Connect CAROLINA

Student Records Training
Block Enrollment
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Summary
This document introduces ConnectCarolina users the functionality that allows staff to enroll groups of students into one or more classes.

Objectives
At the conclusion of this training, you will be able to:

- Create a student block
- Create a course block
- Merge the student block with the course block
- Handle overrides for students in a block enrolled class
- Retrieve the results of the block enrollment process
- Search for previously processed block enrollments
Block Enrollment Background
The Block Enrollment feature used by the ConnectCarolina system allows authorized UNC-CH staff to:

- Create a block of students using their PIDs
- Create a block of one or more classes
- Merge the two to create a single enrollment request

This process can be used instead of the one-by-one approach used in Quick Enroll.

After merging a student block with a course block, you can retrieve and review the details resulting from the enrollment request and adjust any enrollments that were not successfully processed.

Block Enrollment Naming Convention
IMPORTANT: The Naming Convention used for Block names is not controlled by security.

1. Block Names are viewable/editable by all users on campus.
2. Block Names are not deleted through any regular cleanup process.

These two conditions make it important for everyone to:

1. Use a consistent naming pattern.
2. Minimize the number of blocks created.
3. Re-use existing blocks that you yourself have created from one term to the next.

Block names are restricted to five (5) characters.

When creating your blocks, use your School abbreviation as the first two characters.

Example:
If your department is in the College of Arts and Sciences, your block will begin with AS. If you are in the School of Public Health, your block will begin with PH.

These are the same abbreviations used for student Programs, such as ASBA or PHMPH.

The second two characters in the block name should represent your program, and the last character will be a number. This number can be from 0 to 9.
Example:
If you are creating a single block for the Women’s Studies program, the name would be ASWS1. If the MD program within the Medical School needed 9 blocks, they would be named SMMD1, SMMD2.

You can enter more specific information, such as the term, in the block description. The description can be changed at any time.

Outline of Block Enrollment Process

Step 1: Create a Class Enrollment Block
Step 2: Create a Student Block
Step 3: Merge the Class Enrollment and Student blocks
Step 4: Review the Results of the Merge
Step 1 -- Create a Class Enrollment Block

1. Navigate to the Create Class Block page.
2. Click the Add a New Value tab.
3. Enter a name for the new class enrollment block.
4. Click the Add button.

**Note:** If a block exists by the name you enter, you will be notified and given the option to proceed or choose a different name.

**Important:** To reuse an existing class block, from the Find an Existing Value tab, enter a name for the new block, and click the Search button.

If you do not remember the name of a previously created block, type your School abbreviation (AS, PH, etc.) into the Class Enrollment Block field and click the search button.

This will display the list of all blocks associated with your school abbreviation.

5. Complete the required fields on the Create Class Block screen. *(If reusing a block, delete out the information first, and start re-enter with the new information.)*

   A. Enter a description of the new block.
   B. Enter the term.
   C. Lookup the course number (same as in Quick Enroll).
   D. Check for overrides.
      - If the class requires permission, we recommend that you check ‘Class Permission at this point.
      - If the class is full or has a reserve capacity that you want to override, check ‘Closed Class’ at this point. Note that if you check this, you will override the enrollment limit and reserve capacity for all students in the student block.
6. Additional courses can be added to the block by clicking the + button.

7. Click the **Save** button when finished configuring the class enrollment block.

**Step 2 -- Create a Student Block.**

*Records and Enrollment >> Enroll Student >> Block Enrollment >> Create Student Block.*

1. Navigate to the **Create Student Block** page

2. Click the **Add a New Value** tab.

3. Enter a name for the new Student block.

Use the same naming convention for the student block as you used for the class block.

*Note: If a block exists by the name you enter, you will be notified and given the option to proceed or choose a different name.*

*Important:* To reuse an existing student block, from the Find an Existing Value tab, enter a name for the new student block.
If you do not remember the name of a previously created block, type your School abbreviation (AS, PH, etc.) into the Student Enrollment Block field and search.

This will display the list of all blocks associated with your school abbreviation.

4. Add Students to the block

   A. Enter a description of the new block.
   B. If you are reusing a block, delete all previous rows of student PIDs (Use the - button).
   C. Click the + sign to add new rows for each additional student PID.

   ![Image of Block Enrollment Students]

   **Note:** Do not use the Lookup icon for ID. The search will take too long, as it scans the entire PID database.

5. Click the Save button when finished configuring the class enrollment block.

6. Locate the Add Merge Process link to begin merging the class block and the student block.

   **Alternate Path:** Records and Enrollment >> Enroll Student >> Block Enrollment >> Block Enroll Merge
Step 3 – Merge the Class block with the Student block

1. Use the lookup icon to find the name of the student block and the class block.

2. Click the merge button.

3. Click the submit button.
   This will process the enrollment request.
Step 4 – Review the results of the enrollment

1. To review the results of the enrollment, click the Retrieve button.

2. The retrieve function will display a summary status for each student in the Block Enroll Detail tab. It provides the same information as the Quick Enroll process.

3. Make sure to record the Enrollment Request ID number for future reference.

4. Check the Status column to determine if the merge was a success or if there are errors present. If the status is Success or Messages, the enrollment request was successful. If the status is Errors, the enrollment request was not successful.

5. To review the detailed information on each student’s enrollment click the Detail link on the right of the screen.

6. The Block Enroll Details screen will display information about the merge.

7. Locate the Messages area to view a detailed explanation of the result of the merge.

8. Resolve any enrollment errors, if appropriate.
### Student Records: Block Enrollment

**Enrollment Request ID:** 0017583788

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<thead>
<tr>
<th>Seq #</th>
<th>Action</th>
<th>Class Nbr</th>
<th>Grading Basis</th>
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<tbody>
<tr>
<td>1</td>
<td>Enroll</td>
<td>4883</td>
<td>GRT</td>
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<tr>
<td></td>
<td>Reason</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Session</td>
<td>NATIVE NORTH AMERICA</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Undergrad</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Related 1**

| Units Taken | 3.00 |

**Related 2**

**Permission**

<table>
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<tr>
<th>Action Date</th>
<th>Access ID</th>
<th>Advanced Enrollment</th>
<th>Caree</th>
<th>Dynamic Dates</th>
<th>Grading Basis</th>
<th>Units Taken</th>
<th>User ID</th>
<th>Service Indicator</th>
<th>Time Conflict</th>
<th>Unit Load</th>
<th>Wait List Okay</th>
</tr>
</thead>
</table>
How to Resolve Errors
If you receive errors in the status field after a merge you will need to:

1. Click on the DETAILS from the retrieve results page.
2. Check the override that is appropriate to resolve the error and save.
3. Go to the Block Enroll Merge tab, and resubmit the request by clicking the Submit button.
4. Retrieve the results of the request.
**Enrollment Overrides**
Below are explanations of some commonly used overrides. If you have questions on other overrides, please contact the Registrar’s Office for clarification.

**General Overrides are “student” specific:**

![Image of enrollment override interface]

**Time Conflict:** Dept. staff have access, if they previously had access. By checking this override, it allows you to enroll the student in two courses with a time conflict.

**Action Date:** *OUR only.* The OUR uses this field to change an effective date of an enrollment request. If a department submits a registration drop form, with a different effective date, the OUR will enter the appropriate effective date in this field. Department staff will be able to view the effective date that was entered.

**After Fall 2010: Requisites:** Dept. staff have access. By checking this option, it allows you to enroll a student in a class where the student does not meet one of the prerequisites for the class. One nice feature about PS, is that it is capable of enforcing pre-requisites to classes. We are not enforcing this for Fall 2010, but will in the future.

**Class Overrides are “class” specific:**

![Image of class override interface]

**Closed Class:** Dept. staff have access, if they previously had access. By checking this override, it allows you to enroll the student in a class that is already full (has reached the enrollment limit). This is if you want to override the enrollment limit, without changing the enrollment limit. Otherwise, you could go to Curriculum Management and actually increase the number of seats in the class – whichever business process is appropriate for your dept. Closed Class override is also used to override a Reserve Capacity for the class.

**Class Links:** Dept. staff have access. One nice feature of PS, is that the system enforces the link between a lecture and related components. By checking this override, it allows you to break the link between the lecture and related component (recitation, lab, etc.) and enroll the student in just the lecture. Remember, that if you “break” this link, though, you’ll need to keep track of getting the student into the recitation.
**Class Permission:** Dept. staff have access, if they previously had access. Formerly known as “Controlled Enrollment” in SIS, in PS there is the option to set the class to require permission. By checking this option, you are giving the student permission to take the class.

**Waitlist Okay:** Dept. staff have access. This is a little confusing, because it’s not an actual override. If the class is set up to have a waitlist, and you want to place the student on the waitlist if the class is closed, you check this before submitting the enrollment request.

**Waitlist Pos:** After placing the student on the waitlist, you can click this link to see what position they are on the waitlist.
**Student Records: Block Enrollment**

**Tips for Block Enrollment:**

1. A Plan that contains a list of student PIDs and the courses they will be enrolled should be created before creating blocks. Block enrollment works best when a merge is performed only once.

2. If a student is overlooked when creating the Student Block or if a new student is added after the merge, use Quick Enroll.

3. If an error is received for any of the students on the merge process, correct the problem and then, use the Enrollment Request ID number to open the previous block enrollment. Submit the request again and then retrieve. The row associated with that student should be successful unless he/she had more than one (1) enrollment error.

4. After the merge process is complete, go to the class roster (Curriculum Management > Class Roster) and verify that all students were actually registered in all classes.