BLOCK SCHEDULING: STUDENT SELF-SERVICE

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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 allow the student to register for the block through self-service. 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. Due to the fact that this process requires students to be able to select a block through self-service during registration, all set up MUST be completed prior to the Schedule of Classes going live for the quarter.
6. 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 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 [Banner 8] and https://studentoverallsb.ucr.edu/StudentOverall [Banner 9]) to follow along.

FORMS

The forms listed below are covered in this training. **This process uses Block Scheduling forms in Banner 8 and Banner 9.**

Form	Form Name	Description
STVBLCK (Banner 8)	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.
SFABLCK (Banner 9)	Block Registration Control Form	
SFABRDF (Banner 9)	Block Rule Definition Form	

PROCEDURES

DEFINE A BLOCK

STEPS

1. In Banner 8, 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 be visible to the student in self-service, so be mindful when selecting the description.
   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.

DEFINE COURSE SECTIONS FOR A BLOCK

STEPS

1. In Banner 9, Go to **SFABLCK**
2. Enter the term in the **Term Field**
3. Enter the appropriate block code in the **Block Field**
   a. If you do not recall the name of the block, you can look it up by clicking on the button with the three dots. This will invoke a lookup of the validation table.
4. Click **Go**

1. This will open 2 blocks on the form
2. In the **Capacity Definition block** enter the maximum number of students who can enroll in the block in the field labeled **Block Pre-Assignment Limit**
3. **Save**

4. In the **Block Registration Control block** click the Insert button
5. A new line will then be added to the Course and Section area
6. Enter the **CRN** of a course to be added in the **CRN field** of the new line – the course section information will then populate in the other fields on the line.
   a. If you do not recall the CRN, you can look it up by clicking on the button with the three dots. This will invoke a lookup of existing sections.
7. Repeat steps 7 through 9 for each course to be included in the block
   a. Make sure you add each section, including linked discussions or labs,
8. Click Save
9. 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.

DEFINE STUDENT CHARACTERISTICS FOR THE BLOCKS

The following set-up allows you to define the students who can view the block or blocks during registration. If you select to use cohort as a means to identify the student population please use *Cohort Assignment* procedures to ensure the students are assigned appropriately.

STEPS

1. In Banner 9, go to **SFABRDF**
2. Enter the term in the **Term field**
3. Click **Go**

4. This will open the Block Rules Definition block and Block Settings tab on the form
5. Add a line to the Block Rules Definition block by clicking **Insert**
6. With the new line highlighted, add information about the characteristics of the student population.
    a. For example, for Learning Communities students will be identified by Cohorts. Therefore, scroll to the right until you reach the cohort column.
    b. Enter the cohort associated with this block in the column labeled cohort.
    c. This creates a "rule" that students enrolling in this block must be part of the indicated cohort.

7. In the three columns to the very far right (you may need to scroll to the right) check the boxes as appropriate:
    a. The **Block Selection Required** checkbox when checked, presents the blocks to students when they log into Registration.
    b. If the student has more than one block for which they qualify for per the rules set up here, the **Allow Change Block** checkbox will allow students to switch blocks if it is checked or prevent block changes if it is unchecked.
    c. The **Active checkbox** triggers the block to display to students for enrollment if it is checked.

8. Navigate to the **Block Settings block**
9. Click **Insert**
10. In the **Block field** enter the block code associated with the rule defined.
11. In the **Add and Drop Courses field** use the buttons to indicate if adding or dropping courses that are part of the block is not allowed, allowed only for courses which are not part of the block, or if students may add and drop any course without restriction.
12. If you will be offering more than one block to the **same student population** keep the block rule highlighted and repeat steps 8 through 11. This allows the students in that population you defined in the top block (Block Rules Definition) to see more than one block selection at the time of registration.

13. Click **Save**
14. Students may now enroll via the self-service website.
    a. A staff member can manually enroll the student following the procedures *Block Scheduling - Manual.*
15. Repeat steps 5 through 13 for additional populations and blocks.

FINAL QUIZ

1. To complete this process you need to work in Banner 8 to set up the code and description for the blocks, but then move to Banner 9 to complete the set-up of the blocks and the rules for displaying to the students in self-service.

     a. TRUE

2. The maximum number of students who can enroll in the block should be placed in the field labeled **Block Pre-Assignment Limit?**

     a. TRUE

3. In Banner 9 navigation, you will use the "Go" button instead of "Next Block".

     a. TRUE

4. 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.

     a. TRUE

5. 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**

6. Due to the fact that this process requires students to be able to select a block through self-service during registration, all set up MUST be completed prior to the Schedule of Classes going live for the quarter.

     a. TRUE