Student Records Overview Training Agenda

Training Environment

- Environment for today's training- iHub Training/Sandbox (TRN)- https://np-**patrn**.fscj.edu/psp/patrn/EMPLOYEE/EMPL/h/?tab=FSC_GUEST

  - ❒ When you are logged into the system do you see (**patrn)** not paprd (production) in the address?

Advising Center

- Navigate to Main Menu > Campus Solutions > Self Service > Advisor Center > Advisee Student Center
- Input a student's ID and select the search button.

  - ❒ Can you see student information on the student center tab?

View a student's program plan stack

A student's program of study in Orion is now called their program/plan in PeopleSoft. A student can only have one active career – program – plan stack. The program plans stack will show program plans that are completed, discontinued (or no longer active), and one active program. If you see a program/plan of legacy these were used in the conversion process to move enrollment data for the student into PeopleSoft. These legacy programs will all have a discontinuation row and are not a valid program plan for enrollment.

- In the Advisee Student Center click on the Academics tab.
- Review the student's program/plan information in the Institution/Career/Program area.

  - ❒ Can you see student's program plan information?
  - ❒ Does the student have an active program plan?
  - ❒ Does the student have any completion rows?
  - ❒ Does the student have stacks in multiple careers?

View a student's term summary

The term summary section in the advisee center will show you every term the student has been activated in for every career. A student must have a term summary (term activation) record if they want to enroll in classes in that term. The Term Summary section for each term will tell you what their program is for the term, if they are eligible to enroll, what their academic level is for the term, what classes they are enrolled in, and their cumulative statistics.

- In the Advisee Student Center on the Academics tab look for the section titled Term Summary.
- Review the terms that the student has enrollment information for. You can do this by clicking on the terms listed under the careers in the left side of the term summary section.
  - ❒ Does the student have any classes in these terms?
  - ❒ What was the Academic Level for each term?
  - ❒ Review the term statistics for each term for the student.

Term Activate a student

In order to manually term activate a student for a new term you will need to do the following steps.

- Navigate to the Advising Center. (Main Menu > Campus Solutions > Self Service > Advisor Center > Advisee Student Center)
- Input your student's EMPL ID and click the search button.
- Click on the academics tab.
- In the term summary section click the green Edit Term Data button. This button will take you to the Term Activate a Student page (Main Menu > Campus Solutions > Records and Enrollment > Student Term Information > Term Activate a Student)
- Choose the Career that you want to add a term activation for located in the first row of data.
- In the second row of data click the plus sign to add a new row. When the blank row populates input the term into the Term field that you want the student term activated for.
- Click Save. Upon a successful save without errors the student is now term activated for that term.

  - [ ] Successfully term activate a student for a term.

Viewing a student's enrollment appointment

On the Student Center page in the Advisor center you can determine if a student has an enrollment appointment by looking at the Enrollment Dates section on the right side of the screen. There will be a message there indicating the date the student can begin enrolling. You can click on the detail link for more information about the appointment. If the student does not have an enrollment appointment the dates for open enrollment will show in this section. Once open enrollment begins students do not need an appointment to enroll in classes.

  - [ ] On the student center tab does your student have an enrollment appointment?

Assigning a Priority Enrollment Appointment

- Begin by navigating to the Student Enrollment Appointment page at Main Menu > Records and Enrollment > Term Processing > Appointments > Student Enrollment Appointment.
- Enter the EMPL ID for the student you want to assign an appointment and hit the search button.
- In the search results, click on the line for the career and term you want to add the appointment for.
- You will then see student enrollment appointment page. For the session, select the Regular academic session. Giving the student an appointment for the regular academic session will allow them to enroll in later sessions.
- In the Enrollment Appointments section in order to find an Appointment Block and Appointment number you will need to click the Find Appointment link.
- On the search for an appointment page click the Fetch Appointments button. PRI 1 appointments are for Athletes and Veterans. Pri 2 appointments are for students with more than 30 units and Bachelor students. Click the select appointment button for the appointment block you want to give the student.

- In the Select Limits for appointment section click the button to use program term/session limit. This will put the registration limits that are part of the configuration of the term/session on the student's appointment.
- Click the save button.

  - ❒ Navigate back to the advising center and validate that the student has an enrollment appointment.

Quick enrolling a student

- Navigate to the Advising Center (Main Menu > Campus Solutions > Self Service > Advisor Center > Advisee Student Center)
- Click on the academics tab and go to the term summary section.
- In the term summary section click on the quick enrollment link under the classes section
- On the quick enrollment screen, you have the options of selecting the action of enroll (to enroll a student in a class) or drop (to drop a student from a class they are already enrolled in. Input the action you are testing in the action field.
- The class number is equal to an Orion reference number. In Orion the reference number was a unique number tied to a class regardless of what term it was offered in. In PeopleSoft the class number is unique to a class offering for a specific term. Class numbers will be reused every term.
- If you don't know the class number for the class you want to register the student in you can use the magnifying glass to look up the class offering. If you know the class number for the class you want to enroll the student in you can input it directly into the Class Nbr field. If you click on the magnifying glass to search for a class you will be directed to the class search page. You can enter in the subject and course number for the class you are looking for and hit the search button. You can look through the class sections to determine the class that the student would like to enroll in. Once you have found the section you want to enroll the student in you can click on the select button. You will be taken back to the quick enroll screen and the class number will populate in the class number field.
- Click on the Other Class Info tab to input an Action Reason for why you are enrolling a student in the class.
- If you know of a specific override the student will need you can click on the General or Class Overrides tab and click the appropriate override.
- Click the submit button on the top right of the screen to process the enrollment request.
- If the enrollment request went through without any errors you will see a success link populate next to the section field on the class enrollment tab.
  - If the enrollment request went through but returned a message (or warning) you will see a Messages link. This indicates that the system enrolled the student but there are warnings you need to review.
  - If there are errors in the enrollment request you will see an errors link. To look at any of these messages you can click on the link to see more information. After reviewing the errors you can return to the enrollment request and provide the appropriate override. After providing the override, click the submit button to re-submit the request.

    - ❒ Navigate back to the term summary page in the advising center and validate that the student is enrolled in classes.

Viewing Enrollment Request History

If you need to view the enrollment request history for a student you can do so on the Enrollment Request Search page. The data in the search will tell you who submitted the enrollment request, the enrollment request ID, the enrollment request source, if the transaction was to enroll or drop the student, any overrides that were given, and if the enrollment request returned as a success, messages, or error. If you want more information about the enrollment request you can go to the direct link to the quick enroll page, input the enrollment request ID and hit the search button. This will pull up the enrollment request and you can view the success, error, or message link for more information.

- Navigate to Main Menu > Campus Solutions > Records and Enrollment > Enroll Students > Enrollment Request Search.
- At the enrollment request screen input the value for our Academic Institution, FSCJ1. Then click the search button. This will take you to the Enrollment Request Search page.
- In order to search for an enrollment request you need to input values for at least two fields. Once you have input this data click the search button on the top right of the screen.
- Review the enrollment request data.

  - [ ] Search for and review an Enrollment Request.

Produce an Enrollment Verification

- Navigate to Main Menu > Campus Solutions > Records and Enrollment > Enrollment Verifications > Enrollment Verification.
- Input the EMPL ID of the student in the ID field. Then click the search button. This will take you to the Enrollment Verification screen.
- The academic institution and date to be printed default for you.
- Input the fields from term and to term for the academic history data to be included in the verification. You can only select terms that the student has enrollment history for at FSCJ.
- Check the boxes for Current Program, Earned Degrees, and/or Cumulative and term GPA if you want to include this information in the verification.
- Click on the address tab.
  - If the enrollment verification is going to the student, check the send to requestor box. Then select the address type for the student. The verify address field will populate with the address we have on file for the student. Select the OK button once you have verified the correct address.
  - If the enrollment verification is going to someone other than the student type the name in the Send to field. Input USA for country. Then select the edit address link to input the address where we are sending the enrollment verification. When done click the OK button.
- Click on the notes tab.
- On the notes page you can add any additional information that the student is requesting to be included in the verification.
- When you are done click the save button.
- Go back to the Enrollment Verification Request tab and select the Print button.

- Click on the Report Manager link located under the Print button. When the report has finished running you will see a link to the Enrollment Verification Report PDF. Click on that link and you will see the enrollment verification report you generated.

    - Generate and view an enrollment verification for a student.

View a student's transfer credit

Transfer credit, test credit and other credit can be viewed on the advising tab located in the advising center. Credit will show here for the student once the credit has been evaluated and posted. If you do not see any credit links here then a transfer credit evaluation has not been processed for the student.

- Navigate to the Advising Center (Main Menu > Campus Solutions > Self Service > Advisor Center > Advisee Student Center)
- Click on the transfer credit tab.
- If the student has transfer credit that has been posted you will see a summary of the institution.
- For more information click on the Detail link next to the external source for more information.
- In the transfer credit term section you will see a row for each course that was brought in from the external source.

    - ❒ Review the transfer credit for a student

Determine course equivalencies for external courses

If you are viewing a student's unofficial transcript and want to see what the course equates to at FSCJ you can look at the transfer credit rules to see if we have already defined an equivalency.

- Navigate to Main Menu > Records and Enrollment > Transfer Credit Rules > Transfer Subject Area.
- In the Source ID field enter the source ID for the external institution. If you do not know this number you can use the search button.
- Enter the subject for the course you want to view equivalencies for in the School Subject field.
- Click the search button.
- The search results will return a row for every course at the external institution that we have a rule for. Look for your external course in the School Subject and School Course Number column. If you do not see the course there then an equivalency has not been determined yet.
- If you see the course you are wanting more information on click on the row that has the course.
- Click on the subject Area Elements tab at the top. There is a row for every equivalency within the subject you searched for. Scroll through the subject area elements section until you see the external course ID in the subject and course number in the Incoming Course area.
- When you find the external course you can look in the Internal Equivalent area to see what we would equate that course as.

    - ❒ View an institutions transfer credit equivalencies