Project 2: Enrollment Central App: Contextual Inquiry and Contextual Analysis

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Concept Statement

The Enrollment Central Application (EC App) is intended to serve as a user-friendly mobile application supporting and facilitating a number of enrollment-related processes at George Mason University. The primary features of this mobile platform concept include a searchable Enrollment Central process guide, mapping capabilities and the presence of a forms repository. This application will provide pertinent information and guidance related to accomplishing specific tasks relevant to the offices of Transfers/Admissions, Financial Aid, Student Accounts and Registrars. The EC App will appear as a module within the existing Mobile Mason applications suite.

Project Background

Client Information

Enrollment Central Mission: Mason Enrollment Central (EC) provides comprehensive, coordinated, and efficient enrollment services delivery (and related financial) to prospective and enrolling students.

Locations & Hours: Currently, EC has two locations. The main campus location can be found on the ground floor of the Student Union Building I (SUB I) building with an office that faces the hallway. A second location began operations in 2015, at the Prince William campus. Regular office hours for both locations are from 9 am to 5 pm Monday through Friday. There are currently only three staff members servicing both locations. Although staff members rotate site assignments, two staff members operate the Fairfax campus together, while the third staff member operates the Prince William campus.

Staff Members: There are currently three EC staff members. The design team decided to interview all three of them at various times. Their names, job title, and site coverage are as follows:

Todd Diamond   Chris Reed   Geetie Ansary
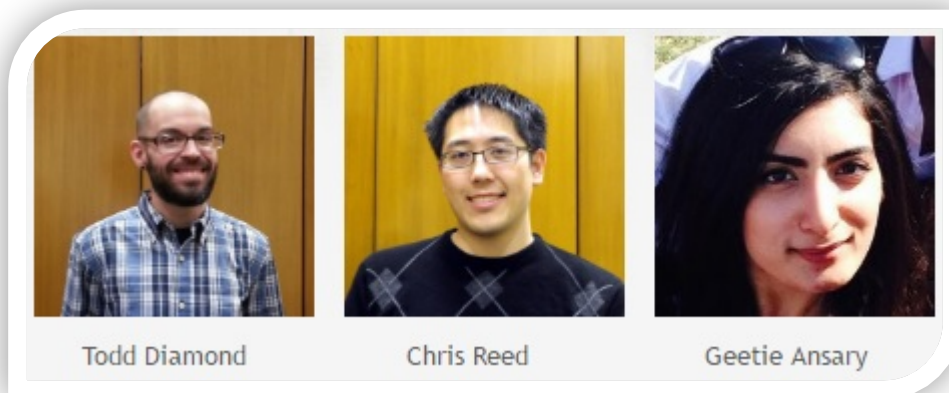
- Todd Diamond: Enrollment Central staff, responsible for manning the EC desk and helping students with their enrollment-related issues. He has been with EC since the beginning in 2003. He spends four days a week at the Fairfax campus and goes to Prince William campus one day a week.
- Chris Reed: Enrollment Central staff, responsible for manning the EC desk and helping students with their enrollment-related issues. He has been with EC since the beginning in 2003. He is the main EC contact person and remains at the Fairfax campus location only.
- Geetie Ansari: Enrollment Central staff, responsible for manning the EC desk and helping students with their enrollment-related issues. She has been with EC since mid-2014. She is the main EC staff member at the Prince William campus and comes to Fairfax campus one day a week.

Current Practices

Current and future students are referred to EC by various offices around both campuses for enrollment-related tasks. Anything involving student admissions, transfers, financial aid, or the adding and dropping of classes could trigger a referral to EC. The staff members are also expected to assist any students with various tasks unrelated to enrollment. Students can also seek assistance by calling or emailing EC to obtain guidance or answers to their questions. There are approximately fifty enrollment-related processes that can prompt students to visit EC for help. These processes are explained on various websites, but most students do not know where to find them. EC staff members know exactly what to do and where to find these forms.

Unfortunately, resources such as an employee manual, handbook, or new employee job aid do not exist. When a new staff member is hired, training is accomplished by shadowing other EC staff members for several weeks. During this time, the new employee learns how to both assess student needs and execute these processes.

The EC staff typically assists an average of fifty students a day. The first and last two weeks of each semester are the busiest times of the year for EC. There is also a great deal of foot traffic

during the period of time in between semesters. Staff can be observed at the counter assisting up to thirty students in an hour. A ticketing system called Q-Nomy was purchased three years ago to assist with the management of this period of high volume (http://www.qnomy.com/). Here are a few pictures of the Q-Nomy ticketing system in action:
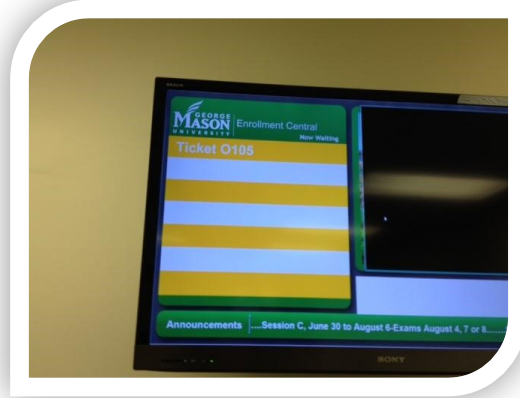
Objectives

The group has determined the following objectives:

- Define Enrollment Central process.
- Create a mobile application that facilitates Enrollment Central processes.
- Improve and accelerate the Enrollment Central processes.
- Optimize the Enrollment Central processes and performance.
- Integrate the EC application with the main application of GMU.
- Provide a valid solution to a real (and current) problem.
- End EC staff's frustrations with current processes.
- Empower students to perform their enrollment process seamlessly and smoothly.
- Make Transfer/Admissions paperwork processes more accessible for the students via the easy-to-follow guidance on different application forms.
- Allow EC staff to focus on other job duties while keeping their jobs.

Scope and Process

Based on the objectives, the design team performed a number of task analyses, which resulted in the tailoring of the scope of this user design project:

- Contacted the EC management to explain the purpose of the project and our need to visit the EC in order to observe and interact with the EC staff.
- Met with the EC staff to try to understand issues relating to the EC.

- Inquired about common work practices and current technology usage and functionality.
- Researched similar enrollment practices currently in use on other campuses.
- Defined the EC processes and the staff member roles.
- Explored the existing enrollment processes from multiple perspectives: End-User (student), organizational (EC staff & subject matter experts) and management (director).
- Explored the EC website including the frequently asked questions and answers section.
- Decided on data collection methods. The data was collected through observations, interviews, and student surveys.
- Assigned the roles for collecting data in terms of how many people would do the observation and who would interview the participants.
- Brainstormed interview questions and edited them down to a final version of the list.
- Collected data on work flow through observations and interviews with students, staff, and management (subject matter experts).
- Collected artifacts related to the EC process and setting.
- Created documents and charts to organize data collected.
- Recognized patterns and commonalities within research and data collection results to define outcomes.
- Defined the main themes and categories that describe the nature of EC processes.

Enrollment Center Category Processes

Transfer / Admissions Processes
Transfer Admissions is responsible for assisting students who apply to transfer to George Mason University from other colleges and universities and checks for earned college credit awarded for advanced high school coursework.

Financial Aid Processes
The Office of Student Financial Aid is responsible for helping students with applying for financial assistance through state and federal programs, loans, scholarships, and grants.

Student Accounts Processes
Student Accounts deals with billing and payment issues for cost of attendance and includes the Cashier's Office.

Registrar Processes
The Office of the Registrar maintains student academic records. This includes the issuing of transcripts and verification of student status, the conducting of registration and awarding of degrees, the handling of domicile status of admitted students, and the administering of veterans' educational benefits.

Project Constraints and Assumptions

There are a number of constraints and assumptions that must be mentioned regarding this design process. Upon initial group observation and discussion, the design team assumed that the sole issue with George Mason University students was their lack of access to an effective, navigational mobile application. The team assumed that there were no other mobile applications available to students other than the main map application. Following further investigation, the team became aware that the core problem actually originated from a lack of student knowledge regarding the admissions and enrollment processes. It was also discovered that two additional mobile applications types were available to students for download. This was interesting because students were simply not using these applications. The design team had a lot to consider. Was the issue related to a lack of poor marketing or advertising of the applications existence? Perhaps, the design issue was not just related to an application. The team observed everything from ineffective technological solutions to processes that were repetitive and mostly manually based. The design team is assuming that once a mobile application is designed that it will be marketed appropriately and that students will possess an appropriate mobile device on which the application can be utilized.

Some constraints emerged as a result of some previous attempts to resolve admissions and enrollment problems. Because of poorly designed prior solutions, such as the current mobile applications and a self-service kiosk (sometimes reliable/temperamental), any newly designed solutions might not be well received. Additionally, staff might still harbor a small level of mistrust at any attempts to evaluate their processes and design a mobile application, which might eventually take away their jobs. Some of the staff members might still view their jobs as being in jeopardy. This could be based on the relationship between them and past administrative members. After all, the design team did discover that the whole purpose of the prior kiosk implementation was to justify staff jobs through the accounting of numbers.

Other constraints, such as scheduling, limited resources, and providing a quality product, are existing concerns of the team. There is a short amount of time left for the semester for the team to design and test for the quality of the mobile application. A number of processes have to be accessible and functioning appropriately in the mobile application. Ensuring this can be difficult. Another constraint is that members of the design team are not specialists in coding. Although they are just designing the prototype of this application, it would be helpful to have a member on the team with coding skill so that functionality of the design concept could be realistically assumed. Another constraint is the lack of access to certain parts of the financial aid process. The design team has to design within this context assuming that there is no security-related issue with making forms available via a mobile application.

Finally, the last constraint remains in the unknown. Will new students, student helpers, parents, and existing students learn about the existence of a new mobile application and actually take the time to download it? Will they stick to using it whenever the need arises? There is a small amount of research, which shows that, at least some percentage of people only use mobile applications once and never return to using them again.

Overall, the group has identified the following issues:

- The staff is tasked with a multitude of duties.
- Limited communication channels, such as email or on-demand chat assistance.
- Lack of a defined starting point and clear path of enrollment processes.
- Lack of consistent synchronization between the computers and service screen in the waiting room with the staff computers.
- All forms must be completed by hand and presented to various departments (the lack of a system in place to utilize electronic versions of forms).
- An antiquated and inefficient Enrollment Central website.
- Limited or restricted staff access to financial aid information, although their job role requires that they provide service to students with financial issues.
- Students do not know how to start their Enrollment Central process or what steps are involved in the completion of that process.

Contextual Inquiry

Preparation

Preparation began as soon as the team reached a group consensus on the decision to design an application around EC processes. One team member approached the EC manager. The project purpose and goals were explained in detail. Upon requesting permission, the EC manager enthusiastically gave the team his approval. The EC staff members were approached and briefed on the project. Then, they were informed of the next steps to expect relative to the observation and interview stages. They seemed enthusiastic and more than happy to comply. The design team began preparations for the interview. One team member conducted a brainstorming session whereby each member came up with a list of interview questions. The whole team was introduced to the EC staff. However, the EC staff expressed that they held concerns about the security of their positions in the event of the creation of a mobile application for EC. Would this app replace the staff? The team explained to the EC staff that this project is only a class assignment and it does not jeopardize their position in the EC.

Data Collection and Initial Contact

The team was fortunate to receive an initial introduction and a meaningful warm hand-off based on a preexisting relationship between one member of the team, Hossein Kord, and the Fairfax

campus staff. The Enrollment Central staff was friendly and enthusiastic about this project. They were willing to allow close-up analysis through tours, interviews, and observations. Hossein, Chris, and Todd began having casual conversations about what this contextual analysis would mean for their job security. It was important to alleviate their concerns and build a sense of trust and respect from the very start so that they would be comfortable with the rest of the team. Based on this established rapport, a number of meetings between the team and the client would follow.

Interview Process and Observation Plan

The following steps were taken to plan and complete observations at the Fairfax Campus Enrollment Central Center:

1. Initial contact with Enrollment Central staff.
2. Confirmation of interview time, date and location.
3. Warm handoff and tour of Enrollment Center by Hossein Kord.
4. Discussion between Chris and Todd with team with a focus on:
    a. Behaviors: Knowledge.
    b. History of Enrollment Central staff and system.
    c. Feelings and attitudes towards existing system and processes (positive or negative).
    d. General manner in which they function.
    e. Frequency in types of processes completed.
    f. Where the process works and where it is broken.
    g. Frustrations of staff, students, and issues.
    h. Strengths and limitations of the process.
    i. Enrollment Center task ownership and relationship to other offices.
    j. How the process could be improved to make it a better student experience.
    k. Length of individual staff service.
5. Compilation of notes and collected artifacts.
6. Preparation for team presentation to community of practice (classmates and professor) and preparation of general student survey.
7. WAAD started and introduction to Trello for WAAD continuation.
8. Rework of student survey (end-user survey).

9. Preparation for the second onsite meeting for the workflow identification.

Sample Interview Questions

The group members contributed the following initial sample interview questions for the Enrollment Central staff:

Kari:

- What is the best part of your job?
- What is the MOST helpful tool that you currently use?
- What are the three questions that students most frequently ask you?
- How much of your interaction with students is face to face, versus email?
- What tools would you like to see developed for you?
- How often do you refer students to the Mobile Mason app?
- What are your busiest times of day when you see the most student traffic? Busiest days?

Aaron:

- When students arrive with a question, what is the primary resource used to provide an answer?
- Is it common for students to exhibit frustration while interacting with EC staff? Cause of frustration?
- What would be the top three most important features of an EC mobile app?

Vera:

- How often do prospective students as well as admitted students ask questions via e-mail?
- Is there a way for a prospective student as well as an admitted student to chat with the EC staff member online?
- Is there a way for a prospective student as well as an admitted student to save a trip to the EC? How can it be done?
- Have you experienced a prospective student as well as an admitted student who was frustrated because he/she couldn't solve his/her problems online and had to come to the EC? If yes, what would be your advice?
- How could the Mason App aid the EC work?

Maimoona:

- How does the EC process support you in achieving your task seamlessly?
- How does the map app promote you to reach where you want to go?
- Is the design of the map app is easy-to-use and helpful?
- When you open Mason Mobile app, can you find what are you looking for quickly?
- How would you like to improve the Mason Mobile App?
- What do want to improve in the process of EC in order to achieve your intended goal?
- How do you contact the EC (e.g. spatial, email, phone, etc.)?

Tracey:

- What are the frequently most asked questions?
- What percentage of questions do Admissions questions account for?
- Do you have any tasks that are more frustrating than others?

- What type of Financial Aid questions can you answer?
- Do students ever come in irate? If so, why?
- Is this attitude directed towards you?
- What about the actual process and its efficiency?
- Are there any other areas where the process is broken?
- If you could deliver the best student experience, what would be an ideal addition to achieve it?
- How long have you both been here?
- Are there any other issues?
- Are there any other offices nearby?
- How is it structured?
- How would you describe your job roles?
- Do you have a manual or a guide?
- Do students get lost trying to find you?
- Who is your customer and for whom activities are intended?
- What specific activities are conducted to achieve outcomes?
- How long has the challenge been in place?
- What resources are available to support the outcomes (e.g., technology, guidelines)?
- What do you ultimately want to change as a result of your activities or processes?
- What do you want to improve in the Mason Mobile app?
- How often do you receive complaints from users?

Final Interview Questions

In collaboration, the following list of final interview questions was developed:

- What are the frequently most asked questions?
- What percentage of questions do Admissions questions account for?
- Do you have any tasks that are more frustrating than others?
- What type of Financial Aid questions can you answer?
- Do students ever come in irate? If so, why?
- Is this attitude directed at you?
- What about the actual process and its efficiency?
- Are there any other areas where the process is broken?
- If you could deliver the best student experience, what would be an ideal addition to achieving it?
- How long have you both been here?
- Are there any other issues?
- Are there any other offices nearby?
- How is it structured?
- How would you describe your job roles?
- Do you have a manual or a guide?

- Do students get lost trying to find you?
- So if we created an application, you think that it should point out full location names?
- Did you know that there were three GMU apps?
- Are there any forms that you hand out that we might be able to have as artifacts?

Observation Plan & Outcomes

The design team planned all of our meetings. Prior to any interview, a few team members would get together and then go to the EC location. EC staff would be greeted and introductions were made. Time would be spent observing the EC staff both from far and up-close. At times when EC staff was not busy, the team would approach the counter to ask investigative questions. Some questions were prepared before and others resulted from on the spot observations. Team members made notes and recordings during these interviews for later analysis.

Observation Outcome 1 Specifics:
Date: 9/30/2016

Location: SUB1

Time: 12:10 PM.

The first observation was scheduled to allow the design team to assess the EC environment while becoming familiar with the EC work culture. The initial visit consisted of four design team members who met the enrollment center staff in the SUB1 building. Two EC staff members were observed sitting behind the front desk area assisting students. The design team sat in the EC waiting room area directly in front of the counter. There are chairs, round tables, and three desktops placed for student use. On the walls of the room, we observed a screen and some colorful flyers hanging on the wall. The flyers displayed, "YOU'RE NOT READY. MASON READY. UNLESS YOU ARE MOBILE READY." We all later recognized it as the Mason Alert app. This is somewhat confusing and forced the design team to ask, "How many apps are currently at Mason?" The team began analyzing and testing out the kiosk system. Once a student ID number was punched in, the kiosk provided an EC service ticket. The ticket number was O103. The team observed that the same corresponding number eventually was displayed on the kiosk service display screen. While awaiting service, the design team accessed the EC website only to discover that the website lacked the most current information. It was also discovered that although there are five known services provided by EC, only four services were actually listed on the website. Similarly, a waiting room brochure also only included the four services. The design team began to notice activity with visiting students. A number of students approached the counter and asked a variety of different questions. The team followed suit and walked over to speak to EC's staff. A number of inquiries were made such as: What was the nature of the flyers on the wall? What were the staff member roles and responsibilities? What were the most frustrating issues encountered while serving students? Staff members responded that handling financial aid tasks could be the most challenging due to such limited access to personal student

information. When questioned about what major services they regularly performed, the EC staff members shared that about 60%-70% of the services were admission transfer-related. Prior to leaving, the team collected the most common forms used by the EC staff to complete several processes that they support. This initial visit was very enlightening, so we thanked them for their cooperation and began preparing for the next stage.

The first formal interview occurred at the Fairfax Campus location. The team began by touring the area and gathering information by asking two staff members key questions, by documenting responses, and by collecting valuable artifacts. A number of notes were taken with the intent of understanding how the Enrollment Central operated. Topics, such as their purpose, their core values, frustrations, their history and their experience with students and administration were discussed. Additional focus was placed on the areas where the process worked well and in some cases where it did not. They were candid in their responses and expressed the addition of one feature, which would yield the optimal student experience. This suggestion involved a specific enhancement to the technological solution that would solidify a better user experience. It proposed the addition of fillable admission and enrollment documents to the design team's mobile application.

The team now viewed their design concept differently. It would solve another major issue. The mobile application would need to serve not only as a GPS navigator but also, as a multipurpose application. It would become a solution that could make directions on processes clear and make enrollment-related documents available to students. It was decided that in order to investigate this need further, more meetings with the client would need to occur, in order to observe the center's processes closely. It was also agreed upon that those receiving services (e.g. students, parents, student helpers) would need to be questioned as well.

A survey was developed as a result of this initial meeting and prior to proceeding with the next meeting. Another design team member would later strategically meet with Chris and Todd on October 5th, 2016 to begin the process of analyzing the processes. Flowcharts and diagrams of their most common processes began to take shape during that next opportunity.

Observation Outcome 2 Specifics:
Date: 10/05/2016

Location: SUB1

Time: from 3:00 p.m. to 4:00 p.m.

This observatory stage placed a great deal of emphasis on the EC workflow processes. Two EC staff members were first presented with an Observation form for completion. Following their review of the form, the EC members granted permission to the following: 1) to be observed

while working with the students and 2) to do a follow up on each process afterwards. The team noticed that there were four student visits that day.

The first request was on the subject of missing credits. A student had acquired sixty-eight credits from NOVA. However, only fifty-two credits appeared on her transcript. The student brought the filled out application form. However, the EC member determined that the form was incorrectly filled out. The EC member provided his guidance on filling out the form correctly. As a result, the completed form was left by the student in the EC for submittal by the EC member to a transfer coordinator. The student was informed that it would take up to a month to finalize the process. The student expressed her intent to visit the EC again during the course of the month.

The second request dealt with the subject of admissions. A student was unable to provide his G#. The student's photo ID was used in order to determine his application status. However, the student was informed that his admittance ultimately depended upon a course-by-course evaluation. That would include an evaluation of course credits earned outside of the U.S. and those represented on his NOVA transcript. The EC member confirmed the receipt of the course-by-course evaluation. The student was advised to request that NOVA resend the e-transcript to George Mason University. The student expressed his intent to visit the EC again in two weeks.

The third request was simpler. It was in reference to a Tuition Application Form. The EC member provided necessary form and explained the application process. The student collected the form and left the EC.

The fourth request had to do with the subject of reevaluation appeal. This request was an atypical one for the EC. Despite this, the EC staff member did his best to assist a student who was not satisfied by the evaluation of her transferred credits. The EC member explained the procedure of the transfer credits reevaluation appeal. In addition to this, the student was given the information, as well as, directions to pursue this process. Finally, the student wrote down the given information and expressed her intent to return to the EC for further guidance.

Overall, it took approximately five to ten minutes to process one request. Each request was well received by the EC member. Three out of four students expressed their desire to visit the EC again.

Survey Questions
As a result of the observations, the group has started designing a survey as a means to aid this project:

1.   Please select one of the following categories:

I am a: Student: ____ Parent: ____ Helping a Student: ____ GMU Staff: ____ Other: ____

2.   What are you here for today?

Transfer/Admissions: ___   Registrar: ___   Financial Aid: ___

Student Accounts: ___   Advising: ___   Other: ___

3.   Have you used these Enrollment Central services before?

Yes: ___ No: ___

4.   Did your visit require that you complete one or more forms?

Yes: ___ No: ___

5.   Does your visit require that you visit additional offices?

Yes: ___ No: ___

6.   Would you use a mobile app, if it helped you with this task?

Yes: ___ No: ___

7.   Would you use a mobile app with a map to find various offices at GMU?

Yes: ___ No: ___

8.   Would you use a mobile app if it showed you what form to fill out for this task?

Yes: ___ No: ___

Comments: _____

Survey Results

EC staff members were given multiple copies of the student survey form and were asked to offer this quick survey to students. Unfortunately, these past few days have been unusually slow. Most students were in a rush and did not take the time to fill out the survey. These are the results of the five completed surveys:

1. All of the five forms were filled out by students.

2. The students came to EC for various tasks, but mostly for Transfer Admissions.

3. All of the students had used EC services in the past.

4. Two out of the five students needed to fill out some kind of a form for their task.

5. Two out of the five students had to go to other offices to complete their task.

6. Every one of them said that they would use a mobile app to help with their task, if it was available.

7. All said they would use a mobile app with a map to find their way around campus.

8. All also said, they would use an app to learn what form they would need to use complete tasks.

Completed Survey Questionnaires:

Contextual Analysis

The systematic process of instructional design for contextual analysis is the routine analysis of the data gathered in contextual inquiry processes. The team defines systematic analysis as a process, which includes the interpretation, consolidation, and communication of the collected data. The data interpretation is accomplished through creating a workflow that describes the EC processes and generates work activity notes from observation and interview. The data consolidation is accomplished by building a work activity affinity diagram (WAAD) from the work activity notes. Trello software was used to consolidate the data into main themes. The communication of the data will be approached by a "members check" by sending the final report to EC staff for their feedback and validation.

Workflow

The following models of the EC processes are generated based on the collecting data through the observations:

Process: **Missing credits.**

Missing credits
- A student has 68 credits from NOVA. Only 52 appears on her transcript.

Steps taken
- The student brought the filled out application form.
- The EC member determined that the form was incorrectly filled out.
- The EC member provided his guidance on the process of filling out the form.

Outcome
- The completed form was left by the student in the EC in order for the form to be submitted by the EC member to a transfer coordinator.
- The student was informed that it may take up to a month to finalize the process.
- The student expressed her intent to visit the EC again during the course of the month.

Process: **Reevaluation appeal.**

The EC response

Reevaluation appeal

A student was not satisfied by the evaluation of her transferred credits.

Student's request

The EC member explained the procedure of the transfer credits reevaluation appeal.	The student was given the information as well as directions.	The student expressed her intent to return to the EC for further guidance.
Step 1	Step 2	Outcome

Process: **Admission.**

Student's request for paperwork assistance
- A student was unable to provide his G#.
- The student's photo ID was used in order to determine his application status.

The EC member's response
- The student was informed that his admission depends on the course by course evaluation of the outside of the US credits earned and his NOVA transcript.
- The receipt of the course by course evaluation was confirmed.

Outcome
- The student was advised to request NOVA to resend the e-transcript once again.
- The student expressed his intent to visit the EC again in two weeks.

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The following model presents the overall picture of the major work roles related to EC:
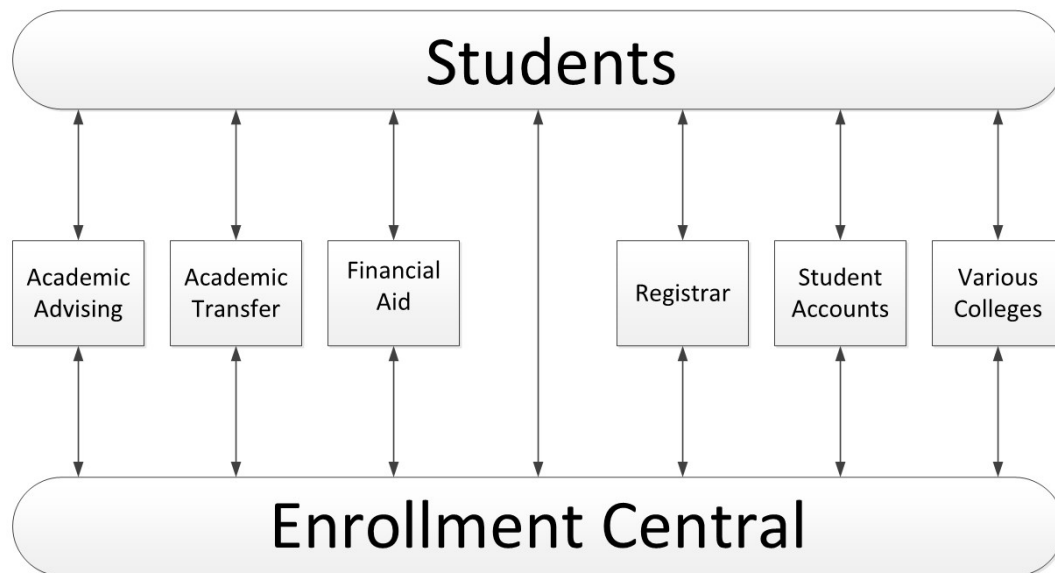
In addition, the following work activity notes were generated through the data collection process by observation and interview.
Data Gathering: Enrollment Central Center
Attendees: Hossein, Maimoona, Tracey & Vera
Fairfax Campus Staff Members: Chris & Todd
Date: 9/30/2016 Time: 1:00pm to 2:45pm
Motto: "Mason EC Makes Mason EZ"

- What are the most frequently asked questions?

They are admissions-related.

- What percentage of questions do admissions questions account for?

About 60-70% however, this depends on the time of year. If it is during the add/drop period, the majority of questions deal with enrollment issues.

- Do you have any tasks that are the most frustrating?

Yes, dealing with financial aid questions can be a challenge because we have limited access to personal student information.

- What types of financial aid questions can you answer?

We answer anything dealing with their balance and whether or not their money is available or not. The financial aid department can be protective and territorial. Although we understand why, this makes our work limited and frustrating. We have a large sign here telling students that we can assist them with financial aid issues.

- Do students ever come in irate?

Yes, this happens frequently. We have to tell them that they've been denied admittance, that their financial aid isn't available, that they have a balance, or that they have to pay out-of-state tuition because their in-state tuition rate was denied. Now they have to pay about $5k more than anticipated.

- Is this attitude is directed at you?

Yes, we are wearing GMU shirts. Some think that we are just part-time, hourly student workers, and this attitude can affect our credibility.

- What about the actual process and its efficiency?

Well, you see that kiosk area? Well, it gives students limited access to Patriot Web, but they still end up coming over to us because it is the same access that they have from any computer. They still end up needing forms from us. A lot of the tasks that they need to complete outside of that enrollment/add/drop period cannot be achieved there.

- Are there any other areas where the process is broken?

Yes, that Q-NOMY screen/ticketing system doesn't always work correctly. Sometimes it doesn't accurately sync up with our system and we end up not calling some student numbers because they simply don't show up in our system.

- If you could deliver the best student experience what would be an ideal addition to achieve this?

Well, I think that if the students could access the forms that they need, fill them out, and have them electronically reach the offices that they need to reach. Then we would have more time to improve the quality of service. There are just the two of us here doing a number of tasks.

- How long have you both been here?

Todd-16 years. Chris-13 years. We were initially part of another office. Then, we were setup to include one member from additional offices. That just never happened. We ended up sort of evolving, meeting student needs on behalf of a number of offices.

- Are there any other issues?

Well, even though we are supposed to work together, it's almost like there are a bunch of sovereign nations under GMU.

- Are there any other offices nearby?

Sure, Financial Aid and Transfer Admissions are right there and right above here. However, students cannot access transfer admissions because they'd need an employee pass. That means that they still end up coming to us. That office isn't publicly accessible to them.

- How is it structured?

Well, we are part of the Provost office, which flows into the Enrollment Management Services, and then we come in as a subset of them.

- How would you describe your job roles? Do either of you perform tasks that the others do not?

Well, no. We both do the same things. We complete most tasks manually. There's tons of information to remember, it's sort of Ad-hoc.

- Do you have a manual or a guide?

Yes and no. There are a couple of cheat sheets that we have but, we've been here a long time and we do not use them.

- Do students get lost trying to find you?

Yes, a lot of times because the campus has poor signage. For example, the SUB I sign isn't really visible. Plus, new students (freshmen not transfer students) are sometimes told to go to the Student Union Building not realizing that that means SUB I.

- So if we created an application, do you think that it should point out full location names?

Yes, I do.

- Did you know that there were three GMU apps?

I only knew about one of them. I know that when people use Google to find this campus, there is only one address for it. So, when they are looking for certain locations like the SUB, they have to use that map app just to see that.

- Are there any forms that you hand out that we might be able to have as artifacts?

Yes. Here they are.

Artifacts

- Video of Chris and Todd assisting students.
- Pictures of ticket and it displayed on the screen.
- Frequently requested form samples:

Transfer Credit Inquiry Form

GEORGE MASON UNIVERSITY | TRANSFER CREDIT INQUIRY FORM

Transfer students are expected to review their transfer credit evaluation with their academic advisor to understand how transfer credit is applied toward degree completion requirements. Submit this form to address any missing transfer credit or to inquire about transfer electives. Allow up to three weeks for a response. All follow-up communication is sent to your MASON email account. Revised transfer credit evaluations are available on Patriot Web.

DATE: _____

NAME: _____

GNUMBER: _____

◊ I am missing transfer credit from a previous college/university and requested my final transcript to be sent to the Office of Admissions on: _____

◊ I am missing transfer credit by exam: ◊AP ◊ CLEP ◊ IB ◊ Other_____
 I requested my transcript to be sent to the Office of Admissions on: _____
 For IB Exam results, list your IB personal code and month/year of exam.

◊ I was offered GAA admission and have not been awarded a lower-level general education waiver. I verified that my degree has been awarded and requested my final transcript on: _____

◊ I was awarded elective credit(s) and think Mason offers the equivalent course(s).

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

SUBMIT THIS FORM TO: ENROLLMENT CENTRAL, FIRST FLOOR STUDENT UNION I
FAX: 703.993.4622   EMAIL: admissions@gmu.edu

Undergraduate Change/Declaration of Academic Program

UNDERGRADUATE CHANGE/DECLARATION OF ACADEMIC PROGRAM

Office of the University Registrar
Student Union 1, Room 2101
4400 University Drive, MS 3D1
Fairfax, VA 22090
(703) 993-2441, Fax (703) 993-4668

_____ _____ _____
Student's GNumber   **Last Name, First Name**   **Mason E-mail address**

Please check all that pertain to you:

☐ I have spoken to my previous major advisor.
☐ I have a Mason GPA of 2.0 or higher.
☐ My GPA is less than 2.0 and I have spoken with my advisor about ways to improve my GPA.
☐ I am making this change because I have been Terminated from my previous major.
☐ I have reviewed a "What-If Analysis" Degree Evaluation with my new advisor.
☐ I am planning to graduate this semester and I have filed my graduation intent.
☐ I am a double major student and I have reviewed the General Education Requirements for both programs.

Why are you making this program change? _____

_____

_____   _____
Student's Signature   **Date**

-ADVISOR USE ONLY-

CHANGE OF MAJOR/CONCENTRATION

New Major:_____

Degree (circle) BA BAS BFA BIS BM BPRE BS BSE BSN BSW

New Concentration: _____

New Catalog Year (List only if Changing Catalog Year: _____

_____
New Major Advisor's Name

_____/_____
New Major Advisor's Signature   **Date**

SECOND MAJOR DECLARATION

Notes:

1. Students seeking to graduate with a BA or BS degree in two or more subjects must meet departmental requirements for the major in each field.
2. For each major, at least 18 credits used to fulfill its requirements cannot be used to fulfill the requirements of another major, a concentration, a minor, or an undergraduate certificate.
3. The Second Major Catalog Year and Degree type must be the same as the Primary Major.
4. The Undergraduate Second Degree Declaration form must be used to add a secondary degree to a student's record.

Second Major: _____   _____
                                                                    Second Major Advisor's Name

Second Concentration: _____   _____/_____
                                                                    Second Major Advisor's Signature   Date

Undergraduate Minor Declaration

GEORGE MASON UNIVERSITY

Office of the University Registrar
Student Union 1, Room 2101
4400 University Drive, MS 3D1
Fairfax, VA 22030
(703) 993-2441, Fax (703) 993-4668

UNDERGRADUATE
MINOR DECLARATION

_____   _____   _____
Student's G Number   **Last Name, First Name**   **Mason E-mail address**

_____   _____
Student's Major   **Student's Major Catalog Year**

I am planning to graduate this semester and I have filed my graduation intent.   Yes or No
                                                                                    Please Circle One

Student's Signature _____ /_____
                                                                            Date

---

-ADVISOR USE ONLY-

PRIMARY MINOR DECLARATION

Minor Requested _____   Catalog Year Requested for Minor_____
                                                (if different from Major)

Minor Advisor's Signature _____ /_____
                                                                            Date

---

SECONDARY MINOR DECLARATION

Minor Requested _____   Catalog Year Requested for Minor_____
                                                (if different from Major)

Minor Advisor's Signature _____ /_____
                                                                            Date

---

CHANGE OF MINOR CATALOG YEAR

Minor _____

Previous Catalog Year _____   Requested Catalog Year_____

Minor Advisor's Signature _____ /_____
                                                                            Date

Eligible catalog year: no earlier than the catalog in effect for the student's first semester in degree status; no later than the student's last enrolled semester to complete degree requirements and graduate.

Registrar's Initials _____/_____

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Enrollment Verification

Enrollment Verification

The university's official verification of enrollment is provided to students through Patriot Web at no cost 24 hours a day by the National Student Clearinghouse. After logging on to Patriot Web, select Student Records and then Order Enrollment Verification. You will then be connected to the National Student Clearinghouse Student Self-Service Site. Please note that prior to the term start date the Advanced Registration option may show enrollment updates not reflected with the Current enrollment option. From the same site you can also view:

- Enrollment information on file with the Clearinghouse
- Student loan deferment notifications
- Enrollment verifications provided to third parties and via student self-service
- Specific information about your student loans

The verification should be attached to any form provided by a third party and returned directly to the requestor. Verifications can be used for insurance companies, scholarships, military identification cards, prospective employment, student housing, and all other services that require proof of being enrolled at Mason. An Enrollment & Degree Verification Supplemental Page is available that provides additional information that may be of interest to certain third parties. This supplemental page can be submitted with the enrollment verification as needed.

A view of the National Student Clearinghouse Student Self-Service Site is below.

National Student Clearinghouse
Student Self-Service Site

Home

Welcome. This service is offered by the National Student Clearinghouse in cooperation with GEORGE MASON UNIVERSITY
IMPORTANT: Do NOT use the browser forward/back buttons. LOG OFF when you are done to protect the privacy of your records.

Please select from the following options

- Obtain an enrollment certificate to print and mail to a health insurer or other company that requests proof of my enrollment.

  ● Current enrollment   ○ All enrollment   ○ Advanced Registration

- View the enrollment information on file with the Clearinghouse
- View the student loan deferment notifications that the Clearinghouse has provided to my loan holders (lenders and guarantors)
- View the proof(s) of enrollment that the Clearinghouse has provided to my health insurers and other providers of student services or products
- Order or track a transcript
- View specific information about my student loans **LoanLocator**

Selective Withdrawal

Office of the University Registrar
Student Union 1, Room 2101
4400 University Drive, MS 3D1
Fairfax, VA 22030
(703) 993-2441, Fax (703) 993-4668
Email: regsite@gmu.edu

SELECTIVE WITHDRAWAL
PAGE 1

<u>**Undergraduate Degree-Seeking students**</u> may request a **maximum of <u>three</u>** **selective withdrawals during their entire undergraduate career.** Student requests for selective withdrawal must be submitted during the selective withdrawal period posted in the Academic Calendar. Courses meeting less than the full semester will have selective withdrawal periods proportional to their length, and those dates will be posted on the Registrar's Office website. Selective withdrawals, once requested by the student, and processed by the Office of the Registrar, are final and will not be removed at a later time.

A Selective Withdrawal will not be processed for a course in which the student has an Honor Code charge.

Withdrawing from courses will result in a recalculation of your student time status based only on enrolled courses remaining after selective withdrawal. There may be a reduction in your new time status that could negatively affect you in such areas as:

- Financial Aid – Contact the Financial Aid Office, before submitting this request, if you have questions.
- Access to certain campus facilities
- Health Insurance
- Department of Veterans Affairs (VA) benefits
- On campus housing (Refer to Housing and Residence Life)
- Potential indebtedness for withdrawn courses paid by a third party (Refer to Student Accounts)

Term _____ ID/GNumber _____

Name _____
           Last   First   MI

Mason E-mail _____ Phone _____

Course Information:

CRN	Department	Course #	Section #	# of Credits

-form continues on page 2-

Refund Request Form

GEORGE MASON UNIVERSITY

Student Accounts Office
4400 University Drive, MS 2E2, Fairfax, Virginia 22030
Phone: 703-993-2484 Fax: 703-993-2490

Refund Request Form

Student ID: G ☐☐☐☐☐☐☐☐   Date: ☐☐-☐☐-☐☐

Student Name: _____
               Last   First   M.I.
                         (Please Print)

Refunds are processed according to the method of payment last received by GMU. Payments made by cash will be refunded as a check or direct deposit (direct deposit authorization form required). Payments made by check require a 7 day waiting period from the date of the last check payment before a refund may be processed. Credit card payments are credited back to the credit card that was most recently used for payment. Please allow 7 to 10 business days for processing all refunds.

Refund checks are made payable to the student and are mailed to the permanent address listed in the student record on Patriot Web. If you have moved or you would like the check sent to another address please update your address on Patriot Web and enter a "Refund Recipient Address." Due to security, banking regulations, and the large number of checks processed, all check refunds are mailed and in person check pick up is not available.

NOTE: Financial good standing and a university record clear of holds are required for students to receive services. Refunds will not be provided to students with a financial hold of any kind on their record.

This form will not drop your classes and is not required for financial aid refunds prior to disbursement.

Student Signature: _____

For Office Use Only										
RF01	RF02	RF09	RF11	RF12	RF13	RF15	RF16	RF17	RF18	RF19

CC Pay Date	Cashier Name	Authorizer	Approver

Payments	Non-Refundable	Refund Due
	CC	

Transfer of Re-evaluation Appeal

GEORGE MASON UNIVERSITY

TRANSFER CREDIT RE-EVALUATION APPEAL

The Office of Admissions provides transfer credit evaluations based upon official transcripts from all institutions attended prior to enrollment at Mason. The Office of Admissions makes the final determination of the award of transfer credit consistent with University policy. Transfer credit evaluations will not be adjusted after the first academic year of enrollment at Mason.

Name:_____ Date:_____ Gnumber:_____

Mason email:_____

INSTRUCTIONS FOR STUDENTS

You are responsible for attaching catalog course descriptions and syllabi to this form supporting your appeal. Incomplete appeal forms will not be considered. Submit completed forms to the Mason academic department that offers the coursework from which you wish to receive credit. A maximum of two courses may be combined to equate to one specific Mason course and one elective.

TRANSFER
INSTITUTION:_____

TR COURSE PREFIX, NUMBER, TITLE,
CREDIT:_____

TR COURSE PREFIX, NUMBER, TITLE,
CREDIT:_____

REQUESTED MASON EQUIVALENT COURSE &
CREDIT_____

NOTE: INCOMPLETE OR ILLEGIBLE FORMS WILL NOT BE PROCESSED. FORMS SUBMITTED AFTER FIRST YEAR OF ENROLLMENT WILL NOT BE PROCESSED.

INSTRUCTIONS FOR ACADEMIC DEPARTMENTS

Transfer credit appeals apply globally to all students. Re-evaluations must be approved by a department chair or designated department representative. If the academic department does not approve the student appeal, the department is responsible for communicating the decision to the student.

☐ I approve this equivalency.   ☐ I do not approve the equivalency

Name:_____ Title:_____

Approving Mason
Department_____

Signature:_____ Date:_____

Email:_____ Phone:_____

RETURN SIGNED FORM TO THE OFFICE OF ADMISSIONS, MS 3A4. FORMS WILL NOT BE ACCEPTED DIRECTLY FROM STUDENTS.

Revised 4/14

Consent to Release Student Information (FERPA Form)

Consent to Release Student Information (FERPA Form)

The **Family Educational Rights and Privacy Act (FERPA)** is a federal law that prevents Mason from releasing certain information from a student's record without his/her consent. Student records may include admission, registration, academic, financial aid and student account information. Students may give permission to release FERPA protected student information by completing and signing this Consent to Release Student Information form. Students may submit this form to the Registrar in-person with a photo ID or via their Mason email account to regsite@gmu.edu. Students may also submit this form to the Mason official who has access to the information the student wants to share (e.g., their academic advisor).

Student Information

Full Legal Name   G Number

I understand: (1) I have the right not to consent to the release of my student records and information, (2) the information may be released orally or in written form, and (3) that I may revoke this consent at any time. This release overrides all FERPA directory information suppression I have previously set up in my student record for the third party designee.

Information to be Released

ACADEMIC AFFAIRS AND ADMISSIONS:	FINANCIAL AID AND/OR STUDENT ACCOUNTS:
Check all that apply	Check all that apply:
☐ Academic (e.g., grades/GPA, registration, academic progress/status, enrollment information, demographics)	☐ Financial Aid (e.g., awards, disbursements, applications, eligibility, financial aid academic progress reports)
☐ Academic Advising (e.g., conversations with departmental faculty, staff and advising sessions)	☐ Student Accounts (e.g., billing statements, charges, credits, payments, holds, past due amounts, collections)
☐ Admission (e.g., records maintained by the Office of Admissions)	
☐ Only the records indicated below:	☐ Only the records indicated below:
Duration of Release: ☐ One-Time ☐ Semester: Fall Summer Spring ____ Year	For Financial Aid and Student Accounts, this release is active until the student provides written revocation.

Passcode

Students must designate a non-sequential 4 digit passcode (i.e., not 1234) for each third party. The third party will need to provide the passcode in order to receive information over the phone.   Passcode: _____

Third Party Designee

Name   Relationship (Parents, Spouse, Employer, etc.)

Street Address   City   State   Zip Code
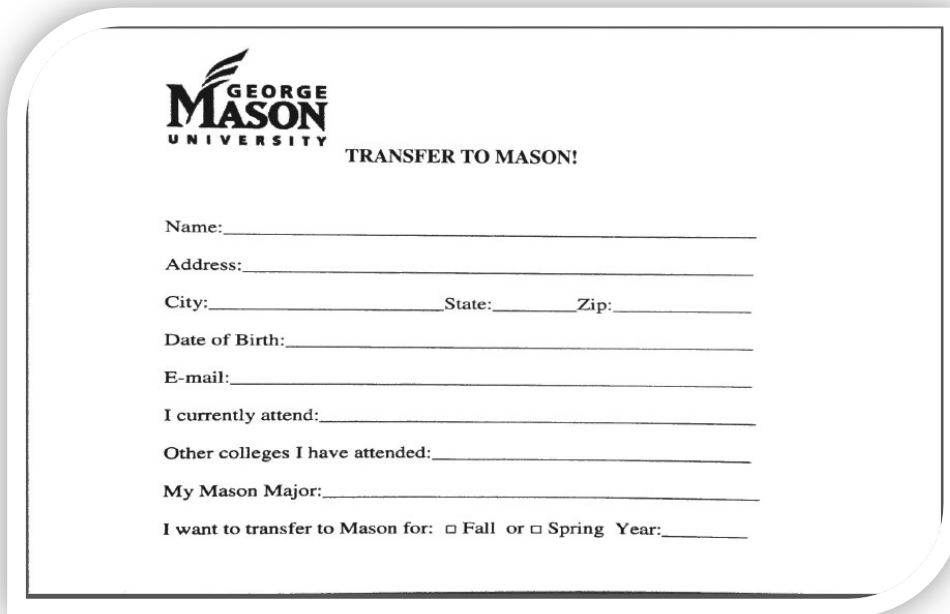
Email   Phone Number

Purpose of Release

☐ Family Communication   ☐ Employment
☐ Other: _____

Student Signature   Date

. . . .

REVOKE AUTHORIZATION: By signing below, I hereby revoke any prior authorization for George Mason University to disclose my student records and information with the individuals listed above, effective immediately.

Student Signature   Date

Transfer to Mason! Card

Q-NOMY ticket sample from Hossein's sign in with his G-number:

Observation sample video can be viewed here and the Interview Samples Audio1 and Audio 2 are also available.

Data Consolidation

Post Visit Analysis

Following the first visit, the design team reviewed their notes and conducted a review of raw data in an effort to ensure that all members were informed of the latest discoveries. The information was disseminated, scanned, and uploaded into the team folder for artifacts. This meeting allowed the design team to strategize for future meetings. The core focus of the discussion was on the need to consider making processes and forms available in the application. The team discussed in detail how this might be accomplished along with concerns about cyber security and how the addition of documentation might affect the existing process. They took the responsibilities of the EC staff members into consideration. The final decision weighed heavily on whether or not it would be acceptable to electronically send these forms to their respective offices. It was finally agreed upon that the mobile application should indeed include access to information about the processes as well as fillable forms. The team updated their survey to be inclusive of this decision. The survey became more tailored towards the user.

Work Activity Affinity Process

There were two stages involved in the process of building the WAAD. First, the team used a whiteboard approach to generate a number of considerations currently supporting the current system. This was conducted face-to-face. Thoughts and ideas were written down on sticky notes and then affixed to the board. All team members participated in this brainstorming. Images were taken of this initial stage.

The second part of building the WAAD was extended electronically using a system called, Trello.

This format facilitated group collaboration regardless of individual geographical locations, while still providing a central repository for the representation of categories. Primary themes began to become visible through the numerous categories, which developed while utilizing the Trello platform. The first generated themes were under eight categories including: design ideas, wish list, frustration, objectives, users, perspectives, and other items not yet categorized. The final themes are: Student actions/perspectives, EC staff processes/perspectives, and Technology. We moved all of the items under these three themes. We decided to keep our "Wish List" category separate so that we could distinguish between what was currently happening, and what we would like to see in the future. In addition, this category touches upon points of improvement in every theme.

The first generated categories are:

Objectives

- Elucidate/Define Enrollment Center Processes
- Create an App/Module that merges with Mobile Mason
- Improve performance
- Create a product that reflects well on GMU
- End frustration
- Empower students
- Allow EC staff to focus on other areas and keep their jobs
- Make Transfer/Admissions paperwork processes more accessible for the students via the easy-to-follow guidance on different application forms.

Add a card…

Other items/not yet catagorized

- Most Common Questions: Transfer/Admissions make up 60-70%
- Advertising and Exposure???
- Kiosk options/improvements
- Tracking number of students coming through EC
- Enrollment Central as a collection point for processing completed forms
- They receive the majority of inquiries during the first and last two weeks of each semester. The period between semesters is also very busy.

Add a card…

Boards | 🔍 | Trello

EDIT 730 Group B WAAD ☆ 🔒 Private

Design Ideas
- Forms Repository (searchable, printable, editable)
- Text or Automated GPS directions to campus locations
- New Student Welcome packet with Top 5-10 EC related priorities
- Searchable Process list (ex. Type in "transfer credits" and results yield relative info)
- Multipurpose app with an enrollment central office in it. When user selects it, several common questions appear. User selects desired one. Forms and directions appear for that process. GPS flashes at the end pointing them in the direction that they need to go if needed. 3 D character with GMU shirt appears asking them what they need...
- A built-in feature of Ask EC based on live online chat during the EC work hours.
- Missing credits and incomplete form
- update the EC website.

Add a card…

Wish List
- Electronic Forms Submission (with Docusign?)
- Interactive Forms with guidance
- Access Needed form prior to visit
- Map that includes pertinent location names, contact info, associated forms, GPS-able directions.
- The EC awareness building actions, such as electronic bulletin board on campus.
- SOP/Staff manual for the new hires in order to ensure both quality and consistency of the provided services.
- Improving the website.

Add a card…

Users
- Students
- Parents
- Student Helpers
- Other Enrollment Staff
- EC Staff

Add a card…

Perspectives
- External: End Users (students, parents, etc.)
- Internal: Staff

Add a card…

Frustrations
- Ticketing system (feels like a Deli, Bank teller, or DMV)
- Waiting room across the hall
- The EC is mistaken for the Information Desk
- Staff has limited access to Financial Aid info
- Staff are full time (12-16 yrs experience) but are viewed as part time students
- Staff uniforms
- Kiosk doesn't provide much info
- Q-Nomy doesn't always sync
- Students can't find EC or SUB1
- What app?? (Mobile Mason)
- Repetitive process/questions
- Absence of Training Manuals for the new hirers
- Worries about job security and defining need for EC as a department
- Jargon used is not clear to all users
- Surprise changes/charges to student accounts

Add a card…

Processes
- Cheat Sheet
- Limited student account info on Mason computers
- Print and manually write directions on paper campus map
- Rely on Experience rather than S.O.P.
- Face-to-face interaction only. No work done via e-mail, phone and/or chat.
- collecting student's form manually for transformation to another offices.
- long period for processing tasks
- Admission is the most frequent questions (60-70%)
- Limited process that can be accomplished through the patriot web.
- There is always no synchronization between screen and tickets.
- Students wait for long time because their tickets' number isn't shown on the EC staff computers.

Add a card…

The finalized list of themes and categories:

Wish List	Theme A: Student Activities/Perspectives	Theme B: EC Staff Processes/Perspectives	Theme C: Technology
Interactive Forms with guidance	Empower students	web.	Create a product that reflects well on GMU
Access Needed form prior to visit	Ticketing system (feels like a Deli, Bank teller, or DMV)	Staff has limited access to Financial Aid info	Text or Automated GPS directions to campus locations
Map that includes pertinent location names, contact info, associated forms, GPS-able directions.	Missing credits and incomplete form	There is always no synchronization between screen and tickets.	What app?? (Mobile Mason)
The EC awareness building actions, such as electronic bulletin board on campus.	Waiting room across the hall	Students wait for long time because their tickets' number isn't shown on the EC staff computers.	Make Transfer/Admissions paperwork processes more accessible for the students via the easy-to-follow guidance on different application forms.
SOP/Staff manual for the new hires in order to ensure both quality and consistency of the provided services.	Students can't find EC or SUB1	Elucidate/Define Enrollment Center Processes	Create an App/Module that merges with Mobile Mason
Searchable Process list (ex. Type in "transfer credits" and results yield relative info)	Student complaints regarding processes that are out of their control or have nothing to do with EC.	Improve performance	Q-Nomy doesn't always sync
Forms Repository (searchable, printable, editable)	limited channels of communication such as email, so students must visit the center physically	Jargon used is not clear to all users	Tracking number of students coming through EC
Improving the website.	The EC is mistaken for the Information Desk	Staff originally expected to be joined by one member from each office and it never happened. 16 years later, they are still just 3 members on 2 campuses.	Kiosk options/improvements
Electronic Forms Submission (with Docusign?)	New Student Welcome packet with Top 5-10 EC related priorities	Allow EC staff to focus on other areas and keep their jobs	A built-in feature of Ask EC based on live online chat during the EC work hours.
	limited students support on financial aid issues.	End frustration	Multipurpose app with an enrollment central office in it. When user selects it, several common questions appear. User selects desired one. Forms and directions appear for that process. GPS flashes at the end pointing them in the direction that they need to go if needed. 3 D character with GMU shirt appears asking them what they need...
	Surprise changes/charges to student accounts	limited authority EC staff has specifically in providing information about financial balance.	
	Student's don't know where to start/who to call	EC get more Frustrating when dealing with financial aid issues.	
	External: End Users (students, parents, etc.)	Repetitive process/questions	update the EC website.
	students revisit EC regularly to		

Field Notes

Sample 1:

Provost
EC Enrollment

Student Perspective

Enrollment Center Perspective

Processes
• Cheat Sheet
• Daily or on-demand

Roles

text Directory (TOPS)

Forms lists Searchable downloadable Editable?

Are students prepared when they provide?

How could students better prepare before visiting EC?

How are forms (signed) processed / records updated?

Are forms / information available anywhere?

Admissions Go 70% MOST FREQUENT

Wish List
• Access needed forms ahead of time
• Editable → Submit online
• Keep -/longtime names

Frustrations
• Ticketing system
• limited access to Financial info.
• hairline / shirts
• use kiosk but doesn't provide need info
• Remedy doesn't always sync
• Bureaucracy (MASON)
• Students get lost finding office @ EC

• Student helpers
• Enrollment staff
• Disabled students

Referrals
improve performance

Advertising & Exposure

Kiosk App mobile person

(mason shuttle)

E.C. collection point?

Identify objectives
• Eligibility / Defer
  Enrollment Center processes
• App that syncs with mobile Mason
• Reflect built on Grid

Echo Buddy language app to pair native speakers

C. Landscaping mobile app
  - train how to install
  - spanish speakers
  - just in time

D. Language Mobile App
  - OC English (client)
  - Assist immigrants to assimilate

Welcome Packet
  WCA

Access to Centralized