Instructors – Integrated Waitlist Tip Sheet

Waitlist Overview:

- Starting with the F14 term, a new course waitlist feature has been added to eGrades and GOLD
- A waitlist button will become available to students once the following criteria are met:
    - Registration Pass 1 has begun (this is a change effective Spring '17);
    - The department or instructor has enabled the waitlist for the course in eGrades; and
    - All lectures and sections of the course are full or closed.
- Students signing up for the waitlist will be prompted to select which sections they would be willing to add and will be informed of the number of students already on the waitlist for each section.
- The waitlisted units will count toward a student's unit maximum to limit the number of units that they may waitlist. Students may also 'link' a waitlist to a registered course to indicate that they want to replace the enrolled course with the waitlisted course.
- Spaces that become available after students have registered for a waitlist may not be directly added by the student. They may only be added by the Auto-Add process or with an approval code.
- The Auto-Add process, if left enabled, will run every 6 hours (midnight, 6am, noon, and 6pm) and will assign available spaces to the student at the top of the waitlist. The student will be added and notified via email
    - The auto-add feature may be set to sort students on a first come, first served basis or may be set to use other criteria (e.g. major, class level.)
    - This feature will only add students that are eligible to add the course. Students missing pre-requisites, major limitations, level limitations, etc. will not be automatically added.

Setting up a Waitlist:

- After logging into eGrades and selecting the future quarter, there will be a "View Waitlist" link next to each course name:

ANTH 2 - INTRO CULT ANTHRO	(View Waitlist)				eGrades Due: 12/23/2014 11:59:59PM	
EnrlCd	Cncrnt	Instructor(s)	Meeting Time(s) / Location(s)	Enrld/Max	Proxy(s)	Status	Grades
00018		WALSH C	M W F 10:00-10:50 CAMPB HALL	2/860		Not started	Open
00026			F 2:00- 2:50	2/28		Not started	Open

- Clicking on that link will navigate to the Waitlist settings page:

Course Waitlist for ANTH 2

Settings | Waitlist

Instructor modification for this course's waitlist settings have been turned off at the departmental level. If changes to these settings are required, please contact the grading coordinator for your department.

Enable/Disable Waitlist

Enable Waitlist: ⦿ Yes ◯ No

Disable Auto-Add From Waitlist: ☐

Auto-Add End Date: ⦿ At end of 5th Day of Instruction ◯ Prior to First Day of Instruction

Waitlist Type: ◯ First Come, First Served ⦿ Criteria Based

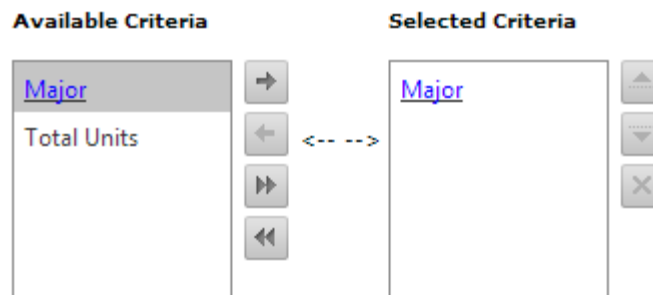| Available Criteria		Selected Criteria
Major	→	Total Units
Total Units	← <-- -->	
	⏩	
	⏪	

These notes will display to the student in GOLD.

Waitlist Notes:

[Return to List of Courses] [Save Changes]

- Available settings:
  - Enable Waitlist: Selecting 'Yes' will enable the waitlist
  - Disable Auto-Add: The Auto-Add process will automatically add students to the course if spaces become available. If you wish to distribute approval codes instead of allowing the Auto-Add process to run, check this box.
  - Auto-Add End Date: this will determine whether the auto add will stop prior to the first day of the term or at the deadline to add without an approval code (5th day of instruction).
  - Waitlist Type: Select either First Come, First Served or a Criteria based Waitlist. If Criteria based is selected, you will see a display of criteria options. To select criteria to be enforced simply click and drag the criteria over to the Selected Criteria column. The waitlisted students will be ordered by the criteria selected. Additional information is in the Criteria Selection section below.
  - Waitlist Notes: Any notes entered in this box will be be displayed to the student in GOLD. We highly recommend using this space to inform the student of the criteria and process being used to assign spaces in the course.
- Once you have completed entering your settings, click the Save Changes button.

Setting Criteria for a Criteria-based Waitlist:

When selecting a criteria-based waitlist, you will need to specify which criteria should be used in sorting the students on the waitlist. To select criteria, click and drag the desired option(s) from the Available Criteria box to the Selected Criteria box.

Available Criteria:

- Major: The major option will allow you to select a list of majors that should be given priority when sorting the waitlisted students. Double-clicking on the Major option will open a pop-up dialog box. To select majors, find the department which houses the major you wish to select and double click on the Department name or click on the arrow next to the department. The Department will expand to display all majors housed in that department. To select the major code, click and drag the major to the Selected Majors box. Once all majors have been selected, click on the Save button at the bottom of the pop-up. Once you see the message indicating that the updates have been saved, you may click on the 'X' in the upper right corner of the pop-up to close it.

  The order of the majors selected does not matter at this point in time. The majors selected will all be granted equal priority.
- Total Units: will sort the students by their total units from greatest to least.

Sorting

The sort will be performed based on the criteria selected and their order in the Selected Criteria box. For example, if the Selected Criteria list contained Major followed by Total Units, the students would be sorted based on those students that are in one of the prioritized majors followed by those that aren't. Then within those two groups, the students would be sorted based on unit totals. In cases where there are 2 or more students with the same selected criteria, the students would be ordered based on when they added themselves to the waitlist.

Viewing Students on a Waitlist:

- The list of students currently on the waitlist may be viewed by accessing the waitlist settings and clicking on the 'Waitlist' tab:

Settings	Waitlist							

Enroll Code Filter: All ▾

Eligibility Filter: ⦿ All Students
       ○ All Active Students
       ○ Eligible Students
       ○ Ineligible Students

Pstn	Perm	FirstName	LastName	Eligible	Status	ClassLevel	GPA	Major(s)	Email
1	300530	Case	Test	True	Active	Masters	3.96	ECE	tc1@umail.ucsb.edu
2	526777	Case	Test	True	Active	Junior	3.04	PRCHM	tc2@umail.ucsb.edu

[Return to List of Courses] [Send E-mail to This Group] [Export List]

- At the top of the Waitlist dipslay you will find some filter options:
  - Enroll Code: Allows you to display All students on the waitlist for the course or you may select an individual Enrollment Code to display only the students that selected that Enroll code as an option.
  - Eligibility Filter allows you to limit the displayed students to only those that meet certain criteria:
    - All Students: displays all students with waitlist records
    - All Active Students: Only displays those students that are still Active (not enrolled or dropped)
    - Eligible students: Only displays students that meet the requirements to add the course (note: this will include students that have pre-requisite coursework in progress)
    - Ineligible students: Only displays those students that do not meet requirements to add the course.
- The fields displayed are:
  - Pstn: Position on Waitlist. This field will display the student's current position on the waitlist based on the waitlist settings. Students that are not Active (either enrolled or dropped) will not have a value.
  - First Name
  - Last Name
  - Eligible: 'True' indicates that the student currently meets the criteria to be added to the course. 'False' indicates that the student doesn't meet pre-requisites, major restrictions, or some other coding that would prevent the student from adding the course.
  - Status: 'Enrolled' indicates that the student was on the waitlist but has since been enrolled in the course. 'Dropped' indicates that the student removed themselves from the waitlist. 'Active' indicates that the student is still on the waitlist.
  - Class Level: This is the student's current class level for the quarter.
  - Major(s): Up to two of a student's majors will be displayed
  - Email: the student's Umail account
- If you wish to Extract the class list, you may do so by clicking on the Export List button. This will produce a comma-separated value (CSV) file that may be opened in Excel or any other spreadsheet application. The extract will only include those students currently displayed on screen, so you may filter the students prior to extracting should you choose to do so.
  The Extract includes the following fields in addition to all those from the online display:
  - There will be one column for each Enrollment code covered by the Waitlist. Each student record will have a 'Y' for each Enrollment Code that they selected when adding to the waitlist.
- If you wish to send an email to the population of students, filter the students until the desired population is displayed, then click on the "Send Email to This Group" button. A dialog box will open that will allow you to fill in the email subject and message. Clicking Send will email the selected group. If you select the option to receive a copy of the email, it may take some time to arrive depending on the number of students on the distribution list (sometimes up to an hour). The copy to the sender is the last email sent and is confirmation that the rest of the emails were sent by the application.

Auto-Add Process:

The Auto-Add process is a background process that runs 4 times per day and attempts to add Waitlisted students to courses as spaces become available. This process will only add students that meet all eligibility criteria for a course (e.g. pre-requisites, major limitations, level limitation, etc.). Students that do not meet all criteria are notified at the time they add to the waitlist that they will not be auto added and will need to speak to the instructor or department.

When a space becomes available the Auto-Add process will find all of the students that selected that enrollment code and sort them based on the criteria set in the Waitlist settings. It will then proceed to attempt adding the student at the top of the list. If the student is not eligible for the class, the process will move on to the next student in line. The process will continue until there are no available spaces remaining or until it has attempted to add all of the students on the list.

Approval codes will continue to function alongside the waitlist and will override the waitlist as well as any eligibility checks.

Instructors that do not wish to use the Auto-Add process may disable this feature in the Waitlist settings and may issue approval codes to fill spaces as they become available.

Important Dates:

- Last Day to Add a Course without an Approval Code (5th day of instruction): This is the last day that a student may add themselves to a waitlist and the last day in which the Auto Add process will run.

Frequently Asked Questions:

1. How do I give priority to a particular student on a waitlist?
    a. While there is not currently a way to flag a student as next in line, you may always issue an approval code to allow a student into a course.
2. Can settings be changed for an individual lecture if there are multiple offerings of a course?
    a. As of right now the Waitlist system only supports one set of criteria per Course, so all instances of a particular course number will share settings.
3. When does the Auto-Add process stop?
    a. The Auto-Add process stops running once the deadline to add a course without an Approval Code passes or prior to the first day of instruction depending on the waitlist settings. If you wish to shut off this process early, please work with the eGrades grading coordinator to update the waitlist settings to disable the Auto Add function.
4. Why can I no longer edit the waitlist settings?
    a. Instructors may edit the waitlist settings at any point up until the first student adds themselves to the waitlist. Once students have started adding to the waitlist, edits to the settings must be performed by users in the Grading Coordinator, Acting Chair, or Chair roles. You should still be able to view the waitlist, export the waitlist, and send a group email using the utilities on the Waitlist tab.

For further assistance with eGrades, email eGrades@sa.ucsb.edu or call 893-4147