Phases	Milestone	Tasks	Start	Due	Assigned to	Status	Notes
KICKOFF PHASE			7/5/2024	7/15/2024	Nithya	Completed	
		Internal Project Prep & Knowledge Transfer					
		Schedule Internal Team Debrief					
		Client Kickoff					
DISCOVERY			7/20/2024	9/30/2024	Nithya	Completed	
		Schedule discovery interviews					
		Complete discovery interviews					
		Complete user stories					
		Complete user stories review					
IMPLEMENTATION PHASE			8/15/2024	1/31/2025		Started	
	Data architecture		8/15/2024	12/31/2024	Sarah, Nithya	Started	
		Course dataset				Completed	
		Course section dataset				Completed	
		Enrollment by Quarter Entity				Completed	
		Course enrollment entity				Completed	
		Major dataset				Started	
		Fields and prompts				Started	
	Integration		8/15/2024	12/31/2024	Nithya		
		Demographics data - Identify fields that must be integrated				Started	
		Course data - Identify fields that must be integrated				Started	
		Matriculation by quarter data - Identify fields that must be integrated				Started	
		Course catalog data - identify fields that must be integrated				Started	
		Demographics data - Map fields in Slate				Started	
		Course data - Map fields in Slate				Started	
		Matriculation by quarter data - Map fields in Slate				Started	
		Course catalog data - Map fields in Slate				Started	
		Demographics data - UAT				Started	
		Course data - UAT				Started	
		Matriculation by quarter data - UAT				Started	
		Course catalog data - UAT				Needs Info	UW Tacoma is reviewing K&Co's request to split up course catalog and course sections into separate files
		Demographics data - Move to Prod				Not Started	
		Course data - Move to Prod				Not Started	
		Matriculation by quarter data - Move to Prod				Not Started	
		Course catalog data - Move to Prod				Not Started	
	Forms		10/1/2024	1/10/2025	Emily, Nithya, Ryan		USE THIS - UW Tacoma Slate Student Success Information Request 10-7-24.xlsx
		Graduation Petition (pdf)				Started	Form and Workflow Built
		Registration Transaction Request (pdf)				Started	Hold
		Affidavit_Residency (pdf)				Started	Hold
		Residency Checklist (pdf)				Started	Form built; Workflow Pending
		Resident Tuition for American Indian Students (pdf)				Started	Form built; Workflow Pending
		Residence Tuition for Military Connected Students (pdf)				Started	Form built; Workflow Pending
		Tuition Reduction for Military Connected Spouse or Child (pdf)				Started	Form built; Workflow Pending
		Tuition Reduction for Non-Resident Refugees/Asylees (pdf)				Started	Form built; Workflow Pending
		Student Record Change or Correction Form				Started	Form built; Workflow Pending
		Enrollment Status or Degree Verification				Started	Form built; Workflow Pending
		Change Major/Minor				Started	Form built; Workflow Pending
		General Scholarship Application				Started	Form built; Workflow Pending
		Repeat Petition				Started	Form built; Workflow Pending

Phases	Milestone	Tasks	Start	Due	Assigned to	Status	Notes
		Registration				Started	Form built; Workflow Pending
		Scholarship Application				Started	Form built; Workflow Pending
		Course Substitution				Started	Form built; Workflow Pending
		Course Code Request Form				Started	Form built; Workflow Pending
	Workflows for Forms		11/1/2024	1/10/2025	Nithya, Ryan		
		Graduation Petition			Nithya	Started	
		Registration Transaction Request				Needs Info	
		Affidavit Residency				Needs Info	
		Residency Checklist					
		Resident Tuition for American Indian Students					
		Residence Tuition for Military Connected Students					
		Tuition Reduction for Military Connected Spouse or Child					
		Tuition Reduction for Non-Resident Refugees/Asylees					
		Student Record Change or Correction Form					
		Enrollment Status or Degree Verification					
		Change Major/Minor				Needs Info	
		General Scholarship Application				Needs Info	
		Repeat Petition					
		Registration					
		Scholarship Application					
		Course Substitution					
		Course Code Request Form					
	Communications		10/7/2024	11/30/2024	Nithya, Ryan	Started	Brevo Comms
		FA_Aid Cancellation Reminder				Started	Recipient List Pending
		FA_Freshman Merit Scholarship Sample Message				Started	Recipient List Pending
		FA_General Scholarship Denial				Started	Recipient List Pending
		FA_General Scholarship Recepient				Started	Recipient List Pending
		FA_Transfer Merit Scholarship Sample Message				Started	Consolidate into another
		Reg_Academic Drop Notice				Started	Recipient List Pending
		Reg_Autumn Prepare to Register				Started	Recipient List Pending
		Reg_Returning Not Registered				Started	Recipient List Pending
		Reg_Spring Prepare to Register				Started	Consolidate into another
		Reg_Summer Prepare to Register				Started	Consolidate into another
		Reg_Welcome to Autumn Quarter				Started	Recipient List Pending
		Reg_Winter Prepare to Register				Started	Consolidate into another
	Notes & Interactions		10/2/2024	11/26/2024	Nithya, Ryan		
		Advisor Notes				Started	Cannot be public notes; most folks should know that a note exists but not what the note is
	Appoinment Scheduling		10/15/2024	12/17/2024	Nithya	Started	
		Set up template	10/15/2024	10/25/2024	Nithya	Completed	
		Set up portal	11/8/2024	11/26/2024	Nithya		
	Permissions Structure		8/15/2024	11/22/2024	Ryan, Nithya, Sarah	Started	UW Tacoma Pilot User List
		Shared instance planning	8/15/2024	10/30/2024	Ryan, Nithya, Sarah	Completed	
		Design permission structure	10/1/2024	11/22/2024	Ryan, Nithya	Started	
		Create populations	11/1/2024	11/8/2024	Ryan	Completed	
		Create custom permissions	10/14/2024	11/15/2024	Ryan	Started	
		Create realms	10/14/2024	11/8/2024	Ryan, Nithya, Sarah	Started	
		Create roles	11/1/2024	11/15/2024	Ryan	Started	

Phases	Milestone	Tasks	Start	Due	Assigned to	Status	Notes
		Update current user permissions	11/13/2024	11/22/2024	Ryan, Nithya		
		Create new users	11/13/2024	11/22/2024	Nithya		
		Test permissions	11/11/2024	11/22/2024	Nithya, Ryan, Dan		
	Student Portal		9/23/2024	1/10/2025	Nithya, Ryan	Started	
		Build student portal					
		Test student portal					
	Queries and Reports		11/1/2024	1/26/2024	Nithya, Ryan		
TRAINING AND ADOPTION			10/1/2024	1/31/2025	Nithya, Sarah, Ryan	Started	
	Documentation		10/1/2024	1/31/2025	Nithya, Sarah, Ryan	Started	
	End User Training		1/6/2025	1/17/2025			
		Identify users for training					
		Overview					
		Appointments					
		Email communications					
	Admin Training		1/13/2025	1/24/2025			
		Overview					
		Forms and workflows					
		Integrations					
		Portal					
		Queries					
	Post Go-live support		1/20/2025	2/7/2025			
PROJECT CLOSE OUT			2/3/2025	2/7/2025			