**UR Student/Workday -> Student Cohort Worksheet** –

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*Use this worksheet (or the MS Excel Spreadsheet that was attached to Sean’s email) to help you communicate your areas Student Cohort needs to the UR Student project team. Please complete one worksheet per student cohort. Please send worksheets to* [*sean.hanna@rochester.edu*](mailto:sean.hanna@rochester.edu) *or upload to the Advising SIG Box Account (invitation forthcoming).* ***Please note: You can either submit one MS Word worksheet for each cohort, or you can complete the MS Excel Worksheet with one cohort per column.***

**Your Name:** e.g., Sean Hanna

**Your Title:** e.g., Functional Team Lead - Advising

**Your email address:** e.g., sean.hanna@rochester.edu

**Your direct line** (for UR Student Project follow up only, we will not publish): e.g., x59083

**Cohort Name** (e.g., Ph.D. Admission Cohort for program X, Class of 20xx, Research Lab xx, John Smith’s advising cohort, etc. – nothing is set in stone here, so don’t worry about getting the name exactly right): e.g., ASE UG Child of Employee

**Cohort Description** (Provide a brief description of why you need this group of students, e.g., to attach students to advisor, to create a study group that works together throughout academic period, to track a group of students with a specific attribute or attributes): e.g., Tracking AS&E undergraduate students who are children of UR employees

**Cohort Category** (a. Advising, b. Tracking/Reporting, c. Create Student Category or Attribute – see page 2 for further details to help with this.) e.g., Tracking/Reporting; Create Student Category

**Academic Unit** (School, Department)**:** e.g., AS&E

**Academic Level** (undergraduate, master’s, doctoral, non-matriculated, visiting student, etc.): e.g., Undergraduate

**Manual or Criteria Based (or Unknown)** (Is there an attribute in the system that ties these students together or do we create the membership manually? We can always talk about this later): e.g., manual? (not sure)

P**ublic or Private** (Can the student see that they are a member of this cohort? If “yes” = public, if “no” = private. “Public” does not mean that the cohort membership is public to every user, as there will be security around who can see which cohorts.): e.g., Private

**Is there a specific advisor for this cohort? (Yes/No)** (If “Yes” answer the following question – “Advisor Name”): e.g., No

**Advisor Name(s)** (If you do not have specific names now, that is okay, just type TBD or provide a brief explanation. Remember, an advisor may have multiple cohorts if s/he advises different groups of students): e.g., n/a

**Non-Advisor(s)** (Only answer this if necessary - In some cases there may be a person who is attached to cohort to coordinate, monitor or manage it, but that person is not actually an advisor for the students in the cohort.): e.g., Sean Hanna

Here are a few reminders about student cohorts to help you with the task of defining the student cohort needs for your part of the University. We will be creating student cohorts for the following reasons:

* + To connect advisers to advisees
    - Any time we need to connect students to an advisor, we will do by placing students in that advisors cohorts
    - Some advisors will have multiple cohorts, as they may advise different groups of students for different purposes (e.g., multiple programs of study within an academic department, pre-major advising + major advising for UG students, etc.)
  + To capture special populations for tracking and communications
    - Subgroups of students in the same admissions cohort, like those employed by the Simon School of Business
    - Student who receive the same scholarship, assistantship or fellowship
    - Student who participate in the same research lab
  + To create a student category for which there is no field in UR Student (at least not yet)
    - Class year
    - Employee or child of employee
    - Legacy students
    - Academic Warning

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**Cohorts in UR Student** - The UR Student/Workday system will provide us with significant flexibility in how we group students and attach students to advisors. While there are some fields in the student profile to track certain student characteristics (e.g. First Generation), many characteristics, groupings and tags that you currently apply to students for advising and research purposes will be achieved through UR Student’s “cohort” functionality. Some cohorts may be fixed (membership in an admissions cohort), while others are more fluid (advising assignments, which have the potential to change). We will discuss the UR Student cohort functionality in greater detail at our first meeting, but I hope this explanation is helpful. Basically, anytime we want to attach a student or group of students to an advisor, we will use a cohort. Anytime we want to tag a group of students with a certain attribute that doesn’t have a field in UR Student, we will create a cohort. For cohorts of students that are based on shared criteria (e.g., same program of study), we would also like to know the data source (in many cases it will be the admissions system or the student information system (SIS)).

When completing this worksheet, think about the various ways that your school attaches students to advisers and which student groupings or attributes you want to be sure that we are able to track in UR Student. Some items will have fields in UR Student that will be used to create the cohort. In other cases the cohorts will need to be created manually. Please keep in mind that UR Student will have the ability to connect students to as many advisers as needed through UR Student’s cohort functionality. So, there may be advising relationships that we can formalize in UR Student that were not systematically formalized in the SIS that is currently in use at UR.

Here are a few categories you may want to consider as you think about the cohorts you will want us to configure for you.

Academic Standing / Student Success

- academic probation (attaching students to probation advisers)

- academic warning, etc. (for engagements and retention tracking)

Admissions Tags

- legacy

- child of employee

- special scholarship/assistantship recipient

- veteran / child or spouse of veteran

Research Lab membership

Class Year

Work/Study Team

- groups of students who are groups together for group projects and advising

Instrument / Instrument Group (ESM)

Studio (ESM)

Admissions Cohorts

- groups that matriculate together to be measured for retention and graduation rate

Underrepresented Minority Status/Category

Any Special Populations You Wish to Track (think about all your special populations that you will want to track in UR Student so that we can figure out if we need to use cohorts or if there is another method for tracking the population)

Please feel free to begin sharing your ideas with Sean Hanna (sean.hanna@rochester.edu) via email about the student groups your school will want to track and how students are attached to advisers. An inventory of cohorts will be built for UR Student (advising relationships and special populations) at UR by collecting the following information from you for each cohort.

Cohort Name

Description

Academic Unit (i.e., School or college)

Academic Level

- Grad

- Masters

- Doctoral

- etc.

Manual or Criteria Based (Is there an attribute that ties these students together or do we create the membership manually?)

Public of Private (can the student see that they are a member of this cohort)

Advisor (in some cases there may not be an advisor attach to a group)