COURSE SETUP PLAYBOOK

Guidance for Student Services Managers
Updated 7/20/2023

WELCOME!

This playbook was developed as a resource for Student Services Managers as part of the Operational Excellence Course Setup Project. It is not a complete guide to course setup - yet, but the Office of the University Registrar, in collaboration with the Office of Undergraduate Curriculum, will continue adding content to make this a comprehensive resource for Student Services Managers.

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Course Setup Overview

- SSM Course Setup Activities: CSM & Extended CSM
- Year at a Glance Timeline & Tasks

Course Schedule Maintenance (CSM)

The time when Department SSMs have *full* scheduling access in ConnectCarolina

CSM Activities

- Review rolled sections (prior fall semester is copied to the future fall, etc.). This prevents SSMs from having to re-enter data.

- Cancel any sections that won't be used. An opportunity to cancel any rolled courses no longer needed.

- Update these data fields on sections:
  - Mode of instruction
  - Section and class numbers
  - Meeting pattern (days and times)
  - Instructors
  - Consent flags
  - Enrollment capacities
  - Reserve capacities
  - Class notes

- Add new sections to the schedule.

- Make sure combined sections have rolled and are set up correctly

- Make sure non-sponsor units open/close their sections according to combined section offerings for the new term

- Assign any department priority classrooms in 25Live

- For Fall semesters, begin planning for new First-Year seats and new transfers seats to be entered in the customized MOI and Reserve Capacity page when opened.

Extended CSM

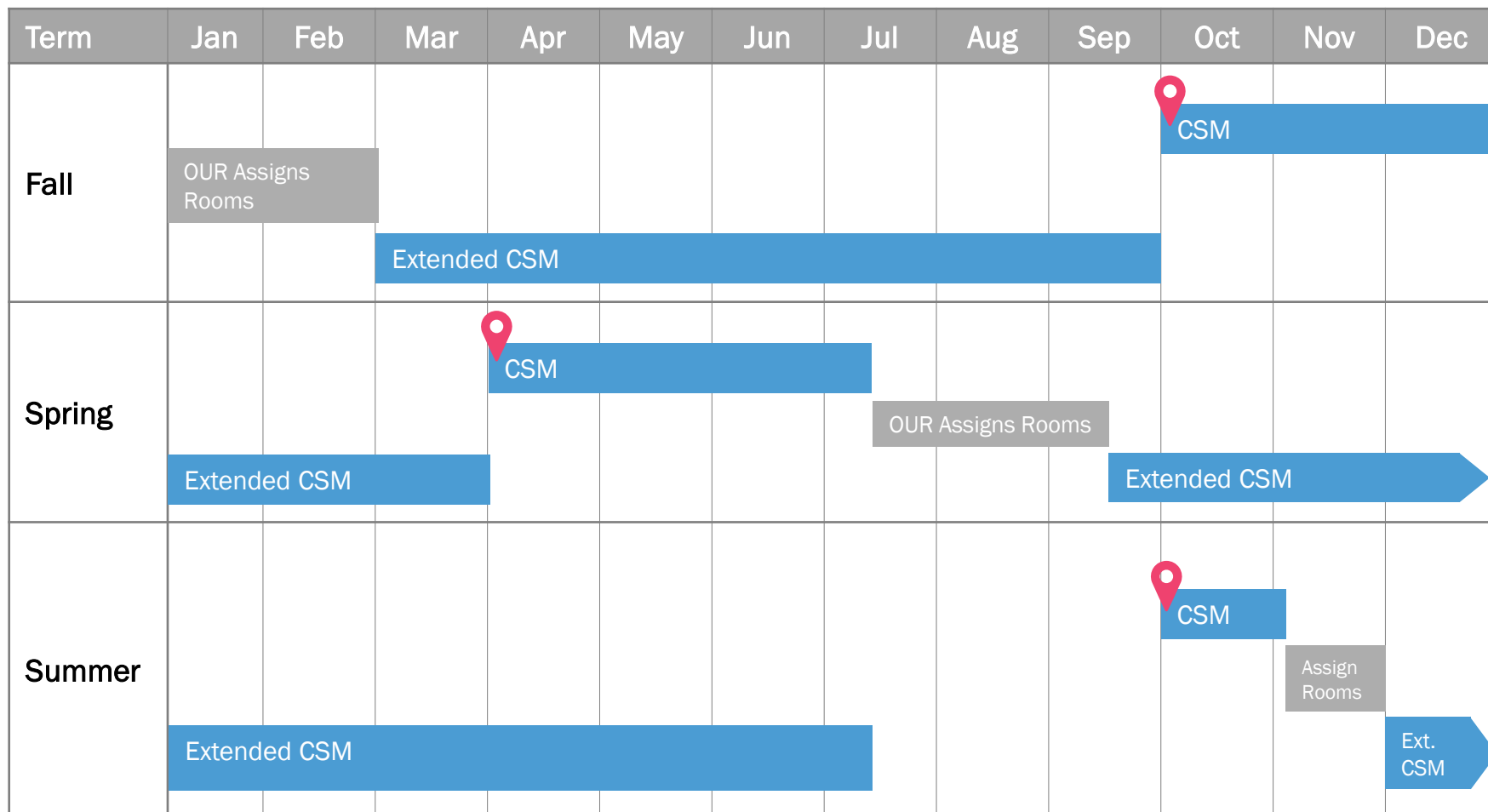The time when Department SSMs have *limited* scheduling access in ConnectCarolina

Extended CSM Activities

- Update these data fields on **scheduled** sections:
    - Instructors
    - Consent flags
    - Class notes
    - Enrollment capacities (must fit assigned room)
    - Reserve capacities

- Submit requests to the scheduling team via Formstack
    - Add or cancel sections
    - Change meeting pattern
    - Change room

- Submit requests to change Mode of Instruction via the MOI & Reserve Capacity page in ConnectCarolina
    - Must be approved by the senior associate dean for the division or dean of the school

- Add any last-minute sections

- Cancel sections due to changes in instructor availability

- Add grad-student teaching assistants to their sections

- Adjust enrollment capacities based on pre-enrollment data or changes to instructor availability

Course Setup – Year at a Glance Timeline

Specific dates available on the Course Schedule Maintenance Timeline

Term	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Fall	OUR Assigns Rooms		Extended CSM							CSM		
Spring	Extended CSM			CSM				OUR Assigns Rooms		Extended CSM		
Summer	Extended CSM								CSM		Assign Rooms	Ext. CSM

📍 Begin course planning for the term

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Course Setup – Year At A Glance Tasks

Specific dates available on the Course Schedule Maintenance Timeline

● Fall
● Spring
● Summer

January	● Fall CSM ends
	● College calls for new First-Year and new transfer seats to be set aside before Fall continuing registration begins
February	● Add Fall NSSR, FYPR & TRF seats, along with expected enrollment for FDOC, to the custom MOI & Reserve Capacity Page in ConnectCarolina
March	● Fall Extended CSM begins and runs through the end of the registration period
	● Continuing student registration opens for Fall
	● Continuing student registration opens for Summer
April	● Spring CSM begins - start planning for Spring term
	● Seat release occurs for Spring
June	● Continuing registration ends for Fall; ConnectCarolina is shut down for new student registration
July	● Spring CSM ends
	● Fall new student registration/seat release begins and continues through the end of new student registration
August	● New student open enrollment followed by all open enrollment
September	● Spring Extended CSM begins
October	● Fall CSM begins - start planning for Fall term, including New First-Year and transfer seats
	● Summer CSM begins - start planning for Summer term
	● Student registration opens for Spring
November	● Summer CSM ends
	● Spring seat release happens on Fall LDOC
December	● Summer Extended CSM begins

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Overview of Options for Controlling Enrollment

- Reserve Capacities
- Instructor or Department Consent (Permission Numbers)
- Pre-Requisites and Co-Requisites

Overview of Options for Controlling Enrollment

There are three major categories of options for controlling course enrollment in ConnectCarolina. Each option has benefits and constraints, which are described in the following sections.

Reserve Capacity	Instructor or Dept Consent	Pre-Requisites & Co-Requisites
• Use when trying to set aside a *portion of a course* for a specific population	• Use when the *whole course* is being vetted by the instructor or dept for enrollment	• Use to set the academic requirements for a course

These methods can be used independently, but there are times when multiple options might be used, based on the needs of the dept and the timing in registration.

Reserve Capacities

- Definition & Application
- Benefits
- Student Experience with Reserved Seats
- Process: Reserving Seats for Continuing Students

Definition & Application

- A Reserve Capacity is a specific population (defined by a plan, class, major, etc.) that you want to reserve seats for
    - You may see or hear reserve capacities referred to as reserve caps or abbreviated as RC.
- Reserve Capacities should be used when trying to set up aside a portion of a course for a specific population.
- You can define any number of reserve capacity groups for a class.
- Reserve Capacity functionality allows you to automate opening and closing the date ranges during which various student populations can enroll in each class section.
- When a student enrollment request is processed, ConnectCarolina will automatically search through the reserve capacities (in sequential order) and place the student in the first group of reserves with an available spot the student qualifies for.

Example

- Psychology 210 wants to reserve 50 seats for majors in the 100-person class.
- During registration, when a Psychology major tries to register for PSYC 210 they will automatically take a seat in the 50-seat major reserve.
- If a student is not in the reserve group, they are eligible for one of the other non-reserved seats

Benefits

- Utilizing reserve capacities allows departments to manage enrollment in specific courses for special populations. (i.e., majors, minors, transfers, new students, etc.)

- The automatic process to release seats removes the manual efforts of many departments.

- Having the automated process ignore LDOC allows departments that would like to hold seats longer to do so.

- As we are trying to create transparency for students, the automatic process removes the need to keep '1' seat in the reserve to cancel out the reserve. This allows for the right number of seats to be shown to students during registration.

Student Experience with Reserved Seats

Information about reserved seats will be available to students for the first time in 2023 spring term registration.
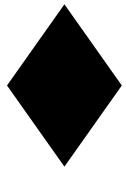
Class Section Status Icon
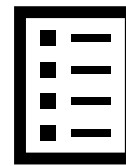
Naming Convention

Class Availability Details

Error Messages

Class Section Status Icon for Reserved Seats

New for Spring 2023 registration

- "Only reserved seats available" icon – purple diamond
- Visible in Class Search and Shopping Cart
- "Closed" icon changed from a blue square to a red square
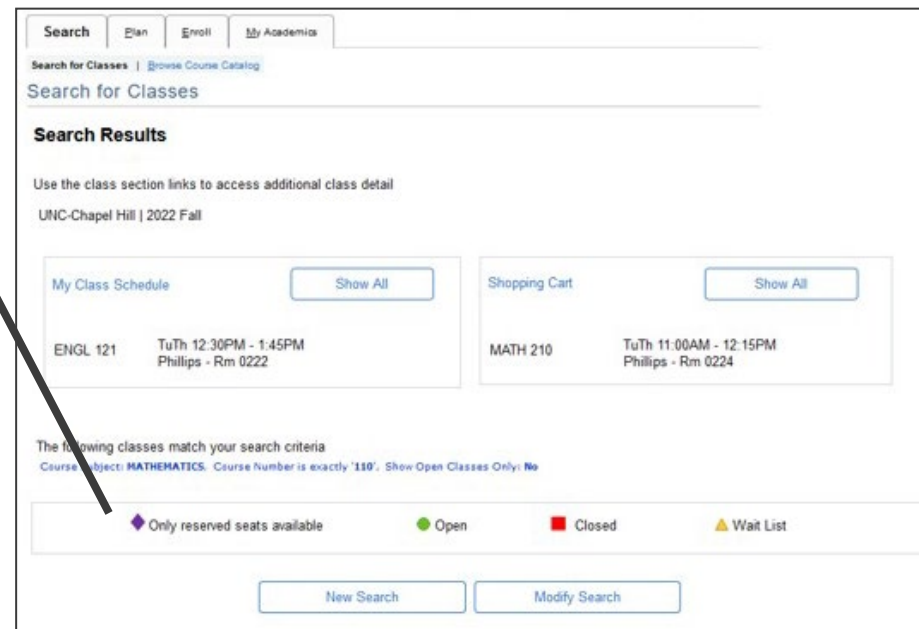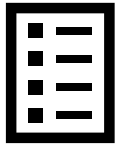
Reserve Capacity Naming Convention

Short Description Naming Convention

- UG or GR
- 4 letter major abbreviations
- Spell out other groups as much as possible
- Major, Minor, Maj/Min

The long description is displayed when you hover over the short description in ConnectCarolina

Examples

Long Description	Short Description
Russian Culture Minor students only	UG Russian Culture Minor
Undergraduate Media and Journalism students	UG MEJO Maj/Min
UGRD BUSI or BUSV Majors Foreign Exchange students	UG BUSI Major Exchange

Class Availability Details

The Class Availability section of the Class Details page lists the number of seats reserved for specific populations. If you hover over the abbreviation, a longer description is displayed and you can determine if you are in that population.

- For example, in the below picture you see "UG EXSS Majors." If you hover over the abbreviation the long description appears as "Undergraduate Exercise and Sport Science Majors."

⚠ Error Message

The error message students receive if they are not able to enroll because they don't meet the reserve requirement has been updated for clarity and to provide direction

Previous	New
You are unable to enroll in this class at this time. Available seats are reserved and you do not meet the reserve capacity requirements.	You are unable to enroll in this class at this time. Available seats are currently reserved and you do not meet the reserve requirements. See class detail page for more information.

Reserving Seats for Continuing Students

The following resources cover how departments can reserve seats for continuing students in ConnectCarolina. There is a separate process for new students.
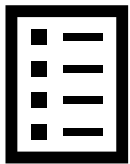
Overview & Tips
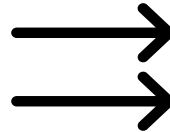
Run Concurrent Reserve Capacities

Create a single reserve capacity sequence
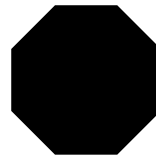
End a Reserve Capacity

Set up consecutive reserve capacities

Seat Release Process

Overview & Tips

ConnectCarolina pathway

- Main Menu
- Student Admin menu
- Curriculum Management
- Schedule of Classes
- Maintain Schedule of Classes
- Populate Class Search
- Reserve Cap tab

- Always ensure that the **Start Date** value is no later than the date registration opens (unless part of a consecutive reserve capacity situation).

- There is no longer a need for depts to release seats. This is done automatically through a cybermated process.

- Reserve capacity requirement groups can run:

  - in chronological order (consecutively), which requires only **one** reserve capacity sequence, and/or

  - concurrently-two date sets running at the same time or overlapping each other-which requires **two** reserve capacity sequences.

- Use consecutive or concurrent reserve capacities but not both.

Create a single reserve capacity sequence

1. Select a group or plan by clicking the **Requirement Group Look Up** button and selecting the item you require.

Use the Description drop down box to quickly narrow your search.

Select "contains" and type a portion of a word such as "anth" if you're looking for anthropology.

Create a single reserve capacity sequence

2. In the Start Date field, enter the date on which the selected requirement group should begin enrolling for the class.

⚠️ Starting a reserve cap **after** registration opens allows students outside the selected group to register for the class before that date

3. In the Cap Enrl field, type the enrollment cap value to assign to the designated group.

4. Click Save to save the group. If you've reserved the entire enrollment cap for one group, you're finished entering data on the Reserve Cap tab.

A reserve cap does not have to match the enrollment cap of the class. You can 'save' any number of seats up to the max enrollment.

Other seats will be open to anyone or to another reserve capacity.

Set up Consecutive Reserve Capacities

Click the **Plus** (+) button adjacent to the **Cap Enrl** field to add a row for a second requirement group. A second row appears.

Follow steps for creating a single reserve cap for the second requirement group, ensuring that when added together the enrollment for the two groups does not exceed the total enrollment cap.

The next group cannot enroll beginning on the same date as the first group. Groups in single sequences can only run consecutively!

In this consecutive RC sequence, all 50 seats are held for ANTH majors beginning at 11:59pm on 4/09/19 (this date is before any registration begins). On 4/23/19 no more seats are held for Anth majors. Of the seats remaining, 10 are held for ANTH minors.

Run Concurrent Reserve Capacities

To have more than one reserve capacity run concurrently

Use the PLUS (+) button to create a Reserve Capacity Sequence 2

Add your second reserve capacity requirement group

Looking at "View All" you can see both reserve capacities.

Use consecutive or concurrent reserve capacities, but not both

End a Reserve Capacity prior to LDOC

Separate from the automated seat release process described on the next page

1. Create the second group using the same Requirement Group you used for the first group.

2. Set the Cap Enrl field's value to zero (0). Doing so allows the remaining seats to become available to anyone when the second group's date becomes current.

3. Always click SAVE!

Reserve Capacity	Find | View All	First ◀ 1 of 1 ▶ Last
*Reserve Capacity Sequence 1	Enrollment Total 0	➕➖

Reserve Capacity Requirement Group			Personalize | Find | 🗗 | 📑	First ◀ 1-2 of 2 ▶ Last
*Start Date	*Requirement Group		Cap Enrl	
04/09/2019 📅	000225 🔍	RC PLAN UGRD ANTH MAJ	50	➕ ➖
04/23/2019 📅	000225 🔍	RC PLAN UGRD ANTH MAJ	0	➕ ➖

⚠️ Using a zero (0) on any reserve capacity ends all the reserve caps on a class, even if they are on separate sequences!

Seat Release Process Overview

The following pages include an example with screenshots for each step

1 Departments add reserve capacities prior to registration

2 The seat release process runs on LDOC and releases open reserved seats

3 If depts want to reserve seats after LDOC: Add another row using the LDOC date as the start date with the number of seats to reserve.

4 The process runs every 5 minutes throughout open enrollment to continue releasing open reserved seats, ignoring rows with an start date of LDOC

Seat Release Process

1 Departments add reserve capacities prior to registration

Example

- The Classics (CLAS) department put a reserve capacity on CLAS 131.001 in the Spring term.
- 15 seats were put aside for students in the Classical Humanities Minor (CLAH)

Seat Release Process

2 The seat release process runs on LDOC of the previous term at 12:01am.

It releases open reserved seats by matching the capacity enrollment to the number of students enrolled under it.

Example

- On Fall LDOC the seat release process runs and identifies 7 students that enrolled through the RC. The process adjusts the seat reserve capacity to match.
- The reserve capacity is changed from 15 to 7, 7 being the students that enrolled in the reserve cap, essentially releasing all open reserved seats (8 seats) to all students.

Seat Release Process

③ If depts want to keep seats in reserve and not release them on LDOC:

Add another row **using the LDOC date as the start date** with the number of seats to reserve.

This can be done at any time prior to LDOC.

Example

- The dept adds a row with LDOC as the start date, reserving 8 seats

Seat Release Process

(4) Starting on LDOC the process runs every 5 minutes throughout the registration period to continue releasing reserved seats dated prior to or after LDOC.

The process ignores reserve capacities with LDOC as the start date.

Example

When the department does NOT want to continue reserving seats after LDOC

- If 1 of the 7 students in the original reserve capacity drops the class
- The seat release process identifies 6 students that enrolled through the RC and adjusts the seat reserve capacity to match. The open seat is released to all students.

Instructor or Dept Consent (Permission Numbers)

- Definition & Application

- Benefits

- Process

Definition & Application

- Instructor or Department consent should be used when the whole course is being vetted by the instructor or department for enrollment.

    - Enrollment is managed by unique permission numbers the instructor or department issues to the students to allow enrollment in the class.

- This consent can be placed prior to registration or at any point throughout registration.

- Once consent is placed on a section, students can only enroll via a unique permission number generated by the Registrar and distributed by the faculty or department.

- These types of consent are placed on the section level of the course by the department.

Examples of courses that might utilize instructor or department consent

- independent study

- special topic

- pilot course with enrollment vetting needed

Benefits

- Utilizing instructor or department consent allows for departments to manage enrollment in specific courses for special populations that cross multiple-discipline, academic and professional paths.

- Instructor or department consent can be put on a course at any point during registration. Once consent is placed, all open seats must be managed through permission numbers (this includes reserve seats).

- This is a manual process on departments but does allow for a level of vetting necessary in some courses.

- All students needing to enroll will need to speak with the instructor or department as designated. This makes the 'way the student enrolls' transparent.

Process

The department places Instructor/Department Consent on the course.

ConnectCarolina Pathway

- Curriculum Management

- Schedule of Classes

- Maintain Schedule of Classes

- Populate Class Search

- Enrollment Control Tab

  - Add Consent dropdown

  - Select Department or Instructor Consent

  - Save

Home   Student Admin Menu   Curriculum Management   Schedule of Classes

Process

- The dept requests permission numbers be generated for a specific class via the [formstack form](#) and shares semester, class, section, and total number of permission numbers needed.
  - The permission numbers only over-ride instructor or department consent unless otherwise specified.
  - Upon request, permission numbers can be set up to over-ride consent, pre/co-requisites, reserved seats, and class capacities.

- Once permission numbers are generated, they are shared with the requesting dept to distribute to individual students as needed.

- Students will need to use the unique permission number when registering for the course.
  - Once a permission number is used by a student, it can't be used again. If a student drops the course, they will need to be issued a new permission number.

The Registrar's Office has training materials on how students use permission numbers.

Pre-Requisites and Co-Requisites

- Definition & Application
- Benefits
- Process

Definition & Application

- Pre-requisites and co-requisites should be used to set the academic requirements for a class. They are courses that need to be taken prior (pre-requisite) or at the same time (co-requisite) to enroll in the course.

- When a student enrollment request is processed, ConnectCarolina will automatically search the pre-requisite or co-requisite to ensure the student qualifies for the course based on courses taken or currently enrolled in.

> If a student is registered for a pre-requisite in the fall and is attempting to register for the next sequential course, ConnectCarolina assumes the student has passed the in-progress course for pre-registration purposes

Example

- To register for COMP 210, a student must meet the prerequisites of COMP 110 and MATH 231 AND OR Pre- or corequisites, COMP 283 or MATH 381.

- If the student is trying to enroll in COMP 210 for the spring, the student could be enrolled in any of the above courses the fall prior and could register for COMP 283 or MATH 381 at the same time as COMP 210.

Benefits

- A pre-requisite ensures a student has the appropriate knowledge when entering the subsequent course.

- Automatically controls enrollment; if a student does not have a stated pre- or co-requisite ConnectCarolina will not allow the student to enroll.

Process

- Depts should set up pre- or co-requisites when developing a new course.

- This info is added into CIM (Course Inventory Management) and is then reviewed and approved by the appropriate dept and college curriculum committees.

  - Changes to add new or remove existing pre- or co-requisites should be approved by the dept and processed through CIM.

Prerequisites	BIOL 390
Pre- or Co-requisites	BIOL 447L; Required preparation, a grade of C+ or better in BIOL 390
Corequisites	
Enforced Requisites	Prerequisite, BIOL 390 with a grade of C+ or better; corequisite, BIOL

Should students be checked for the above requisites when registering for this course?
⦿ Yes   ○ No

| Restriction Statement | Majors only. |

- If a course should be for only majors (never will someone outside the major enroll), this can be added to the pre- or co-requisite; however, this will need to be approved by the College or professional school Dean because

  - Often other depts will use courses that are put aside for majors as related, minor, other.

  - By leveraging a major in a pre- or co-requisite you could be limiting opportunity.

Waitlists

- Definition, Application & Benefits
- Student Experience with Waitlists
- Process: Establishing and Supporting Waitlists

Waitlists
Definition & Application

Definition: A waitlist is a list that students can join within ConnectCarolina and wait for open seats in a class. **Being on a waitlist does not guarantee a student a seat in a class.**

Application:
- When a waitlist is added to a class section it holds students waiting for the class to open systematically.

- If a desired course is closed at the time a student first attempts to enroll in it, the student may waitlist the class (with the hope that a seat becomes available later).

- To get added to a waitlist, the student must first select the option "waitlist if full" after adding the class to their shopping cart.

- Students are positioned or numbered on a waitlist based on date added. Once added to the waitlist, the student is assigned and can view their waitlist position number via their class schedule.

- During the enrollment period, the waitlist engine runs every five minutes to check for open seats. When a seat becomes available, the system will automatically add the student with the lowest position number who also passes all validation checks into the available seat.

Beginning the Spring 2024 registration cycle, the following new dates will go into effect:

Waitlist Addition End Date	Important Dates	Waitlist Purge Date
Day Before Add Deadline (4 days after the first day of classes)		**Day After Add Deadline** (6 days after the first day of classes)
Note: The waitlist addition end date refers to the last day that a student may add themself to a waitlist in ConnectCarolina.		*Note: The waitlist purge date refers to the day when some Waitlist records are removed from ConnectCarolina and the auto-enroll function is turned off. Departments will receive a list of those students left on a waitlist at the time of the purge.*

Waitlists
Example of Waitlist Application

Course: Psychology 210

Course Setup:
Enrollment Capacity: 100 seats
Waitlist Capacity: 999 seats

Scenario #1: All 100 seats are full when wave 2 of registration opens, what should a student do?

Answer: If a course is full, students should join the waitlist. Should a seat open up, the student in position #1 will be automatically enrolled in the course should they meet enrollment criteria. If they don't the next eligible student on the waitlist will be enrolled.

Course: Economics 101

Course Setup:
Lecture Enrollment Capacity: 100 seats
Recitation Capacity (Per Section): 20 Seats
Waitlist Capacity: 999 seats

Scenario #1: Ramses joins the Econ 101 waitlist and selects to join recitation A should a seat open in the lecture. Another student in recitation B drops Econ 101. Will Ramses be automatically enrolled?

Answer: If the student is positioned next on the waitlist and meets all validation checks, they will be enrolled in the ECON 101 lecture and the respective recitation.

Waitlists
Benefits of Waitlists in ConnectCarolina

Standardization:

- Departments and faculty can direct all students interested in taking a class to sign up via ConnectCarolina, which standardizes the enrollment process across units.

- The expansion of waitlist hours increases opportunities for students to waitlist desired courses and standardizes the number of waitlist hours available to all students (both graduate and undergraduate).

Transparency:

- Students, faculty, and staff can all see how many individuals are on a waitlist at any time.

- The waitlist tile on the student center home page in ConnectCarolina provides quick access to waitlist information that is unique to each student.

- An automated email confirmation to students keeps them informed of successful waitlist enrollments.

Automation:

- The "Auto Enroll from Waitlist" function reduces excess manual work for staff by automatically enrolling students from the waitlist.

Data & Reporting:

- Following the purge date, a list of those left on the waitlist is sent by the Registrar to departments, who then may enroll students manually at their discretion.

- Applying waitlists to all courses provides foundational data for departments to analyze student behavior and proactively plan course availability for future terms.

Waitlists
Cons of "Paper Waitlists"

Note: "Paper Waitlists" are all waitlists operated outside ConnectCarolina. They can be managed in anything from an excel spreadsheet to a piece of paper. It is highly recommended that staff use ConnectCarolina instead of paper waitlists.

There are several drawbacks to maintenance of waitlist enrollment through this method:

- Creation of inequity among students and confusion between faculty and departmental staff.

- Removal of opportunity for students to receive timely communication if they are enrolled in the course.

- Risk of discrepancies between paper waitlists and ConnectCarolina, preventing students from knowing when a seat becomes available for enrollment.

- Difficulty in enrollment tracking, hindering the administration from collecting data to plan for future terms.

- Requirement of excess manual processing and management by staff on top of existing responsibilities, leading to enrollment delays and stress for all.

Waitlists
New Guidelines

Beginning during the Spring 2024 registration cycle, the following guidelines will apply regarding waitlists in ConnectCarolina:

Note: Automatic waitlists may be removed from a course or course type in ConnectCarolina. Please see the corresponding page of this playbook for more information on how to request an exception.

1. Waitlist hours Separated From Enrolled Hours: Waitlisted hours will not be counted towards total enrolled hours until a student has been auto-enrolled from the waitlist. This aims to reduce "false hope" and increase transparency within enrollment.

3. All Courses in ConnectCarolina will Automatically Have Waitlists Turned On: Every course in ConnectCarolina (unless granted an approved exception) will automatically have a waitlist turned on for use during registration. This aims to create consistency, increase transparency and help capture student interest.

2. New Credit Hour Limits: Beginning during Wave 2 of registration for Spring and Fall semesters (and during open enrollment for first-years), all students may waitlist up to 12 credit hours. Limits during the summer will be increased to 8 hours. This matches long-standing informal practices and provides additional flexibility for students.

4. Waitlists in ConnectCarolina have Unlimited seats: Waitlists within ConnectCarolina will no longer have seat limits and will allow an unlimited number of students to join. This aims to create consistency, increase transparency and help capture student interest.

Student Experience with Waitlists

Updated information about Waitlists will be available to students for the first time in 2024 spring term registration.
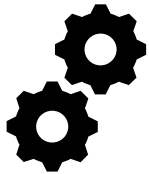
Core Functionality
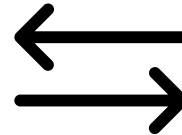
"Swap to Waitlist"

Communication of Enrollment Outcome

Waitlist Tile
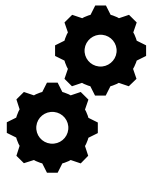
Core Functionality
Standard Waitlists Process

When adding a course to their shopping cart, a student must check the "Wait list if class is full" box in the top right-hand corner prior to hitting "Next" to join the waitlist. If they add the course to their cart without checking this box and later decide to waitlist, they will need to remove the course from their cart and add it back with the waitlist option selected.

Note: Waitlisted courses within the shopping cart are indicated with the yellow triangle status symbol.

Core Functionality
Checking Position Number

Note: When a seat becomes available in a previously full class, the system will automatically enroll the next eligible student. Should a seat be released, and validations (listed on the following page) are not met, the student will be skipped and autoenrollment will continue to run for the next position number.

To check their position number, students can navigate to their Student Center in ConnectCarolina. From there, they must select "My Class Schedule" under the Academics header to the left. Their waitlist position numbers will be noted under each waitlisted class.

Search | Plan | **Enroll** | My Academics

My Class Schedule | Add | Drop | Swap | Edit | Term Information

My Class Schedule

Select Display Option   ● List View   ○ Weekly Calendar View

2023 Summer I | Graduate | UNC-Chapel Hill   [Change Term]

Class Instruction Mode Details   Click this link to see instruction modes and to select your choice for classes that offer both an in person and remote option.

▼ Class Schedule Filter Options

☑ Show Enrolled Classes
☑ Show Dropped Classes
☑ Show Waitlisted Classes

[Filter]

HPM 393 - FIELD TRAINING IN HPM

Status	Units	Grading	Grade	Deadlines
Enrolled	2.00	Undergrad - graded not UG		🗒

Class Nbr	Section	Component	Days & Times	Room	Instructor	Start/End Date
1127	001	Lecture	TBA	TBA	Staff	05/17/2023 - 06/23/2023

PSYC 210 - STAT PRIN PSYC RES

Status	Waitlist Position	Units	Grading	Grade	Deadlines
Waiting	1	3.00	Graduate - graded		🗒

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Core Functionality
Validations

Throughout the enrollment process, validation checks are made to ensure that a student meets certain criteria set for each given course. There are different validation checks run at different stages of the enrollment process. The table below shows which validations are run at each step.

Important: Validations below are listed in the order in which they are checked in ConnectCarolina. Once one validation fails (i.e., the student does not meet the required criteria), ConnectCarolina will not continue to check the remaining validations in that sequence and that student will be skipped (not enrolled).

Enrollment Validation Check	Standard Enrollment From Shopping Cart	Validation Button (In Shopping Cart)	Addition to Waitlist From Shopping Cart	Enrollment From a Waitlist
Within Enrollment Appointment	✓	✗	✓	✗
Seat Availability in Class (includes Reserve Capacities)	✓	✗	✗	✓
Service Indicators/Holds	✓	✓	✓	✗
Consent (if needed)	✓	✓	✓	✗
Career Restrictions	✓	✓	✓	✗
Unit Load	✓	✓	✓	✓
Requisites and other Enrollment Requirements (like min GPA, etc.)	✓	✓	✓	✓
Time Conflicts	✓	✓	✗	✓
Repeat Rules	✓	✓	✗	✓

Note: No validations are run to add a course to the shopping cart or when a staff member uses Quick Enroll. Please also be aware that the columns above represent different stages in the enrollment process and the ConnectCarolina validations run **at each stage**.
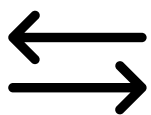
"Swap to Waitlist"
Part 1: Definition, Setup & Course Selection

The "Swap to Waitlist" feature in ConnectCarolina allows students to automatically drop a course should they be enrolled from the waitlist. This function **does not apply to non-enrollment course components and must be set up prior to a student being added to a waitlist.** Students may waitlist up to 12 hours (which includes courses with a set up "swap to waitlist" condition) and may set up a "swap to waitlist" multiple times for the same course (although they are not encouraged to do so). Students can set up "swap to waitlist" function using the following steps:

| Search | Plan | Enroll | My Academics |

My Class Schedule | **Add** | Drop | **Swap** | Edit | Term Information
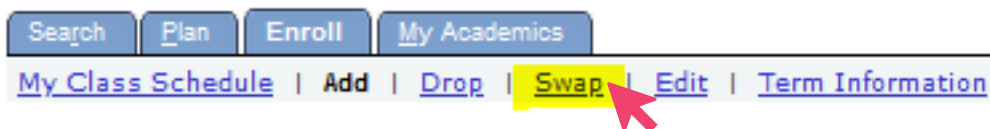
Setup: To find the "swap to waitlist" function, students must navigate to the "Swap" link under the Enroll tab. The "Swap to waitlist" function cannot be set up with a standard class search.

Course Selection (Step 1a): To use the "swap to waitlist" function, a student must first select a course to drop from the "Swap This Class" drop-down menu. Only one course may be selected.

Waitlist Selection (Step 1b): Next, the student must select the course they would like to waitlist from the "With This Class" table. To select a course, they can use the class search, their Tar Heel Tracker, or the course number.

1. Select a class to swap

Select the class you wish to swap then select the class you wish to replace it with.

2023 Summer I | Graduate | UNC-Chapel Hill   Change Term

Swap This Class

Select from your schedule   PSYC 210: STAT PRIN PSYC RES

With This Class

Search for Class   Class Search   Search

------ OR ------

Enter Class Nbr   [   ]   Enter

"Swap to Waitlist"
Part 2: Enrollment Preferences & Confirmation

Enrollment Preferences (Step 1c): Once a student has selected a course, the "Enrollment Preferences" page will be displayed. Here, students should select "Wait list if class is full" and then select "Next" to progress.

1. Select a class to swap - Enrollment Preferences

2023 Summer I | Graduate | UNC-Chapel Hill
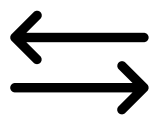PSYC 230 - INTRO COGNITIVE PSY

Class Preferences

Wait List ☑ Wait list if class is full

PSYC 230-001   Lecture   ⚠ Wait List

Permission Nbr [   ]

Session   Session A

Career   Undergraduate

Grading   Graduate - graded

Enrollment Information

Units   3.00

- Prerequisite, PSYC 101
- PL- Physical and Life Science

[Cancel]   [Previous]   [Next]

Section	Component	Days & Times	Room	Instructor	Start/End Date
001	Lecture	MoTuWeThFr 9:30AM - 11:15AM	TBA	Kathryn Weatherford	05/17/2023 - 06/23/2023

2. Confirm your selection

Select Finish Swapping to process your swap request. To exit without swapping these classes, select Cancel.

2023 Summer I | Graduate | UNC-Chapel Hill

▼ You are replacing this class

| | ● Enrolled | ⊗ Dropped | ⚠ Wait Listed |

Class	Description	Days/Times	Room	Instructor	Units	Status
PSYC 210-02W (1922)	STAT PRIN PSYC RES (Lecture)	TuWeTh 11:30AM - 1:00PM	TBA	P. Harrison	3.00	●

▼ With this class

| | ◆ Only reserved seats available | ● Open | ■ Closed | ⚠ Wait List |

Class	Description	Days/Times	Room	Instructor	Units	Status
PSYC 230-001 (1933)	INTRO COGNITIVE PSY (Lecture)	MoTuWeThFr 9:30AM - 11:15AM	TBA	K. Weatherford	3.00	⚠

[Cancel]   [Finish Swapping]

Confirm Selection (Step 2): On the "Confirm your selection" page, students will see the course they are replacing as well as the class they are waitlisting. Once reviewing that everything is correct, they should select "Finish Swapping".

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"Swap to Waitlist"
Part 3: Viewing Results

Viewing Results (Step 3): If the swap initiated in step 2 was successful, a course status of "Success" will be indicated with a green circle. If there is an error, the student should check that they meet all of the validations listed under the "Addition to Waitlist From Shopping Cart" column on the validations page of this playbook.

3. View results

View the results of your swap request. Select Fix Errors to try and correct the problems listed or change your swap choices.

2023 Summer I | Graduate | UNC-Chapel Hill

● Success: Classes were swapped   ✖ Error: Unable to swap class

2023 Summer I Enrollment Shopping Cart

Class	Message	Status
Swap PSYC 210 with PSYC 230	**Message:** Class 1933 is full. You have been placed on the wait list in position number 1.	●

My Class Schedule

Viewing Courses with the "Swap to Waitlist" function: After establishing conditions for a waitlist, students can view the waitlisted course in their course schedule. Following a successful autoenrollment, the course with conditions applied to it will be dropped, and the waitlisted course will be counted as enrolled. Autoenrollment for "Swap to Waitlist" courses requires the same validation checks as standard autoenrollment of waitlists. Please note that if you drop the enrolled course that conditions are applied to the established "Swap to Waitlist" will be broken and the system will treat that waitlisted course like a standard waitlisted course.

View Prior to Autoenrollment

PSYC 210 - STAT PRIN PSYC RES

Status		Units	Grading		Grade	Deadlines
Enrolled		3.00	Graduate - graded			📖

Class Nbr	Section	Component	Days & Times	Room	Instructor	Start/End Date
1922	02W	Lecture	TuWeTh 11:30AM - 1:00PM	TBA	Patrick Harrison	05/17/2023 - 06/23/2023

PSYC 230 - INTRO COGNITIVE PSY

Status	Waitlist Position	Units	Grading		Grade	Deadlines
Waiting	1	3.00	Graduate - graded			📖

Class Nbr	Section	Component	Days & Times	Room	Instructor	Start/End Date
1933	001	Lecture	MoTuWeThFr 9:30AM - 11:15AM	TBA	Kathryn Weatherford	05/17/2023 - 06/23/2023

View following Successful Autoenrollment

PSYC 210 - STAT PRIN PSYC RES

Status		Units	Grading		Grade	Deadlines
Dropped		3.00	Graduate - graded			📖

Class Nbr	Section	Component	Days & Times	Room	Instructor	Start/End Date
1922	02W	Lecture	TuWeTh 11:30AM - 1:00PM	TBA	Patrick Harrison	05/17/2023 - 06/23/2023

PSYC 230 - INTRO COGNITIVE PSY

Status		Units	Grading		Grade	Deadlines
Enrolled		3.00	Graduate - graded			📖

Class Nbr	Section	Component	Days & Times	Room	Instructor	Start/End Date
1933	001	Lecture	MoTuWeThFr 9:30AM - 11:15AM	TBA	Kathryn Weatherford	05/17/2023 - 06/23/2023

Communication of Enrollment Outcomes

Beginning with the Spring 2024 registration cycle, students will receive an email if they have been successfully auto-enrolled from a waitlist into a course. This automated email will only be sent once following successful enrollment, be specific to only one course, and include the following information:

Dear [Student Name],

You have been successfully auto-enrolled into [Course Number] from the waitlist for the [Term] semester. We encourage you to review the class notes and class features pages within your student center (link). For any additional questions regarding this course, you should reach out directly to the instructor of record indicated on your class schedule or contact your program/department for assistance.

For questions concerning other waitlisted courses, please refer to your Waitlist Tile in ConnectCarolina or visit registrar.unc.edu/guide/waitlists/.

If you have any questions related to registration, please contact the Office of the University Registrar For questions regarding degree completion, we encourage you to connect with UNC Advising.

Sincerely,
Office of the University Registrar

ℹ️ Waitlist Tile

The waitlist tile in ConnectCarolina aims to provide students with a snapshot of the courses they are on a waitlist for. This tile is shown throughout the registration cycle only when waitlists are enabled. It includes the following:

| SSI SSII **Fall**	**Waitlist Status**	Waitlist Closes **08/24/23**
ANTH 300-001	Position #1 on Waitlist	
BIOL 201-002	Student dropped class from schedule	
ECON 200-001	Position #8 on Waitlist	
FREN 003-006	Enrolled in class from Waitlist	
My Schedule	**Shopping Cart**	**Waitlist Info/FAQ**

Process: Establishing and Supporting Waitlists

The following resources cover how departments can set up Waitlists for courses in ConnectCarolina. This section will also cover best practices for supporting students on Waitlist in ConnectCarolina.
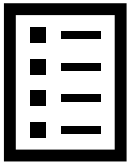
Overview & Tips

Navigating Waitlists in ConnectCarolina
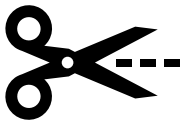
Removing Waitlists From a Course

Supporting Faculty with Waitlists

When to Quick Enroll

Overview & Tips

Active Waitlists are visible to staff within the "Maintain Schedule of Classes" section on the Enrollment Control tab. Both instructors and staff can view a waitlist roster by going to the Class Roster page for the class section and changing the view from "Enrolled" to "Waiting". This will also display position numbers, student names and PIDs.

Waitlists for all class sections will be turned on with an unlimited number (maximum value 999) of seats by default. Students will be limited to 12 waitlisted credit hours. Please refer to the **"New Guidelines"** and **"Removing Waitlists From a Course"** sections of this playbook for more information.

Note: Simply being on a waitlist does not guarantee students a spot in that course. Students are encouraged to monitor waitlist position numbers via their waitlist tile, confirm that they will pass possible validation checks and maintain realistic expectations if there are a significant number of students ahead of them on the waitlist.

Why Automatic Unlimited Waitlists?

Turning on unlimited digital waitlists for all class sections ensures that waitlist behavior is consistent across departments and allows students to simplify their registration process, reducing requests to instructors and department staff for registration assistance. Having waitlists automatically applied to all class sections also ensures that "paper waitlists" (waitlists outside of ConnectCarolina), which are inequitable to students as well as a burden on instructors and staff, are rendered obsolete. Flexibility will be granted to courses with legitimate rationale for existing outside of this standard.

Overview & Tips
Auto-Enroll Function in ConnectCarolina

As noted throughout this playbook, beginning with Spring 2024 Registration, waitlists will be turned on for all class sections by default. Along with these changes, **staff will no longer have the option to shut off the "auto enroll" function** for a course's waitlist. This creates consistency for students and reduces administrative burden. For additional ways to limit enrollment, please see the course setup section of this playbook.

Important: The "Auto Enroll from Wait List" function within the "Enrollment Control" tab creates consistency for students and reduces administrative burden.
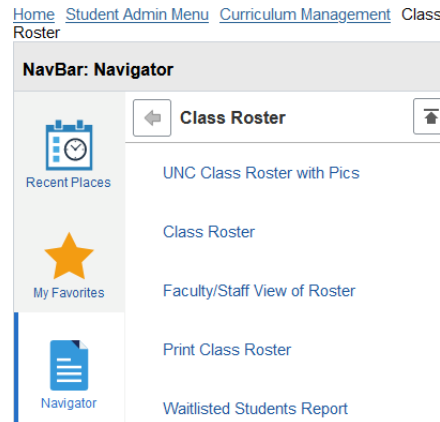
Navigating Waitlists in ConnectCarolina

How to view student position numbers:

Viewing Position Numbers via the Class Roster: Navigation Pathway
1. Home
2. Student Admin Menu
3. Curriculum Management
4. Class Roster
5. Class Roster *or* Faculty/Staff View of Roster

Navigating the Class Roster:
- Enter the search parameters for the class section you want to view.
- Enrolled students display in alphabetical order by last name on the class roster.
- Waitlisted students display in position order on the class roster (lowest position first).
- Rosters can be downloaded into Excel files or used to contact students both individually and collectively.

Home Student Admin Menu Curriculum Management Class Roster

NavBar: Navigator

Recent Places

My Favorites

Navigator

← Class Roster

UNC Class Roster with Pics

Class Roster

Faculty/Staff View of Roster

Print Class Roster

Waitlisted Students Report

Note: The Roster page defaults to show enrolled students; you can change the view by changing the Enrollment Status (dropdown menu) to show Enrolled, Dropped, or Waitlisted students.

Class Roster

2022 Fall | Session A | UNC-Chapel Hill | Undergraduate

▽ BIOL 103 - 001 (13423)
How Cells Function (Lecture)

Days and Times	Room	Instructor
MoWe 3:35PM-4:50PM	Carroll - Rm 0111	Kelly Hogan, Sierra Cole

*Enrollment Status Enrolled ⌄

Navigating Waitlists in ConnectCarolina
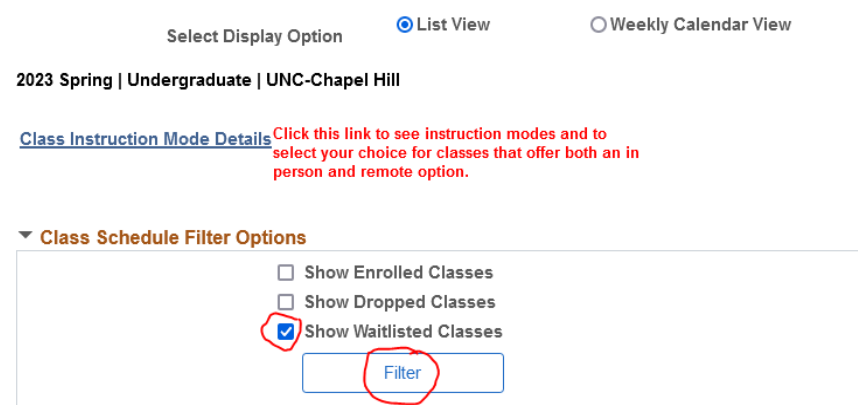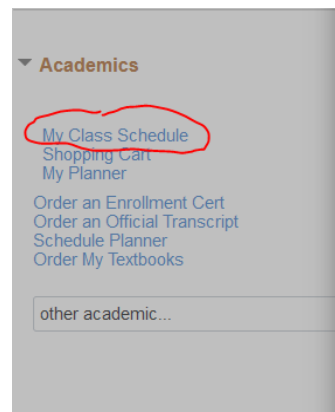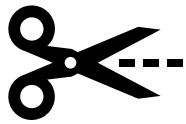**How to view all waitlisted hours for an individual student**

View Student Center: Navigation Pathway
1. Home
2. Student Admin Menu
3. Campus Community
4. Student Services Center (Student)

Note: You will need the student's PID and/or full legal name to access their Student Center.

How to view waitlisted classes/hours within the Students Center:
1. Select "My Class Schedule" under the Academics tab.
2. Select "Show Waitlisted Classes" under the Class Schedule Filter Options on the pop-up page.
3. Click "Filter" to view. For each waitlisted class it should also show the student's position number.

○ List View   ○ Weekly Calendar View

Select Display Option

2023 Spring | Undergraduate | UNC-Chapel Hill

Class Instruction Mode Details Click this link to see instruction modes and to select your choice for classes that offer both an in person and remote option.

▼ **Academics**

My Class Schedule
Shopping Cart
My Planner

Order an Enrollment Cert
Order an Official Transcript
Schedule Planner
Order My Textbooks

other academic...

▼ **Class Schedule Filter Options**

☐ Show Enrolled Classes
☐ Show Dropped Classes
☑ Show Waitlisted Classes

Filter

Removing Waitlists From a Course

Part 1: Definition, Setup & Request Selection

==Departments can request== that additional credit-bearing courses taken for degree progress be excluded from new guidelines outlined in this playbook. For convenience, the following courses have already been excluded from the excluded:

- First-Year Foundations
- Independent Studies
- Internships

- Research Thesis and Dissertation
- Interinstitutional
- Non-Degree

Additional exclusions should be requested through ConnectCarolina using the following process prior to Extended Course Schedule Maintenance:

==Waitlist Exception Requests==

Setup: To exclude a course or course type, staff should go to the MOI & Reserve Capacity page under the Teaching Resources folder within Student Admin WorkCenter. There they will see a "Waitlist Exception Requests" link.

Step 1: The "Waitlist Exception Requests" link will take staff to a pop up page to request an exception. Any prior requests will display at the top of the page with the current status and a link to go back and see the request and any comments or decisions by the approving Senior Associate Dean.

Waitlist Exception Requests

Help

Waitlist Exception Requests

1-1 of 1 | View All

Term	Academic Group		Datetime Created	User	Request	Status
2023 Fall	SPH	School of Public Health	05/30/2023 12:04:03.000000PM	Julie Dockens	Request Link	Pending

New Request

Term: [   ]

Academic Group: [   ]

Create New Request

Return
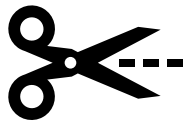
Removing Waitlists From a Course
Part 2: Request Details

Step 2: Several options for exceptions can be found on this page. Here the user can request that an entire Subject be omitted (e.g. BUSI or NUTR); all sections of a particular subject/catalog number (e.g. all BIOL 101 sections); or a single class by listing the subject/catalog number/section. Once a submission is made using the options below, requests will be routed to the Senior Associate Dean noted on this page.

Note: Prior to requesting an exception, it is highly recommended that departments consider if a waitlist will hinder the learning objectives of the given course or course type. Please note that data collected in line with the guidelines in this report is critical to understanding items related to course demand at Carolina.

When to Use Quick Enroll

Quick Enrolling a student in a class with an active waitlist ignores the waitlist and overenrolls the class, which creates an equity issue since it favors the student who has staff support over students already on a waitlist. In some cases, staff intervention on behalf of a student is warranted, but actions favoring one student over those on an active waitlist should always be considered carefully.

Staff should avoid Quick Enrolling students into class sections with an active waitlist when the waitlist software is running (through the 4th day of the semester). **Any decision to Quick Enroll a student in a class with an active waitlist should be considered not just in the context of the individual student, but as it impacts all students on the class waitlist and the university's goal of a fair and equitable registration process for ALL enrolled students.**

We understand that Quick Enrolling students is a way to ease demand and is something many departments have been accustomed to doing at will, but we ask departments to consider the inherent inequities of this practice and redirect students and instructors to enrollment control methods available to all.

What does it mean to Quick Enroll?

Quick Enroll is a manual override tool staff use to add students to class sections that they cannot enroll in on their own. Staff have multiple override actions available to them with the Quick Enroll function but should consider the reason a student cannot get into the class on their own when selecting the override needed to force the enrollment. Just because you can enroll the student in the class does not mean you need to do so *at that exact point in time*.

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Supporting Faculty with Waitlists

In each department, student services staff are the experts in ConnectCarolina, particularly when it comes to scheduling and registration. **You are a teacher, guide, and partner for instructors using these processes.**

Faculty do not have the ability to enroll or drop students from their classes, but they can and should be involved in deciding how to handle student requests and enrollment.

Important: Staff and instructors both want what is best for **ALL** students, which sometimes means you may not be able to oblige an individual at a particular moment in time. By teaching and reinforcing good waitlist practices with your instructors, you are making registration **more equitable** for your students, reducing everyone's email workload, and empowering your faculty to focus on what they do best.

Our Recommendations

- Establish clear and reasonable policies for all instructors regarding the use of waitlists in your unit that align with those set by the institution before registration begins.

- Collaborate with faculty administration in your unit to share these policies in faculty meetings, communications from the chair, DUS and DGS, program directors, faculty mentors, and graduate student advisors, and they should be readily available to all new hires.

- Note deviations from the established policies and bring these to the attention of your business manager and faculty administrators where appropriate, thus holding instructors and students accountable.

Supporting Faculty with Waitlists

As the SSM, you can also reinforce good waitlist practices through the following actions:
1. Send pre-registration reminder emails to instructors each term with relevant policy details.
2. Include information about department waitlist policies in Class Notes.
3. Provide instructors with language to include in their Class Features content.
4. Create and distribute faculty resources for accessing and using waitlists.

Below we have provided sample language that may be included in course syllabi or the class notes to help faculty support students with waitlists:

> ### Example language for use regarding Waitlists
>
> There is an "automatic waitlist' for [Course Subject & Number], which translates into 'first-come, first-served." The Registrar's website (registrar.unc.edu/guide/waitlists/) explains that when a seat becomes available in the class, the person who's been on the waitlist the longest is automatically enrolled, provided they meet the eligibility criteria.
>
> Please be aware that only a small number of waitlisted students will move up into full enrollment for this class. If you haven't moved from 'Waitlisted" to "enrolled" by the end of the second day of classes, you probably won't get a seat.
>
> The good news is that this class is offered [frequency of offering].
>
> If you are unable to enroll for it this term, we encourage exploring other course options available to you during registration. For assistance with understanding degree requirements and schedule planning, contact your Academic Advisor.