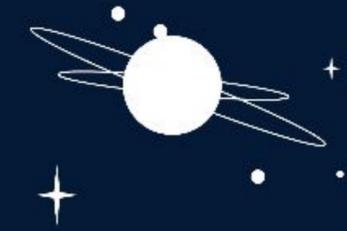


EXPLO

ADM/SIS Design for Student Identity



ADM/SIS Requests

As we have been making alumni calls, something we've encountered is some confusion around student names and pronouns. Sometimes it is very apparent that students' identity at home and over the summer are the same but a lot of times students might change the way they identify when they're with us. We never want to out students and it is also important to make sure that we can respect and honor who they are in whatever ways we can. The idea is to have some specific section (internal use only) where we can note name and pronoun use both in and before summer to make sure that our communications align with student and family needs. This is definitely a stretch thing and probably will need some conversation but I wanted to submit it before it got lost in the fray.

~ Admissions Counselor

Key Points

- Need location for internal use only pronouns/identity
- Minimize loss of communication between summer staff and year round staff
- Communicate properly with family and student needs after the summer
- Ensure that Summer Fields do not sync with the portal: “campus name”, etc.
- Information regarding Student Identity is relevant in all modules necessary



Goals

- clear notification if student has different summer identity
- place or student identity notes
- clarification of given name, preferred name, campus name, etc.
- overall cleanup of outdated clutter

ADM Design Iteration 1 - Student Tab

The screenshot shows the 'Portico Apps' interface for a student record. At the top, there's a search bar for 'MY STUDENTS' and a 'Setup' button. Below that, navigation buttons for 'PREV' and 'NEXT' are shown, along with '1 of 96 Records Found'. Action buttons for 'BROADCAST', 'LABELS', 'LETTERS', 'PRINT LISTS', and 'SMS' are also present.

The main record for 'Test Laura2' includes fields for 'App Year' (2023), 'New/Alum' (New), and three 'Session' fields. Below this is a table with columns for 'Rec. Created', 'Deposit Rec.', 'App Receipt', 'Grade', 'Res. Gen.', and 'Weeks 1-6'. The 'Grade' is '9' and 'Res. Gen.' is 'F'.

A horizontal menu contains various tabs: Application, Billing, Bus/Transport, Communication History, Course Preference, Course Registration, Documents, Marketing, Misc/Reports, Relations, Requirements, GENE, Transcript, Search, and Tags.

The 'Application Information' section includes checkboxes for 'International', 'Wants VISA Letter', and 'Insurance Opt-in?'. There's a 'Payment Method' dropdown set to 'check' and a 'CREATE FA RECORD FOR 2023' button.

The 'Add Enrollment' section has a search bar and a form with fields for 'SESS.', 'TYPE', 'PROGRAM', and 'STATUS'. The current selection is '2. Pick Session', 'EXPLO Pre-College', and 'Enrolled'.

The 'Session Enrollment' section features a table with columns: 'SESS. TYPE', 'SESSION NAME', 'STATUS', '+', 'S', 'E', and 'ENROLL'.

The 'Weekly Enrollment' section has a table with columns: 'WK', 'TYPE', 'PROGRAM GROUP', 'STATUS', '+', 'S', 'E', and 'ENROLL'. The 'ENROLL' column contains links like 'WL', 'WD', 'HL', 'NA', and 'RFW'.

A red box highlights the 'Student' tab in the bottom left, which contains a form with fields for 'Given/Pref.', 'Last', 'DOB/Res. Gender', 'Pronouns', 'Campus Name', 'Grade/CY/YOG', 'School/City/Cntry', 'Email', and 'Ambassador'.

Application > Student Tab

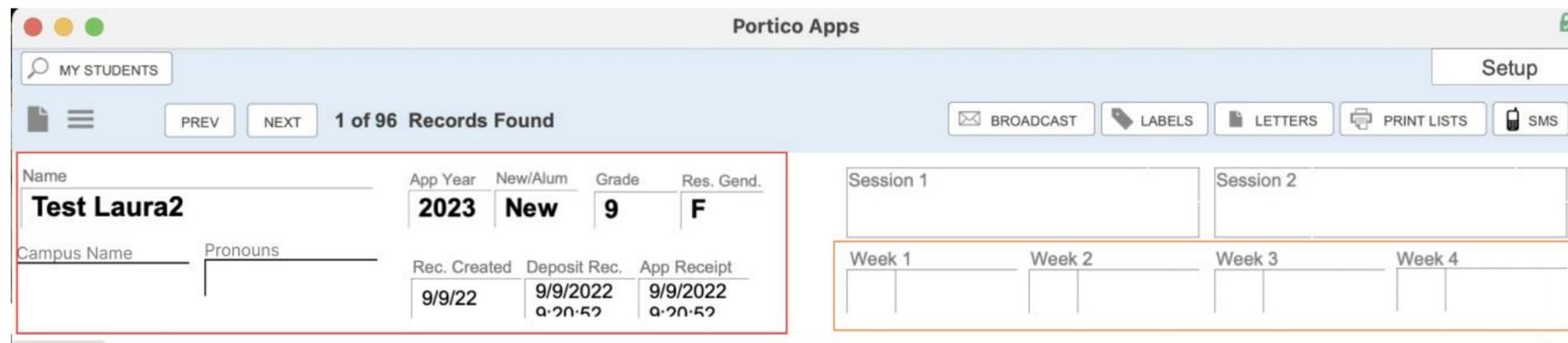
- Minimal change: add fields for pronouns, Campus Name, and insert Student Note field from SIS.
- Further improvements: Week 1-6 and Weekly Enrollment not necessary any more, can use space to expand Student tabs

ADM Design Idea 2 - Top Bar

a)



b)



Top Bar

- Add Campus Name/Pronouns to top bar for quick view
- Week 1-6 can be removed

Combined ADM Iteration 2

Home Name/Campus Name added to Top bar

Icon/Identifier
Notifies user "something is different about this student's identity"

Minimal Top Bar
Removal of unnecessary information.

Student Information
Expanded Student Information tab with additional fields and Student Identity Notes from ADM.

Minimal Fields
Removal of Weekly Enrollment, Moved Application Information to expand Student Information Tab section

The screenshot shows a web application interface for 'Portico Apps'. At the top, there is a navigation bar with 'MY STUDENTS' and 'Setup' buttons. Below this is a toolbar with 'PREV', 'NEXT', '1 of 96 Records Found', and action buttons for 'BROADCAST', 'LABELS', 'LETTERS', 'PRINT LISTS', and 'SMS'. The main content area displays student details for 'Test Laura2'. A red dot icon next to the name indicates a change in identity. The details include: App Year (2023), New/Alum (New), Grade (9), Res. (F), Home Name, Campus Name, Session 1, Session 2, Rec. Created (9/9/22), Deposit Rec. (9/9/2022), and App Receipt (9/9/2022). A horizontal menu below the details lists various application categories like Billing, Bus/Transport, etc. The 'Student' tab is active, showing a form with fields for Given/Pref. (Test), Last (Laura2), DOB/Res. Gender (6/7/2010, F), Home Name, Campus Name, Student Identity Notes, Gender/Notes (F), Grade/CY/YOG (9, 9, 2027), School/City/Cntry (Test, Denver, Unit, CO), Email (lgabriel@explo.org), and Ambassador (checkbox). To the right, there are sections for 'Add Enrollment' (with '2. Pick Session' and 'EXPLO Pre-College' selected), 'Session Enrollment' (with a table for session details), and 'Application Information' (with checkboxes for International, Wants VISA Letter, Insurance Opt-in, and a 'check' payment method). A 'CREATE FA RECORD FOR 2023' button is also present.



Goals

- ease of readability and usability for “summer brain”
- easy onboarding
- “who did I forget to tell” - place information in all areas people that contact parents/home would need to see before making call/communication
- clear notification if student has different summer identity
- place for student identity notes
- clarification of given name, preferred name, campus name, etc.
- rethink the use of space throughout sidebar and primary areas

Current SIS Design Review

sis (minerva.explo.org)

ENROLLMENT TRIPS OFFICES ENROLLMENT COURSES GROUP REQUISITION

prev next 1 of 1587 found message board labels print lists

Simon Valentino 2022

S2 EXPLO Senior 360

EXPLO 360 Residential EXPLO Senior

Session-Specific Information (All Sessions)

Session Group	Status	Res Type	Room Key	(space)	Bus Route Bus Stop	Birthday in Session
S2	Enrolled	Residential	DL 32	✓ ←		
Dudley Law 2-3	M			✓		

Start 7/17/2022 End 8/4/2022

Summer Devices and Contact

Simon has a phone on campus: 508-596-9010
can_sms data

Simon DOES NOT have a gmail email address.

Simon DOES NOT have a laptop on campus

Other Information

Alum 12/29/2006
Alum or New? Birthdate

10 2025
Grade Year of Grad

Simon
Given Name

M
Gender Shirt Size

IMPROVEMENTS

- Notifier/Icon needed
- Notes beneath Gender
- Notifier underneath Session
- Redesign sidebar to include campus name, etc.
- We do not use bus information for 2023, can be removed and space utilized differently
- Session/OSL information is squished

Initial SIS Design Ideas



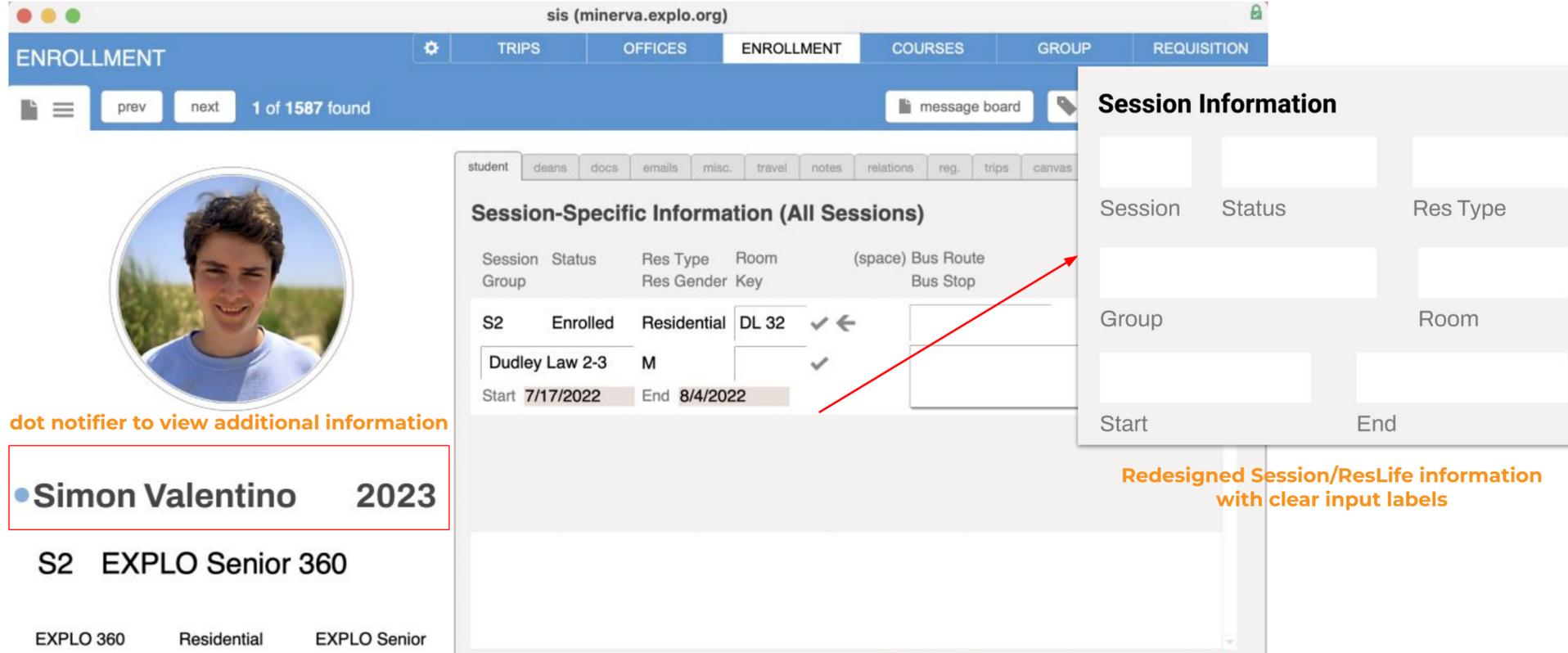
Simon Valentino **2023**

he/him/his **Campus Name**

S2 EXPLO Senior 360

EXPLO 360 Residential EXPLO Senior

minimal change: pronouns/campus name fields
 design assumption - campus name field only shows if a student has a different name from given or preferred name.



sis (minerva.explo.org)

ENROLLMENT TRIPS OFFICES ENROLLMENT COURSES GROUP REQUISITION

prev next 1 of 1587 found message board

Session-**Specific Information (All Sessions)**

Session Group	Status	Res Type	Room Key	(space)	Bus Route Bus Stop
S2	Enrolled	Residential	DL 32	✓ ←	
Dudley Law 2-3	M			✓	
Start	7/17/2022	End	8/4/2022		

dot notifier to view additional information

● **Simon Valentino** **2023**

S2 EXPLO Senior 360

EXPLO 360 Residential EXPLO Senior

Session Information

Session	Status	Res Type
Group		Room
Start		End

Redesigned Session/ResLife information with clear input labels

Other Information

Alum	12/29/2006
Alum or New?	Birthdate
10	2025
Grade	Year of Grad
Simon	
Given Name	Campus Name
M	he/him/his
Gender	Pronouns

other information minimal design change

SIS Design Iteration 1 - 'Quad View'

sis (minerva.explo.org)

ENROLLMENT TRIPS OFFICES ENROLLMENT COURSES GROUP REQUISITION

prev next 1 of 1587 found message board labels print lists

Simon Valentino 2022

Preferred Name Preferred Name Campus Name Campus Name

Student Information

Given Name Campus Name

Res Gender Campus Pronouns

Alum or New? Year of Grad

Birthdate T-Shirt Size

Summer Devices and Contact

Phone Number Phone on Campus

Email Address

Laptop on Campus

Office of Student Life Information

Group Room

Residential Advisor

Residential Director

Schedule

Course Location

Course Location

Course Location

S1 Program Name Status

Program Type ResType Name

S2 Program Name Status

Program Type ResType Name

Sidebar Changes

- Preferred Name and Campus Name added beneath Given Name
 - Campus name would only show if that field is filled
- Minimizes sidebar spacing of Program Information
- Design Assumption - Campus Name and Preferred Name only visible if student actually has one, blank or hidden if a student does not

Session Specific Information

- Clearer fields/labels
- Additional Identity fields in Student information
- OSL Information separated
- Summer Devices and Contact updates
- Schedule Field? This quad was left blank after removal of Bus information, could be utilized for something else. Initial design only

Additional Improvements

- How else can the side bar be used?
- What other information should be visible here?
- OSL Box - need to have both session information, if different between S1 and S2

SIS Design Iteration 2 - 'Horizontal View' with Sidebar Iteration 1

sis (minerva.explo.org)

ENROLLMENT TRIPS OFFICES ENROLLMENT COURSES GROUP REQUISITION

prev next 1 of 1587 found message board labels print lists

Simon Valentino 2022

Preferred Name Campus Name

S1 Program Name Status
Program Type ResType Name

S2 Program Name Status
Program Type ResType Name

Session-Specific Information (All Sessions)

Student Information

Given Name Preferred Name Campus Name

Alum or New? Res Gender Home Pronouns Campus Pronouns

Birthdate T-Shirt Size Year of Grad

Office of Student Life Information

Group Room

Residential Advisor

Residential Director

Summer Devices and Contact

Phone Number Phone on Campus

Email Address

Laptop on Campus

Sidebar Iteration 1

- Addition of Icon to symbolize “something is different”, “check student notes”, “check given v. campus name”, etc.
- Mirrors effect of ADM icon (dot)
- Sun/shield, open to other ideas.
- Icon hidden if not necessary for a student



Session Specific Information

- Horizontal organization
- Summer Devices/Contact in original location
- OSL information separated

Further Improvements

- Sidebar Program Information
- Includes repeated information for 2022-23 programs

SIS Design - Sidebar

Sidebar 2

Given (Pref) Name Year

Preferred Name **Campus Name**
Preferred Name Campus Name



Session Program Name Status

Program Type Res Type

Living Group Room

Residential Advisor

Session Program Name Status

Program Type Res Type

Living Group Room

Residential Advisor

Sidebar Iteration 2 and 3

- Removal of duplicate Session information (specific to 2022-23 program offerings)
- Inclusion of Residential Information
 - would change fields in Session Specific Field
- All initial information in one location when looking for a student
- Opens up Session Specific Tab for more information
- Session 1 and Session 2 fit in available space
- What names are static and what names are searchable?
- Should Preferred Name be separated from the primary name field?

Sidebar 3



Given (Pref) Name Year

Preferred Name **Campus Name**
Preferred Name Campus Name

Session Program Name Status

Program Type Res Type

Living Group Room

Residential Advisor

Session Program Name Status

Program Type Res Type

Living Group Room

Residential Advisor

SIS Design - Relations Iteration 1

The screenshot shows the SIS (minerva.explo.org) interface. The top navigation bar includes tabs for ENROLLMENT, TRIPS, OFFICES, ENROLLMENT (selected), COURSES, GROUP, and REQUISITION. Below the navigation bar, there are buttons for 'prev', 'next', and '1 of 5 found'. There are also buttons for 'message board', 'labels', and 'print lists'.

The main content area is divided into several sections:

- Student Profile:** Displays the student's 'Given (Pref) Name' and 'Year'. Below this is a circular profile picture of a young man. To the right of the picture is a small shield icon with a person silhouette.
- Related Contacts:** A table with columns 'Siblings' and 'Relationship'. It lists several contacts, including Jennifer English (Parent), Nicola Valentino (Parent), Katherine English (Grandparent), and Thomas English (Grandparent).
- Other Contacts:** A section for 'Primary Contact' showing Jennifer English with contact details: englija@gmail.com, (508)395-4693, 268 Hosmer Street, Marlborough, MA 01752. Below this is a 'Student Identity' field with a shield icon.
- Emergency Contacts:** A section for 'Emergency Contacts' showing Jennifer English with contact details: englija@gmail.com, (508)395-4693.
- Residential Information:** Two identical sections on the left side of the page, each containing fields for Session, Program Name, Status, Program Type, Res Type, Living Group, Room, and Residential Advisor.

Contact Changes

- To help protect students' identities on campus, additional information/notifiers added to the contact page to help notify anyone making contact to a parent/guardian.
- Addition of Notifier Icon
- Addition of Student Identity field from Student Notes

Further Improvements

- Where else does student identity information need to be located?
- Swap Primary Contact/Related Contacts/Student Identity fields

SIS Design - Relations Iteration 2

Relations Tab Changes

- Reordered fields in terms of perceived importance
- Feedback requested on order of boxes from OSL members
- Design features revised Sidebar

The screenshot shows the SIS interface for a student profile. The top navigation bar includes tabs for ENROLLMENT, TRIPS, OFFICES, ENROLLMENT (selected), COURSES, GROUP, and REQUISITION. Below the navigation bar, there are buttons for 'prev', 'next', and '1 of 5 found'. The main content area has a sidebar on the left with a student photo and details like 'Given (Pref) Name', 'Year', 'Preferred Name', and 'Campus Name'. The main content area has tabs for 'student', 'deans', 'docs', 'emails', 'misc.', 'travel', 'notes', 'relations' (selected), 'reg.', 'trips', 'canvas', and 'transcript'. The 'relations' tab is active, showing a list of contacts with their names and relationships. The 'Primary Contact' section shows 'Jennifer English' with contact information. The 'Siblings' section is empty. The 'Emergency Contacts' section is empty. The 'Billing' section shows 'Jennifer English' with contact information. The 'Others' section shows a list of contacts with their relationships: Jennifer English (Parent), Jennifer English (Parent 1), Nicola Valentino (Parent), Nicola Valentino (Parent 2), Jennifer English (Billing), Katherine English (Grandparent), Thomas English (Grandparent), Jennifer English (Primary Contact), Jennifer English (Preferred Contact), Nicola Valentino (Preferred Contact), Barbara Caffrey (Teacher), and Jennifer English (Billing).

Next Steps

- After discussing preferences with Admissions team, implement ADM Design Iteration 1 - Student Tab
- After discussing preferences with both Admissions and Student Life leadership, implement SIS Design - Relations Iteration 1 and SIS Design Iteration 1 - 'Quad View'. Further, discuss campus wide uniformity in the use of the Student Notes section. It does not necessarily need a redesign, but instead needs to be used the same way across all three programs.