**Schedule of Courses Training Document (for Chairs and Admins) Updated July, 2018**

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5. ***SOC Timeline***

**Department Admins & Chairs: Initial Schedule Build (~6 weeks)**

* Schedule from corresponding semester of previous year rolls over in Banner form SWCSCHD. The version of the schedule that rolls is the final version, not the initial schedule build. For example, the end-of-term version of 201709 (fall 2017) is copied to create the draft version of 201809 (fall 2018).
* The Registrar’s Office notifies departments and dean’s offices when the schedule has been rolled and sets deadlines and the overall timeline for the remainder of the process.
* Departments (Chairs and Admins) edit the SOC (through SWCSCHD) and enter new information for the subsequent term. SWCSCHD typically closes to departments at the end of the first week of a given semester for the subsequent semester. For example, the SOC for 201901 (spring 2019) closes to departments at the end of the first week of classes for 201809 (fall 2018).

***\*\*NEW in 2018: An SOC conflict resolution meeting will occur at this point in the process\*\****

**CEMS Student Services: Schedule Entry for Interdisciplinary Subject Codes, Student Conflicts, Local Room Conflicts (~2 weeks)**

* CEMS Student Services builds the schedule for non-departmental subject codes: ENGR, EMGT, CEMS, CSYS.
* CEMS SS examines the collective schedule through the lenses of both traditional and off-cycle students, ensuring that requested meeting patterns allow typical schedules to be built. CEMS SS works with Chairs to resolve conflicts that were either not identified or resolved during the conflict resolution meeting. For example, if all ME sophomores have a conflict with MATH 271, CEMS SS works with ME and MATH Chairs to move course(s) from one or both departments.
* CEMS SS identifies opportunities to manage conflicts by restricting enrollments by section. For example, if EE sophomores have conflicts with all but one section of MATH 121, an initial restriction of EE majors only on the section that fits into their schedule may be added in order to prevent those with more flexibility from taking seats from those with less.
* CEMS SS views the requests for all locally-controlled CEMS rooms – Votey 205, Votey 229 & Perkins 108 – through the [Votey computer lab schedules website.](http://www.cems.uvm.edu/uvmpages/labsched.php) If there are conflicts, CEMS SS works with appropriate department Chairs to resolve them.
* SWCSCHD typically closes to Deans’ Offices (CEMS SS) at the end of the third week of a given semester for the subsequent semester. (CEMS SS has access for two weeks after departmental access ends).

**Registrar’s Office: SOC Review, Hardcoding Restrictions/Prerequisites/Fees (~2 weeks)**

* Registrar’s Office reviews information entered into SWCSCHD and contacts departments and/or CEMS SS with any questions.
* RO hardcodes restrictions on courses that have been entered into comments. Prerequisites (whether in the initial comments or not) and fees are also hardcoded at this point.
* **IMPORTANT: Requested changes to the SOC are put on hold until this process is complete.**

**Departments & CEMS Student Services: Proofing (~2 days)**

* Departments and Deans’ Offices (CEMS SS) have the opportunity to proof the schedule after the RO review to ensure requests are accurately reflected.
* Departments and CEMS SS can request changes to the schedule during proofing phase, and they will be processed immediately. Any changes requested during RO review phase are processed during proofing.
* Proofing is only open for two days and is a critically important step. It typically occurs in early October (for the following spring’s SOC) and mid-February (for the following fall’s SOC).

**Registrar’s Office: Classroom Scheduling (~3 weeks)**

* RO pre-assigns classrooms for faculty with ADA letters on file with HR.
* RO reaches out to academic units to address supply/demand issues, particularly for large classrooms during primetime.
* RO meets with Associate Deans (or CEMS SS in the case of CEMS) to clarify issues, often around common hour midterm exams, recitation sections, and other unusual meeting patterns.
* After the scheduler is run, RO provides CEMS SS with a list of all of the courses that are scheduled in General Purpose (GP) rooms and all courses that “fell out” of the room scheduling process, i.e. could not be scheduled.
* **IMPORTANT: Requested changes to the SOC are put on hold until this process is complete.**

***\*\*Schedule of Courses is typically posted at this point without classroom information\*\****

**CEMS Student Services: Classroom Assignment Review (~1 week)**

* CEMS SS has opportunity to review room assignments and make internal swaps before assignments are released to faculty.
* CEMS SS follows up on all “fallouts”, working with Chairs to change meeting patterns and/or capacities, add sections, etc.

**Faculty & Chairs: Classroom Assignment Review (~1 week)**

* Department Chairs and faculty review classroom assignments. Change requests should be submitted through the appropriate forms in myUVM as soon as possible to maximize options.
* Faculty and Admins can submit change requests themselves through their myUVM accounts. (Faculty-initiated change requests go to Department Chairs, who must approve them by forwarding them to CEMS SS.
* Department Chair-initiated change requests are automatically sent to CEMS SS.

1. ***SOC Responsibilities***

**Department Admin Responsibilities**

* Initial schedule entry into Banner.
  + Comments
* Fees <http://www.uvm.edu/policies/acct/coursefees.pdf>
* Prerequisites (refer to current year’s catalogue)
* Restrictions, e.g. CEMS students only – be specific!
* Classroom technology/set-up requests
* Room requests
* Avoid internal conflicts, e.g. CE 001 and CE 170 MWF 12:00-12:50 in Votey 207.
* Room requests are not required. It is possible to request a particular building without requesting a room or leave both the building and room fields blank. (Note that the ‘NSM’ code will display).
* Common hour exams (e.g. CS 021)
  + If possible, request and enter only specific dates/times (e.g. October 4 & November 8, 6-8 PM)
  + Request same day of week to minimize impact on student schedules.
* Multiple meeting patterns (e.g. EE 141)
  + Enter both meeting patterns for course on separate lines in SWCSCHD (e.g. MWF 1:10-2:00, R 4:05-5:20).
  + Lecture/Lab combinations (e.g. EE 120)
    - If there is only one lecture and one lab, enter both the lecture and lab meeting patterns for the course on separate lines in SWCSCHD.
    - If there are multiple lab options, they should be set for 0 credits and listed as L01, L02, etc. or A01, A02, etc.
* Proofing during two day proofing period and requesting appropriate changes.
  + Proofreading considerations:
    - Print final schedule prior to CEMS SS and RO review and proof against it.
    - Proof against initial schedule in format submitted by Chair.
    - If there are inconsistencies or other items of concern, communicate them to Chair.
    - Check that RO has cleared out comments that aren’t intended for/helpful to students.
* Submitting room and schedule change requests (on behalf of Chair and/or faculty) throughout the SOC lifecycle.

**Department Chair Responsibilities**

* General considerations.
  + In an effort to keep average class size low, split classes before they reach an enrollment cap of 70.
  + Convey all PTL and overload requests to the DO (Jacob & Doug).
  + Restrictions: Who can register?
    - Do you want to open a given course to students outside of your program/college?
    - Some courses, e.g. MATH 015, MATH 018 have intended audiences in other units. Communicate with them about restrictions and expected enrollments.
    - Don’t forget the interdisciplinary programs: ENGR (BA/BS) and EMGT.
* Setting realistic capacities.
  + Overestimating capacities maximizes the number of sections that can be scheduled into the meeting patterns being requested. (This is particularly true for large sections with enrollments of 70 or greater).
  + Underestimating capacities leads to late requests to find larger rooms or split classes, which isn’t always possible.
  + If you are offering any x-listed courses, negotiate with your counterpart in the other department(s) offering the course regarding the breakdown of seats for each of the x-list iterations. For example, if ME and EE 295 are x-listed and the total capacity of the course is 30, how many seats should be in the ME version and how many in the EE version? (NOTE: If the overall cap is set at X and each section is also set at X, students are able to register for either course until the overall cap is met).
* Reviewing relevant data to set capacities.
  + Examine current enrollments in feeder courses.
  + Examine the relationships between feeder and subsequent courses from year-to-year, e.g. what % of students in fall ME 040 sections go onto ME 042 in the spring?
  + Use the Enrollment Summary report in the Schedule of Courses Tools section of the Dean/Chair tab, which allows you to compare course enrollments across terms.
* Spreading out course offerings over all meeting patterns.
  + There are enough rooms to accommodate sections if all meeting patterns are used. Limit requests for non-standard meeting patterns, particularly in GP rooms.
  + Schedule larger, required courses in non-primetime meeting patterns.
  + Use the Course Distribution tab in myUVM to view distribution of courses across the day.
  + Set 50/50 primetime/non-primetime as the goal for your department.
* Room requests.
  + Match room requests with capacity needs.
  + An enrollment cap set at room cap will result in the scheduling software giving priority to a CEMS class versus another class competing for the same space with a lower enrollment cap.
  + Use [Virtual EMS](https://emsweb.uvm.edu/EmsWebApp/BrowseForSpace.aspx) to view capacities, technology specs and photographs of the space.
  + Use the [Warrington Room Finder Tool](http://www.cems.uvm.edu/~gswarrin/rooms) to find rooms that aren’t being requested during a given timeslot.
  + Convey to faculty that room requests during the initial stages of the SOC process are only requests – they are not assignments!

**CEMS Student Services (Dean’s Office) Responsibilities**

* Initial entry of courses using interdisciplinary subject codes: ENGR, EMGT, CEMS, CSYS.
* Examining schedule through student lens; working with appropriate Chairs to resolve student conflicts
* Looking for opportunities to manage conflicts by restricting enrollments by section; communicating about and enforcing restrictions.
* After room scheduling run, working with Chairs to resolve courses that “fall out”.
* Advising Chairs on courses to offer during summer sessions and how to maximize summer enrollments (e.g. offering courses in succession; offering lower division courses online).
* Collaborating with CDE on marketing for CEMS summer courses.
* Liaising with RO on faculty and student ADA issues that have SOC implications.
* Working with Chairs and RO on Block Scheduling process for FTFY students.
* Ongoing maintenance of SOC, including:
  + Monitoring enrollments and communicating issues to Chairs; working with Chairs and Dean to develop solutions for full sections, such as adding additional capacity, changing rooms, and/or adding sections.
  + Adjusting capacities, personnel and comments. **NOTE: Any x-listed course capacities must be adjusted by the RO, and thus may have a longer turnaround time.**
  + Negotiating internal room swaps with appropriate Chairs.
  + Working with Chairs and Dean to make adjustments to the SOC due to sabbaticals, retirements, resignations, medical leaves and other unforeseen circumstances & personnel changes.
  + Advising Chairs, Admins and faculty on SOC processes.

1. ***Final Exam Scheduling***

Final exam scheduling is done separately (and after) the SOC process for a given semester. Faculty requesting to move final exams or schedule common hour final exams should initiate such requests with their Chair. The Chair will share the request with the Dean’s Office (CEMS SS). CEMS SS will work with the Registrar’s Office to accommodate the request.

1. ***Web Resources***

* Resources tab (myUVM)
  + Room change request for faculty & Admins
* Dean/Chair tab (myUVM) => Schedule of Courses Tools
  + Proof courses
  + Section change request form
  + New section request form
  + Room change request form
  + Link to GP classroom information (from EMS)
  + Standard meeting patterns
  + SWCSCHD Banner form instructions
* Course Distribution tab (myUVM)
  + Displays course distribution across prime-time & non prime-time meeting patterns.
  + Displays MWF versus TR meeting patterns.

Locally scheduled room schedules website w/ capacity info:

* <http://www.cems.uvm.edu/uvmpages/labsched.php>

Warrington Room Finder Tool and Warrington Course Data Tool:

* <http://www.cems.uvm.edu/~gswarrin/rooms>
* <http://www.cems.uvm.edu/~gswarrin/charts>