th>Metrics</th>
<th>Practices</th>
<th>Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vs.</strong></td>
<td>Structure</td>
<td>Practices</td>
<td>Metrics</td>
<td>Services</td>
</tr>
</tbody>
</table>

Table 2 gives examples of appropriate questions to ask for the various areas of focus.

**Table 2. Sample Questions for Focus Areas**

<table>
<thead>
<tr>
<th>Question</th>
<th>Focus Area</th>
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<tbody>
<tr>
<td>Who do we serve and what do they do?</td>
<td>Students</td>
</tr>
<tr>
<td>What services do we provide them?</td>
<td>Programs, services</td>
</tr>
<tr>
<td>How do we know we are doing a good job?</td>
<td>Metrics, standards</td>
</tr>
<tr>
<td>What is the best possible way to provide the desired services?</td>
<td>Practices, delivery</td>
</tr>
<tr>
<td>What is the best way to organize?</td>
<td>Structure, reengineering</td>
</tr>
</tbody>
</table>

**Principles of Effective Online Advising**

Technology will only get better, more powerful, and more viable as an enabler or tool for online advising. The institutional and human challenge is to get better at managing technology as an enabler, to bridge and match technology advances with equally effective student support services. Technology becomes effective only as it is integrated...
into, supports, and humanizes the service environment for providers and students. As technology transforms the way we do things, so too must providers transform themselves. Service providers’ focus should be on high touch as much as, if not more than, high tech and high effect.

In reviewing the experiences of institutions that have integrated online advising into their academic enterprise, a number of principles emerge that should help other institutions deliver the best service possible to students.

**Focus.** There are a number of areas where institutions might incorporate technology in the advising process. However, not all changes can be made simultaneously. Institutions must determine which areas are most important and focus efforts on the top priorities.

**Redesign.** Rather than simply automating existing processes, successful online advising initiatives rethink and redesign processes to make them more efficient. It is also important to consider the student perspective as processes are being redesigned. Processes based on an institutional or organizational perspective sometimes create unnecessary challenges for students.

**Involve staff and students.** Students and staff bring valuable perspectives and skills to online advising. Involving students and staff from planning through execution can save time and avoid mistakes.

**Determine where technology adds value.** Technology may not always bring value. Determine what technology can do to assist and enhance the role of the service provider in supporting student needs.

**Ensure information is consistent, accurate, and comprehensive.** Institutions must review the information they have, ensuring that it is consistent, accurate, and comprehensive.

**Create a reliable technology infrastructure.** For online advising to be successful, the technology infrastructure must be reliable and completely consistent. Students may have questions or need information at any hour of the day or night; thus, the infrastructure and associated services should be accessible 24 x 7.

**Reassess the appropriate organizational structure.** Historically, most campus departments have defined themselves in a hierarchical model. However, Web technology has made it possible to flatten organizations. Well-designed online advising initiatives are often linked to a flatter organizational structure, bringing multiple units together to solve student problems.

**Retain the human touch.** Regardless of information technology advances, it is up to service providers to ensure that the human face of the institution is preserved. Each institution must work to find the appropriate mix of information technology and personalized services that are appropriate for the institution’s goals and culture.
Key Questions to Ask

Key questions institutions should ask about online advising include:

- Could our service to students be improved by integrating online advising into our academic programs?
- In what areas of advising do we have the greatest weakness? Could this be improved using an online process?
- Do we have the technical resources necessary to succeed with online advising?
- Is there sufficient cooperation among the units that would need to be involved in an online advising initiative?
- Is an online approach consistent with our institutional values and student needs?

Given appropriate planning, Web technology and student services providers can form a partnership to deliver high-quality, flexible online advising. It is possible to integrate support services in a seamless fashion so that the student perceives a single institutional voice on administrative and academic policies and procedures. In addition, online advising calls for even greater administrative commitment and support to a student services staff, which may already be stretched. It is important to remember that without the employees, institutions cannot take care of students.

Where to Learn More

- EDUCAUSE information resource library items on advising systems: <http://www.educause.edu/asp/doclib/subject_docs.asp?Term_ID=332>
- G.L. Kramer and M.W. Childs, The “e” Factor in Delivering Advising and Student Services (Manhattan, Kansas: NACADA Monograph Series 7, 2000)

Endnotes


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