

Manual Canvas Enrollments Procedure

About the Procedure

WHAT: In 2024, IDT was instructed to revise our procedures for requests to manually add users to Canvas course shells. **All college Deans/Associate Deans have been made aware of this procedure.** Enrolled students and instructors of record are automatically loaded into Canvas shells via eServices (PeopleSoft data). All other manual enrollments are subject to the following procedures.

WHY: These changes ensure FERPA-related student data security when anyone other than designated instructors of record or officially enrolled students (both per eServices/PeopleSoft records) have access to potentially sensitive user data.

Canvas Roles/Permissions

Users in Canvas are assigned one of the course roles listed below. Roles that include user access to student grades ("**Grade Access?** Yes?) require written (email) approval from the college's dean or associate dean. Roles that do not include student grade access ("**Grade Access?** No) don't need a dean's or associate dean's authorization; however, the dean will receive a notification when IDT staff manually add users with these roles.

| Role | Needs Grade Access? | Description |
|----------------------|---------------------|--|
| Teacher (Instructor) | Yes | The instructor(s) of record are automatically added to their Canvas shells based on eServices/PeopleSoft data. IDT will NOT manually add users with this role without the dean's/associate dean's approval. |
| Secondary Instructor | Yes | This is a manually added role used when an instructor-of-record or college administrator needs another instructor to review, assist with, or temporarily access a Canvas course with the ability to see and/or edit student grades. For example, this role should be used in the event an instructor suddenly retires, stops teaching, or leaves for whatever reason. IDT will NOT manually add users with this role without the dean's/associate dean's approval. |

| Role | Needs Grade Access? | Description |
|---|----------------------------|--|
| Teaching Assistant (TA) | Yes | This manually added role is nearly identical to the Teacher role in terms of course access and management. IDT will NOT manually add users with this role without the dean's/associate dean's approval. |
| View Grades Student | Yes | This is a manually added role that is identical to the Student role but enables the user to view student grades. IDT will NOT manually add users with this role without the dean's/associate dean's approval. |
| Non-Grading Teaching Assistant | No | This is a manually added role that restricts access to student grades but enables the user to edit course content and interact with learners via Discussions, Messages, etc. |
| Embedded Tutor / Librarian | No | This is a manually added role that restricts access to student grades but enables the user to interact with learners via Discussions, Messages, etc. |
| BUS Teaching Assistant / Practicum Student | No | This is a manually added role that restricts access to student grades and content editing but enables the user to interact with learners via Discussions, Messages, etc. |
| Student | No | The only users manually added to Canvas credit course shells with this role are auditing students or learners working to resolve an Incomplete. Regarding Incompletes, faculty need to inform IDT about whether the user should be reactivated in the learner's original shell or in the instructor's current semester offering. For auditing students, the instructor must make the request to IDT and inform the learner to forward to supportcenter@uhcl.edu their completed auditing paperwork (Audit Application, Schedule, and Fee Statement). |

Responsibilities/Procedures

Responsibility for manually adding faculty, staff, or students to Canvas shells is shared by instructors, their Deans/Associate Deans, and OIT's IDT team, as described within each option below.

UHCL Faculty

Instructors wanting users manually added to their courses are responsible for the following:

1. Ensure that you are not requesting that we add someone as a TA who is already a registered student in the course.
2. Ensure that the user to be added has an active UHCL staff computer account. IDT will not manually add users using UHCL student computer accounts (except for auditing students and students working to resolve Incompletes).
3. Request Student-role access with the user's UHCL student account for auditing students and those working to resolve Incompletes.
4. For requests occurring outside of when their dean's office sends bulk TA/RA enrollment requests to IDT, **faculty must request from their Dean/Associate Dean that the Dean send written (email) approval to IDT staff, requesting the user's manual enrollment in any Canvas role that includes grade access (see table above).**

College Deans' Offices

Each college dean's office will be responsible for the following in advance of each new semester.

1. Ensure that employment records for TAs/RAs are submitted or updated before the start of each new term. This step ensures that TAs/RAs have active UHCL staff computer accounts that IDT must use when manually adding users.
2. At least one week before the first day of the new semester, the Dean's/Associate Dean's Office will provide IDT with a comprehensive list of all TAs/RAs for the new term, including the course information for classes to which each TA/RA should have access and the specific role (e.g., TA, BUS TA) each is authorized to be granted.
3. The dean's/associate dean's office should advise IDT staff if/when TAs/RAs should lose access to designated Canvas courses for any reason **during a semester.**

In addition, each Dean/Associate Dean is responsible for responding to manual user enrollment requests from faculty made at times other than the start of each new term.

Deans/Associate Deans should email the IDT staff to approve the manual add, specify the user to be added, the course to which to be added, and the role/permissions to be granted to the user.

OIT Instructional Design and Technology (IDT) Team

IDT staff are responsible for the following:

1. Manually add users to Canvas shells within five (5) business days of receiving lists (or similar notifications/requests) from the deans'/associate deans' offices. **NOTE: Expired user accounts will be added to the requested courses; however, users with expired accounts will remain unable to access the course(s) until the college and HR complete the hiring/rehiring procedures needed for automatic account reactivation.**
2. Notify the appropriate dean's office when IDT manually adds a user to a Canvas shell in any role that does not include grade access (per the table above).
3. Notify the requesting dean/associate dean when a user cannot be added or has been added but cannot access designated Canvas shells because they do not have an active UHCL staff computer account (per item #1 above).
4. Ensure that manually added users lose access to designated courses at the end of each term.

For more information about the contents of this document, please contact the OIT Support Center (supportcenter@uhcl.edu) to request IDT assistance.