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Summary
This manual provides essential background knowledge on the registration process and working with student records in ConnectCarolina. This manual also provides information on basic system skills, features and references that are necessary for completing registration actions in the ConnectCarolina system.

Learning Objectives
This document provides references and solutions for the following actions:

- Provide background knowledge in UNC-CH’s registration process.
- Overview of the pages associated with the student record.
- How to use Search tools to locate student records.
- How to navigate/interpret a results page.
- How to modify a student’s program, plan and sub-plan.
- How to enroll, drop and swap single courses during open enrollment.
- How to enroll and drop from a single course during the drop/add period.
- How to enroll and drop from a single course after the registration period closes.
- How to work with service indicators associated with the enrollment process.
- How to work with general or course specific overrides to process an enrollment.
- How to view a wait list.
- How to cancel an existing registration or withdraw a student for one or more terms.
- How to term activate a student.
ConnectCarolina Basic Skills

Working with Components and Pages

Components

Components consist of several pages within the same window that pertain to a specific task. Components contain page tabs with each tab containing a related page.

Components are accessed from the menu. Select the desired menu item (links) from the home menu or the navigation folders. These links either display a single page or open the first of several pages in a component.

Page

A Page is the individual display and data-entry screen for each part of ConnectCarolina. Pages are used to view, enter and update data. Each page display also provides features in the form of buttons or links to help you navigate through the system.

Page Tabs identify the page you are viewing and allow you to navigate through a component. The dark blue identifies the page being displayed.

Privacy of Student Records

Students have the right to request that records be kept private. Within ConnectCarolina a student record marked as private will be displayed with a FERPA service indicator.

FERPA, or The Family Educational Rights and Privacy Act (commonly known as the Buckley Amendment) establish a ‘right to privacy’ for student academic records.
In general, the student and only the student can have access to the student’s academic records. University employees who have an ‘educational interest’ may also have access. This can be frustrating for parents, but is firmly established law. The law also establishes a small number of exceptions (response to court subpoenas in limited circumstances, for example). The exceptions are dealt with and documented by the Office of the Registrar.

The law defines a set of directory information that universities may release if the student does not request otherwise.

Directory information includes:

1. Name
2. Address
3. Telephone Number
4. Date and Place of Birth
5. Major
6. Degrees and official awards
7. Participation in official activities and sports
8. Weight and height of athletic team members
9. Enrollment Status
10. PID
11. Anticipated Graduation Date
12. Dates of Attendance

Failure to follow FERPA may result in both institutional and individual liability. Individuals who fail to follow FERPA will be subject to discipline and possible termination.
Favorites
The Favorites feature in ConnectCarolina allows you to bookmark pages that you use frequently. Once you add a favorite, it appears under the Favorites folder in the upper left hand corner of any ConnectCarolina page.

The favorites that you set up are not stored on a specific computer but are associated with your ConnectCarolina user profile, so you can access them from other computers.

How to Add a Favorite
1. Open the page that you want to designate as a favorite.

2. Click the Add to Favorites link in the page header.

3. The Add to Favorites box appears, with the page name as the default in the Description field. If you like, update the description for the favorite.

4. Click OK. Your page should now be displayed in the My Favorites folder.
How to Edit your Favorites

1. Expand the My Favorites folder in the left navigation menu.

2. Click Edit Favorites

3. The Edit Favorites page displays the favorites that you have selected.

4. Locate the favorite that you want to modify.
   - To change the label, type a new name in the Favorite box.
   - To delete a favorite, click the delete button
   - To reorder favorites, type an appropriate number in the Sequence number box.

5. Click Save.

Navigation

There are several buttons located at the bottom of the pages will help you in navigation:

Return to Search
Click this when you are on a page and wish to return to the search results page.

Previous in List and Next in List
When you have more than one record in your search list you can quickly move to the previous or next in list with these buttons.
If you want to look up another student select Return to Search, click the Clear button and enter the new search criteria.

**Scroll Bars**
Many pages have scroll bars that allow you to look at different rows or pages of information for the student. Sometimes each row is for a different term, sometimes for a different class or different action taken.

**Using a scroll bar**
To use the scroll bar’s navigation features

- Click **View All** to show all the data
- Click the **triangle shaped buttons** to scroll forward and backward
- Click **First** to go to the first record
- Click **Last** to go to the last record

**Page Tabs**
Many components have more than one page. Click on the tab at the top of the page to move to another page or use the link at the bottom of the page.

**Terms**
Terms are comprised of four characters

**Example:** 2109 = Fall 2010

- First character will be a 1 *(for 1900’s)* or 2 *(for 2000’s)*
- Second two characters represent the last two digits of the year *(i.e. 99 for 1999)*
- The last character indicates the term:
  - 2 = Spring
  - 3 = First Summer
  - 5 = Summer Term
  - 9 = Fall
User defaults

User defaults will auto-populate field values in search pages and data entry pages based on your User ID. It is a very useful tool for making data entry easier and faster.

**IMPORTANT** – enter as many or as few fields as makes sense for your situation. You can change your User Defaults as often as needed. You will always be able to change from the default settings and choose another option when you enter the

**Navigation**

*Set up SACR > User Defaults*

**Background**

The User Defaults page contains several tabs. This document works with User Defaults 1 and User Defaults 3.

ALL the other default pages (User Default 3, Enrollment Override Defaults, Communication Speed Key and User 3C Groups Summary tabs) are defaults specific to Admissions and the Registrar’s Office staff and do not need to be filled in.

**Steps**

*Step 1 – Accessing the User Defaults page*

1. Using the left side Menu click on ‘Set Up SACR’

2. Click on User Defaults

**Step 2 – Assign User Defaults**

**User Defaults 1 Tab**

Use lookup icons to enter the following fields. Leave fields blank if you do not want to set defaults for them.
The following fields are available:

- **Academic Institution**
  UNCCH

- **Academic Career**
  Choose one that matches the majority of students that you enter — UGRD or GRAD or leave blank

- **Academic Group**
  Choose your college or leave blank

- **Subject Area**
  Choose a subject’s 4-letter rubric or leave blank

- **Term**
  Choose a term or leave blank (you must select a Career before the Term)

- **Academic Program**
  Choose a college or leave blank

- **Academic Plan**
  Choose a major and degree or leave blank

- **Academic Sub-Plan**
  Choose a concentration or leave blank

Click the **Save** button.

**Tip:** Use the Look up Icons (magnifying glass) to enter default values
**User Defaults 3 Tab**

Carry the student PID information from page to page.

1. **Carry ID checkbox** – Click on to carry a student’s ID from one page to the other.

2. Click the Save button located at the bottom of the page.
   **Note:** Save button not shown in above image.

---

**Understanding ConnectCarolina Pages**

In ConnectCarolina applications, data is grouped into related fields, which are presented on one or more related pages. A set of related pages is called a page group (or component), and is presented as a series of tabbed pages in a browser window.

The name of the page group is the name in the navigation path at the top of the browser window. Each page within a page group has its own name, which is displayed in the page tab (often abbreviated).

Page groups are easily accessed using the ConnectCarolina menus.
You can open new pages without closing the current page or page group by clicking the New Window link on the page. This opens a new browser instance which you can use to access a different page group, while your original page group remains open in the other browser window.

Using Page Groups (Components)
Pages are grouped together into components to show that the information they contain is shared or related. For example, the Student Program/Plan page group is divided into several pages which form a logical arrangement of information, and guide you to related information or activities.

Pages in a group are treated as a single entity when you save data. This means that when you click the Save button from any page in a page group, data on all pages in the group is saved to the database. If the system encounters a required field that you have not completed on any page in the group, you will receive an error message.

To display any of the pages in a group, click on the tab for that page. These pages can also be accessed by clicking on the hyperlinks at the bottom of the ConnectCarolina page, or by using the access keys indicated by the underlined letter in the tab name.
Searching Records

When you navigate to a ConnectCarolina page group, the system displays a Search/Match (Find an Existing Value) page. This page allows you to look up and select records from search results based on the criteria you enter.

Key Information:
If your search yields more than 300 results, only the first 300 will be displayed. It is recommended that you narrow your search sufficiently so that your search will pull up less than 300 results.

Search Criteria
You can change the search conditions (operators) that specify how you want ConnectCarolina to match the criteria you enter to the values in the field.

To specify how you want ConnectCarolina to match your criteria, select an operator in the field between the field name and the field where you enter your criteria.

Common search fields:

- **EmplID**: if you know the student’s PID number, enter it in this field and press the Search button.
- **Academic Career**: use the drop down list to determine the appropriate choice.
- **Campus ID** and **National ID** are not good fields to use for a student search.
- **Last Name** and **First Name**:
  - Enter in the student’s Last Name and First Name and press Search. You can search on just last name but not just first name.

Basic Search
Basic Search is a simpler version of the Advanced Search page that is the default in ConnectCarolina. Basic Search allows you to search using only one field, such as EmplID or Last Name.

To access the Basic Search page click the Basic Search link at the bottom of an Advanced Search page.
Search Results
There are three possible results after running a search:

1. If only one student matches your search the page will open with their information.
2. If more than one record matches your search, a list will be displayed below the search fields. Click on any field in the list for the student you wish to select.
3. No matching values will be found.

Working Through a Search List
If you have selected a value from a search results list with multiple records listed, the search list buttons at the bottom of the displayed page will be enabled. You can then use the Return to Search, Next in List, and Previous in List buttons at the bottom of the page to work through the list, record by record.

The ‘Previous in List’ and ‘Next in List’ buttons are very valuable when, for example, you need to search through a list of students with similar first and last names.

These buttons allow you to navigate forward and backward through the retrieved records in the search list:

- To display the next record in the search list, click the Next in List button. If this button is disabled, you are viewing the last record in the list.
- To display the previous record in the search list, click the Previous in List button. If this button is disabled, you are viewing the first record in the list.
- Click the Return to Search button to return to the search results on the Find an Existing Value page, where you can scroll through the generated list of records, select a particular record in the list, or perform another search.
**Retrieving a Single Record**

When you are searching for a record, if you know and enter a unique value, such as an EmplID, a single record will be retrieved, and most often will be displayed directly.

**Note:** The steps in this section describe how to use the search feature in any Find an Existing Value page. The example uses the Student Program/Plan page group.

1. When you click on a page group menu item, the Find an Existing Value page for that group is displayed.
2. Locate the record you want to view by entering person-specific search criteria in any of the following fields:
   - EmplID – enter the person’s PID
   - First Name – Enter all or part of the person’s first name
   - Last Name – Enter all or part of the person’s family name

**Note:** Partial names will most likely return a list of individuals.

3. If you require access to both current and historical records select the Include History check box.
4. Click the Search button

**Using look-up prompts to Search**

Some fields are linked to database prompt tables, which store values used as shared information. These fields appear as edit boxes on your screen with a *prompt button* to the right. (See image below)
How to lookup a class using a look-up prompt

1. Click on the prompt button to open the quick enrollment Search Criteria page (see image above).
2. Enter the 4-character Course Subject ID (use the ‘select subject’ button to look up the Course Subject ID).
3. Enter the 3-character Course Number (use the drop down arrow to refine your search).
4. Make sure the Course Career matches the student’s course career (use the drop down arrow to select a course career).
5. Check the ‘Show Open Classes Only’ button to display only open courses (checked by default).
6. Click the SEARCH button.

**Note:** Search results will display only 75 results. Search results will display up to 100 results during busy registration periods.

If your search has more than 75/100 results you will get an error message and be asked to narrow your search.

How to Search for Classes using the General Education Requirements

**Navigation:**
Records and Enrollment > Enroll Students > Quick Enroll a Student

OR

Curriculum Management > Schedule of Classes > Class Search

**Background:**
Undergraduates at UNC-CH fulfill General Education requirements in addition to the more specialized requirements of their own major fields.

The structure of the General Education requirements reflects not only the regular updating of curricular expectations but also the faculty’s intent to make the entire General Education experience more integrated and meaningful for the University’s undergraduates.

More information on General Education requirements can be found on pages 27 – 44 in the Undergraduate Bulletin. [http://www.unc.edu/ugradbulletin/requirements.html](http://www.unc.edu/ugradbulletin/requirements.html)
**Step 1: Create a new student enrollment request for the term**

1. Enter the student’s PID
2. Check to make sure the ‘Academic Career’ is correct.
   If not use the lookup to locate the correct ‘Academic Career’.
3. Enter the Term
4. Click Add to create the enrollment record to view or modify

**Step 2: Search for a Class using the General Education Requirements**

1. Click on the look up icon to launch the class search page

2. At the top of the page, select the general education requirement criteria.

   For more information on General Education Requirements at UNC please go to pages 27 – 44 in the Undergraduate Bulletin.

3. Select a General Education Requirement from the list.
4. Click Search to view the classes meeting the General Education Requirements

5. Classes associated with the selected General Education Requirement(s) will be returned.

6. Click the ‘Select a Class’ button to add the class to the enrollment record

Currently there is a 75-class result limit.

*If your search exceeds this limit use the course subject, course number and Additional Search Criteria area to further refine your search.*

**OPTIONAL SEARCH CRITERIA:** The following search options can help to refine a General Education Requirement as well as a basic class search.
OPTIONAL:
Additional general education requirements can be selected to refine your search results

Click the + icon to add a new General Education Requirement criteria – OR –
Click the - icon to remove a General Education Requirement criteria

OPTIONAL:
Course Subject, Course Number and Course Career can be used to refine your search results

1. Enter the 4-character Course Subject ID or use the ‘select subject’ button to look up the Course Subject ID
2. Enter a 3-character Course Number and use the drop down arrow to refine your search
3. Make sure the Course Career matches the student’s course career
4. Check the ‘Show Open Classes Only’ button to display only open courses (checked by default)

OPTIONAL:
Additional Search Criteria can be used to further refine search results
5. Once you have added all of the classes you intended to add click the Submit button to add the classes to the student’s enrollment

More detailed enrollment information can be located in the Student Records manual under Enrollment
Student Academic and Enrollment Information

The Academic and Enrollment information covered in this section includes:

**Navigation: Records and Enrollment >**

- Student Program/Plan
  - Student Program
  - Change major *(plan)*
  - Change minor *(plan)*

- Enrollment Activities
  - Check Student’s Record Prior to Enrollment
    - Term activation
    - Registration Appointment
    - Service Indicators
  - Enrollment
    - Overrides
Student Academic Information

**Navigation**

*Records and Enrollment* > *Career and Program Information* > *Student Program/Plan*

**Background**

Student Program/Plan is a component that allows the tracking of a student’s high level relationship within the University.

With Program/Plan, a history of a student’s majors, minors, specializations and other information can be compiled and tracked.

Once the student is matriculated they will come over to student records and be visible in the program stack.

Fields on the Program/Plan will populate from the Admissions or Quick Admit pages. This process creates an academic record for the student in the form of a career, program, plan, and sometimes a sub-plan.

A student record will have multiple program actions to view (*admit, matriculation, program change, plan change*) through completion of program.

**Navigating the Program/Plan stack**

Use the scroll bar buttons on the blue bar to navigate through the Program Actions (*rows*). The most recent will be the first or top-most program action.

Various pieces of information contained in each row can be investigated by clicking on various tabs at the top of the page.

**Program Stack**

As the student modifies their program/plan during their career at UNC-CH, ConnectCarolina will keep a dated record of those changes. Those changes will be found in one single record that has multiple “rows” of data. Each row of data in the stack is a change in either the Academic program or plan. The combined rows are called the program stack.
**The Dresser Analogy**

One interesting way to look at the program/plan stack is to think of the entire program/plan stack as a dresser.

The program/plan stack (*dresser*) can have as many drawers as needed, with the idea being that every time the student initiates a program or plan change, another drawer is added to the dresser.

The program tab of program/plan is kind of like the drawers. If you “view all” you can kind of see the drawers stacked on top of each other to make the dresser, and basically there is the label on each drawer for what’s inside (*Example: matriculation, program change, A plan change*).

To see what’s in the drawers, you have to move over to the Plan (*& Sub-plan tab if concentrations apply*).

**Best Practice:** You will want to select “View 1” before moving over to the Plan tab, as Plan is harder to read as an expanded stack. When you’re on the plan tab, it’s as if you’ve opened the drawer and can see what’s in there – their major(s), minors & honors (*if they are in the honors program*).

Each change to the stack has an *action date* (*the date in which the change was recorded in ConnectCarolina*) and an *effective date* (*the date in which the student wants the change to take place*). The *action date* cannot be modified but the *effective date* can be post-dated, future-dated or give the same date as the action date.
Second Majors
Students may declare double majors, per University Policy, with one major being their primary major, and then second being their second major. In ConnectCarolina, as was the case in SIS, the first major is attached to the degree. University Policy remains that same, in that a BS (or a BFA or a BMus for example) degree basically trumps a BA degree. This means that a student may have the following combinations of double majors:

1. A BS first major with a BS second major
2. A BA first major with a BA second major
3. A BS first major with a BA second major

***A student may not have BA first major with a BS second major.***

In ConnectCarolina, second majors are designated with a “2nd” classification. So, a student that has declared Psychology (BA) for their second major would have PSYA2nd major code on their plan stack.

Comparing/Viewing Academic Structure in ConnectCarolina and SIS

ConnectCarolina and SIS display a student’s program stack in a different format. Each system displays similar content such as College, Degree, Major/Minor as well as type of enrollment or action.

In SIS a student’s program plan/stack is displayed in Terms (semesters) on screen 191 and screen 111.

Terms (semesters) are grouped from oldest to most recent. Each term’s program/plan can be viewed in detail by clicking on a term and viewing the information displayed on Screen 111.

In ConnectCarolina the program stack information is displayed using rows. Each row represents an action in the student’s plan. Effective Dates determine the beginning and end of rows.

Program Plan Tab

ConnectCarolina vs. SIS Program Plan terminology

<table>
<thead>
<tr>
<th>ConnectCarolina</th>
<th>SIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career</td>
<td>Career or AU</td>
</tr>
<tr>
<td>Academic Program</td>
<td>College/Catalog combined with Degree</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>Major, Minor and Honors</td>
</tr>
<tr>
<td>Student Sub-plan</td>
<td>Concentration</td>
</tr>
</tbody>
</table>
Student Program Tab
This tab can be used to view and modify a student’s Academic Program (college).

If a student is changing majors including a change of college (e.g. BA in PSYC to a BS in CHEM), change both the student program tab and student plan tab.

1. Top Section — Student Information
   - Name and PID
   - Academic Career
2. Lower Section — Academic Program Information
   a. Status: Indicates a student’s status standing within the program such as Active, Discontinued or other status as of the Effective Date of the row.
   b. Effective Date: Identifies the date upon which the most recent change in program status took effect. The effective date can be pre-/postdated.
   c. Program Action: A change to a person’s program data.
   d. Academic Institution: UNCCH is the default value
   e. Academic Program: This is the degree the student has selected to pursue and should only be changed when an action of Program Change (PRGC) is being executed.
      *** ASBA is written as college/cat (AS) and Degree (BA) from SIS
   f. Admit Term: The first term of the student’s career
   g. Requirement Term: Also known as Catalog Term in SIS. The student will be responsible for the program requirements active during this term.
Related Information in SIS

In SIS student program and plan information can be found using:

- **Screen 191**: Verification of Enrollment
  Used to display critical data concerning a student’s enrollment history and degree completion at UNC-CH
- **Screen 111**: Student Term Attributes
  Used to enter and update a student’s term related data.

**Page Comparison: Student Program tab vs. SIS screen 191**

This comparison identifies common information in ConnectCarolina and SIS.

<table>
<thead>
<tr>
<th>ConnectCarolina – Student Program Tab</th>
<th>SIS – Screen 191 and 111</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. <strong>Effective Date</strong>: The date on which the program action and the other field values on the row became effective</td>
<td></td>
</tr>
<tr>
<td>B. <strong>Program Action</strong>: Indicates a change to a student’s academic program data.</td>
<td></td>
</tr>
<tr>
<td>C. <strong>Academic Program</strong>: The Academic Program field in ConnectCarolina represents a combination of the COLLEGE/CATALOG and Degree fields in SIS.</td>
<td></td>
</tr>
<tr>
<td>D. <strong>Admit Term</strong>: This term will indicate the MATR (Matriculation) term.</td>
<td></td>
</tr>
</tbody>
</table>

24
**Student Plan Tab**

**View and modify a student’s academic plan (major and minor)**

If a student is changing major within the same college (*e.g. History major changing to Sociology*), you will need to change only the plan.

It is important to remember that you will need to add a row (click ‘+’) from the Student Program tab.

1. **Student Information**
   - Name and ID
   - Academic Career
2. **Academic Program Information**
   A condensed version of what is on the Student Program tab
3. **Academic Plan Information**
   The student’s major and minor.
   - Majors are written as degree/subject.
   - Example: **BAANTH = Bachelor of Arts in Anthropology**
1. **Academic Plan**
2. **Plan Sequence:** A student’s major will carry a lower number than other plans which will carry a higher number (+10)
3. **Declare Date:** The date the student declared this major.
   Note the declare date is the same as the effective date above, but they do not have to be the same date.
4. **Requirement Term:** This lines up with Catalog Year.
   IF THEIR REQUIREMENT TERM IS FALL 2010, THIS MEANS THAT THEY ARE RESPONSIBLE FOR THE REQUIREMENTS IN THAT YEAR’S BULLETIN.

**NOTE:** This is very important for the new degree audit system. It will be important that the requirement term be set to the appropriate catalog year for the student whenever a program or plan change is made.

### Page Comparison: Student Plan Tab vs. Screen 191

1. **Effective Date:** The date on which the program action and the other field values on the row became effective. The effective date can be referenced in SIS by converting it into a SIS TERM.
2. **Academic Plan:** The Academic Plan field in ConnectCarolina represents a combination of the DEGREE and MAJ1 fields on SIS Screen 191.
Student Sub-Plan tab
View and modify concentration

1. Student Information
   - Name and ID
   - Academic Career

2. Academic Program/Academic Plan Information
   A condensed version of what is on the Student Program and Student Plan tabs

3. Student Sub-Plan Information

Scenarios

How to Change a Student’s Academic Program

Background
If a student is changing majors including a change of college (e.g. Chemistry major changing to finance), you will need to change both the program and plan. Instructions for changing a student plan will immediately follow.

Navigation
Records and Enrollment > Career and Program Information > Student Program/Plan
**Step 1: Locate the Student’s Record**

1. Enter the student’s PID
2. Enter the Academic Career
3. Click the ‘Include History’ check box
4. Click the Search button

**Include History**

This option displays all rows of an existing effective dated record.

***If this option is not checked you see only current and future dates.***

**Step 2: Modify the Student’s Program and Plan**

1. From the Student Program tab, add a new row to the student’s program stack.
   
   To add a new row click the add icon.

2. Use the lookup icon to set the program action to PRGC (program change).
3. Use the lookup icon to select the new Academic Program.
4. Enter the Admit Term or the term the change will take effect.
5. Click on the Student Plan Tab to continue.

**How to Change a Student’s Academic Plan**

**Background**

If a student is changing majors including a change of college (e.g. Chemistry major changing to Finance), you will need to change both the program and plan. (The instructions below are a continuation of the Academic Program change How to from above)
If a student is changing major within the same college (e.g. Finance major changing to Accounting), you will need to change only the plan.

**Navigation**
*Records and Enrollment > Career and Program Information > Student Program/Plan*

1. **Select the new Academic Plan**
   - by using the look-up icon ⭕
   
   Only the options associated with the newly selected academic program will be available

2. **Plan Sequence**

3. **Requirement Term**

4. **Click the Save button to commit the changes**
**Student Enrollment Information**

Managing the enrollment process includes:

- Enrollment Activities
- Career and Program Information
- Term activation Activities
- Cancellation Activities
- Withdrawal Activities

All aspects of the enrollment process are located within the Records and Enrollment menu. *Remember many pages contain tabs which contain additional information fields*

**Enrollment Activities**

1. Enrollment Activities *(Add, Drop, Swap)*
2. Overrides
3. Student Enrollment Appointments
4. Enrollment Summaries

**Career and Program Information**

1. Student Enrollment Eligibility
2. View Student Groups
3. View Student Career

**Term Activation Activities**

1. Term Activate a Student
2. Term Processing
3. Registration Audit Trail
4. Cancellation
5. Withdrawal
Student Enrollments Activities

**Navigation: Records and Enrollment > Enroll Student > Quick Enroll a student**

This section will cover:

1. Adds
2. Drops
3. Swaps

**ConnectCarolina** provides two separate screens for these enrollment activities:

- **Quick Enroll:**
  The Quick Admit component, Quick Enroll component, and Quick Admit process component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you’ll use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students.

  The Quick Enroll component enables you to enter, update, and post class enrollment requests for both new and continuing students on a student-by-student basis. The Quick Enroll component has the exact same functionality as the Enrollment Request component, using the same enrollment engine processing and performing the same edit checks.

- **Enrollment:**
  The Enrollment component is similar to the Enrollment Request and Quick Enroll components but has some unique features that make it the most powerful component in which to process enrollment transactions.

The information requested and used on these screens is identical.

**Add a new Value**

The ‘Add a New Value’ tab should be used to add or drop taken enrollment steps for the Semester in question. This is the default tab.
To create the student enrollment record:

1. Enter the student’s PID

2. Check to make sure the ‘Academic Career’ is correct.
   If not use the lookup to locate the correct ‘Academic Career’.

3. Enter the Term

4. Click Add to add a new enrollment request.

Enrollment Messages
Enrolling or dropping classes from a student’s record will produce several messages. Below are descriptions of several messages.

- **Pending**: This message shows before the request is submitted.
- **Success**: The modification to the student record is complete.
- **Errors**: Additional actions must be taken to complete the enrollment action. To view the error click on the error message.

Add a Class to a Student’s Record
The next step in the enrollment process is to select a class for a student.

1. From the Quick Enrollment page choose ‘enroll’ from the Action drop down menu to add a class to the student’s record.
2. Enter the 4-digit Class Nbr or use the lookup icon to find the class to add.
3. Click the Submit button to enter the enrollment request in the system.
4. Click Save when you have finished adding courses to the student’s enrollment record.
Quick Enrollment

Drop a Class from a Student’s Record
1. From the Quick Enrollment page choose ‘Drop’ from the action drop down menu to remove a class from the student’s record.
2. Click the check box to select the course to drop and click Return.
3. Click the Submit button.

Swap a Class from a Student’s Record
1. From the Quick Enrollment page choose ‘Swap’ from the action drop down menu to remove a class from the student’s record.
2. Using the ‘Class Nbr’ field, enter the 4-digit Class Nbr or use the lookup icon to find the class to remove the student from.
3. Using the ‘Change To’ field, Enter the 4-digit Class Nbr or use the lookup icon to find the class to swap (enroll) the student into.
4. Click Submit to swap the classes. If the requested class is not available the swap will not take place.

Overrides

Depending on the situation, it may be appropriate to override a student or class restriction to enroll a student into a class. In ConnectCarolina, registration overrides are split into two categories.

The student’s specific overrides are displayed on the General Overrides tab, while the class-specific overrides are on the Class Overrides tab.

1. Enter a student PID and Term.
2. Click Add.
3. Click on the General Overrides or the Class Overrides tabs.
   a. General Overrides

The table below details the General Overrides that are used in ConnectCarolina.

*Note: Not all overrides will be used.*

<table>
<thead>
<tr>
<th>General Overrides</th>
<th>Explanation</th>
<th>SIS Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment</td>
<td>Select to override the student’s enrollment appointment date, time and maximum enrollment units. This enables you to enroll the student in the class on the corresponding row of the enrollment request, regardless of the student’s enrollment appointment.</td>
<td>Override is handled by OUR Staff.</td>
</tr>
<tr>
<td>Available only to OUR staff</td>
<td></td>
<td>Screen 112 Credit Limit.</td>
</tr>
<tr>
<td>Unit Load</td>
<td>Select to have the enrollment engine skip all unit limit checks, including the unit load for the student’s enrollment appointment, the term and session unit load, the term and session course count load, the term and session no grade point average (GPA) units, the term and session audit units and the minimum unit enrollment check.</td>
<td>screen 112 Credit Overload</td>
</tr>
<tr>
<td>Time Conflict</td>
<td>Select to override anytime conflicts between classes when you process the enrollment request.</td>
<td>Screen 104 Time Conflict</td>
</tr>
<tr>
<td>Action Date</td>
<td>Select the date that you want to use as the action date for processing this enrollment transaction. The action date is the effective date for the enrollment transaction. By default, the system uses the current date. When you are processing an enrollment request and you select to override the action date, this field becomes available for edit.</td>
<td>Screen 116 Update Date</td>
</tr>
<tr>
<td>Only OUR Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
b. Class Overrides tab

The table below details the Class Overrides that are used in ConnectCarolina.

**Note:** Not all overrides will be used.

<table>
<thead>
<tr>
<th>Class Overrides</th>
<th>Explanation</th>
<th>SIS Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed Class</td>
<td>Select to allow students to add a class that is closed due to capacity or to override the course’s reserve capacities.</td>
<td>Screen 104 ‘Closed Course’ Override</td>
</tr>
<tr>
<td>Class Links</td>
<td>Select to allow students to add and drop class sections without having to add or drop an associated class, such as recitation or lab. This override also allows student to</td>
<td>In SIS, you could register for the lecture without the recitation, even though they were linked so you must either register for the lecture and all related required components or</td>
</tr>
</tbody>
</table>
enroll in a non-enrollment type section, and to allow multiple student enrollments in a course. This basically ‘breaks’ the link between lectures and related components.

<table>
<thead>
<tr>
<th>Grading Basis Available to OUR staff</th>
<th>Select to allow student to enroll into a class with a grading basis other than the one established for the class. For example you would use this override when a student wants to audit a course.</th>
<th>Screen 184</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Permission</td>
<td>Select to override general requirements. When departments have placed a permission restriction on a course, this override is the equivalent of giving the student permission needed to register for the course.</td>
<td>SIS screen 104</td>
</tr>
</tbody>
</table>

**Enrollment Appointments**

*Navigation: Records and Enrollment > Enroll Students > Quick Enroll a Student*

Locate the Appointment Block area to determine the student group to be used for activation. This information will include start date/time and end date/time.
Enrollment Summary

*Navigation: Records and Enrollment > Enrollment Summaries > Enrollment Summary*

Enrollment Summary gives an overview of enrollment actions in the term you are viewing. The student’s schedule is displayed without drops and swaps.

The enrollment summary will display 3 classes. If there are more classes to view the page will indicate this between the <> navigation arrows. (Example below: “1-3 of 6”)

Click the View All link to view all classes on the same page.
Important fields to review:

1. **Term**: The term for which the following information is displayed.
2. **Career**: Displays the career associated with the term.
3. **Class Nbr**: The class number is the unique number used for a class in term enrollment.
4. **Subject**: The subject and title of the class is displayed.
5. **Catalog**: The catalog number associated with the class is displayed.
6. **Grading Basis**: The grading basis for the course indicates how the course will be graded. This information will only be available to University Registrar staff.
Career and Program Information
The career and program information covered in this section includes:

Navigation: Records and Enrollment > Career and Program Information >

- Student Term Search/Enrollment Eligibility
- Student Groups
- Student Career
**Enrollment Eligibility**

*Navigation: Records and Enrollment > Career and Program Information > Student Term Search*

This page will determine if a student is eligible to enroll in a given term.

---

**View Student Groups**

*Navigation: Records and Enrollment > Career and Program Information > Student Groups*

Student Groups allow for the tracking of student based on a group or classification they belong to. Student Groups are used campus-wide to facilitate different offices tracking the same group of students.

Enrollment groups *(displayed in the list below)* are determined by terms in residence. These groups determine a student’s enrollment appointment time. A batch process is run to assign students to new enrollment groups each term, prior to term activation.
View Student Career

Navigation: Records and Enrollment > Career and Program Information > Student Career

This menu provides an overview of each term for which a student was enrolled and their enrollment status for that term. Historical enrollment activity will not be visible on this screen until fall 2010.
Activation Activities

Navigation: Records and Enrollment > Student Term Information > Term Activate a student

Each term, activating students is a prerequisite process for enrolling students, posting transfer credit, and calculating tuition. In other words, Term Activation makes a student eligible to register in a semester. The process makes a student record ‘active’ for the term.

The ‘Term Activate a Student’ page contains several tabs that are useful in maintaining a student's career term record or activating a student for a term.

Maintain a student's career term record or activate a student into a term.

Tabs:
- Term Activation
- Enrollment Limit
- Student Session
- Terms in Residence
Terms in Residence

Navigation

*Records and Enrollment > Student Term Information > Term Activate a Student*

Enter a PID in the Search page.

Click on Terms in Residence Tab.

Locate the ‘Cumulative in Residence Terms’ and check the value.
View Academic Standing

Navigation:
Records and Enrollment > Student Term Information > Term History

Click the Academic Standing tab.

Locate the Formal Description field.

View Registration Audit trail

Navigation: Records and Enrollment > Enroll Students > Enrollment Request

Previous enrollment requests for a student can be used as a registration audit trail, like the SIS screen 159. All enrollment requests can be viewed by clicking through enrollment requests, with the exception of enrollment requests done through block/mass enrollment.

You can detail in on each enrollment request to see what action was taken, what overrides were used and any additional information that was changed by a transaction. If the request has a message or error attached to it, you can also see the messages and errors, along with the date and time of the request. If the request is successful without messages/errors, the date/time is not included. If you need this information, you can call the OUR and the information can be provided.
Locate the Enrollment Request

1. Click on ‘Find an Existing Value’ tab.

2. Enter the Student’s PID in the EMPLID field.

3. Enter the Term.

Select the Enrollment Request to View

A listing of enrollments performed at various times is displayed at the bottom of the screen.

These enrollments are grouped together by when the enrollment request was performed in the system.

The enrollment request groupings are organized with higher enrollment request being the more recent in the system.

Review the Enrollment Request for Specific Information

If there was more than one class submitted with the individual enrollment request, you can click through the records to see each class.
If additional information is needed, such as the user making a specific change, the Office of the University Registrar (OUR) can be contacted to run a custom query to obtain the information.
Glossary

Academic Career
In ConnectCarolina Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

Academic Institution
An individual university or college, working with the same course catalog and showing on the same transcript

Academic Plan
is an area of study (such as a major, minor, or specialization) that is within an academic program or within an academic career.

Academic Program
The Academic Program for the student is a collegiate unit or its equivalent within the University of North Carolina – Chapel Hill system.

Academic Sub-Plan
An area of further specified study tied directly to a plan.

Action Date
The date the Program Action was actually entered.

Action Reason
Indicates why a specific Program Action was taken.

Bio /Demo
Biographical and demographic person data, such as name, ethnic code, and address.

Campus Community
The single system of record for all person data (students, faculty, staff, alumni, external organizations). Data is shared across systems (Student Admin/HR).

Class Number
Number assigned to a course that appears in the Course Catalog. You do type this in. For instance, for MTH 201, the number "201" is the Catalog Number.

Effective Date
Date the Program Action is effective.

A method of dating information in ConnectCarolina Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it
actually goes into effect. By using effective dates, you don’t delete values; you enter a new value with a current effective date.

The effective date is usually the first day of the term you wish to make the change effective or the day before the beginning of the term when placing students on leave or discontinuing. This may be different from the Action Date.

**EmplID**
ConnectCarolina’s person identifier—ConnectCarolina ID across the UH System

**Matriculation**
The student is ready to enroll. As soon as the student has been accepted and paid their enrollment deposit first, they are ready to enroll.

**Page**
A screen in which data is entered and/or displayed. Pages let users view, change, or add data.

**Plan Sequence**
The Plan Sequence determines in which order the Degree Progress Report will evaluate a Plan. E.g., Plan Sequence 10 should be the major, so it would be evaluated before a minor.

**Program Action**
Identifies a change to a student's Program. Tracks the student's career from application through graduation, including changes in major, leaves of absence, and application for graduation.

**Program Plan**
During the Admission Matriculation process, a Student Program record is created that includes the student’s college and major. Fields on the Program/Plan component will populate from the Admissions pages. This is the process that creates an academic record for the student in the form of a career, program, plan and sometimes a sub-plan. Additional information about the student's career is also created as part of matriculation: admit term, requirement term, catalog year and academic load. After matriculation staff may modify this information through the use of the Program/Plan component.

**Program Stack**
A program stack is the entire history of what a student has taken during their tenure at UNC-CH.

**Search Match**
The process of searching to determine if a record already exists for a specific person. This process should always be performed before entering a new record into ConnectCarolina in order to avoid duplicate records.

**Service Indicator**
In ConnectCarolina Enterprise Campus Solutions indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from
receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

**Stack**
Rows of data showing a progression of transactions.

**Student Plan Page**
The Student Plan page indicates a history of all majors and minors for a program. Information contained on this page will be created during the admissions matriculation process or through a quick admit and will be modified when students change, add or drop majors and/or minors. Any change to the Student Plan page should be indicated on the Student Program page with a Program Action of Plan Change.

**Student Program Page**
The Student Program Page is used to indicate a collegiate unit and a student’s high-level relationship (status) within that unit. A student’s program status will indicate their status standing within the program such as Active, Discontinued or other status.

**Student Sub Plan**
An area of further specialized studies directly within an academic plan. Sub-plans must be tied to Plans.

**Term**
A combination of the semester and year that the university divides the calendar year into. At CMA, we offer and Fall and spring semester, and, in the past, a summer term.

**Term Activation**
A process that permits students who are qualified to register for the next term.
**SIS to ConnectCarolina**

**About this Document:**

This document maps common student records tasks in SIS with the corresponding actions in ConnectCarolina. This document should only be accessed by University Registrar staff. If campus faculty and staff need access please see the SIS to ConnectCarolina campus version.

**How to use this document:**

Locate the action you want to perform in ConnectCarolina.

<table>
<thead>
<tr>
<th>Action</th>
<th>SIS</th>
<th>ConnectCarolina</th>
<th>Screen Shot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look up a student record using name</td>
<td>Screen 002 102 202</td>
<td>Search screens are attached to most pages in ConnectCarolina.</td>
<td><img src="image" alt="Search Screen" /></td>
</tr>
<tr>
<td>View/Modify Student Addresses</td>
<td>Screen 003</td>
<td><em>Campus Community</em> &gt; <em>Personal Information (student)</em> &gt; <em>Biographical (Student)</em> &gt; <em>Addresses/Phones</em> &gt; <em>Addresses</em></td>
<td><img src="image" alt="Address Screen" /></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select a type of address by checking the address type and click submit.</td>
<td></td>
</tr>
<tr>
<td>Basic Bio Demo</td>
<td>Screen 007</td>
<td>Campus Community &gt; Personal Information (student) &gt; Biographical (Student)</td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>-----------</td>
<td>-------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Foreign Student Data</td>
<td>Screen 009</td>
<td>Campus Community &gt; Personal Information (Student) &gt; Identification (Student) &gt; Citizenship</td>
<td></td>
</tr>
<tr>
<td>View family, emergency contacts and relationships</td>
<td>Screen 013</td>
<td>Campus Community &gt; Personal Information (student) &gt; Biographical (Student) &gt; Relationships</td>
<td></td>
</tr>
<tr>
<td>View/modify active and inactive stops(service indicators) for students</td>
<td>Screen 017 112 119</td>
<td>Campus Community &gt; Service Indicators (Student) &gt; Manage Service Indicators</td>
<td></td>
</tr>
</tbody>
</table>

**Screen Effective FALL 2010**

Currently (as of 3/1/2010) emergency contact name and/or number can be updated in student central.

IMPORTANT: You can only add/delete Service Indicators for which you have security access.
<table>
<thead>
<tr>
<th>Task</th>
<th>Screen Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>View additional information on individual service indicators</td>
<td>02s</td>
</tr>
<tr>
<td><strong>Campus Community &gt; Service Indicators (Student) &gt; Manage Service Indicators</strong></td>
<td></td>
</tr>
<tr>
<td>Click the link on Service Indicator Code for additional information.</td>
<td></td>
</tr>
<tr>
<td>Display a list of all sections of a course</td>
<td>105</td>
</tr>
<tr>
<td><strong>Curriculum Management &gt; Schedule of Classes &gt; Class Search</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the Course Subject Code and Course Number and click search</td>
<td></td>
</tr>
<tr>
<td>Click the link for each course to view the open seats, enrollment limit, etc.</td>
<td></td>
</tr>
</tbody>
</table>
| View a Class Roster | Screen 107 | *Curriculum Management > Class Roster > Class Roster*

Click on Enrollment Status to select the type of student roster to display.

The Registrar’s office and other campus departments will have access to this quick class roster option.

| View the Wait List | Screen 108 | *Curriculum Management > Class Roster > Class Roster*

Enrollment Status = Waitlist

| View Student’s Schedule | Screen 109 | *Records and Enrollment > Enroll Student > Quick Enroll a Student*

Click on Study List to view a full list of the student’s class schedule

The student schedule will also be viewed from the Student Services Center (Student). This feature will be available in Fall 2010.

*Campus Community > Student Services Center*
<table>
<thead>
<tr>
<th>Activity</th>
<th>Screen</th>
<th>Directory Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and Drop Courses</td>
<td>104</td>
<td>Records and Enrollment &gt; Enroll Student &gt; Quick Enroll</td>
<td>quick enrollment screen showing options for add and drop courses.</td>
</tr>
<tr>
<td>View Student's Registration</td>
<td>104</td>
<td>Records and Enrollment &gt; Enrollment Summaries &gt; Enrollment Summary</td>
<td>View a student's enrollment summary screen showing how to view all records.</td>
</tr>
<tr>
<td>View a student's Enrollment Appointment</td>
<td>112</td>
<td>Records and Enrollment &gt; Enroll Students &gt; Quick Enroll a Student</td>
<td>Click on enrollment appointments. Alternate path: records and enrollment &gt; term processing &gt; appointments &gt; student enrollment appointment.</td>
</tr>
<tr>
<td>View grades by term</td>
<td>113</td>
<td>Records and Enrollment &gt; Student Term Information &gt; Student Grades</td>
<td>Course history with grades will be available in ConnectCarolina starting October 2010, under “Student Grades”.</td>
</tr>
<tr>
<td>Task</td>
<td>Screen</td>
<td>Steps</td>
<td>Image</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------</td>
<td>-----------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>View/Change effective drop and enrollment dates</td>
<td>116</td>
<td>Click the General Overrides tab</td>
<td></td>
</tr>
<tr>
<td>Graduation Checkout</td>
<td>117</td>
<td>Records and Enrollment &gt; Quick Enroll &gt; Find Existing Value</td>
<td></td>
</tr>
<tr>
<td>Academic Statistics</td>
<td>118</td>
<td>Records and Enrollment &gt; Student Term Information &gt; Term History &gt; Cumulative Stats</td>
<td></td>
</tr>
<tr>
<td>View degree application</td>
<td>120</td>
<td>Records and Enrollment &gt; Graduation &gt; Student Degrees</td>
<td></td>
</tr>
<tr>
<td>View all degrees earned by student</td>
<td>Screen 123</td>
<td>Records and Enrollment &gt; Graduation &gt; Student Degrees</td>
<td></td>
</tr>
<tr>
<td>------------------------------------</td>
<td>------------</td>
<td>------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Course and Class Information</td>
<td>Screen 125 129 134 132</td>
<td>Curriculum Management &gt; Schedule of Classes &gt; Class Search</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maintain Schedule of Classes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Check Class Restrictions | Screen 143 | Curriculum Management > Schedule of Classes > Maintain Schedule of Classes  
Also known as Reserve Capacities This will available by 4/12/2010 |
|--------------------------|-----------|------------------------------------------------------------------|
| Block Enrollments        | Screen 150 152 153 | Records and Enrollment > Enroll Students > Block Enrollment  
1. Create Class Block  2. Create Student Block  3. Block Enroll Merge |
| View Transfer Credits    | Screen 159 | Records and Enrollment > Transfer Credit Evaluation > External Education |
| View registration audit trail | Screen 159 | Records and Enrollment > Enroll Students > Quick Enroll a Student  
View Existing Enrollment Request Information and click on the enrollment request for additional information  
**The OUR will have the registration audit trail in query form** |
| Verification of Enrollment | Screen 191 | Records and Enrollment > Student Term Information > Term History |
|--------------------------|-----------|-----------------------------------------------------------------
| This action is a combination of viewing the Term History and the Program/Plan Information. |

| View Student Athlete Data | Screen 194 | Campus Community > Personal Information (student) > Participation Data (Student) > UNC Athletic Participation > Student Athlete Maintenance > Athletic Participation Tab |
|---------------------------|-----------|-----------------------------------------------------------------
<p>| If “Athletic Participation” = ACTV (or Active), the registration Add/Drop form requires Athletic Advising Approval |</p>
<table>
<thead>
<tr>
<th>View Cancellation or Withdrawal</th>
<th>Screen 111 104 Reapply flag on Screen 112</th>
<th>Records and Enrollment &gt; Student Term Information &gt; Term History Select Term Withdrawal Tab</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>View Application Status – Intent to Enroll</th>
<th>Screen 223</th>
<th>Records and Enrollment &gt; Career and Program Information &gt; Student Program/Plan The last record in the stack should contain the MATR (Matriculation) record which equals Intends to Enroll (IE)</th>
</tr>
</thead>
</table>