BLOCK SCHEDULING: MANUAL

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REVISION HISTORY

Version	Date	Name	Description
Initial	2/11/2016	Bracken Dailey	Initial
Update	7/6/2018	Merlin Krieger	Updated to Banner 9.
Update	9/20/18	Margaret Stewart	Reviewed content; made grammatical edits and minor text edits; updated table of contents

INTRODUCTION AND PURPOSE

Management of block scheduling can be done in several ways depending on the extent of the student's involvement in the registration process for the block of courses. The purpose of this procedure is to demonstrate how to create blocks when the College/Department/Program intends to enroll the students either manually or by batch. This means the student will not enroll in the block or have a choice of block in self-service registration. UCR's primary use of block registration is for Learning Communities; therefore, the examples in these procedures will focus on Learning Communities.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- 1. College/Department/Programs who would like to utilize block registration for a student population will need to first provide the Registrar's Office with details of the student population and program requesting block registration.
- 2. Once a College/Department/Program is approved for block registration, they are responsible for creating their own course blocks.
- 3. If Cohorts will be used to identify student populations for block registration, refer to "Cohort Assignment" procedures to assign the necessary cohorts.
- 4. If reserved seating will be used to assist with enrollment management of course sections assigned to Blocks, use Academic Scheduling: Banner procedures to set these up.
- 5. All batch processing for blocks and enrollment are processed by Information Technology Solutions (ITS).
- 6. Due to the fact that this process has the College/Department/Program manually enrolling the student, IF the student must enroll in additional coursework above and beyond the block the manual block registration MUST be completed prior to the Schedule of Classes going live for the quarter.
 - a. For Highlander Orientation, the manual block registration needs to be completed prior to registration for that orientation session.
- 7. It is the responsibility of the College/Department/Program to manage their enrollment, block registration, and drop students from courses if they no longer meet the criteria or choose not to enroll in the block.
 - a. For example, students who are not active Learning Community cohort participants, after enrolled in a Learning Community block, must be dropped from all those courses and should have their cohort inactivated.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

- 1. Registrar's Office
- 2. Academic Departments
- 3. College Offices

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

The pages listed below are covered in this training.

Page	Page Name	Description
STVBLCK	Block Code Validation	Use Block Code Validation (STVBLCK) to create, update, insert, and delete block codes which are used in Block Scheduling processing.
SFABLCK	Block Registration Control	Use Block Registration Control (SFABLCK) to add course sections to a Block code.
STVCHRT	Cohort Code Validation	Cohorts can be used to identify and track any group of students.
SFAREGS	Student Course Registration	Student Course Registration Page (SFAREGS) provides an automated mechanism for registering students into sections created by the Class Schedule module.

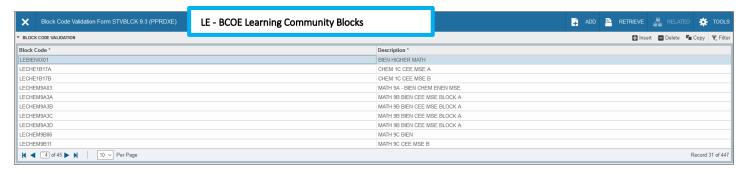
PROCEDURES

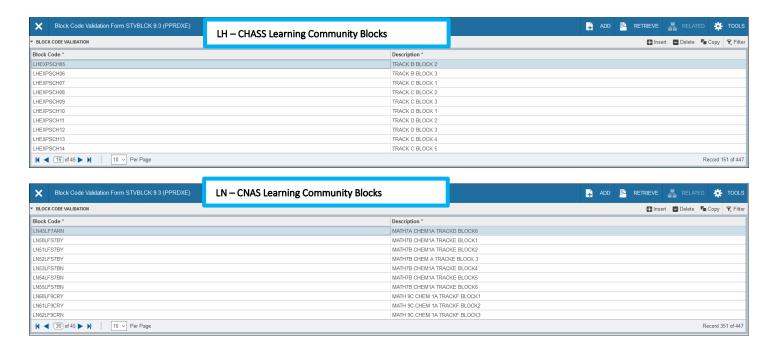
DEFINE A BLOCK

- 1. Enter the Block Code
 - a. Block Codes should follow a naming convention to allow for ease in searching and reporting. The field has a 10-character limit.
 - b. For example, when creating block codes for Learning Communities the following naming convention should be used:

L	L	L INDICATES THIS IS A LEARNING COMMUNITY BLOCK
Е	Н	INDICATES COLLEGE (N-CNAS; H-CHASS; E-BCOE)
В	С	
С	Н	6 CHARACTERS TO NOTATE DEFINING INFORMATION SUCH AS:
Е	S	MATH PLACEMENT
G	С	MAJOR
Е	N	ETC.
N	Т	NOTE: the first 8 digits match the cohort code
0	0	Indicates the
1	2	Block number NOTE: the last 2 digits indicate the block

- 2. Enter the Description
 - a. The description of the block will not be visible to the student in self-service since the student will be manually enrolled
 - b. The field has a 30-character limit.
 - c. It should follow a similar structure to the code as a way to differentiate the blocks from others.
 - d. Block codes and descriptions cannot be changed once they have courses assigned to them so it **MUST** be ensured that the block set-up is final and accurate before assigning any courses to the block.
 - e. Double check the set-up before adding courses to the block.
- 3. Academic Scheduling will enter Learning Community block names and descriptions in STVBLCK (Block Code Validation).





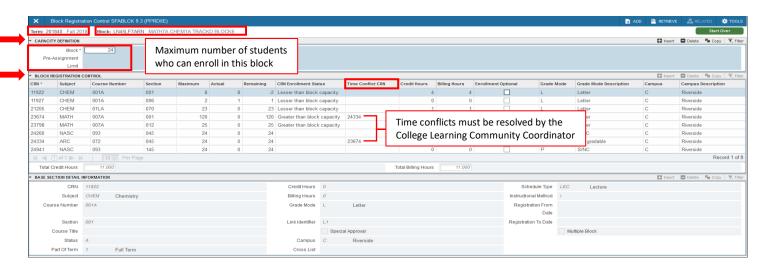
SET-UP AND USE BLOCK REGISTRATION

1. Each College Learning Community Coordinator will submit a completed LC template.

Block Name	Block Description	Block Pre Limit Assignment	CRN	SUBJ	COURSE ##	SECT
LN45LF7ARN			24334	ARC	72	45
LN45LF7ARN			23674	MATH	7A	1
LN45LF7ARN	MATH 7A, CHEM 1A TRACK D BLOCK 6	24	23798	MATH	7A	12
LN45LF7ARN			11922	CHEM	1A	1
LN45LF7ARN			11927	CHEM	1A	6
LN45LF7ARN			21205	CHEM	1LA	70
LN45LF7ARN			24260	NASC	93	45
LN45LF7ARN			24941	NASC	93	145

2. Academic Scheduling will enter this in the SFABLCK (Block Registration Control).





- The maximum number of students who can enroll in that block is entered in the Block Pre-Assignment Limit field in the Capacity Definition section.
- 4. Each section including linked discussion or labs are entered in the Block Registration Control section.
- 5. Blocks cannot contain time conflicts.
 - a. If the **Time Conflict CRN** column is populated at any time during data entry (indicating a time conflict with another CRN in the block), the applicable **College Learning Community Coordinator** must resolve the time conflict.
- 6. Adding and dropping of courses in a block can impact enrollment and ultimately enrollment management of course sections.
 - a. Make sure to double check work to ensure everything is accurate prior to start of registration.
- 7. The block is now complete, and staff can enroll students.

MANUALLY ENROLLING A STUDENT INTO A BLOCK

Manual enrollment can be done in three different ways:

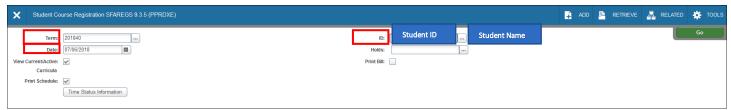
- 1. Batch assignment of blocks and enrollment.
- 2. Batch assignment of blocks and manual enrollment.
- 3. Manual assignment of blocks and enrollment.

STEPS - BATCH ASSIGNMENT OF BLOCK AND ENROLLMENT

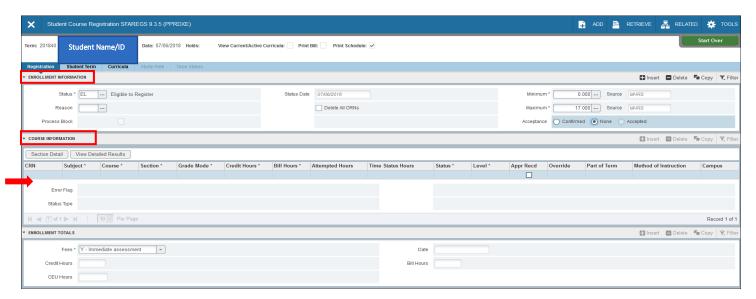
- 1. Batch assignments should be coordinated with Information Technology Solutions (ITS).
- 2. In preparation for this, ensure the following has been completed:
 - a. Block(s) were created in STVBLCK (Block Code Validation) and section in SFABLCK (Block Registration Control).
 - b. Created the applicable population rules or list. Three possible ways are:
 - i. If using Cohorts to help identify the student population, ensure they were created in STVCHRT (Cohort Code Validation). Changes to cohort codes and descriptions cannot be made once students have been assigned to them; therefore, ensure that the cohort set up is final and accurate. The cohorts could already be assigned to the appropriate students, or ITS could be requested assign them at this time as well.
 - ii. Have specific criteria using fields in Banner such as college or major that can identify the students.
 - iii. Have an Excel of SIDs.
- 3. THIS PROCESS MUST BE COMPLETED PRIOR TO THE OPENING OF REGISTRATION, SO PLAN AHEAD AND COORDINATE WITH ITS TO ENSURE ALL UPDATES ARE DONE A WEEK PRIOR TO THE SCHEDULE OF CLASSES GOING LIVE.

STEPS - BATCH ASSIGNMENT OF BLOCK AND MANUAL ENROLLMENT

- 1. Batch assignments for blocks should be coordinated with Information Technology Solutions (ITS).
- 2. In preparation for this, ensure the following has been completed:
 - a. Block(s) were created in STVBLCK (Block Code Validation) and sections entered in SFABLCK (Block Registration Control).
 - b. Created the applicable population rules or list. Three possible ways are:
 - i. If using cohorts to help identify the student population, ensure they were created in STVCHRT (Cohort Code Validation). Changes to cohort codes and descriptions cannot be made once students have been assigned to them; therefore, ensure that the cohort set up is final and accurate. The cohorts could already be assigned to the appropriate students, or ITS could be requested to assign them at this time as well.
 - ii. Have specific criteria using fields in Banner such as college or major that can identify the students.
 - iii. Have an Excel of SIDs.
- 3. THIS PROCESS IS BEST COMPLETED PRIOR TO THE OPENING OF REGISTRATION, SO PLAN AHEAD AND COORDINATE WITH ITS TO ENSURE ALL UPDATES ARE DONE A WEEK PRIOR TO THE SCHEDULE OF CLASSES GOING LIVE.
- 4. Once ITS completes the batch assignment of blocks, go to SFAREGS (Student Course Registration) to enroll students.
- 5. Enter the guarter in which the student is to enroll in the Term field.
- 6. Enter the Student ID number in the ID field.
- 7. Click Go.



8. Navigate to the Enrollment Information block.

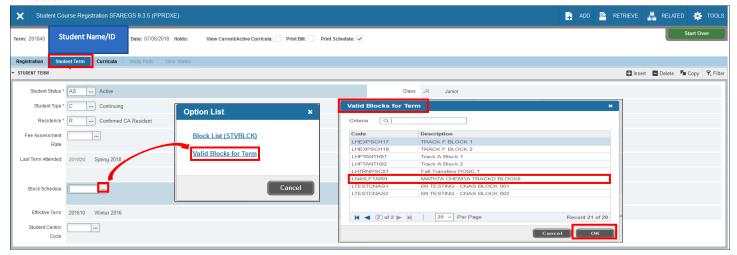


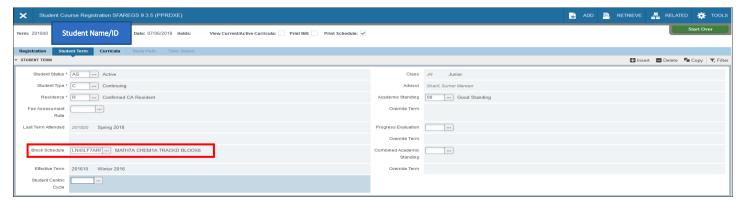
- 9. Click the box next to the Process Block field; this will cause the courses to populate in the Course Information block.
- 10. Save to add the registration
- 11. **Save** again to assess fees and complete the enrollment a message that the fee assessment has been processed will appear when the enrollments are complete.

STEPS - MANUAL ASSIGNMENT OF BLOCK AND ENROLLMENT

Manual assignment of blocks can be completed in either SGASTDN or SFAREGS, and it is dictated by the timing of when it's desired to assign the block. Assignment of blocks must occur in SGASTDN prior to enrollment preparation for the term (traditionally the 4th week of the current term), and then once registration is open, the enrollment can be completed in SFAREGS. Therefore, it is suggested that if the intent is to manually assign the block and enroll the student, wait until registration is officially open so both actions can be completed in SFAREGS at one time. This minimizes the number of pages used.

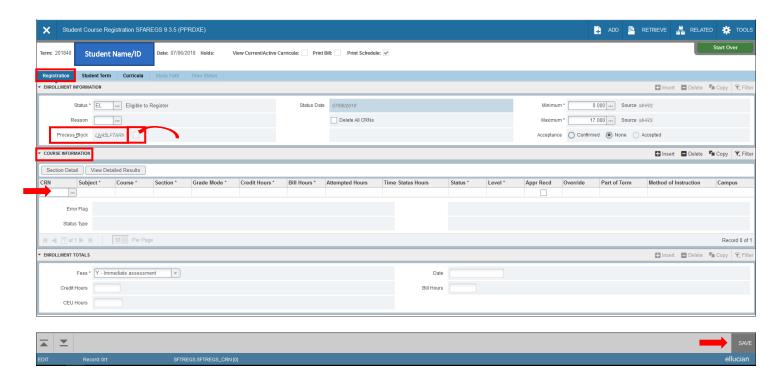
- Ensure block(s) were created in STVBLCK (Block Code Validation) and sections in SFABLCK (Block Registration Control).
- 2. Go to SFAREGS (Student Course Registration).
- 3. Enter **Term** and **Student ID** number in the **ID** field.
- 4. Click on the **Student Term** tab.
- 5. Enter the block code in the **Block Schedule** field
- 6. If the Block Code is unknown, click on the Search button (contains three dots) and select Valid Blocks for Term.
- 7. Click on desired block code; then click OK.
- 8. **Save.**







- 9. Click the **Registration** tab.
- 10. Check the box next to the Process Block field; this will cause the courses to populate in the Course Information block.
- 11. Save.



FINAL QUIZ

- 1. All batch processing for blocks and enrollment are processed by Information Technology Solutions (ITS).
 - a. TRUE
- 2. The description of the block will not be visible to the student in self-service since the student will be manually enrolled.
 - a. TRUE
- 3. When entering the CRN for the courses in the block, only the primary activity of a course has to be added.
 - a. FALSE; you need to add <u>each section, including linked discussions or labs,</u> to be included in the block in the **CRN** field
- 4. Manual enrollment can be done in three different ways: batch assignment of blocks and enrollment; batch assignment of blocks and manual enrollment; and manual assignment of blocks and enrollment.
 - a. TRUE
- 5. If a student needs to enroll in additional courses above and beyond those courses included in the block, wait and enroll them in the block after they register for the other courses.
 - **a.** FALSE; ensure that the block is registered for BEFORE registration begins so the student can appropriately plan around the courses included in the block.
- 6. If you are both manually assigning the block and enrolling the student, it is suggested this process be completed after the enrollment preparation for the term (traditionally the 4th week of the current term).
 - a. TRUE