ConnectCarolina

Student Records Training

Summary

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

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

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.

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.

Important: 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:

- **ID**: 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**:
  - 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.

- 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.

Note: 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 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.

How to Search for Classes using the General Education Requirements

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

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

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.

Click the icon to add a new General Education Requirement criteria

– OR –

Click the icon to remove a General Education Requirement criteria

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**)

Student Academic and Enrollment Information

The Academic and Enrollment information covered in this section includes:

- 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

Program/Plan

A student's 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.

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 the completion of a 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

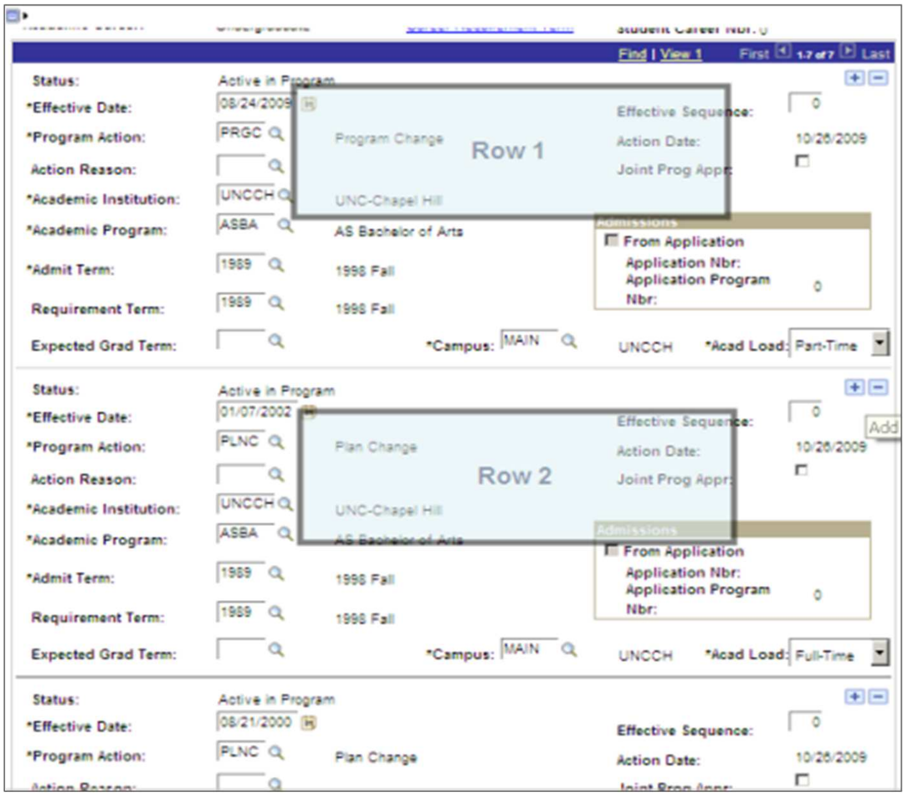
As the student modifies their program/plan during their career at UNC-CH, ConnectCarolina will keep a dated record of those changes. Those changes will be found in one single record that has multiple "rows" of data. Each row of data in the stack is a change in either the Academic program or plan. The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

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.****

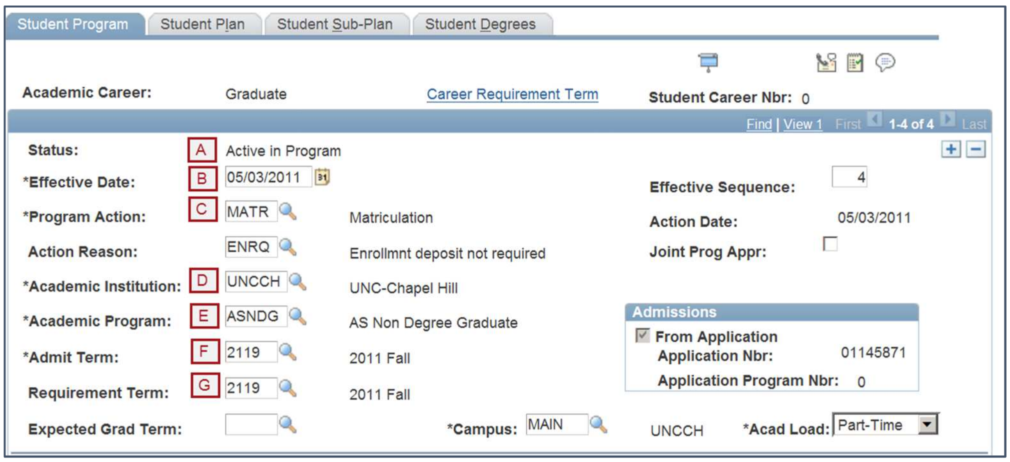
In ConnectCarolina, second majors are designated with a "2nd" classification. So, a student that has declared Psychology (BA) for their second major would have PSYA2nd major code on their plan stack.

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.

Student Program Tab

This tab can be used to view and modify a student's Academic Program (*college*).

Note: 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. Student Information

    - Name and PID
    - Academic Career

2. 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.

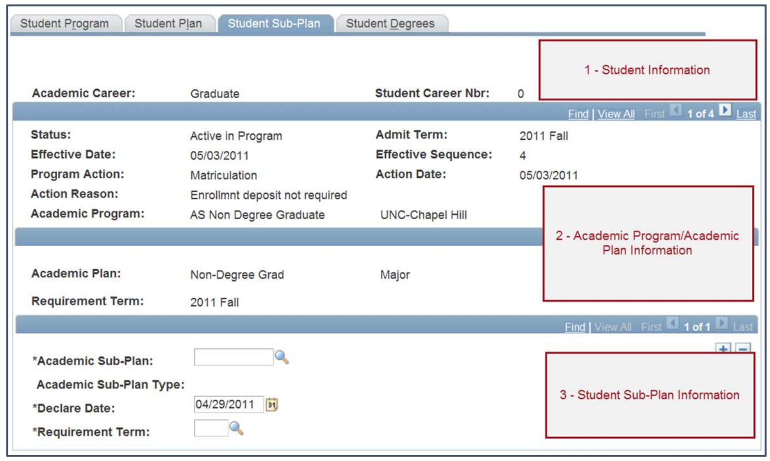
    f. **Admit Term:** The first term of the student's career
    g. **Requirement Term:** The student will be responsible for the program requirements active during this term.

Student Plan Tab

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

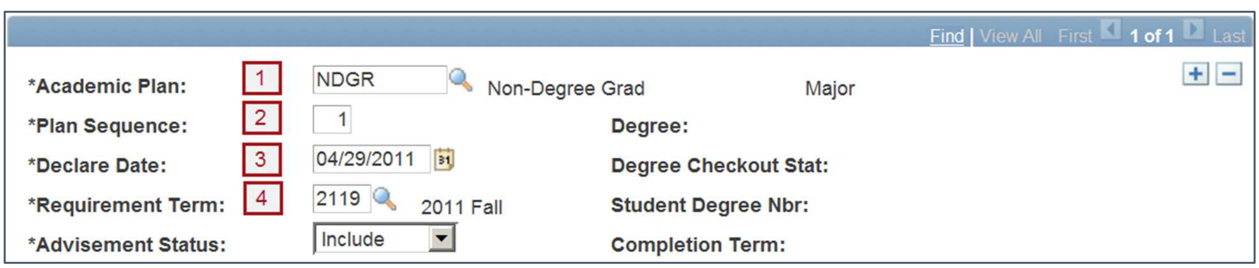
If a student is changing major within the same college (*e.g. History major changing to Sociology*), you will need to change only the plan.

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



1. <u>Student Information</u>
   - Name and ID
   - Academic Career
2. <u>Academic Program Information</u>
   A condensed version of what is on the Student Program tab
3. <u>Academic Plan Information</u>
   The student's major and minor.

- Majors are written as degree/subject. Example: BAANTH = Bachelor of Arts in Anthropology

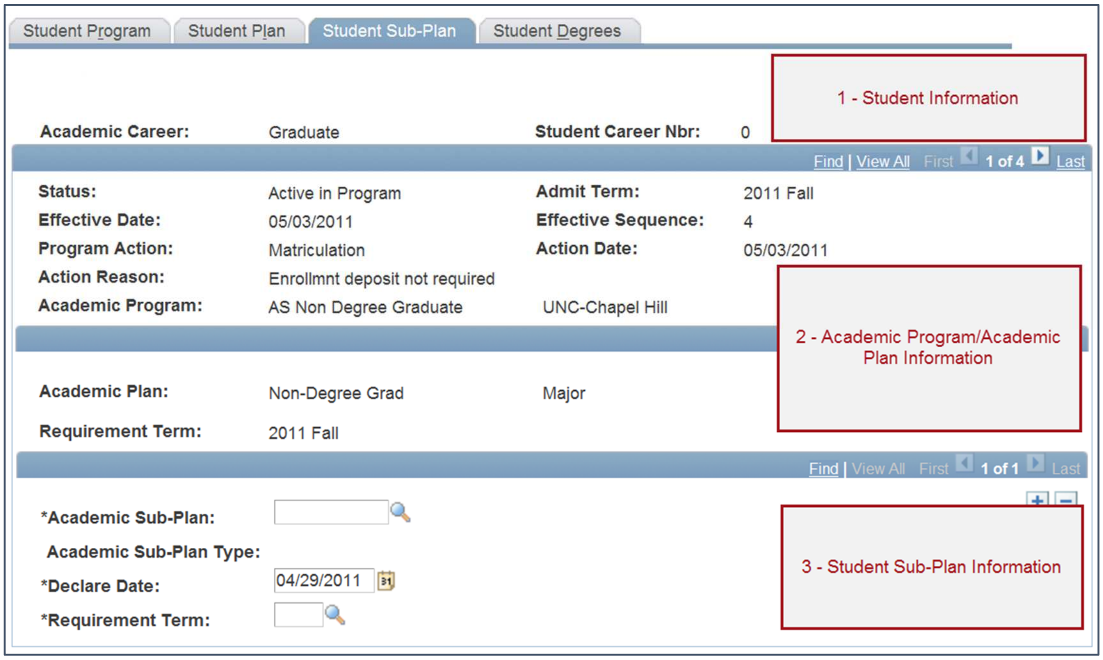


1. <u>Academic Plan</u>
2. <u>Plan Sequence</u>**:** A student's major will carry a lower number than other plans which will carry a higher number (+10)
3. <u>Declare Date</u>
   The date the student declared this major.
4. <u>Requirement Term</u>
   Catalog Year.

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.

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

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.

Enrollment Activities

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.

Enrollment Messages

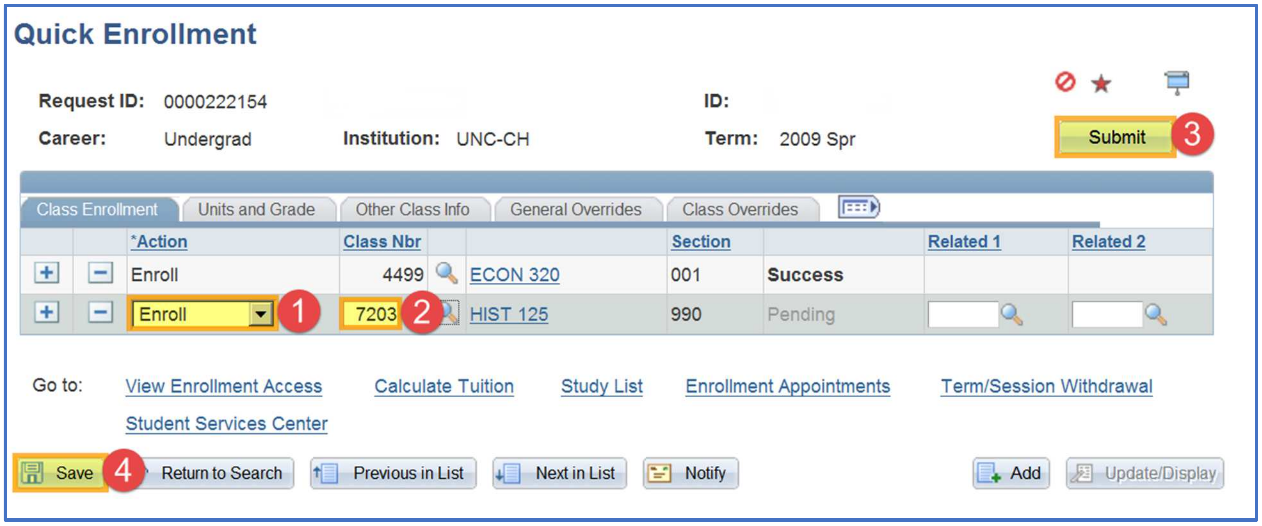
Enrolling or dropping classes from a student's record will produce several messages. Below are descriptions of several messages.

- **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.



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

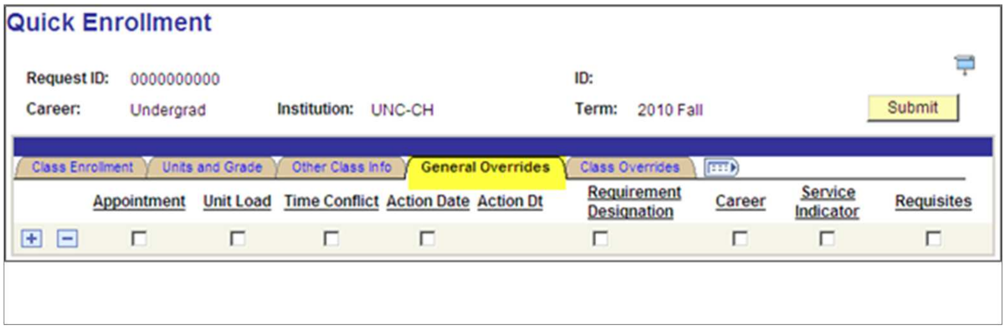
1. From the Quick Enrollment page choose 'Swap' from the action drop down menu to remove a class from the student's record.
2. Using the 'Class Nbr' field, enter the 4-digit Class Nbr or use the lookup icon to find the class to remove the student from.
3. Using the 'Change To' field, Enter the 4-digit 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



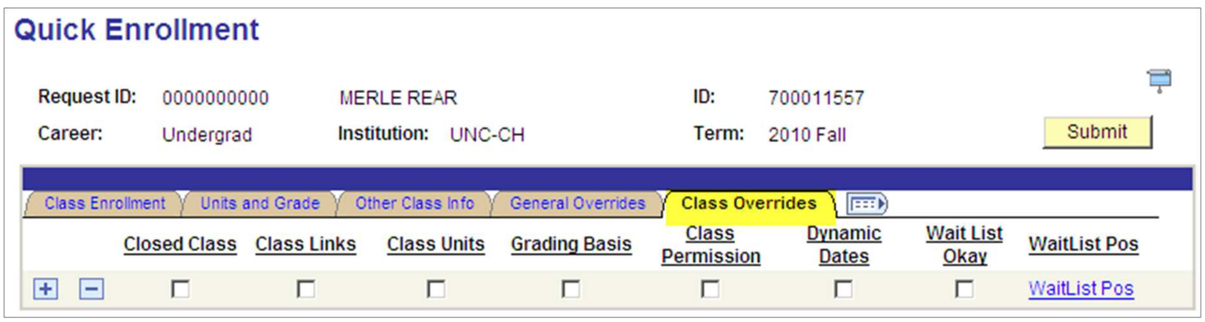
The table below details the General Overrides that are used in ConnectCarolina.

Note: Not all overrides will be used.

General Overrides	Explanation
Appointment *Available only to OUR staff*	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.
Unit Load	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.
Time Conflict	Select to override anytime conflicts between classes when you process the enrollment request.
Action Date *Only OUR Staff*	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.
Career **OUR Staff Only**	Select to override academic career pointers and career pointer exception rules for the student's academic career.

Service Indicators	Select to override service indicators that have been placed on the student's record.
Requisites *This feature is not turned on for Fall 2010*	Select to have the enrollment engine bypass requisite checking when you submit the corresponding row of an enrollment request for processing. This feature is not active for Fall 2010.

b. Class Overrides



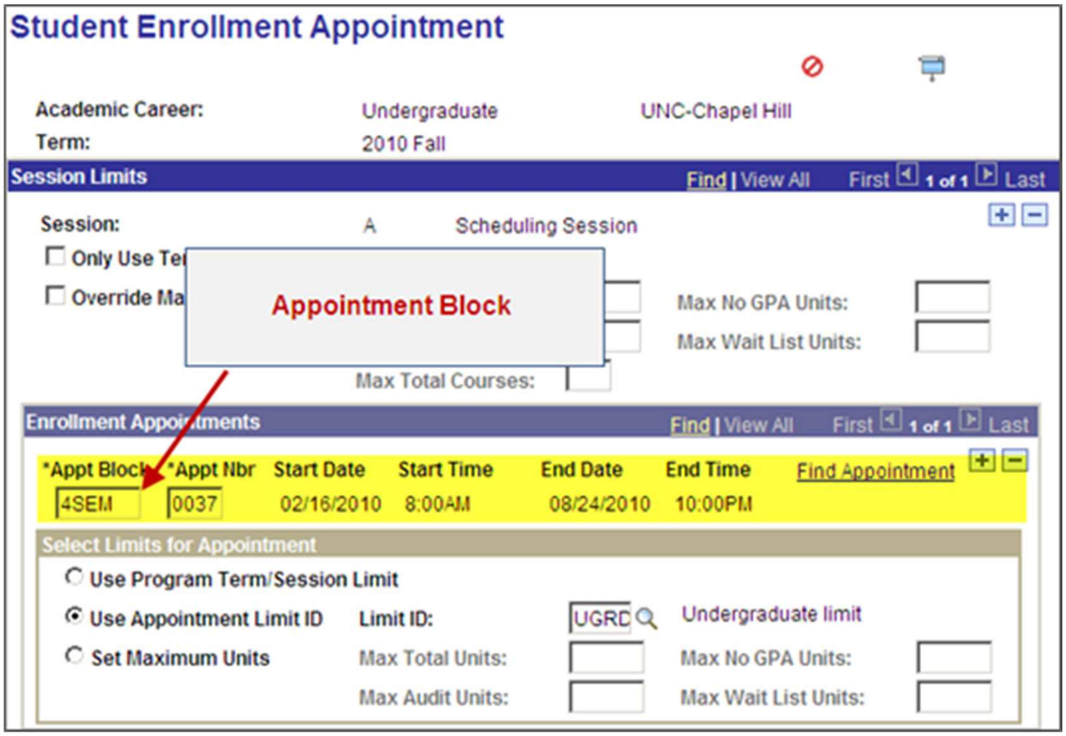
The table below details the **Class Overrides** that are used in ConnectCarolina.

Class Overrides	Explanation
Closed Class	Select to allow students to add a class that is closed due to capacity or to override the course's reserve capacities.
Class Links	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 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.
Grading Basis Available to OUR staff	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.

Class Permission	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.

Enrollment Appointments

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.

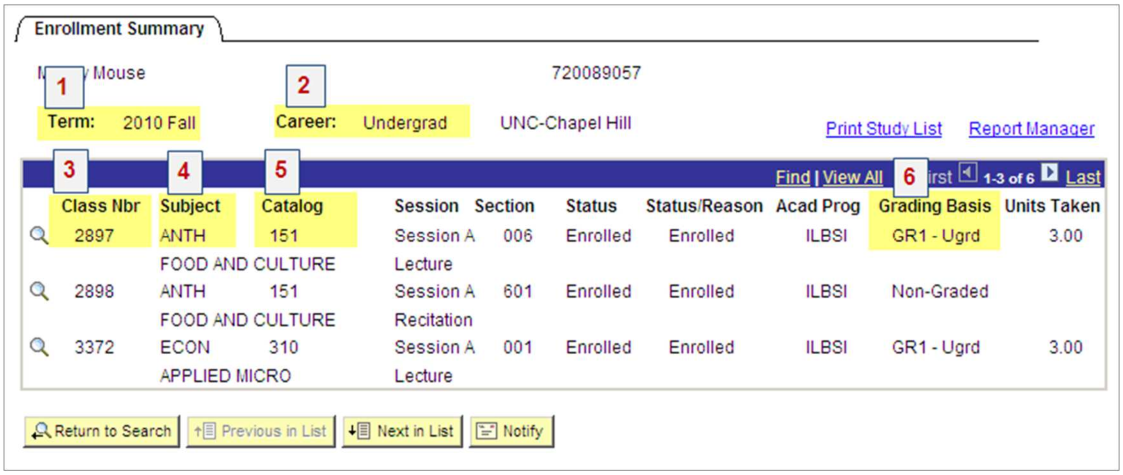


Enrollment Summary

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:

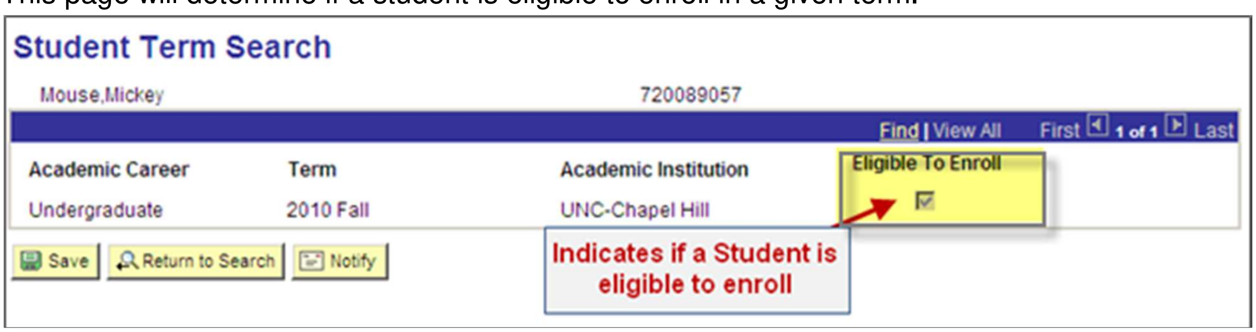
1. **Term**: The term for which the following information is displayed.
2. **Career**: Displays the career associated with the term.
3. **Class Nbr**: The class number is the unique number used for a class in term enrollment.
4. **Subject**: The subject and title of the class is displayed.
5. **Catalog**: 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:

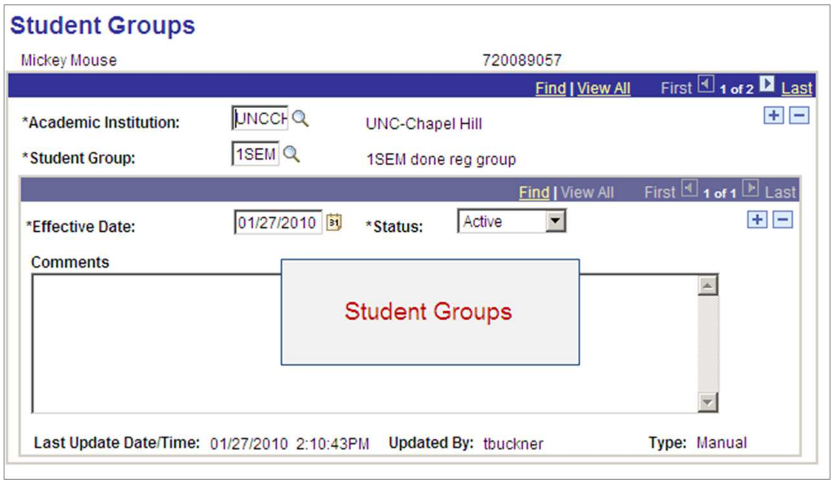
Enrollment Eligibility

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



View Student Groups

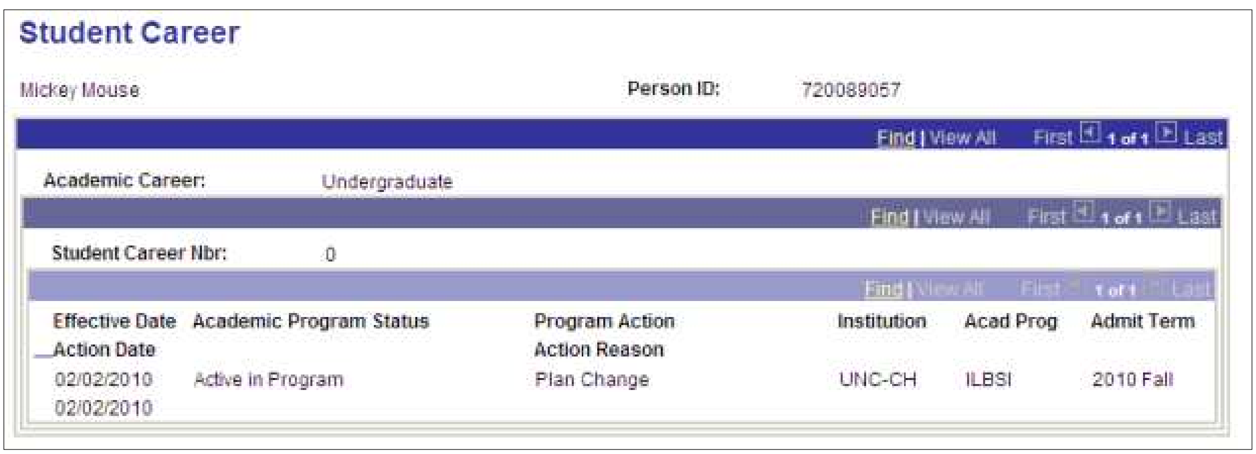
Student Groups allow for the tracking of student based on a group or classification they belong to. Student Groups are used campus-wide to facilitate different offices tracking the same group of students.



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

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.



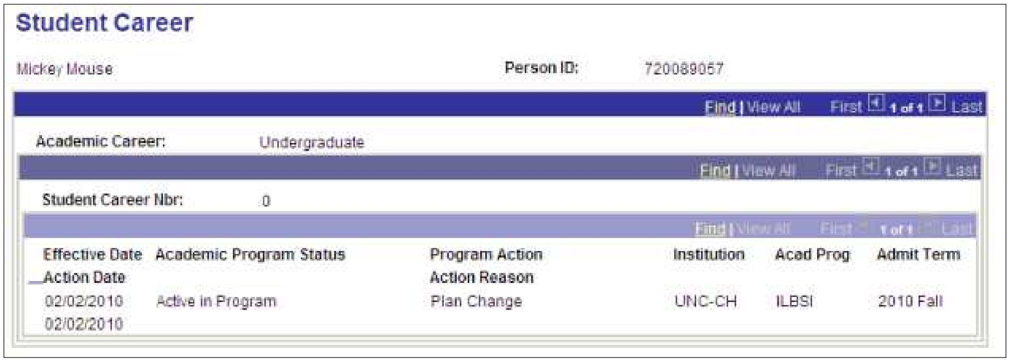
Activation Activities

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.

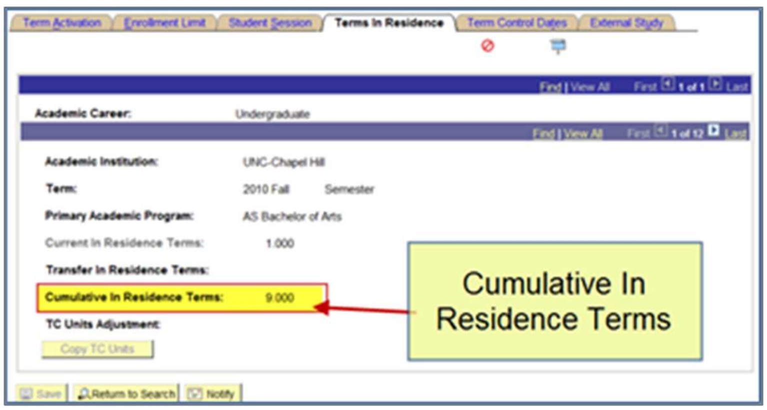
The 'Term Activate a Student' page contains several tabs that are useful in maintaining a student's career term record or activating a student for a term.
Maintain a student's career term record or activate a student into a term.

Terms in Residence

1. Enter a PID in the Search page.
2. Click on Terms in Residence Tab.

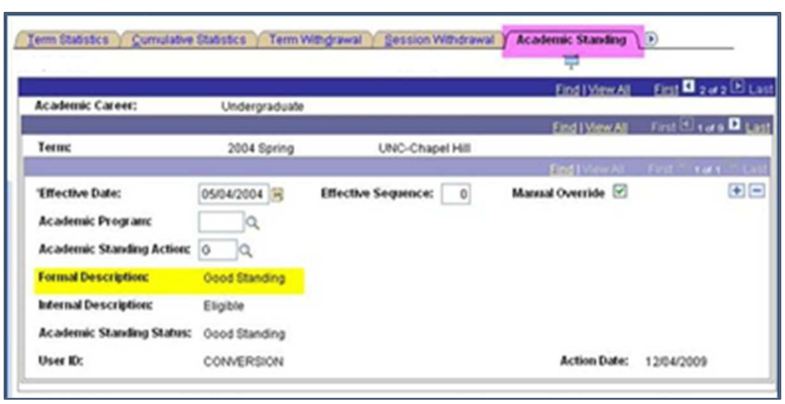


3. Locate the 'Cumulative in Residence Terms' and check the value.



View Academic Standing

1. Click the Academic Standing tab.
2. Locate the Formal Description field.



View Registration Audit trail

Previous enrollment requests for a student can be used as a registration audit trail. 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.

Note: If you need this information, you can call the OUR and the information can be provided

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 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