Berkeley | Student Information Systems Project

SIS Project Hot Topics for Staff

This document represents a synthesis of issues and questions raised by Staff on campus at the September 1, 2016 SIS Town Hall and follow up September 8 and September 22 Triage Sessions.

CONCURRENT ENROLLMENT

Significant issues have been addressed with the release of Action Center and Work Center on 9/7/16. Bugs continue to be addressed, tools and reports refined, and enhancement requests being evaluated for potential future delivery. Note - the last day for Fall 2016 Concurrent Enrollment processing is Friday Sept. 23.

- **Training** for Concurrent Enrollment
  - See FAQ on Action Center & Work Center for more info on using these features.
  - In progress: How-to Job Aid for Spring 2017. Need identified at 9/8 Triage Session.
- **Reports** for Concurrent Enrollment
  - There are three reports that relate to Concurrent Enrollment available for advisors and enrollment managers in the Concurrent Enrollment pagelet of the Reporting Center -
    - UC_CS_GT_CE_1STEP (for approvers who have a single step of approval - specific departments only)
    - UC_CS_GT_CE_2STEP (for L&S departments)
    - UC_CS_GT_CE_3STEP (for non-L&S departments.)
  - Reporting Crosswalk for info on new SIS reports replacing legacy reports
  - Visit SIS Reports website for info on release dates, contact info and other news
- Issue 1 - It is very **slow to approve each request 1 by 1**. How can I see all CE applications on one page and batch approve/deny?
  - Response - The new Action Center shows all requests available to be evaluated. Approvers can filter by class number, student name, student ID number or by a single Form ID. An approver can approve or deny multiple forms at once. These functions just went live in early Sept. 2016.
- Issue 2 -How can a department **block students from requesting Concurrent Enrollment** in certain courses where it is not allowed?
  - Response - Functionality that allows departments to restrict which courses eligible for Concurrent Enrollment has been documented as a need for future development. Delivery timing TBD.
- For help on specific issues related to Concurrent Enrollment, please contact UCB Extension at concurrent@berkeley.edu.

WAITLISTS & TIME CONFLICTS

SIS has captured a number of diverse issues relating to Waitlist and Time Conflict management, and is fixing bugs and addressing individual issues as quickly as possible. For some known losses of functionality compared to legacy systems, such as ability to bulk manage wait lists, these have been logged as potential future enhancements, and best practices are being honed and communicated that may make these changes easier..

- **Training** resources
  - See SIS Training site for Waitlist Management Resources
  - See Enrollment Management FAQ, a living document with information on many issues relating to enrollment, including waitlists and time conflicts
- **Reports** to assist with enrollment
  - How-to guide for Reports to assist with enrollment and getting students into class
  - Office of the Registrar's Suggested Classes list of currently open classes with no prerequisite required for Fall 2016
  - Reporting Crosswalk for info on new SIS reports replacing legacy reports
  - Visit SIS Reports website for info on release dates, contact info and other news
- Issue 1 - The new **time conflict enforcement** approach and functionality is creating a lot of downstream issues and added work effort for staff. What is being done/can be done?
  - Short-term: Students were provided with a time conflict override mechanism to request enrollment into time conflicted classes and they are continuing to be lprocessed.
  - Medium/long-term: analyze the reasons provided in students' override requests, and re-evaluate the business case for enforcement and potential solutions.
  - For issues related to time conflicts, please submit a ticket to SIS at sishelp@berkeley.edu.

- Issue 2 - **Waitlists are not running** consistently!
  - UPDATE - Effective week 4, automated waitlists no longer run for Fall, as per Registrar practices, but can be run for an individual department by special request. Contact sishelp@berkeley.edu.
  - During the first 3 weeks of class, Student Records ran the automated waitlist process at 7am and 7pm. There were some issues that caused the batch job not to run on occasion, impacting users however, fixes were made that are expected to improve this functionality for Spring.
  - For issues related to waitlists, including a request to run the waitlist process for a specific class or department, please submit a Help Desk ticket to SIS at sishelp@berkeley.edu.

- Issue 3- Students not able to **switch secondary sections when on the waitlist** as they were able to in TeleBEARS. (They first have to drop the waitlisted section then re-add another. Students can use the "edit" option to switch sections if enrolled.) This has resulted in a significant increase in traffic and requests to staff (Advisors and Enrollment managers) to make the add/drop moves on behalf of students while retaining their overall wait position (see Issue 4 below).
  - Short term: Students should review the enrollment FAQ and plan accordingly, i.e. advise student to pick their section choice when they initially waitlist for a class and discussion.
  - Long term: The SIS project will evaluate the cost/benefit of implementing a modification to Campus Solutions code to support waitlist switching.

- Student resources:
  - Enrollment FAQ
  - Enrollment Guide
- UG students should submit tickets related to waitlists to Cal Student Central. Grad students and staff please submit tickets to SIShelp@berkeley.edu.

- Issue 4- Managing enrollments and waitlist processing has become increasingly more time consuming. The inability to process **batch add/drops** from a waitlist in the new SIS is creating a lot of extra work for staff. On an individual request basis, the act of moving a student from one class or section is many more screen and extra clicks, resulting in repetitive stress problems.
  - SIS recognizes this loss of functionality from legacy systems.
  - Short term: There is no easy solution currently available. The prescribed batch process is around 45 steps and an individual move must be processed on 3+ screens. Please see SIS site for Enrollment & Waitlist Management Resources.
  - Long term: evaluate and identify ways to improve the workflow for waitlist management, which may include creating new tools or short-cuts
  - For help on specific issues related to waitlist management, please submit a SIS Help Desk ticket at sishelp@berkeley.edu.
- Issue 5 - **How to set up classes** - what boxes to check, etc. - to meet my specific needs? How you setup a class can really impact enrollment processing, ex:. from an efficiency (automated) perspective.
  - Class Schedulers have class-specific requirements that they need to achieve, such as:
    - Shaping who can/can't enroll (reserve capacity), prerequisites, permissions, and blocking enrollment
    - Process manually or auto from waitlist
    - Permitting undergraduates to enroll in a grad class
  - Short-term: Class schedulers should see the Office of the Registrar's Scheduler's Toolbox. See SIS Training site for Waitlist Management Resources
  - Long-term Opportunity: the SIS project, in partnership with class schedulers, should create a "cook book" of "recipes" or use cases for setting up a basic class, large classes, and to meet specific enrollment restrictions.
  - For help on specific issues related to class setup, please submit a SIS Help Desk ticket at sishelp@berkeley.edu.

GRADUATE AWARDS AND FEE REMISSION

- **Training** resources
  - Training resources are available here: http://sis.berkeley.edu/training/financial-aid-resources under "award entry by departments."
  - When you receive access to Campus Solutions (after completing required SIS and FERPA trainings), you will receive information about Open Labs, where you may bring specific issues for hands-on support.
  - In progress: Based on your feedback, SIS is creating a visual map of the end-to-end process of funding grad students, including awards, fee remissions, so staff can do self-service troubleshooting and understand how the system works.
- **Reports** for Graduate Awards and Fee Remissions
  - All reports related to Grad Financials are being managed by the financials team in the Graduate Division. For more information, please contact Graduate Division directly.

- Issue 1 - **Not having access to Campus Solutions** needed to process awards
    - Award Entry access training and FERPA training is required.
    - Backlog in Security Access requests is now up to date
    - New users may access the training for Award Entry here:
        - http://baimanuals.berkeley.edu/UPK/CampusSolutions/data/toc.html
        - Select "Financial Aid"
        - Select "Award Entry"
    - Going forward, if security access requests are delayed, please verify that you have completed both the training and the FERPA requirement. If it has been more than three business days since trainings were completed, please log a SIS Help Desk ticket at sishelp@berkeley.edu
- Issue 2 - **Setting up item types** took too long, was confusing, and there was no confirmation back when they had been set up
    - As of Monday, September 19, the Create Item Type functionality will be available in Campus Solutions. The temporary New Item Type request form was removed as of Friday, September 16.
    - The backlog of new item type requests prior to September 14 has been processed.
    - Requests that were entered while the New Item Type form was still available are now being processed.
    - Instructions for creating Item Types may be found here.
    - To check on the status of a previously created Item Type or an award, please log a SIS Help Desk ticket at SIShelp@berkeley.edu
- Issue 3 - Students **fee remission not posting to their accounts** in Cal Central
    - The Fee Remission process is now automated, and certain requirements must be met:
        - Student must have a qualifying Job Code in HR, including start/end dates and FTE (hours)
        - Student must be enrolled in 12 or more units
    - If student falls out of eligibility, Fee remissions will not be granted or may be rescinded.
    - There have been issues with the cross referencing of employee IDs/student IDs/CalNet UIDs that have prevented remissions from posting. An overall fix is in the works.
    - In the case of a problem that cannot be resolved timely, with Graduate Division consent, the SIS team has a way to temporarily override the automated process so students are not penalized because of a system problem.
    - For fee remission issues, please log a SIS Help Desk ticket at sishelp.berkeley.edu
- Issue 4 - The nonresident alien tax withholding (1042S) business process has changed, based on clarification of the policy by UCOP.
    - Nonresident (NRA) Students (generally F-1 or J-1 visa holders) receive automated communications from CS when their Glacier paperwork needs to be submitted or updated. Awards will post to CS, but non-fee specific awards will not apply to any charges or refunds until the paperwork is received and processed by the Glacier Team in Central Payroll.
    - Once the NRA student files the required paperwork, ***the tax withholding rate of 14% (unless there is a tax treaty exemption) is calculated on the award amount in excess of qualified fees .*** Student Health Insurance Program (SHIP) fees are considered qualified fees for purposes of 1042S tax withholding.
    - The tax withholding amount is computed and maintained in Campus Solutions so it is always up to date and visible to students and administrators/advisers. Unlike prior

practice, tax is not withheld in BFS at the point the student receives an EFT/check payment

- The timing of awards, remissions,and sponsor payments, can sometimes result in tax withholding showing on the student's account as an amount due. This is most often the case when a qualified fee (such as NRST) is reversed.
- For issues regarding tax withholding, please log a SIS Help Desk ticket at sishelp.berkeley.edu