

## Foothill Clockwork Project Conf. Call Minutes

August 13, 2014 noon-1:00 p.m.

Participants: Teresa Ong, Thom Shepard, Roland Amit, Mary Baddam, Carmela Xuereb, Linda Koyama

- Teresa had a chance to send the FH DSPS spreadsheet of the configurations and a scanned document of the on-line test booking to Mary.
- Data Sync: ETS has created the Banner connection, based on the fields that Clockwork sent to ETS. Includes the demographic info, educational goals and registration info (courses for current and future term). Mary is currently configuring it and will send the list of fields to Teresa of what is being sent. the depts. can decide if they need to add more fields (Please let Jim know).
- **Questions from Teresa:**
  1. If pages need to be printed, how do we print it out? Clockwork has a print summary option where you can print all the data that you have on the intake form disability accommodations. If you want a template which can be printed out (accommodation letter, referral letter, confidentiality agreement) , you need to send Mary a sample with letterhead in word format. Need to provide a list of templates to Mary. 4 or 5 templates will be needed for audit purposes. Also need to think about what letters need to be sent out. Teresa will get that to Mary by next week.
  2. How does a student know when an instructor does or does not approve of exam? Is there another confirmation email? When a student books an exam on-line, an e-mail notification goes out to the instructor to confirm the information on the test. If the instructor changes the date and time, the booking rows that were affected by that change will be yellow highlighted in Clockwork. You will have to manage it manually and can reassign the seat. (Will go over in training). Can have batch e-mail reminders can go out 1 or 2 days prior to the test alerting them of an upcoming test with a disclaimer that says that it is different from the time that they originally scheduled. Wording for that e-mail needs to be sent to Mary.
  3. How can students request alternate media? Web module for alternate media is not available yet (add on module, extra cost). There is a management interface available. Will continue to receive the request as you currently do, but the management interface allows you to enter that request, can enter the job, maintain your files, and reporting.

- Thom's questions:
  1. Automatic e-mail to instructors for booking(usually disabled because instructors will receive individual e-mails for each request.) A better alternate is to use batch e-mail 7 days before the test as a reminder to instructor with a list of students which is part of configuration that can be set up.
  2. The URL gives them quick access to the web module to upload a copy of the test.
  3. For instructors that prefer to drop off paper copies of test, you can mark in Clockwork that you received it to stop e-mail notifications to them.
- Blue ink signature required forms can be scanned and uploaded into Clockwork.
- Mary Will configure the veteran's module like the one configured for another client and we can make changes after (forms are dynamic).
- Probably not interested in note-taking module.
- Mary will e-mail Teresa if she has any questions.

To do list:

- Finish configuration list
- List of Disabilities
- Create templates (i.e. accommodation letter template)
- Determine what paper letters need to be sent out,
- Wording for e-mail alerting students of upcoming tests
- Form that you are currently using that instructors fill out that gives instructions on what materials to be used, what type of test it is.
- Configuration for veterans (core-staff list, appointment booking types)