Checklist for iPASS Degree Planning Technology

Below is a compilation of questions and items for institutions to consider as they set up and roll out their iPASS Degree Planning system.

# How will the software interface/integrate with your other systems that are critical in your iPASS work?

* Will it integrate with your Student Information System (SIS)?
* Will it integrate with your Early Alert System and your advising case management system (if you have one)?
* Does it need to integrate with the learning management system (LMS)? (Usually not)
* Does the Degree Planning system read your degree audit system (if you have one in place)?
* Does the system integrate with the SIS and other systems needed out of the box, or do integration scripts need to be written? If scripts need to be written, what is the estimated load on IT?
* Does it integrate in both directions? (Meaning it receives data and sends data back)
* How often can you be sending SIS updates to the system?
* Will your Degree Planning system update your SIS? If so, how often?
* Is it possible to determine/restrict access to the system, to certain information in the system, and/or to specific system functions, depending on the roles/personas of those requesting access?
* Can you integrate with SIS system to trigger registration from a degree plan?
* Does the system allow for single sign-on? How?
* Does the system have easy to navigate student and staff facing interfaces?
* Is the system mobile app ready?

# How are Degree Plans created/generated?

* Can students build their own degree plans?
* Can degree plans be system generated?
* Can you bulk assign degree plans to groups of students based on certain criteria?
* Can you create degree plans for prospective students? In other words students that may not be in the system already.

# Degree Planning functionality

* Can you determine time left for completion based on degree plan?
* Can you see financial impact of degree plan?
* Can you do what-if scenarios to explore other majors/minors and degrees?
* Can the system show the financial impact of changing degrees?
* Can you determine if a student is on track to completing their degree? Can you notify students if they have fallen off course to their degree plan?
* Can you see how many credits are completed, how many credits a student has registered, and how many credits are needed to complete?
* Can you customize a degree plan?
* Can you waive/substitute requirements? Can you add notes to document these waivers/substitutions?
* If the system allows for note taking, can the notes entered be shared with other offices? How will these notes interface with other advising system/s?
* Can you restrict who can modify degree plans?
* Can you clear a student to graduate based on degree plan (and possible waivers provided)?
* Does the system track who made changes to degree plans?
* Can the system check what sections of courses are available based on the plan?
* Does the system warn you if student is registering off plan?

# What kind of reports are available out of the box with the system?

* Can students run and print their own degree plans?
* Can any user with permissions run reports, or can only system administrators run reports?
* Can advisors run reports on groups/lists of students? If so, can these be downloaded and printed?
* Can reports be customized?
* Can the system provide course demand reports for upcoming terms based on student plan requirements?

# Time and effort for implementation.

* Does the system come with any pre-delivered easy HELP/ Training embedded in the software?
* Ask for time and effort for implementing the system.
* Consider implementing in phases with the most common degree plans being implemented first and adding other degrees as time allows.