Enrollment and Career Program Plan (CPP)

Training Guide

New York University
ALBERT SIS
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Course Overview

The objective of this training is to provide administrative users with an understanding of enrollment functionality, career program plan (CPP), and service indicators. After completing this training users should be able to successfully enroll a student, update their plan, and place/release a service indicator. The functionality covered in this training is considered enrollment and CPP update access in Albert SIS.
Chapter 1 Service Indicators

Service indicators, also called holds, can be used to provide or limit access to services for an individual or to distinguish them in some way.

Add a Service Indicator

Step 1: Navigate to Campus Community > Service Indicators (student) > Manage Service Indicators

Step 2: Populate the information you know: name, N number, or campus ID and Click Search

Step 3: Click on either one of the + Add Service Indicator links

Step 4: Enter a Service Indicator Code, you will only see the ones you have access to in the Look up

Step 5: Enter a Service Indicator Reason Code, you will only see reasons associated with the code you selected and that you have access to; when the reason code is populated the description field, department, and placed Person ID will auto populate

Step 6: Enter a Start Term and Start Date (within the term you selected; The End Term and End Date fields are optional
Step 7: Click OK; The hold has now been placed
Remove a Service Indicator

**Step 1:** Navigate to Campus Community> Service Indicators (student)> Manage Service Indicators

**Step 2:** Populate the information you know: name, N number, or campus ID and Click Search

**Step 3:** Select the Code you want to remove

**Step 4:** Click on the Release button to remove this service indicator. If you do not see a Release button you do not have security access to release this hold.

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**Edit Service Indicator**

- John

<table>
<thead>
<tr>
<th>Institution:</th>
<th>NYU-NEW YORK UNIVERSITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Indicator Code:</td>
<td>XAC</td>
</tr>
<tr>
<td>Service Ind Reason Code:</td>
<td>XAC</td>
</tr>
<tr>
<td>Description:</td>
<td>You are not currently eligible to enroll in courses for this term. Approval of your schedule by your advisor is required.</td>
</tr>
<tr>
<td>Effect:</td>
<td>Negative</td>
</tr>
</tbody>
</table>

- Click OK
- The hold has now been removed
Viewing Service Indicators

Campus Community> Student Services Ctr (Student)

- The circle with a line through it means the student has a negative service indicator and the red star is a positive service indicator. If you click on the symbols you will be taken to the Manage Service Indicators page.

- Clicking on the ‘details’ link in the Holds box will display all information for the holds

Your Holds

<table>
<thead>
<tr>
<th>Hold Item</th>
<th>Reason</th>
<th>Start Term</th>
<th>End Term</th>
<th>Start Date</th>
<th>End Date</th>
<th>Department</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measles, Mumps, Rubella Vac</td>
<td>Measles, Mumps, Rubella Vac</td>
<td>Hold Until Released</td>
<td></td>
<td></td>
<td></td>
<td>All Departments</td>
<td>A block has been placed on your registration for failure to comply with NYU Public health Law 2567 and New York University's requirement to provide proof of inoculation to measles, mumps and rubella. Please visit the health requirement information page at the Student Health Center's website: <a href="http://www.nyu.edu/health/requirements">www.nyu.edu/health/requirements</a> to review the required documentation and forms. The block will be removed approximately 24 hours after you comply.</td>
</tr>
<tr>
<td>Meningitis Vaccination</td>
<td>Meningitis</td>
<td>Hold Until Released</td>
<td></td>
<td></td>
<td></td>
<td>All Departments</td>
<td>A block has been placed on your registration for failure to comply with NYU Public health Law 2567 and New York University's requirement to acknowledge receipt of information or provide proof of vaccination against meningococcal meningitis. Please visit the health requirement information page at the Student Health Center's website: <a href="http://www.nyu.edu/health/requirements">www.nyu.edu/health/requirements</a> to review the required documentation and forms. The block will be removed approximately 24 hours after you comply.</td>
</tr>
</tbody>
</table>
Audit Service Indicators

Service indicators are not deleted, they are simply removed from student records and an audit is kept on when it was placed, who placed it, and when and who removed this service indicator.

Step 1: Navigate to Campus Community>Service Indicators (student)> Audit Service Indicators

Step 2: Populate at least 2 search values Recommend using students Campus Id (N number) and the Start Term fields

Audit Service Indicators

Step 3: Click Search

Step 4: Click on any link to view details, Actions are A=Add, D=Dropped

Audit Service Indicators

- Click to view all of the information on the 3 tabs at once (Assignment, ID Data, and Date/Time)
Chapter 2: Understanding Enrollment

This section illustrates how to enroll (register) a student in classes, drop a student from a class, perform a SWAP, and normal maintenance. Students must be active in a career/program and a plan, term activated in the term you are attempting to enroll them in, and have a valid enrollment appointment before a student is eligible to enroll.

Step 1: Navigate to Records and Enrollment> Career and Program Information>Student Program/Plan

Step 2: Validate the student is “Active in Program”

Step 3: Navigate to Records and Enrollment>Student Term Information>Term Activate a Student

Step 4: The term you want to enroll them in is populated

Step 5: Navigate to Campus Community> Student Services Center (Student)

Step 6: Check the Enrollment Appointment box
Enrolling a Student

Step 1: Navigate to Records & Enrollment > Enroll Students >Quick Enroll A Student

Step 2: Select the Add a new value tab

Step 3: Use the student’s N # or ID, once you enter one the other will auto-populate. Use the look ups to select Career and Term, you will only see valid options. Then Click Add

Quick Enroll a Student

Find an Existing Value  Add a New Value
**Step 4:** Leave the Action as Enroll

**Step 5:** Enter the Class Nbr or use the look up. The look up will bring you to the class search.

**Step 6:** Once you have selected a class, click Submit

**Quick Enrollement**

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**Step 7:** You will receive 1 of 3 results: Error, Messages, or Success.

- **Errors:** The student was NOT enrolled. Click on the Errors link to see why. Note that the system will only display one error at a time if there are multiple. So if you resolve the first error you get, you may get another when you click submit again.
- **As an administrator with access to enroll students you will have access to these overrides:**
  - Class closed: Click on the Closed Class override and resubmit the request, will read success.
  - Requisites not met: Click on the Requisites check box and resubmit the request.
  - Permission Needed: Department Consent Required to Enroll in Class, Add Not Processed. Click on Class Permission and resubmit request.
  - Override Career – student is undergrad and you have authority to enroll them into a graduate level class.
- **Messages:** the action was successful but the student was waitlisted or is repeating the class
- **Success:** the student was enrolled, no further action required

**Drop a Student from a Class**

**Step 1:** Navigate to Records & Enrollment > Enroll Students >Quick Enroll A Student

**Step 2:** Select the Add a new value tab

**Step 3:** Use the student’s N # or ID, once you enter one the other will auto-populate. Use the look ups to select Career and Term, you will only see valid options. Then Click Add

**Step 4:** Select Drop from the Action drop down menu

**Step 5:** Enter the class number or use the look up. The look up will display all the classes the student is enrolled and waitlisted in.
Step 6: Select a class then click submit.

**SWAP**

A swap is a single enrollment transaction that simultaneously drops a student from one class and enrolls them in another.

Step 1: Navigate to Records & Enrollment > Enroll Students > Quick Enroll A Student

Step 2: Select the Add a new value tab

Step 3: Use the student’s N # or ID, once you enter one the other will auto-populate. Use the look ups to select Career and Term, you will only see valid options. Then Click Add

Step 4: Select SWAP from the Action drop down menu

Step 5: Enter the class number or use the look up. The look up will display all the classes the student is enrolled and waitlisted in, Select one

Step 6: Enter a class number in the Change to field or use the look up. The look up will bring you to the class search.

Step 7: Click Submit, you will get Success, Errors, or Messages.
Normal Maintenance

Normal Maintenance is used in most cases to change the number of units a student is enrolled in for a variable unit class.

**Step 1:** Navigate to Records & Enrollment > Enroll Students > Quick Enroll A Student

**Step 2:** Select the Add a new value tab

**Step 3:** Use the student’s N # or ID, once you enter one the other will auto-populate. Use the look ups to select Career and Term, you will only see valid options. Then Click Add

**Step 4:** Select ‘Norm Maint’ from the Action drop down menu

**Step 5:** Use the Class number look up to view the student’s current enrollments, Select one

**Step 6:** Go to the Units and Grades tab

**Step 7:** If you selected a variable unit class, you will be able to edit the Unit Taken field

**Step 8:** Once you have changed the number of units, click Submit.

NYU Enrollment Request Search

This page is helpful when you are troubleshooting a registration issue or need to see a student’s entire registration history

**Step 1:** Navigate to Records and Enrollment> Enroll Students> NYU Enrollment Request Search

**Step 2:** Populate at least 2 criteria on this page, Career is required, and click on Search
Step 3 (optional): Can be downloaded to Excel by clicking the

Step 4: Click any of the Request Id links to view details on that transaction

Step 5: If the request had errors you can view the message(s) received at the bottom
Chapter 3: CPP (Career Program Plan)

Career Program Plan, also known as CPP, is a compilation of a student’s history of their degree, major, and minor information. A program plan stack is created when a student matriculates.

- Adding a plan to a student record is used when admitted students declare a minor or decide to take on a non-primary (secondary) major.
- Modifying a plan is used when a student wishes to change without deleting an existing primary major, non-primary major or a minor.
- Deleting a plan is used when a student wishes to drop a minor or non-primary major.
- Adding or modifying a sub-plan occurs when a student selects or changes a concentration within their plan.

Changing a Student’s Plan

Step 1: Navigate to Records and Enrollment > Career and Program Information > Student Program Plan

Step 2: Populate values on Search page to find student

Step 3: Add a new row by clicking the (+).

Step 4: Select the First Term Active for the term you want to make the change. Effective Date will auto-populate to the first day of the selected term. Do not change it.

Step 5: Select the Program Action, PLNC

Step 6: Click Save, Go to the Student Plan tab
Step 7: If you are changing the plan click the – button to remove the no longer valid plan. If you are adding major or minor to the plan click the + button.

Step 8: Use the Look Up for the Academic Plan field to select a value.

Step 9: Click Save.

Put a student on a Leave of Absence

- DO NOT put the student on Leave of Absence if they are enrolled in classes on or after the term you are placing the student on Leave of Absence.
  - This enrollment should be dropped prior to placing the student on leave.
- In order to put a student on Leave of Absence, their status should be “Active in Program”.

Step 1: Navigate to Records and Enrollment > Career and Program Information > Student Program Plan.

Step 2: Populate values on Search page to find student.

Step 3: Add a new row by clicking the (+).

Step 4: Select the First Term Active for the term you want to make the change. Effective Date will auto-populate to the first day of the selected term. Do not change it.

Step 5: Select the Program Action, LEAV.

Step 6: Select an Action Reason.

Step 7: Click SAVE.
As part of the current business process, when you put a student on a Leave of Absence you must also submit a RLOA Return from Leave of Absence

**Step 1:** Add a new row by clicking the (+).

**Step 2:** Select the First Term Active for the term you want the student to return. Effective Date will auto-populate to the first day of the selected term. Do not change it.

**Step 3:** Select the Program Action, RLOA

**Step 4:** Click SAVE
Albert SIS Security

Albert SIS security is given by roles. Roles in the system define the pages a user can view and the functions they can perform on a given page.

To receive access to Albert SIS, a user must complete the following:

1) FERPA & Training Requirements: Anyone requesting an Albert SIS account must complete the FERPA tutorial. Once completed, make sure to sign in with your NetID and password to fill out and submit the displayed form.

2) An authorized account requestor must submit a security request on behalf of the user. Each school has designated administrators to approve and submit requests for access to Albert SIS. The Office of the Registrar relies on these Requesters to determine if individuals within their schools should be given access, and if so, what access is needed for their specific role. See the current list of authorized requestors.