Greetings from Adante Harvey

Dear Colleagues,

Soon four additional campuses, Baruch, City College, John Jay, and Medgar Evers will begin to use CUNYfirst Campus Solutions for student information. With this change, we are introducing an enhanced approach to help prepare you for using the new system.

The CUNYfirst team has developed a ‘simulation’ system to help in understanding and completing your day-to-day responsibilities, prior to your college going live. The system has your students and institutional data, security access linked to your ID, and access to make updates. In other words, you will be able to practice and become more comfortable months before your campus moves to the new system.

There will be four additional Training Times newsletters, where additional information will be shared and requested of you. As part of this experience, training classes will be made available – by your campus CUNYfirst Trainers. These trainers have completed the CUNYfirst Train the Trainer program, and are available to assist with “how to” questions for specific items or general information. A listing of available courses will be available in ELM, the CUNYfirst Learning Management System, for anyone needing a course refresher.

We are also working with your campus help desk and security teams. If, while working in the system, you do not have access, please contact your campus help desk and refer to the section “Security” in the newsletter.

This system has been created to allow you to work at your own pace, and to learn and experience CUNYfirst before go-live. I look forward to working with each of you as we move toward a successful launch of CUNYfirst Campus Solutions.

Adante Harvey
CUNYfirst Training Manager

How to… Activate Your Account

In Internet Explorer, claim your Production 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.
    The training 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.
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 ours 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 these boxes as shown below.

**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.

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**Self Service Course Description**

**CS-FAC-201 Self Service: Faculty**
- Faculty who advise should attend Self Service: Advisors
- Schedules – Teaching and Exam
- Rosters – Class, Attendance and Grade
- Entering Textbooks

**CS-ADV-201 Self Service: Advisors**
- Academic Progress
- Service Indicators and Student Groups
- Enrollment - Search for Classes, Add, Swap or Drop Classes

**Campus Community Course Description**

**CS-CC-201 Campus Community**
- Student Services Center with Summary Data
- Add a Person to CUNYfirst
- Update Personal Information
- Service Indicators
- Checklists
- Student Groups

**Financial Aid Course Description**

**CS-FA-003 Verification**
- View Financial Aid Status
- 3C’s
- Suspense Management
- Correct ISIR Record
- View ISIR Field Audit
- View Student Packaging Status

**CS-FA-004 Awarding**
- Manually Awarding Financial Aid
- View Financial Aid at other CUNY Colleges
- View Aggregate Aid
- Online Manual Authorization Aid
- Create Authority Failure Report
- View Award Activity
- View Anticipated Aid

**CS-FA-005 Loan and Pell Processing**
- Assign Direct Loan to a Student
- Originate a Direct Loan
- View Direct Loan Application Component
- Run Validation Errors Report
- Override Processing Status
- Overriding Direct Loan/Bio Dem Information
- Relationship
- PLUS Denial/Override
- View Loan Processing Actions
CS Student Records Course Descriptions

SR-201 Foundations
• Student Records Overview
• Student Groups
• Service Indicators
• CEMLI Repository Search

SR-202 Term Setup
• Terms and Sessions
• Academic Calendar
• Certification of Attendance Roster Dates

SR-203 Course Catalog
• Course Offering
• Enrollments Requirements Groups
• Course Equivalency Groups
• Department Consent Requisite
• Course Offering: Update Credits/Hours

SR-204 Class Schedule 1
• Copy Prior Term Schedule (Batch Process)

SR-205 Class Schedule 2
• Schedule New Classes
• Student Specific Permission
• Scheduled Class Meetings
• Sections of a Class
• Associations
• Combined Sections
• Search for an Available Facility

SR-206 Enrollment Setup
• Residency
• Term Activate
• Enrollment Limits for Appointments
• Student Appointment Blocks
• Appointment Times
• Assign Appointments for Multiple Students

SR-207 Enrollment Management
• Term Activate Individual Students
• View/Update Appointments for Individual Students
• Quick Enroll
• Enrollment Request
• Enrollment Component

SR-208 Maintain Program Plan
• Search/Match
• Quick Admit for Non-Degree Student
• Create/Update Program/Plan Stack
• Reactivate Students
• Readmit Students

SR-209 Maintain Student Information
• Create Class Block
• Create Student Block
• Merge Blocks & Enroll (Class & Student)
• Move Students from Waitlist to Enroll
• Withdrawals and Cancellations for Individual Student
• Mass Enrollment (Batch Process)
• Create Enrollment Verification for Individual Student
• Update Instructor/Advisor Table
• Update Advisor Assignment for a Student

SR-210 Transfer Credit Setup
• Create Course Equivalents (Transfer Rules)

SR-211 Transfer Test Credit Evaluation
• Evaluate Transfer Credit - Automatic (Individual Student)
• Evaluate Transfer Credits Manual (Individual Student)
• Evaluate a Student’s Other Credits
• Evaluate Transfer Credit - Automatic (Batch Process)
• View/Update a Student’s External Courses
• View/Print Transfer Credit Summary
• SR-212 Grading
• Generate Transcripts for Individuals or Small Groups
• Generate Multiple Transcripts (Batch Process)

SR-213 Transcripts
• Create Grade Rosters (Batch Process)
• Post Grade Roster (Batch Process)
• Post Grade Roster (Single Class)
• Grade Lapse (Batch Process)
• Update Academic Standing (Batch Process)
• View/Update Academic Standing for Individual Student

SR-214 Graduation
• Graduation Processing for Individual Student
CS Student Financials Course Descriptions

Foundations of Student Financials (CS-SF-201)
Topics include:
- SF Key concepts and terminology
- Administrative View - Student Services Center
- Service Indicators and Student Groups

Tuition Calculation (CS-SF-202)
Topics include:
- Tuition Calculation-Batch and Manual
- Tuition Verification Report
- Tuition Eligibility Report

Student and Corporate Bills (CS-SF-203)
Topics include:
- Create, Generate, Print – Student Bill
- Create, Generate, Print – Corporate Bill
- View Billing Information
- Cancel Invoice

Manage Group Post (CS-SF-204)
Topics include:
- External File Upload
- Create Group Data Entries
- Correct, Post, Review Posted Transactions

Refunds (CS-SF-206)
Topics include:
- Process Campus Based Refunds
- Create Individual Student Refund
- Generate Refund with Extra Amount

Payment Plans (CS-SF-207)
Topics Include:
- Manage SALLIE MAE
- Maintain Third Party Contracts

Cashiering (CS-SF-208)
Topics Include:
- Opening and Closing the Cashier's Office
- Take Payments & Departmental Receipts
- Correcting Cashiering Errors
- Run Cashiering Reports
- Cashiering Maintenance

1098-T Tax Documents (CS-SF-209)
Topics Include:
- Setting up 1098-T Tax Documents
- Generate 1098-T Tax Documents
- Edit 1098-T Tax Documents
- Audit and Print 1098-T Tax Documents

Past Due Accounts (CS-SF-209)
Topics Include:
- Write Offs
- Enrollment Cancelation
- Collections
- Aging of Accounts
- Run Late Fees

End of Term (CS-SF-210)
Topics Include:
- Adjustment Calendars
- Billing & Due Calendars
- Copy Course & Term Fees
- Rollover Course & Class Fees
- Copy Transaction Fees

GL Interface (CS-SF-211)
Topics Include:
- Manage General Ledger Interface
- Post Transactional Data to GL

SF Set-up & Maintenance (CS-SF-212)
Topics Include:
- SF Initial Set-up

Manage 1098T (CS-SF-213)
- Set-up & Processing 1098T's
- Update & Correct 1098T Data

View Customer Account (CS-SF-214)
- View, analyze, & assess student financial account data:
  1. Charges & Payments
  2. Disbursements & Refunds
  3. Financial Aid & Payment Plans

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>.

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

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Serving our Students, Faculty & Staff