OPUS Staff Training Manual

Records Tab: Enrollment
Add/ Drop / Swap / Edit

Enrollment Folder

Quick links to OPUS features are found in folders on the Records tab. The folder contents are grouped so that users may find related functions easily. Let's start at the right side of the page and take a look at the Enrollment folder. Each of the links below are chaptered in this document.

Enrollment

Add / Drop / Swap / Edit
View Student Schedule
View Schedule Log - by student
Process Block Enrollment
Maintain Service Indicators

After clicking the Add/Drop/Swap/Edit link on the Records Tab, a SEARCH page appears. All values on this screen must be populated before clicking ADD.

Add/Drop/Swap/Edit

The Add/Drop/Swap/Edit link allows the user to use the Quick Enroll function to perform multiple enrollment actions in OPUS.

Please note:

❖ *Access to perform enrollment actions for a term end for most staff after the last day of drop/add for the term.*

❖ *School administrators may have extended access to perform enrollment actions on behalf of their school until the last day of the term.*

❖ *After a term ends, only staff within the Office of the Registrar can perform enrollment actions. Requests for enrollment actions must be submitted using a grade change form or by memo from a senior school official.*

Enrollment actions are governed by compliance guidelines and may be subject to the Registrar's review and final approval.
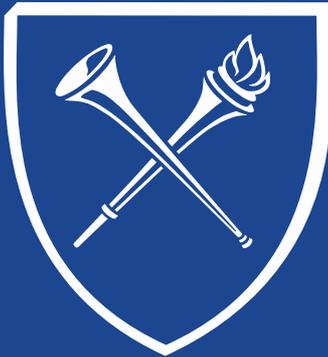
Enrollment Actions

After logging into a student's record in Quick Enroll, the user will see several tabs along the top of the page. Each tab contain data elements that may be needed depending on the enrollment action being completed.

Click each tab to view the features available enrollment options.

Clicking this icon expands the tabs to a single listing for easy access to the available features.

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Enrollment Action – Add
Class Enrollment Tab

When enrolling a student in a class, the ACTION could be Enroll or Swap.

Let's take a quick look at enrolling a student.

1. Under Action choose Enroll and the Class Nbr (if you don't know the class number, you can click the magnifying glass and do a class search. Classes that require a related component such as non-credit lab or discussion are entered under the Related 1 option.

Enrollment Action – SWAP
Class Enrollment Tab

Swap allows you "try out" the new class without the student being dropped or losing their space in a current class.

Under Action choose Swap and the Class Nbr from the schedule that is to be swapped. Next enter the Change To class nbr or do a lookup using the magnifying glass to search for the class that is requested. If you need to swap a lab ONLY, enter the class number in the "Class Nbr" field from the schedule and in the Change To field. Then enter the lab that the student would like to swap into in the "Related 1" field.

Enrollment Action – Add
Units and Grade Tab

The following pages are applicable to both enrolling or swapping classes.

Fixed credit hours cannot be modified, but variable credit hours may be edited during enrollment from the minimum to the maximum allowable hours. Please note: OPUS will always default to the minimum credit hours. Please verify the correct number of hours have been entered for a variable credit class.

In most cases, a student has the option of changing a GRD to SUS.

Applicable requirement designations for Emory Colleges of Arts & Sciences classes is viewable on this page. The applicable GER tag will default to the student's schedule.

If the term has begun, always use the 1st day of the term as your "action date" for enrolling, swapping, and dropping.

If your role allows these override capabilities,

Do Not:

- Overrride "requisites, service indicator, career, requisite, or unit load" unless you are authorized to do so.

You may:

- Override "appointment" when appropriate and if you are authorized to do so.

If your role allows these override capabilities,

Do Not: Overrride "Closed Class, Class Units, Grading Basis, Class Permission or WaitList Pos" unless you understand the consequences and are authorized to do so.

Never:

Override "Class Links."

Enrollment Action – Completed

Click the Submit button to complete the process for enrolling or swapping.

- "Success" or "Messages" indicate the class has been successfully added or swapped.

- "Error" indicates the process was unsuccessful. Click the error link to view why the action was unsuccessful. If you are unable to resolve the issue, please feel free to contact the registrar's office.

Enrollment Action –
Sample Error Messages

Message	Description	Override
Student Already Enrolled in Class, Add Not Processed	The enrollment request was not processed; the student is already enrolled in the class for the specified term. Verify class number and term, and resubmit the request	None
Student Not Enrolled, Class (XX) Full	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached.	Class Limit
Unable To Drop Class, Will Put Student Below Minimum Units	The requested drop transaction was not processed. Dropping the class would put the student below the minimum units required for enrollment.	Unit Load
Time Scheduling Conflict, Student Not Enrolled In Class	The class the student is attempting to enroll in has a scheduling conflict with an existing class the student is already enrolled in. Either select another class, or override the time conflict.	Time Conflict
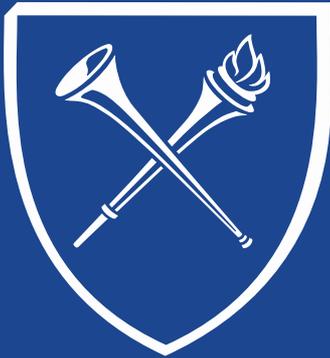
Enrollment Action –
Sample Error Messages

Maximum Term Student Unit Load Exceeded	Add transaction not processed. The student maximum term unit load would be exceeded.	Unit Load
Enrollment Is Not Allowed For This Class: It Is Outside the Student's Career of Study	The Add transaction was not processed. The student's academic career is not valid for the class.	Career
The Student is Already Enrolled in the 'To' Class of the Swap Transaction, Swap Not Processed	The student is already enrolled in the 'To' class of the swap transaction. The swap transaction was not processed.	None
(XX) to Enroll in Class, Add Not Processed.	Consent is needed to enroll in the class. The add transaction was not processed.	Override Permission Nbr
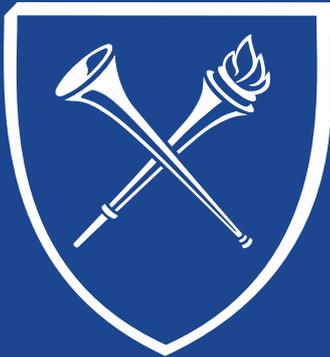
Enrollment Action – Drop
Class Enrollment Tab

When dropping a student from a class, the ACTION would be Drop.

You can enter the Class Nbr or you can choose the magnifying glass and select the class to be dropped from the schedule. Click Submit to complete the process.

Quick Enrollment

| Request ID: | 0000000000 | James Thomas Dooley Jr. Jr. | ID: | 0022365 |
| Career: | Ugrad Coll | Institution: Emory Univ | Term: | Spr 2011 |

Submit

| Class Enrollment | Units and Grade | Other Class Info | General Overrides | Class Overrides |

		*Action		Class Nbr	Section	Related 1	Related 2
+	–	Drop		4114 🔍	Pending		

Go to: View Enrollment Access   Calculate Tuition   Study List   Enrollment Appointments   Term/Session Withdrawal
Student Services Center

Save   Add   Update/Display

Enrollment Action – Drop
Class Enrollment Tab

If the term has not begun, simply drop the class. The class will be removed from the schedule.

If the class is dropped between the 1st day of the term and the end of the drop/add, the class will be removed from the schedule. However, the class enrollment record will be retained for historical purposes in the enrollment table for up to 2 years. Because of this retention, students who are dropped from all classes after the 1st day of class can no longer be admission revoked.

For those who have extended access to drop classes:

- After drop/add has ended, any drops will automatically record a "W" grade on the student's record.

- Users who believe there is a valid reason why a class should be removed from a student's schedule after drop/add has ended, should contact the Office of the Registrar (registr@emory.edu) for guidance.

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Enrollment Action – Edit
Normal Maintenance

There are times when you need to make an adjustment to a student's enrollment such as changing the grading status or credit hours for a class. You would perform this using the Normal Maintenance action.

Click Submit to apply the changes.

OPUS Staff Training Manual

Records Tab: Enrollment
View Student Schedule

After clicking the View Student Schedule link on the Records Tab, a SEARCH page appears for the Enrollment Summary in OPUS. Enter the student id or last name/first name. The search results will include all terms and careers of enrollment for the student requested. Click the appropriate enrollment term to view the schedule.

View Student Schedule

The enrollment summary for the chosen term appears. Please notice the dark blue line on the page. In our example below, the student's enrollment summary is on multiple screens (1-3 of 6).

Find | View All   First ◄ 1-3 of 6 ► Last

To see the full schedule, click the view all link on this line. To print a copy of the schedule, click Print Study List. Notice that "saved" briefly appears in the upper right side of the page.

	Class Nbr	Subject	Catalog	Session	Section	Status	Status/Reason	Acad Prog	Grading Basis	Units Taken
	2988	ENVS	344	Regular	000	Enrolled	Enrolled	LIBAS	Graded	3.00
	American Environmental History			Lecture						
	8216	ENVS	390R	Regular	00P	Enrolled	Enrolled	LIBAS	Graded	2.00
	Sem On Environmental Issues			Lecture						
	5999	ENVS	442W	Regular	000	Enrolled	Enrolled	LIBAS	Graded	5.00
	Ecology of Emory Univ w/lab			Lecture						
	6147	ENVS	442W	Regular	LB1	Enrolled	Enrolled	LIBAS	Non-Graded	
	Ecology of Emory Univ w/lab			Laboratory						
	4267	PHYS	141	Regular	001	Enrolled	Enrolled	LIBAS	Graded	4.00
	Intro Physics I W/Lab			Lecture						
	7534	PHYS	141	Regular	LC4	Enrolled	Enrolled	LIBAS	Non-Graded	
	Intro Physics I W/Lab			Laboratory						

Term: Fall 2014   Career: Ugrad Coll   Emory University   Print Study List   Report Manager

Find | View 3   First ◄ 1-6 of 6 ► Last

🔍 Return to Search   ↑ Previous in List   ↓ Next in List

View Student Schedule

Now click Report Manager. To monitor the process for the printing, click the Refresh button on this page. When the document is ready to print, the Status will be POSTED and the Details link will appear.

Click the Individual Student Study Rpt link under Description to print the document.

OPUS Staff Training Manual
Records Tab: Enrollment
View Schedule Log – By Student

There may be times when a user may want to view when and who made enrollment changes on a student's schedule. This link will provide a history of enrollment actions for a particular student and term. The link takes the user to the Enrollment Request Search page.

Enter Academic Institution = Emory and click SEARCH.

Enrollment Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Academic Institution: begins with ▼ emory 🔍

[Search] [Clear]   Basic Search   💾 Save Search Criteria

View Schedule Log – by student – Search Screen

After entering the institution, a search page with multiple options appears. In the example below, the Academic Career was – Undergraduate Emory College, the term 5149, and the emplid of the student. There are several search options in this panel. The user can search by Emplid of student, User Id of the person who performed the actions (for example: sharr13), and Class Nbr. CLICK the SEARCH button.

The results will appear below the request.

View Schedule Log – by student
– Search Screen

Click the grid box on the dark blue line of the Enrollment List results to export to Excel.

Clicking this icon expands the tab results for easy viewing.

OPUS Staff Training Manual
Records Tab: Enrollment
Process Block Enrollment

Introduction

Block Enrollment would be an effective tool to use when making enrollment actions for a select or large group of students into a specific class or into multiple classes. Class changes related to credit hours, grades, grading basis, or Emory College's (GER) General Education Requirements can easily be updated to all enrolled students in a class using the Block Enrollment feature in OPUS.   Enrollment actions may include swapping, dropping, or enrolling students. Block enrollment would not be the appropriate tool to use when making specific class changes such instructor, title, topic, room, or time. The block enrollment process is a better option than Quick Enroll when the entire class or a large group of students will receive the same enrollment action.

Request for class changes in credit hours, GER tag, or grading basis are sent to DPSTAFF-L@listserv.cc.emory.edu by departments or schools. Sometimes a department or school will request that a new course be substituted for the currently scheduled one. In this case, the block enrollment feature is used to swap students from the old class to the new class.
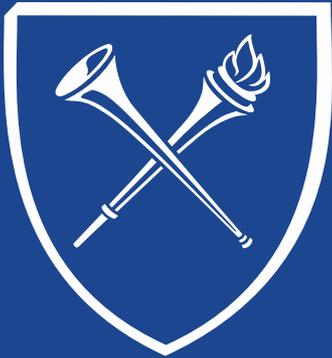
Creating a Student Block/Class Block with Merge Process

Navigation: Main Menu > Records and Enrollment > Enroll Students > Block Enrollment or Type "Block Enrollment" in search window of Main Menu in OPUS. There are three menu options: Create Class Block, Create Student Block and Block Enroll Merge. This document will review each of these options and how they intersect.

Tip: Do not use the browser back arrow when navigating through these panels. Make sure you click the tabs to maneuver between the panels.
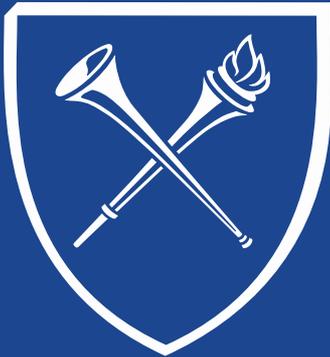
Create Student Block

1. Click on "Add a New Value".
2. Enter a name for the Student Enrollment Block. **Remember** this name. Click on the "Add" button.
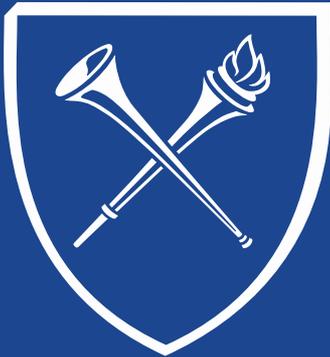
Set Up Block Enrollment

3. Enter a simple description (required).

4. Enter EMPL ID and Career.

5. Click on the "plus sign" to insert Row and enter next EMPL ID. Repeat as necessary.

6. Save

Tip: For medium or large classes it is recommended to save periodically after entering several names/career.

Create Class Block

1. Click on "Add a New Value".
2. Enter a name for Course Enrollment Block. If possible, use the same name as Student Enrollment Block. **Remember** this name. Click on the "Add" button.
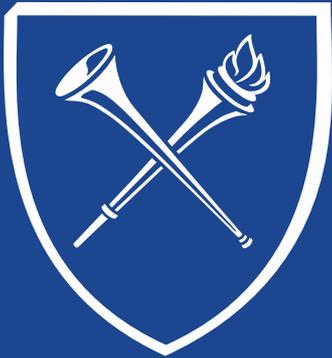
Set Up Block Enrollment

3. Enter a simple description (required).
4. Set up the course information and actions. Be sure to select any necessary overrides.

Options for Block Enrollment Actions:

Below are some of the actions most often performed using block enrollment with examples and instructions.

✓ Enrollment
  ➢ Enter of select term of the action in Term box.
  ➢ Select Enroll as the Action Reason.
  ➢ Enter 4-digit Class Number in Class Nbr box.
  ➢ If the class is Permission Only, click the Class Permission box.
  ➢ If Enrolling students after the Add/Drop/Swap date, click on Action Date box. A new box appears for entering the new date. Use the last day of Add/Drop/Swap for the semester of the enrollment as the Action date.
  ➢ Click SAVE.

✓ Enrollment (Screen View)

✓ Dropping Students

➢ Enter or select term of the action in Term box.

➢ Select Drop as Action Reason.

➢ Enter the 4-digit Class Number in Class Nbr box.

➢ If dropping students after the Add/Drop/Swap date, click on the Action Date box. In the new box that appears, use the last day of Add/Drop/Swap for the semester of the drop as the Action date.

➢ Click on the Class Permission override for Medical School classes. Most of these classes require permission to drop.

➢ For Medical School Only, click on the Unit Load override. When the Medical School drops classes, students may be allowed to be less than full-time. Do not click this override for other schools.

➢ Click OK.

✓ Dropping Students (Screen View)

Set Up Block Enrollment

✓ Swapping Classes

Tips:

➤ If the swapping is from a class to be cancelled to a newly created class, the new class must be created.

➤ Do not cancel the old class before creating a block of students. See the course offering documentation on Maintain Schedule of Classes and Schedule New Course documentation for details on scheduling a class.

➤ Set the enrollment limit of the old class at "0" to prevent new students from enrolling.

➤ Print the class roster of the old class before cancelling it. This will give us the grading basis and units for the students.

➤ If the roster is for a previous semester, the grades will need to be removed. This can be done with the block enroll merge using the Remove Grade action.

➤ If the students have varying units or grading basis, it may be easier to individually swap students into the class using the Quick Enroll process rather than using the Block Enroll process.

➤ Enter or select term in the Term box.

➤ Enter Swap Courses as Action Reason.

➤ In the top box below Class Nbr Change To, enter the 4-digit number for the old class.

➤ In the box directly below, enter the 4-digit number for the class to be swapped into.

➤ If swapping students after the Add/Drop/Swap, click on the Action Date box. Enter the last day of Add/Drop/Swap for the semester of the swap in the Action Date box that appears.

➤ Click on the Class Permission override box for Permission or Medical School classes.

➤ Click SAVE.

Set Up Block Enrollment

✓ Swapping Classes (Screen View)

OPUS Staff Training Manual
Records Tab: Enrollment
Manage Service Indicators
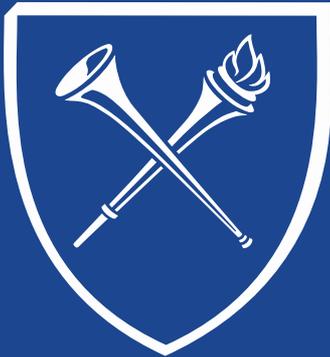
Maintain Service Indicators

Service Indicators are placed on a student's record to be

 Positive notices (informational)

or

 Negative notices (informational and/or preventive)

 FERPA Invoked – Do not release **ANY** information regarding this student

Positive notices may alert users that important information regarding the student's record is available.

Negative notices may prevent enrollment the release of official documents until criteria has been met regarding the student.

Service indicators are placed on a student's record by authorized officials. Service indicators can only be released by authorizing official or their representative.

FERPA can only be released with written approval of the student.
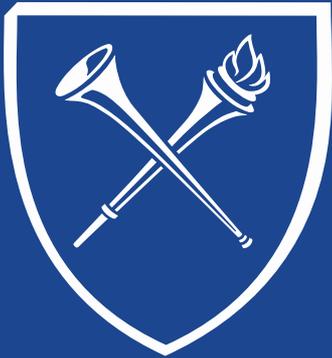
Service Indicators Search

Click the link on the Records Tab under the Enrollment folder

A search page will appear. Enter the student id or name and click SEARCH.

Click + *ADD A Service Indicator* to begin the process.

Please note: the student may have service indicators on their record. If they do click + to add a row on their record.

Adding a Service Indicators

Student's name & ID

Service Indicator Code & Description

Start Term & Date (You may also enter End Term & Date

Department that assigning the indicator

Who to contact?

Comments (if applicable)

Services Impacted (if applicable)

Click Apply & OK to SAVE.

Removing a Service Indicators

Return to the Manage Service Indicator page via the Records Tab link.

Locate the correct service indicator and click on the code. A new screen appears with the information that was entered earlier. Notice there is a RELEASE button active in the upper right side of the page. Click the button and SAVE.
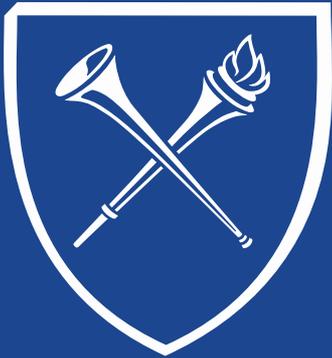
If you have questions about any of the materials covered in this section, please contact the Training Coordinator in the Office of the Registrar at *registr@emory.edu*. Thank you.