Welcome to the Fall CUNYfirst Training Times newsletter. This issue provides information related to training and end user support for campus CUNYfirst activities. In this issue, there are several new additions we have added to help put more information in the hands of users. One of the exciting additions is the updated CUNYfirst Training website. After receiving its cosmetic update earlier this year, we have continued to make improvements like: Self-Service Video Training, new and updated Step Sheets, and a complete section for ‘first time’ CUNYfirst users. Also for continued reference, we have included key topics in the areas of Financial Aid 3 C’s, Bursar Tuition Calculation and View Customer Account, and Registrar Repeat Check and Enrollment Cancellation. Our goal is to continue to update and introduce key topics that need renewed attention or have recent updates and changes.

In an effort to make improvements to the ongoing training needs of new and existing employees, our “Coming Soon” section is a preview of new program additions. Within this initial pilot, we will begin to rollout and offer continued training for our CUNYfirst schools that are live. Look to our next edition of the CUNYfirst Training Times newsletter and the CUNYfirst Training website (www.cuny.edu/cunyfirsttraining) for updates.

I urge you to use this newsletter as a reference for your day to day work and as a resource for keeping up to date with CUNYfirst Training.

Again, welcome and enjoy this edition of CUNYfirst Training Times.

Greetings from Adante Harvey

How to... Activate Your Account

In Internet Explorer, claim your CUNYfirst account.
1. Enter home.cunyfirst.cuny.edu in Internet Explorer.
2. Click the First Time Users link.
3. On the Account Activation page, enter all fields.
   • Tip — Use your First and Last Name of record.
   • Tip — Birthdate example — 11/30/1978.
4. Type the two words displayed in ReCAPTCHA.
5. Click the OK button.
6. On the Challenge Questions and Answers page, select five questions and enter answers.
7. Click the OK button.
8. On the Choose a Password page, enter and confirm your password.
   CUNY Password Policy when choosing a password:
   • 8 or more characters
   • 1 or more uppercase letters
   • 1 or more numeric or special characters
9. Click the OK button to submit the password.
10. On the User Activation Completed Successfully page, your Empl ID (CUNY ID) is displayed.

In Mozilla Firefox, separately to CUNYfirst, claim your training environment account. This simulated system has your security access linked to your ID.

1. Enter https://cnyeptst.cunyfirst.cuny.edu in Mozilla Firefox.
2. Complete Steps 2-9 as above.
CUNYfirst Training Website

The CUNYfirst training team constantly adopts and updates itself with new technology and tools in its endeavor to provide better training and services to the CUNYfirst users. The CUNYfirst training website is one of our such attempts. CUNYfirst users can navigate to the site using the url:

www.cuny.edu/cunyfirsttraining

The opening page of the CUNYfirst training website provides the users with documents that are relevant to all users regardless of their roles. Users can navigate further into the website to access training documents based on their roles by clicking one of the selection boxes as shown below.

CUNYfirst Training website supports documents for the following user roles:
- Students
- Faculty and Advisors
- Administrative Staff

The CUNYfirst Training website initiative is designed to provide time-saving and easy access to most of the training materials thereby bypassing the need to access them on ELM. However due to the confidential nature of some documents (Reference guide, Quick Reference guide etc) users will be able to access them only through the ELM.

Users can also access the ‘CUNYfirst Training Times’ newsletter on the CUNYfirst Training website. The most recent newsletter can be accessed by clicking on the picture of the newsletter on the bottom left-hand corner. All the previous newsletters can be accessed by clicking on the ‘Archive’ link next to the picture of the newsletter.

CUNYfirst Training Website legends:
>>> : Topics with this symbol next to it will expand/ collapse to display/hide relevant information and resources.

<pdf> : Clicking on the icon opens up the document for the corresponding topic in a PDF file format.

<video> : Clicking on the icon opens up the video for the corresponding topic.

CUNYfirst Introductory Courses

Coming soon

CUNYfirst has created a CUNYfirst Introductory course (INT 101). It is a recommended course for the users beginning with the CUNYfirst training program. The INT 101 course will be an Instructor led training course supported by User Manuals, PowerPoint slides and UPKs. The course has been designed with two components with each component aiding in the smooth transition of the end users towards the adoption of the CUNYfirst system.

1: CUNYfirst Training Essentials
This component will provide the user with the detail roadmap of training program and familiarize them with the CUNYfirst project. It will also aid in preparing the users for the core CUNYfirst training courses by acclimatizing them to different resources, training aids and simulation that will be available at their disposal.

2: CUNYfirst Basics
CUNYfirst Basics will introduce the users with the functionality of CUNYfirst system by exposing them to some of the basic processes within system. The component will only cover the basic processes that are relevant to all the user of the campus community. The component will act as a preparatory course for users as they enroll into more detailed training modules within the training program.

CUNYfirst Training Calendar

Coming soon

The CUNYfirst Training team is working on creating a new training calendar that would be part of the Training website. The calendar will display all the training dates and the associated information within it. Please watch out for the ‘CUNYfirst Training Website’ space in our next newsletter for additional details.
The 3C's
Verification is the process of checking the accuracy of the information supplied by students and their families when applying for financial aid. Therefore the campuses utilize the 3C's Components - Communications, Checklists, and Comments, to track and update interactions with student.

The Checklist page is a used to assign lists of requirements to individuals and to monitor progress toward completing those requirements.

The Checklist component can be found by navigating to:
Campus Community > Checklists > Person
Checklists > Checklist Management-Person

The Comments page is used to enter and track comments about individuals and organizations. You can review all comments about an individual or organization or all comments entered by a specific individual. Because personal comments are subjective and often confidential, please refer to business policy for entering and tracking comments.

The Comments component can be found by navigating to
Campus Community > Comments > Comments
Person > Person Comment Entry

The Communication Management page enables you to track and analyze communication with students.

The Communication component can be found be navigating to
Campus Community > Communications > Person
Communications > Communication Management > Person Communication

Financial Aid Status Page
The Financial Aid Status component page is used by the Financial Aid staff and is the primary way to view a students’ Financial Aid information. This component provides packaging status summary, checklist, communications, comments, and FA term information.

The Financial Aid Status Page can be found be navigating to
Financial Aid > View Financial Aid Status

Introducing Pathways
Pathways is here! The Pathways initiative began Fall 2013 across undergraduate colleges. The initiative provides a new system of general education requirements and new transfer guidelines. Each CUNY college has its own guidelines about how students must fulfill the requirements.

Eligible existing students who declared their preference to opt-in to Pathways and new CUNY students can search for classes to complete the 30 credits of Common Core and at some schools an additional 6 to12 credits of College Option credits.

On the Search for Classes page Search for Classes section, users still select the Institution and then the term to view the schedule of classes at that college. As before, users enter at least 2 search criteria and then click Search to view the results.

A new search criterion is the Requirement Designation dropdown menu which includes:
• College Option
• Flexible Core – Creative Expression
• Flexible Core – Individual and Society
• Flexible Core – Scientific World
• Flexible Core – US Experience in its Diversity
• Flexible Core – World Cultures & Global Issues
• Required Core – English Composition
• Required Core – Life and Physical Sciences
• Required Core – Mathematical and Quantitative Reasoning

The Search Results will display only those scheduled classes that meet all of the search criteria. Only one requirement designation value per course can be used. A requirement designation can be extra work that has to be done for a course, such as Design Credit. This table is maintained by the Office of the University Registrar.

Repeat Check
The Repeat Checking process is conducted to identify classes students have been repeated. The CUNY Repeat Policy CEMLI was developed to enhance the delivered repeat checking process and support the following CUNY policies:
• F grade forgiveness policy of a minimum grade; when a minimum grade of C or better is required to forgive the F grade or (F equivalent).
• CUNY policy forgiving all prior F grades within the 16 credit limit.
• 16 credit limit for F grade repeat policy (F-grade forgiveness)
The CUNY Repeat Policy process, updates the student’s record. For detailed information on the CUNY Repeat Policy, review the Student Records Reference Guide.
Tuition Calculation Verification Report

Tuition Calculation can be run manually or in as a batch process to update an students account with tuition charges based on the amount of credit hours in which the student is enrolled.

It is recommended, the Tuition Verification Report be run on a frequent basis to determine if tuition is calculated for each student who is enrolled for a particular term, with greater than zero (0) credit hours. This report can be run before and after Tuition Calculation to ensure the students account is accurate.

The Verification of Tuition Calculation component can be found by navigating to: Student Financials > CUNY SF Report Menu > Verification of Tuition Calc.

For additional information on the Tuition Calculation Verification Report, please refer to the Student Financial Reference and/or Quick Reference guide which can be located in ELM (Enterprise Learning Management) Campus Solutions Repository Student Financials Repository.

Customer Accounts

Staff in the Bursar’s office provide support for enrollment activities using the CUNYfirst View Customer Account component. This is an important component to view a student’s Total Balance and Anticipated Aid. Additionally, it provides Bursar staff with information related to the student’s Academic Plan and Enrollment status to further assess tuition charges and payments.

Key Fields used to analyze a student’s account are the following:

- **Total Balance**: The total amount charged to the student. This balance can include a balance from previous semesters.

- **Anticipated Aid**: The estimated amount of financial aid the student is expected to receive.

- **Balance**: The amount in the account summary reflects a specific term balance.

- **Academic Information Link**: Provides enrollment summary information by term.

In order to access to View Customer Account component, navigate to: Student Financials > View Customer Accounts

Enrollment Cancellation for Non-Payment

The Enrollment Cancellation for Non-Payment process is a collaborative process in which Student Financials will work with Student Records and Enrollment Managers at the campus to coordinate and communication the initiation and finalization of enrollment cancellation.

Bursars will use the report mode function of the Enrollment Cancellation for non-payment process to assist in analyzing the possible results. Bursars and others can use the generated report to determine how Enrollment Cancellation for non-payment would affect the enrollment statistics of their Institution.

Below are the recommended steps for completing the Enrollment Cancellation for Non-Payment Process.

Run the Enrollment Cancellation Process in Report Mode

- If Financial Aid is being interfaced, run the Enrollment Cancellation Query (for interface eligible Anticipated Aid amounts)

- Perform a thorough analysis of the report to determine students who qualify for cancellation or need to be assigned the ‘Do Not Cancel Registration’ (DNC) Service Indicator with the NOCAN Service Impact – either individually or through the Mass Assign Process.

- Run the Enrollment Cancellation Process in Report Mode again to verify the student population which has been modified for Enrollment Cancellation for nonpayment, is accurate.

- Run the Enrollment Cancellation Process in Production and communicate formally to the Student Records team for final cancellation processing.
As the spring semester approaches, you can expect the usual influx of ePermit students. CUNYfirst offers two distinct ways of processing ePermit students. There is a process for students with a CUNY ID and students without a CUNY ID.

**For students with a CUNYfirst ID:**

Campuses should use Program/Plan Stack. Program/Plan involves adding or creating a layer of academic program information to the existing student record. Those who lack pre-existing course data will have their stack created.

**For students without a CUNYfirst ID:**

Campuses should use Quick Admit to directly enter a student into CUNYfirst; and, activate them into an academic career, program, and term. CUNYfirst does not create an application; but, the system will create a student record with a program/plan stack. As needed, application information can be added at a later date.

In both cases, e-Permit students must be added to the appropriate Student Group to ensure the process is run to success. It is imperative the Student Group be active by the first day of classes for a particular term and inactive on or after the last day of finals.

For detailed information on e-Permit process, please refer to ELM (Enterprise Learning Management) Campus Solutions Repository and access the Admissions Reference and/or Quick Reference Guide.

**CEMLI Search**

The CEMLI Search is a repository of information containing reports and queries that have been developed for CUNYfirst. After entering a keyword or other search criteria, displayed is information including:

- Report Description – Including the Purpose and Use of the Report
- Menu Navigation
- Security Role(s) needed
- Notes and other information.

The CEMLI Search component can be found by navigating to: CUNY>CEMLI Search

**Upload Grades**

Additional functionality is now available in CUNYfirst to allow Faculty to upload assigned grades into CUNYfirst. To learn how to upload grades, view, download or print the updated Enter Grades Using the Grade Roster Step Sheet available on the cuny.edu website.

**Security in CUNYfirst**

If you do not have access to the components that you need to do your job:

1. Go to this Security .url in your browser - security.cuny.edu
2. Select CUNYfirst Application Security.
3. Download and complete the Campus Solutions User Access Request Form <pdf>.

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**Help Desks**

To Find any Help Desk address or phone number, refer to the following page on the CUNY website.

https://www.cuny.edu/about/resources/helpdesks.html