Last Updated 2/23/2013.

The audience for this class is CUNY students.

Welcome to Self Service for Students!

I am…

introduce yourself to the group.

This course is specify the duration of the course.

Feel free to ask questions at any time.

We will learn how to use CUNYfirst to enroll for classes, and get information about academic activities to date and going forward to complete your plan and graduate.
Students are able to manage their school related activities via **Self Service**.

We will begin by viewing the **Student Center** that provides a snapshot of your current information.

Then we will learn the **Enrollment** process.

Once you are enrolled, you may view your new **Weekly Schedule**.

You may view your **Customer Account** both for outstanding amounts and your financial aid package.

It is important to take care of any **Holds** on your record and complete your **Meningitis Acknowledgement Form** prior to enrollment.

You may add and edit some types of **Addresses** using Self Service.

Lastly, you may view your academic records via **Course History** and create an **Unofficial Transcript**.

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### Student Self Service Agenda

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When you activate or claim your CUNYfirst Account online, you learn your eight digit CUNY ID. You are assigned a user name and choose a password.

When you login you will usually go to your Student Center.
Navigate to: Self Service > Student Center

On this page are components of CUNYfirst that are part of Self Service for Students with a brief description.

Click on the Student Center link.
The **Student Center** component is used to manage school related activities.

Notice that your **CUNY ID** displays at the top of this page.

On the left is the **Academics, Finances and Personal Information** sections.

The **Finances** section provides details of all charges, payments and financial aid.

In the bottom left **Personal Information** section, your addresses are shown.

On the right hand side there is a stack of sections.

**Holds:** Current holds (service indicators) and a link to the details.

**To Do List:** Outstanding items/requirements checklist.

**Enrollment Dates:** Click the link to view your enrollment appointment date, time and approved load.

**Advisor:** If you have an assigned advisor, then the contact details are provided for your advisor.

The last three sections are links to external websites.
Students may enroll using Self Service.
There are three phases to Enrollment.

In CUNYfirst, you learn when you may enroll. Also, you can choose class sections in which you hope to enroll.

At the time of your appointment, you will place preferred class sections in your shopping cart, validate your eligibility to enroll in each class and add classes to your schedule.

Also, you can change your schedule when you drop or swap classes.
Preparation for enrollment involves knowing when you may enroll and selecting your class sections.

Some holds impact enrollment and must be taken care of prior to enrolling. We’ll look at holds later.
Students use Self Service to view their enrollment appointment during which they are able to add, drop and swap classes.

In the **Enrollment Dates** section, click the **details** link or **Open Enrollment Dates** link.

If you cannot see an appointment for the session for which you wish to enroll, then contact the designated office at your Campus. Most likely this will be the Registrar.
This page is student specific.

It is about your enrollment appointment and may vary from other students.

Open Enrollment Dates show the begin and end dates of your appointment.

Other enrollment appointments also include the time of day such as 10:00am or 3:00pm.

This lets you know how long you have got to prepare before enrolling.

Also view the number of units for which you may enroll.
From the Student Center, click the Search for Classes button.
The **Class Search** link will take you to this page where you may enter your search criteria.

Select the **Institution** and **Term** from the dropdown boxes to see that college’s **Schedule of Classes**.

The Schedule of Classes at every CUNY college in CUNYfirst is available.
Additionally, you must select at least two of the **Class Search Criteria**.

In this example, the two criteria are the **Course Subject** and **Course Career**:
- Undergraduate
- American Studies
Here the Additional Search Criteria are disclosed so that we may see all of the choices we have to narrow the Search Results.

In this example, this student wishes to attend only those classes offered Monday through Friday.

After you have entered all your search criteria, then click the Search button.
The Search Results show a section of interest.

Click the Section link to view Class Details.
The Class Detail page has six sections.

In the Class Details section, notice the status of the class, the grading basis and the instruction mode. For example, some students prefer not to have any part of a course be online.

The Meeting Information section indicates where and when the class is meeting.

You may determine your eligibility to do a course by reading the Enrollment Information section.

The total number of seats and the number of remaining seats is shown in the Class Availability section.

The Description is from the Catalog.

Any learning materials are listed in the Textbook/Other Materials section.
Students add classes to their schedule at the time of their Enrollment Appointment.
The Enrollment Shopping Cart lists those sections in which you would like to enroll.

All of the class sections in which you wish to enroll may be placed in your shopping cart as soon as that term’s Schedule of Classes is added to CUNYfirst.

Placing a class in your shopping cart does not guarantee a seat in the class.

When you add a class during your Enrollment Appointment and get a success message then your seat is confirmed.

We will also learn how to validate your eligibility and for available seats in any section in your shopping cart at any time.

During Enrollment, CUNYfirst availability updates in real time.
From the student center page in the academics section, select the enrollment shopping cart link.
Here we see that this enrollment shopping cart is empty.

One way to place classes in the shopping cart is to type in the class number and click enter.

The other way is to do a class search.
Here we see that this enrollment shopping cart is empty.

One way to place classes in the shopping cart is to type in the class number and click enter.

Input the unique four or five digit number that identifies the section.

Then click the Enter button.
After looking to see if this is the class section you want in your Enrollment Shopping Cart, then click the Next button.
At the top of the page, a message displays that confirms the preferred class section is in your Shopping Cart.

Another way to choose classes is to select the Class Search radio button and then click the Search button.
Here your school and the term is already shown.

Again, at least two criteria are required on the Enter Search Criteria page.

Select the Course Subject to begin your search from the shopping cart.
On the Search Results page, view and select a class section from the list of classes that matches your search criteria.

Here you can see the class number for each section shown in parentheses on the Section link. This unique four or five digit number will apply only to this term or session.

Click the select class button.
After looking to see if this is the class section you want in your Enrollment Shopping Cart, then click the Next button.
The message confirms that the preferred class section has been added to your **Shopping Cart**.
Once a class is in your shopping cart, you may validate your eligibility for the class and the availability of a seat by selecting the **validate** button.

This will help you successfully enroll in your preferred class sections.

Let's view a successful and unsuccessful validation of a class.
In the top example, the student appears not to have the required prerequisite on their record.

Depending upon the reason your request is unsuccessful, your advisor may be able to assist you to get into the section.

In the lower example, you have met any requirements listed on the **Class Details** page and there is a seat available at this point in time. No holds at the time of viewing will prevent you from enrolling in this class.

CUNYfirst updates in real time and so as you near your enrollment appointment it is recommended that you validate your selections to confirm seats are still available.
From the **Student Center** page in the **Academics** section, click the **Enroll** link.

- Select **Enrollment: Add** and then click the **Go** icon.
Once you have validated classes in your Shopping Cart you are ready to enroll.

When the day and hour of your enrollment appointment period begins, you may enroll using Self Service.

When more than one class is in the shopping cart, the system processes enrollment requests in the order you put the class in the shopping cart from top to bottom.

To enroll in these classes from your Shopping Cart, click the **PROCEED TO STEP 2 OF 3** button.
This **Confirm classes** page displays.

Look to see that these are the class sections that you want.

Then click the **FINISH ENROLLING** button.
The View results page displays.

If enrolled, a success message displays that confirms the class is in your schedule.

If not enrolled, an error message displays. Whenever an error message appears, a reason is given. Sometimes, an advisor or the Registrar’s Office may assist with such an enrollment request.
Students are able to make changes to their schedule using Self Service to drop classes.

Also, students are able to use Self Service to swap (take and replace) classes.
To drop a class or classes, we will click a different link from the same section of the **Student Center** page.

From the **Student Center** page in the **Academics** section, click the **Enrollment: Drop** menu item and then click the **Go** icon.
Notice the you are on the **Enroll** tab, **drop** sub tab.

Select or choose the radio button of the term or session from which you wish to drop a class.

Then click the **CONTINUE** button.
In the **Select** column, check the checkbox of each class you wish to drop.

Then click the **DROP SELECTED CLASSES** button.
Read the instructions to consider:
• deadlines for dropping a class
• tuition penalties, and
• the effect on financial aid.

Ensure you selected the class you want to drop, and then click the **FINISH DROPPING** button.
This page displays the results of either **Success** or **Error**.

The message will confirm when a class has been removed or dropped from your schedule.

In the event a class is not dropped, review the Error message and follow through as needed.
Swap classes occurs when one drops a class and in the same enrollment request enrolls in another class.

Swapping allows students to retain a place in one class until they are assured of a seat in a different class.

As before, a student need not see an advisor to do a swap unless seeking their advice or there is an override required.

About Swap Classes

- Drop a Class and Enroll in a Class
  - Calendar Deadlines apply
- Assures seat in new Class before giving up seat in class to be dropped
- May avoid enrolled credits being less than number needed for financial aid
- May need advisor to apply override
To drop a class or classes, we will click a different link from the same section of the **Student Center** page.

From the **Student Center** page in the **Academics** section, click the **Enroll** link.
Choose one of the classes in which you are currently enrolled from the dropdown menu.
Search for a class or enter a class number to swap in

Next search for a class section that has been scheduled or enter the **Class Nbr.**
Search for a class section as before.

Click the **select class** button.
This Select a class to swap – Enrollment Preference page displays.

Select the NEXT button.
This Confirm your selection page displays.

Look to see that this is the class you want.

Then click the Finish Swapping button.
The View results page displays. In this case, the swap is successful.

In the event that an error message appears, then your seat is retained in the class that you wished to swap.

For students receiving financial aid, the swap function may ensure that you are enrolled in the required number of credits to receive your financial aid package.
We have seen how to find out when you may enroll.

We know how to Search for Classes and put them in the enrollment shopping cart.

You can add classes to your schedule using Self Service. In some instances, an advisor may be able to assist you.

Also, you can change your schedule when you drop or swap classes.
Students are able to use Self Service to view their weekly schedule in a calendar format.
From the **Student Center** page in the **Academics** section, you can view your schedule in a list format.

To see your schedule in a calendar format, click the **weekly schedule** link.
Here on the Enroll tab, my class schedule sub-tab, you may select the weekly calendar radio button to switch to this view.

My Weekly Schedule reflects the Academic Calendar of your school.

You may choose a different week by either using the: previous week or next week buttons or change the dates by selecting the calendar icons to select the dates and times of the week you wish to view.

If you do not want to see all of a week’s schedule, then you can narrow the display using the options underneath the calendar.

Add course titles and instructor names or pick only those days and times you want to see.

After you choose your display options, select the Refresh button to reload the calendar with the selected criteria.

The Weekly Schedule also has a Printer Friendly Page link.
Students are able to use Self Service to view their customer account.
In the **Student Center**, the **Account Summary** area shows the total amount due and the amount due at the present time.

Account Summary does not include financial aid.

To get details of the amount outstanding including Financial Aid, select the **Account Inquiry** link from the **student center**.
There are five pages or tabs to choose from once you select the **Account Inquiry** link.

They are:
1. summary
2. activity – charges and payments
3. charges due - debits
4. payments - credits
5. pending aid

Let's look at each one.
On the **Account Summary** page in addition to the outstanding total due, when applicable, you will see a total of pending payments and pending financial aid.

Amounts from terms before CUNYfirst display as a single prior balance.

In this example, the student does not receive financial aid.

Students may choose to make a card payment from this page and the address for remittances at your school is shown.
On the **Account Activity** page both charges and payments are shown.

This new student has only the charges for his tuition for the coming semester.

Longer term students may wish to narrow the results by selecting activities from only one term or from a particular set of start and end dates to view only those activities.

The activities appear in sets in reverse chronological order. Either use the arrow to move to the next page or click the **View All** link to see all of the charges and payments.
Here we see a different student.

While the **Account Activity** page is both charges and payments, the **Charges Due** page does not include payments information.

The **Charges Due** page is divided into four sections.

1. **Summary of Charges by the Due Date** section shows the day the payment is to be received and the total amount.
2. **Details by Due Date** section allows you to see a list of charges by term. It can happen that an amount is overlooked and refers to a previous term. Sometimes even at a different CUNY institution.
3. **Details by Charge** section shows what the charge is in relation to, the due date, term and amount of each charge.
4. **Invoices Due** section shows the day the invoice is issued, the invoices number, the total amount due and the due date by invoice. Use the Invoice Number as a reference when talking to the Bursar’s Office.
On the Payment History page, you may choose a range of dates and click on the Go button to view only those payments.

Both personal and financial aid payments are listed here in reverse chronological order.
The **Pending Financial Aid** page indicates the type of award, term and amount of pending aid for a term or all terms.

Using the **Account Inquiry** link allows you to monitor your **Campus Finances** online and in detail.

Using Self Service you will be able to get detailed information directly through CUNYfirst that you once had to get from the Bursar’s Office.
Students are able to use Self Service to view the details of any holds.
You may hear some people refer to holds as **Service Indicators**.

Service Indicators provide or limit access to services at the college or school for an individual.

Service Indicators are either positive or negative.

Negative service indicators are equivalent to holds. Negative service indicators may impact services including barring enrollment, withholding transcripts and suspending library privileges.

Positive service indicators indicate services we provide such as graduation.

Service Indicators from every institution with CUNYfirst may appear in a student’s **Holds** section.

A hold at a CUNY institution other than your primary institution will not prevent you from enrolling.
Students use Self Service to view their holds.

The top screenshot is of the **Holds** section of the **Student Center** page and shows that this student has a hold. Select the **details** link to go to the **Your Holds** page shown in the lower screenshot.

In this example, the student has one hold showing that the student is the Spouse or Child of a Veteran.

If it applies, then an amount associated with a hold displays along with the currency for that amount.

All holds will show the name of the college for that hold and the term for which the hold is being applied.

Click the link to see further details of the hold.
Students are able to use Self Service to submit their Meningitis Acknowledgement Form.
When there is an item on your **To Do List**, click the details link to learn what is required.

At the present time, only Meningitis Immunization appears on the list.

This form is required by the state of New York.

CUNY requires that the form to be submitted before you enroll.
To submit the form online, click the **Meningitis Acknowledge Form** link on the **Add Class** page of Enrollment.
Students are able to use Self Service to view their addresses on record.

Students may update some address types using Self Service.
Student’s may **add** or **edit** their home, mailing, and billing addresses.

A change to your permanent address must be done through the **Registrar**.

Select a link to go to the **Addresses** page to edit or add a new address.
In this example, the student selects the **ADD A NEW ADDRESS** button to enter a mailing address.
The Edit Address page displays.

The new address is entered and when you are finished, click the OK button.
This page displays for you to view the entered address. As needed, select the edit button to correct an address.
If no edit is needed, then the upper image of the Add a new address page is used to:
1. Confirm the address or edit the address so that it is correct.
2. Then, select the address type for this address.

This is a Mail address. Select the corresponding checkbox of this Address Type. Then click the Save button.

The next page shown below confirms that the new home address is saved. Click on the OK button.
The Personal Information section now shows the new Mailing Address.

- The Mail address now displays in the Student Center
Students are able to use Self Service to view their **Course History**.
The **Course History** page lists every class for which you have been given credit. The credit may have been earned at CUNY or it may have been transferred in from another institution. If credit has been given based on a test result, then it will also be shown here.

For now, credits from CUNY colleges that are not yet live in CUNYfirst appear as transfer credits.

When credit transfers between CUNY colleges that are both live in CUNYfirst, then multiple entries for the same course are shown on the Course History page. The college where the class is taken will appear showing the number of units transferred. The college accepting the units of transfer will show the transferred course with a different course number.
From the **Student Center** page in the **Academics** section, **Course History** may be selected from the dropdown box. Then click on the **Go** icon to take you to that page.
The legend shows which courses were taken and which courses were transferred. Also current term or in progress courses display.

The list can be sorted in several ways.

The table columns may be sorted alphabetically. Click any of the column headers to sort the table by that column. In this example, the courses have been sorted by Description.

The upper right shows dropdown boxes where you can sort classes by any combination of two criteria. These criteria are the same as the column headings: Course, Description, Grade, Status, Term, Units.

To go to the Class Details page, select the name of the course in the Description column.
Students are able to use Self Service to view, save, and print their unofficial transcript.

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About the Unofficial Transcript

- Lists all academic progress to date:
  - Courses taken at the college
  - Courses transferred
  - Test results
  - Courses in progress
- Credits from CUNY colleges not in CUNYfirst appear as transfer credits
- Credits from CUNY colleges in CUNYfirst display twice- the transfer out and the transfer in

Your transcript develops over time with added academic progress.

You will be able to view and track changes by viewing, saving as a .pdf, and/or printing the transcript as it evolves.

When you save your unofficial transcript, it is a good idea to include the date of download in the name.

The Unofficial transcript has a standard university-wide format.
Select Transcript: View Unofficial and then the Go icon.

Select Transcript: View Unofficial and click the Go icon.
Before going any further, ensure your pop-up blockers are turned off in your browser!

From the two dropdown boxes, select your academic institution and the report type - **STUDENT UNOFFICIAL TRANSCRIPT**.

Then click the **view report** button and when the transcript is through being processed which may take a few minutes, then it will pop-up as a .pdf file.
This transcript has a university-wide format and may take several minutes to gather and format the results into a .pdf.

After identifying fields, test scores are shown.

This is followed by your Undergraduate Record by term in chronological order.

Cumulative GPA Totals are shown at the end of the term records.

Then Test Credits are shown by type.
We have seen that using Student Self Service, you may:

- see your Enrollment Appointments with the date, time of day and approved academic load for which you may enroll.
- use Class Search to find class sections to add to your Enrollment Shopping Cart from which you may add, drop or swap classes.
- view your Weekly Schedule with your current or newly enrolled term or session commitments;
- get details of your customer account including pending financial aid,
- get a list of holds and details on how to resolve these holds,
- submit your Meningitis Acknowledgement Form,
- add or update your home, billing and mailing addresses,
- look at your course history, and
- get an Unofficial Transcript in .pdf format.