# UH Requisite Checking

Departments that intend to implement course level requisite checking will contact the Assistant Registrar who will schedule a meeting to review components, functionality, scope and timing.

UH implements course level requisite checking at the request of the department/college that "owns" the course(s), referred to as *user* in the description of this business process, and only after adequate user testing has been completed.

It is highly recommended that the user designated to manage requisites have a strong working knowledge of department/college curriculum management policies and protocol, class schedule development, and enrollment (add/drop) processing before embarking on the implementation of requisites.

Appropriate training and security permission forms must be on file to grant access to this level of **myUH** components. Training sessions (Viewing Student Records, Enrollment, and Class Schedule Development) are scheduled for the university staff at large and training schedules can be accessed by searching "myUH training" on the UH main web page.

Access to the **Post Enrollment Requisite Checking** components (outlined in this document) is granted after user(s) meet with the Associate Registrar for training and have an approved/updated security permission form on file.

After contacting the Assistant Registrar to implement requisite checking, the user will complete the excel template for implementation tracking. This template should be returned before or during the initial implementation discussion and used as the record of implementation progress, this chart defines the scope of the implementation of the project:

**Timing** is everything, when implementing requisites; students will NOT be prevented from registration unless the requisite is in place BEFORE the enrollment cycle begins.

1. Define target courses to be setup using xls template below
   NOTE: only requisites clearly defined in Course Catalog language;
   send list to the ReqCheck Team via email: **ReqCheck@uh.edu**
2. After parameters are reviewed to qualify for ReqCheck setup, you will receive notification. At this point, you need to identify test students/emplids for each course/scenario and send back to ReqCheck team. Test students should include:
   a. students that meet requisite
   b. students that do not meet requisite
3. ReqCheck team will create setup in a test database and notify you when setup is in place
4. you will test as
   a. administrator (can you add them into class?)
   b. student (would student able to enroll self into class?)
   We will communicate by email until we are satisfied that the requisites are working as intended.
5. Setup is placed in production!

| | | | Information provided by course owner | | | ReqCheck Team Use | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Course prefix** | **course number** | **Course ID:** | **Catalog language** | **Comments for implementation** | **where setup: Catalog or Class Schedule?** | **setup completed** | **setup tested** | **setup in production** | **Requirement code** | **Comments** |
| 4 letters (usually) | 4 numbers (usually) | obtained from the active course row in PS | Provide language in catalog that supports this request. | Describe how you want the language to be implemented, if different than the exact language. | **Catalog** = requisite check is on the course and every section scheduled for that course  **Schedule** = requisite check selectively applied to specific section(s) of course | | | | | |
| CHEM | 3221 | 15001 | Prerequisites: CHEM 1112 and credit for or concurrent enrollment in CHEM 3331 | implement as described. | Catalog | sample | sample | sample | 004138 | sample example |
| | | | | | | | | | | |
| | | | | | | | | | | |

Template:

http://www.uh.edu/about/offices/enrollment-services/registrar/curricular-services/class-scheduling/enrollment-management-tools/course-requisites/perc/reqcheck-template.xlsx

**Template Note Text:**

Timing is everything, when implementing requisites; students will NOT be prevented from registration unless the requisite is in place BEFORE the enrollment cycle begins.

1.  Define target courses to be setup using xls template below
    NOTE:  only requisites clearly defined in Course Catalog language;
    send list to the ReqCheck Team via email:  [ReqCheck@uh.edu](mailto:ReqCheck@uh.edu)

2.  After parameters are reviewed to qualify for ReqCheck setup, you will receive notification. At this point, you need to identify test students/emplids for each course/scenario and send back to ReqCheck team. Test students should include:
    a.  students that meet requisite
    b.  students that do not meet requisite

3.  ReqCheck team will create setup in a test database and notify you when setup is in place

4.  You will test BOTH as
    a.  Administrator (can you add them into class?)
    b.  Student (would student able to enroll self into class?)

    We will communicate by email until we are satisfied that the requisites are working as intended.

5.  Setup is placed in production!

**Assumptions**:

*   Users are expected to drop students, who have not met requisites, according to department/college and university policies.
*   Users may not implement requisites that are not clearly outlined in the official course description in the current active record of the Course Catalog.
*   Should changes in requisites, for any course, be updated in the Course Catalog, as approved by the department/college and then GPSC or UGC, the user must notify the Registrar's office, in a timely manner to ensure that requisite filter parameters are updated, before the next enrollment cycle.
*   It is optimal to develop and test, well before the next enrollment cycle begins to ensure that no disruption of service issues occurs.
    UH enrollment cycle periods
    o   Summer/Fall terms - begin mid-April
    o   Spring Term - early November
    The person designated to implement/manage requisite checking, will perform all testing in a non-production database which should include testing as an administrator/advisor and/or student.  OUR will not perform this level of testing.

**To implement requisite checking:**

A. **Enrollment Requirement Group** (ERG) is created (by OUR, if user does not have access), which outlines the parameters of the filters to be implemented:

B. Owners of the course must decide (excel template) whether they want the ERG to be in place
1. **For all time:** the ERG is attached to most currently active Course Catalog row:



Filters will then default to individual class section rows, as seen in the **Adjust Class Associations** component, where users will maintain the ERG throughout the enrollment periods.

**NOTE:** *Also Use Catalog Requisite* checkbox (see below) <u>must be checked,</u> for any sections the requisite is expected to filter. When requisites appear not to be working, **Adjust Class Associations** is the first place the user should check, before reporting issues to OUR.

It is advised that owners of the class <u>always</u> review this setup BEFORE the enrollment cycles begin; in this example (BELOW) the checkbox has been removed, therefore the filter is OFF on all sections being offered for the term:

2. Owners may elect to attach **a term/specific requisite** and should use the *Class Associations Requisites* to add the ERG to the appropriate section of the **Adjust Class Associations** component to add the ERG, then Save, as it is NOT defaulting from the Course Catalog setup.
   In this example, the Course Catalog filter default (ERG 004137) is ON, because the *Also Use Catalog Requisite* is checked and, an additional requisite (ERG 003435) has been added manually to filter Associate Class 1, for Honors Program students.
   This setup reflects two ERG's added to CHEM 1111, Associated Class 1



<span style="background-color:lightgreen">**HERE'S WHERE THE FUN STARTS! -**</span>
- <span style="background-color:lightgreen">**How students qualify for registration in a class  (C)**</span>
- <span style="background-color:lightgreen">**How to audit what qualified the student for Enrollment (D & E)**</span>
- <span style="background-color:lightgreen">**How to audit if a student still qualifies for enrollment in the class (D & E)**</span>

C. When ERG are in place, students are able to enroll if they have met or will meet the requisite prior to class start. If a student has a change in transfer credit records, test records, drops or fails a class, which is a requisite for their future enrollment, they WILL NOT be dropped automatically from their future enrollment.

Courses required as co-enrollment requisites, will force the student to drop the co-enrolled class, before they are permitted to drop the class they wish to drop.  In the case of CHEM 1111, students who are co-enrolled in CHEM 1331 and attempt to drop 1331, must also drop CHEM 1111 because it is setup as a pre-requisite or co-requisite requirement.

OUR runs the *Post Enrollment Requisite* checking process automatically every Monday that will review the class rosters where ERGs are in place and determine how students qualified for enrollment into the course.

D. Users are given access to the **Enrollment Requirement Roster** component, to monitor whether the students on the roster have met the requirements for the class:
Only classes that have an ERG attached, will display in search values, in this component:

Favorites | Main Menu > Curriculum Management > Enrollment Requirements > Post Enroll Req Checking > Enrollment Requirement Roster

**Enrollment Requirement Roster**

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

**Find an Existing Value**

Maximum number of rows to return (up to 300): 300

| Academic Institution: | begins with ▾ | 00730 | 🔍 |
| Term: | begins with ▾ | 1880 | 🔍 |
| Subject Area: | begins with ▾ | CHEM | 🔍 |
| Catalog Nbr: | begins with ▾ | | |
| Session: | = ▾ | ▾ | ▾ |
| Class Section: | begins with ▾ | | |
| Class Nbr: | = ▾ | | |

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

**Search Results**

| View All | | | | | | | First ◀ 1-8 of 8 ▶ Last |
|---|---|---|---|---|---|---|---|
| Academic Institution | Term | Subject Area | Catalog Nbr | Session | Class Section | Class Nbr | Description |
| 00730 | 1880 | CHEM | 1332 | Regular | 01 | 14714 | Fundamentals of Chemistry |
| 00730 | 1880 | CHEM | 3331 | Regular | 01 | 14759 | Fund of Organic Chemistry I |
| 00730 | 1880 | CHEM | 3331 | Regular | 02 | 14762 | Fund of Organic Chemistry I |
| 00730 | 1880 | CHEM | 3331 | Regular | 03 | 14760 | Fund of Organic Chemistry I |
| 00730 | 1880 | CHEM | 3331 | Regular | 04 | 14761 | Fund of Organic Chemistry I |
| 00730 | 1880 | CHEM | 3331 | Regular | 05 | 26265 | Fund of Organic Chemistry I |
| 00730 | 1880 | CHEM | 3332 | Regular | 01 | 14763 | Fund of Organic Chemistry II |
| 00730 | 1880 | CHEM | 3332 | Regular | 02 | 28413 | Fund of Organic Chemistry II |

E. Users will review by Class Number, all class rosters
   a. Filtering
      Use the checkboxes in the Set Filter Options of this component, to adjust the cohort of students you wish to analyze, by checking or unchecking boxes, and then press FILTER to refresh data display.
      In this example, all students have met the requisite and the filter is set to display only those students who have NOT met the requisite.

Favorites | Main Menu > Curriculum Management > Enrollment Requirements > Post Enroll Req Checking > Enrollment Requirement Roster

New

**Enrollment Requirement Roster (Summary)**

Spring 2013 | Regular Academic Session | University of Houston | Undergraduate

▽ **CHEM 1111 - 02 (10992)**
Fundamentals of Chm Lab (Laboratory)

| Days and Times | Room | Instructor | Dates |
|---|---|---|---|
| Mo 2:00PM-5:00PM | STL 301 | Vladimir G Zaitsev | 01/14/2013 - 05/10/2013 |

▽ **Enrollment Requirements:**
Credit for or Co-requisite: CHEM 1331

Enrollment Capacity   10

Select Display Option:   ⦿ Summary View   ◯ Detail View

▾ **Set Filter Options**   [filter]

**Enrollment Status:**
Display   ☑ Enrolled (21)   ☑ Waitlisted (0)   ☐ Dropped (1)

**Most Recent Requirement Status:**
Display students in non-compliance   ☑ Not Satisfied (0)   ☑ Conditionally Satisfied (0)
Display other students   ☐ Enrollment Component (0)   ☐ Overridden (0)
   ☐ Permitted (0)   ☐ Satisfied (21)   ☐ Unknown (0)

**The selected filtering did not return any students**

🖥 Save | 🔍 Return to Search | ↑▥ Previous in List | ↓▥ Next in List

b.  *Requirement Data* tab:
    Below, is an example of changing the filter, to display the students who have "Satisfied" the ERG



- *Enrollment Req Status* column displays the status <u>at the time the student initially enrolled</u>
- *Post Enrollment Req Status* displays the status <u>as of the last time the post-enrollment requirement check process was run</u>.

c.  *Audit/Information Links* tab:

- *Tracking* hyperlink, for a specific student:
  - View the audit trail on the enrollment transaction (who performed the add)
  - View the last update of the Post Enrollment Requisite process run
  - Enter and save notes about enrollment in this section



- *Course History* hyperlink, links you to Student Service Center for the selected student:
  - *My Course History* includes test, transfer, and UH enrollment data:

d. *Communicate with Students*
   Use the Select All box, or check individual students, to notify (send email), as needed:



e. *Run Post Enrollment Requirement Checking*
   This sub-component section (see below) allows you to run the PERC process for selected students and (optional) <u>set the Drop Request Indicator</u> for those that are non-compliant by because the pre/co-requisite(s) are conditionally satisfied and/or not satisfied.
   - This **DOES NOT** drop the student(s).
   - The Drop/Approved Indicator and Post Enroll Req Status columns will update.

f. *Process Drops for Non-Compliance*
   This sub-component section (see below) allows you to process the drop for non-compliance. Select the radio button that is associated with the condition(s) for which you want to drop the student.
   - This **DOES** drop the student(s).
   - The Status and Status Note columns will update.

**Select Display Option:** ◉ **Summary View**    ○ **Detail View**

### ▼Set Filter Options

filter

**Enrollment Status:**

Display  ☑ Enrolled (0)    ☑ Waitlisted (0)    ☑ Dropped (6)

**Most Recent Requirement Status:**

Display students in non-compliance  ☑ Not Satisfied (2)    ☑ Conditionally Satisfied (0)

Display other students    ☐ Enrollment Component (0)    ☐ Overridden (0)

☐ Permitted (0)    ☑ Satisfied (4)    ☐ Unknown (0)

---

**Enrolled, Waitlisted and Dropped Students**    Personalize | Find | 🔳 | 🔳    First ◀ ◀ 1-6 of 6 ▶ ▶ Last

| | Requirement Data | Audit / Information Links | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Select** | **ID** | **Name** | **Drop / Approved Indicator** | **Enrollment Req Status** | **Post Enroll Req Status** | **Status** | **Status Note** |
| 1 | ☐ | 1473410 | Covarrubias,Gustavo Dejesus | Drop Request | Unknown | Not Satisfied | Dropped | PERC Drop |
| 2 | ☐ | 1450797 | Fatima,Nishat | Drop Request | Unknown | Not Satisfied | Dropped | PERC Drop |
| 3 | ☐ | 1431527 | Galvan,Tomas O | | Satisfied | | Dropped | |
| 4 | ☐ | 1405972 | Ravishankar,Sharad | | Satisfied | | Dropped | |
| 5 | ☐ | 1262374 | Rowe,Zachery Lee | | Satisfied | | Dropped | |
| 6 | ☐ | 1436808 | Van,Randy | | Unknown | Satisfied | Dropped | |

Select All    Clear All    Go to top

notify selected students

### ▼Run Post Enrollment Requirement Checking

**Run Post Enrollment Requirement Checking for selected students**    run

Set Drop Request Indicator for Students in Non-Compliance

☐ If process results in a status of Conditionally Satisfied

☐ If process results in a status of Not Satisfied

### ▼Process Drops for Non-Compliance

**For students listed above, process drops for:**    run

◉ selected students

○ students where Drop Request Indicator is selected

○ students with a post enrollment requirement status of:    ☐ Conditionally Satisfied    ☐ Not Satisfied

💾 Save    🔍 Return to Search    ↑🗐 Previous in List    ↓🗐 Next in List