BLOCK SCHEDULING: MANUAL

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REVISION HISTORY

Version	Date	Name	Description
1	02.11.16	Bracken	Final

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 intend to manually or by batch enroll the students. 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 and therefore, the procedures will focus examples 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, use *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 Student Affairs Information Systems (SAIS).
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

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.ucr.edu) to follow along.

FORMS

The forms listed below are covered in this training. **This process uses only Block Scheduling forms in Banner 8.**

Form	Form Name	Description
STVBLCK	Block Code Validation Form	Use the Block Code Validation Form (STVBLCK) to create, update, insert, and delete block codes which are used in Block Scheduling processing.
SSABLCK	Block Schedule Control	Use the Block Schedule Control Form (SSABLCK) to add course sections to a Block code for a term.
SFAREGS	Student Course Registration	The Student Course Registration Form (SFAREGS) provides an automated mechanism for registering students into sections created by the Class Schedule module.

PROCEDURES

DEFINE A BLOCK

STEPS

1. Go To **STVBLCK**
2. 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
E	H	INDICATES COLLEGE (N-CNAS; H-CHASS; E-BCOE)
B	C	
C	H	6 CHARACTERS TO NOTATE DEFINING INFORMATION SUCH AS:
E	S	MATH PLACEMENT
G	C	MAJOR
E	N	ETC.
N	T	**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**

3. Enter the **Description**

a. The description of the block will not be visible to the student in self-service since you will be manually enrolling the student.
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. Save.
1. Block codes and descriptions cannot be changed once they have courses assigned to them so you MUST ensure that the block set up is final and accurate before assigning any courses to the block.
e. Double check your set up before adding courses to your block.

ADDING COURSES TO A DEFINED BLOCK

STEPS

1. Go to **SSABLCK**
2. Enter the term in the **term field**
3. Enter the appropriate block code in the **block field**
4. Navigate to the next block
5. Enter the **CRN** for each section, including linked discussions or labs, to be included in the block in the **CRN field**
6. After all associated CRNs have been entered, **Save.**
7. Adding and dropping of courses in a block can impact enrollment and ultimately enrollment management of course sections. Make sure to double check your work to ensure everything is accurate prior to registration beginning.
8. 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 Block and Enrollment

STEPS – BATCH ASSIGNMENT OF BLOCK AND ENROLLMENT

1. Batch assignments should be coordinated with Student Affairs Information Systems (SAIS)
2. In preparation for this, you need to ensure you have the following:
   a. Created your Block(s) in SSABLCK
   b. Created your population rules or list. Three possible ways are:
      1. If you are using Cohorts to help identify your student population, ensure they are created in STVCHRT. Changes to cohort codes and descriptions cannot be made once students have been assigned to them so you MUST ensure that your cohort set up is final and accurate. The cohorts could already be assigned to the appropriate students or you can request SAIS to assign them at this time as well.
      2. Have specific criteria using fields in Banner such as college or major that can identify the students.
      3. Have an Excel of SIDs
3. THIS PROCESS MUST BE COMPLETED PRIOR TO THE OPENING OF REGISTRATION SO PLAN AHEAD AND COORDINATE WITH

SAIS 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 Student Affairs Information Systems (SAIS)
2. In preparation for this, you need to ensure you have the following:
    a. Created your Block(s) in SSABLCK
    b. Created your population rules or list. Three possible ways are:
        1. If you are using Cohorts to help identify your student population, ensure they are created in STVCHRT. Changes to cohort codes and descriptions cannot be made once students have been assigned to them so you MUST ensure that your cohort set up is final and accurate. The cohorts could already be assigned to the appropriate students or you can request SAIS to assign them at this time as well.
        2. Have specific criteria using fields in Banner such as college or major that can identify the students.
        3. Have an Excel of SIDs
3. THIS PROCESS IS BEST COMPLETED PRIOR TO THE OPENING OF REGISTRATION SO PLAN AHEAD AND COORDINATE WITH SAIS TO ENSURE ALL UPDATES ARE DONE A WEEK PRIOR TO THE SCHEDULE OF CLASSES GOING LIVE.

4. Once SAIS has completed the batch assignment of blocks, To Enroll the student, go to **SFAREGS**
5. Enter the quarter in which you wish to enroll the student in the **Term field**
6. Enter the Student Id number in the **ID field**
7. Navigate to the Enrollment Information block
8. Click the **box next to the Process Block field**; this will cause the courses to populate in the Course Information block

9. **Save** to add the registration
10. **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 you want to assign the block. Assignment of Blocks must occur in SGASTDN prior to enrollment preparation for the term (traditionally 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 you are going to manually assign the block and enroll the student you wait until registration is official open, so you can complete both actions in SFAREGS at one time. This minimizes the number of forms you must use.

1. In preparation for this, you need to ensure you have created your Block(s) in SSABLCK

2. Go to **SFAREGS**
3. Enter the quarter in which you wish to enroll the student in the **Term field**
4. Enter the Student Id number in the **ID field**
5. Navigate to the next block
6. Click on the **Student Term tab**

1. Enter the block code in the **Block Schedule field**
   a. If you do not know the Block Code you can click on the look up and select **Valid Blocks for Term**

2. **Save**
3. Click the **Registration tab**

4. Check the **box next to the Process Block field**; this will cause the courses to populate in the **Course Information block**

5. **Save** to add the registration
6. **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

FINAL QUIZ

1. All batch processing for Blocks and Enrollment are processed by Student Affairs Information Systems (SAIS).
   a. TRUE
2. The description of the block will not be visible to the student in self-service since you will be manually enrolling the student.
   a. TRUE
3. When entering the **CRN** for the courses in the block you only have to add the primary activity.
   a. FALSE, you need to add each section, including linked discussions or labs, 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 Block and Enrollment.
   a. TRUE
5. If a student needs to enroll in additional courses above and beyond those courses included in the block, you should wait and enroll them in the block after they register for the other courses.
   a. FALSE, you need to 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 you complete this process after the enrollment preparation for the term (traditionally 4th week of the current term).
   a. TRUE