Student Services Center

There is a new summary page delivered that can be used as a supplement to the other pages. Some data from different pages is put together on a single page. If additional data is needed that is not in the Student Services Center, then the specific page can still be viewed.

Following this navigation using the side bar menu, select Student Services Center:
Basic Student Information>Student Services Center or Campus Community>Student Services Center

A search window will appear. Type in the ID, Campus ID or name information to find the student of interest.
The Student Center tab will appear with information about the student. The Student Center tab is very similar to what the student will see when they sign on to Enroll and Pay. There are several differences in a staff vs. student view of the Student Center tab. Students see links to change enrollment under the Academics area. They will also see the options to “Add a Class” and “Drop a Class.” Many of the options staff sees are not active links while they are active for the student. With an active link, the student can drill down and see additional information. One example of this is the link to Print/View a Bill under the Finances tab. In addition to the Student Center tab, staff may have access to tabs for General Info, Academics, Finances, Financial Aid and Transfer Credit. The tabs that a staff person will see are based on the training attended and the access granted. Training on the Finances tab will be offered through Student Financials training and will not be provided here. Students do not see the additional tabs, only the Student Center tab. The class schedule, account summary, hold and contact information under the various highlighted headers is exactly the same as the student will see.
The **General Info** tab has service indicators (which are holds on the student’s account), national ID, addresses, email addresses, initiated checklists, personal data, names and phones. Although you can see the student’s university registered email address, the student does not see this and does not change this information through Enroll and Pay.

Each area can be reached through these links. The screen shot below only shows part of the page. Scroll down to see all the areas.

The green arrow will collapse individual areas. Or, all areas can be collapsed with the Collapse All button.

The green edit box, when selected, will go to the page that has detailed information for that area.
Biographical Details

Following this navigation using the side bar menu, select Add/Update a Person

Basic Student Information → Add/Update a Person

<table>
<thead>
<tr>
<th>Biographical Details</th>
<th>Addresses</th>
<th>Regstate</th>
</tr>
</thead>
</table>

**Person Information**

- **Prefix:** this field is not used.
- **Name:** each piece of the student’s name will be entered into the appropriate field – First, Middle, Last. These fields are case sensitive and can include special characters, such as hyphens, apostrophes and periods. The Oracle name format is: lastname,firstname middlename. The student’s Primary Name type is their official record name. Note: If a middle initial is used, a period will follow it. For students that only have one name: only has a Last Name, that data will be in the last name field and a dash in the first name field; only has a First Name, that data will be in the first name field and a dash in the last name field. Sometimes HR enters FNU (first name unknown) in the First Name field, but will be changed in the Enroll &Pay system using a dash, as described above. All students that have the dash in the Last Name field will also have a Campus ID of ‘NOLASTNAME’ and since we are unable to search for last names of '-', you will need to use the Campus ID field to perform a name search.
- **Suffix:** used if provided by the student and should never be put in the Last Name field.
- **Date of Birth:** entered as MMDDYYYY. 1950 and prior years must have the entire four-digit year typed out or the year will default using the 2000 century (ex: 1940 will default in as 2040 if the entire four-digit year is not entered). If the date of birth is unknown this field will be left blank.
- **Birth Information Link:** If known, birth location (city), country and state.
- **Campus ID:** the student’s previous KUID number from the legacy system. Former numbers will be entered if they exist.
• **Biographical History:** can have multiple effective dated rows and can be viewed by either using the View All or the arrows in the Biographical History blue navigational bar.
  - **Effective Date:** defaults to today’s date.
  - **Marital Status:** defaults to ‘single’ for new applicants and will not be changed unless it is information collected on the application by a specific admissions office or by the registrar’s office.
  - **As of:** this field is left blank unless exact date of the change in status is known.
  - **Gender:** defaults to Unknown. “F” or “M” will be used to specify the correct gender of the student. If gender is not available, this field will be left as Unknown.

• **National ID:** the student’s Social Security Number. The country will default to USA and the National ID Type will default to Social Security Number. The 9-digit number will automatically be formatted. If the student does not have a SSN, this field will be left blank and the field will default to X’s.
  - Multiple IDs can be entered for a student if there is also a national ID number from another country. If more than one row is entered, the USA row must be checked as primary.

  Multiple row functionality is not being used at this time for the National ID field.

• **Contact Information:**

  - **Phone:** A student can have multiple phone types with different numbers.
    - Each type can have only one phone number associated with it at a given time because these fields are not effective dated.
    - **Preferred Checkbox:** one phone number will be checked as Preferred if the student has multiple phone numbers. We will use a hierarchy of JHWK, PERM, HOME, to determine which phone type should be checked as Preferred if more than one phone type exists.
    - **Country Code:** can be entered for international numbers, but is not required.

  - **Email:** A student can have multiple email types with different email addresses.
Each type can have only one email address associated with it at a given time because these fields are not effective dated.

Admissions will use the email type of HOME.

Preferred Checkbox: KULC and KUMC email addresses are populated nightly. Entry of these is not needed. This process will use a hierarchy of KUMC, KULC, and HOME, to determine which email type should be checked as Preferred if more than one email type exists.

Visa/Permit Data Page

This page is accessed by clicking on the Visa/Permit Data link located at the bottom of the Biographical Details page.

- **Country** will always be USA.
- **Type** is the type of Visa the student was issued to enter the United States.
  - This information will be entered by the International Student and Scholar Services Office for Lawrence students and by the Registrar’s Office for Medical Center students.
  - This data is interfaced to another system and sent to the Federal Government.
- **Status** will default to Applied when originally entered by Admissions.
- The rest of the fields will not be used.
- Click OK to return to the Biographical Details page.

Citizenship Page

This page is accessed by clicking on the Citizenship link located at the bottom of the Biographical Details page.

- The **country** of citizenship will default to USA and the **citizenship status** will default to native.
  - Resident aliens (applicants with Green cards) will be coded Alien Perm with a country code of USA.
  - International students will be entered as Alien Temp. If the status is Alien Temp, the **Country** code will be the student’s county of citizenship.

Multiple countries w/ citizenship status: at this time students can have only one row of information entered. In the future, multiple rows for citizenship statuses in the USA and the country of citizenship will be entered.

- **Passport information:** is not used at this time.
- Click on OK to return to the Biographical Details page.
Addresses:

- **Addresses:**
  - **Change Address**
  - **Change Campus Address**

- **Address Type:**
  - **Home** is defined as the current mailing address of the applicant.
  - **Permanent** is defined as the student’s permanent address.
  - **Other** is the Sponsor's address for international students.
  - **Hometown** is defined as a way to track the origins of our students by Institutional Research with Admissions usually updating the information, but the Registrar’s Office may update the information upon the request of the student.

- **HOME** and **PERM** address types are required for all applicants.

- Registrar will use three types of address:
  - **Jayhawk/Current** is defined as the student’s current mailing address.
  - **Permanent** is defined as the student’s permanent address – often the parent’s address.
  - **Billing** is defined as the student’s billing address.

The **Campus** address type is updated nightly with information from the Department of Housing. If a student needs to update this address type, then they will need to contact this department. The **Other** address type is defined as any additional addresses a student wants us to know about like a sponsor or a P.O. Box, but will not be used in batch mailings. **Deceased, Transcript Requestor, Commencement, HomeTown City/State and Check** are address types only used in special functionalities/processes and are updated only by individuals with specific duties.

Clicking on the Edit/View Address Detail link to the right of an Address Type, will allow you to see any historical rows of address changes. The Add Address and Add Address Types are areas only used for those that can update addresses, so will be non-functional for ‘view’ access.
• **Regional:**
• **Regulatory Region:** defaults to USA.
• **Ethnic Group:** defaults to *NSPEC* (Not Specified) and will be used when the student doesn’t list this information. If the student provides multiple ethnicities, all will be entered.

⚠️ If multiple ethnicities are entered, **one** of them will be checked as Primary.

• **History (Military Status):** For applicants, this information is loaded from the application. Any updates to this information should **only** be done by the Veteran Affairs Office.

• **Hispanic or Latino Checkbox:** If the student indicates they are Hispanic, this checkbox will be checked. If this checkbox is checked, the ethnic group of **HISPA** will also be entered regardless of the total number of Ethnic Groups on the student’s record.
Emergency Contacts

The Emergency Contacts page provides information about which individual(s) a student wishes to have contacted in case of emergency. Students are able to update this information within Self Service.

Following this navigation, select Emergency Contacts:

**Basic Student Information>Emergency Contacts**

There are several search options available here.

- Enter the student EmplID
  - Or
- Enter the Academic Career
  - Or
- Enter the National ID (Social Security number)
  - Or
- Enter the Campus ID (former system ID or KUID)
  - Or
- Enter a Last Name and all or part of a First Name

If the Student EmplID is available, it is the most efficient way to search for a record.

After choosing the search method and entering criteria, press the Search button.

If names are used for the search, you may get a Search Results list.

To select a student, click on any field on the line for the appropriate student.
The Emergency Contacts page will open:

The Emergency Contacts page has two components: Emergency Contact Information and Emergency Contact Other Phones.

On the Emergency Contact Information page, the following fields will have data:

- Since these are not effective dated, if the first blue navigational bar shows multiple rows, this indicates there are multiple emergency contacts.
- Contact Name (First Name Last Name). The name of the Emergency Contact.
- Relationship. Will be used to choose the relationship of the Emergency Contact to the student.
- Primary Contact checkbox. If the student designates the contact being entered as the primary contact (the one to be contacted first in case of emergency), this box will be checked.
- Same Address as Individual and Same Phone as Individual checkboxes. If either of these two boxes is checked, they will populate the address fields with the student’s HOME address type and phone type.
In the Individual’s Current Address section, the following fields will be filled in.

- **Country.** The country code, Address 1, Address 2, Address 3, City, State, County and Postal Code fields.
- **USA formatting allows for three street address lines.** For mailing purposes we will only use line 1 and 2. **No information should be on line 3** if standard sized window envelopes or labels are being used. Other formatting guidelines will be used as much as possible for consistency:
  - Address information will not be entered on line 2 if the entire address will fit on line 1.
  - Addresses are case sensitive.
  - Admissions will shorten all street names: St, Ct, Dr, Ave, Terr, Tr, Rd, Ln, etc. No periods will be used.
  - Apartment numbers will be indicated using the # sign.
  - City names beginning with Saint and Fort will be shortened: St, Ft (No periods will be used).
- **Individual’s Phone.** If known, the phone number (including area code) for the name listed in the Contact Name field will be entered.

In the Emergency Contact Other Phones component, if needed can list:

- One or multiple Phone Types and Phones
Relationships Page

Following this navigation, select Relationships:
Basic Student Information → Relationships

The Relationships tab will be used to record the name(s) and address(es) of a student’s parents and/or guardians. This page does allow for data entry of multiple parents/guardians living at different addresses.

- **Effective Date:** relationship information is effective dated. Today’s date will default into this field; however, the date in this field may reflect future changes.

- **Status:** is used to indicate if a relationship is active or inactive.

- **Related ID:** is the ID of the parent or guardian if they exist in the SAKU database. This field is being used by Financial Aid to create parent records related to loans.

  At **NO TIME** will the Registrar’s Office enter the ID number of the parent or guardian on a relationship record.

  At **NO TIME** will the Registrar’s Office update a relationship record where the Related ID field is entered. This specific record belongs to Financial Aid.

- **Relationship:** will not be used, but will default to None Indi.

- **Name:** is the name(s) of the parents/guardians. Data entry will use standard PS parsing rules: LastName,FirstName Middle. Depending on the information provided
by the student on the application, the following guidelines will be used for entering relationship names:

- **Two parents with the same last name, two first names provided, same address:** last name, father’s first name and mother’s first name and prefix field blank.
  
  *Example:* Smith, John and Mary

- **Two parents with different last names and same address:** father’s last name, mother’s first name, mother’s last name and father’s first name, and prefix field blank.
  
  *Example:* Smith, Mary Jones and John

- **Two parents with same last name but only the father’s first name is given:** last name, father’s first name, and “Mr. and Mrs.” from the prefix field.
  
  *Example:* Smith, John

- **Single parent:** last name, first name, and “Mr.” or “Ms.” from the prefix field.
  
  *Example:* Jones, Mary

- **If two parents/guardians with different addresses are given:** first name following the above guidelines, then the next name is entered using the same naming guidelines.

- **If two parents/guardians with different addresses are given:** there will be relationships records entered.

- **Prefix:** will only be used in certain circumstances.

- **Suffix:** will not be used.

- **Sex:** will not be used.

- **Marital Status:** will not be used.

- **Guardian:** will be used to indicate the relationship of the person named on this page to the student. It will default *Parent*, but valid options are *Parent, Guardian and Other*.

- **NID Country, NID Type & National ID:** will not be used.
• **Relationship Address tab**

![Image of the Relationship Address tab]

- **Related ID Name/Address/Email:** the name/address/email for the parent/guardian. Addresses/emails for each effective dated row of existing relationship records can be viewed in this section.

- **Primary ID Address/Email:** will display the different address types/email types the student has on their record. However, ‘view’ only access will only see the Address Type of Home.
- **Relationship Detail tab**

  The Details tab provides the phone number of the parent or guardian.

  **Telephone:** will use the *Day* field.

  **Relation Demographics:** is not used.

  **Relation Residency:** is not used.

  **Country of Citizenship:** is not used.
Enrollment Summary Data

Access to student enrollment information is provided using menu choices available in PeopleSoft. Users will have different menu choices or different access levels within menus based on their business needs.

Following this navigation, select Enrollment Summary:

Basic Student Information>Enrollment Summary

There are several search options available here.
- Enter the student ID
  Or
- Enter the Campus ID (former system ID or KUID)
  Or
- Enter the National ID (Social Security number)
  Or
- Enter a Last Name and all or part of a First Name.

If the student ID is available, it is the most efficient way to search for a record.
- Select the Term (optional)
- Press the Search Button

If the Term is specified, the Enrollment Summary will automatically open to the term indicated. The sample Search Results shown below was returned when a term was not specified.

After selecting the term from the Search Results list, the Enrollment Summary page opens.
The Enrollment Summary page contains the student’s class enrollment for the Term and Career shown. It includes the student’s class enrollment status which indicates whether they are Enrolled or in a Dropped or Withdrawn status. It also includes basic class information such as the subject, catalog number and title.

Just above the student’s enrollment summary is a navigation bar with buttons that allow the user to see additional rows of class data.

Note the row count. On this record it indicates it is displaying 1-3 rows out of 4 possible rows. This shows that the student has a total of 4 rows of data to display and 1 row will be displayed on another page.

*View All* will open the entire enrollment list into one long scrollable screen.

*First* returns the user to the first display page (rows 1-3) if the user has moved to another page.

*Last* takes the user to the final display page (row 4) of this record.

The *left* and *right arrow* buttons allow the user to move through the multiple pages one page at a time.
The magnifying glass beside the Class Nbr. represents a lookup function.

Using the magnifying glass will display additional class details, such as the days, times and instructor for the class.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Status</th>
<th>Enroll Total</th>
<th>Wait List Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOUR 568-1002 Marketing and Media Research</td>
<td>Closed</td>
<td>50</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>JOUR 568-1003 Marketing and Media Research</td>
<td>Closed</td>
<td>1</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Prerequisites: Completion of or concurrent enrollment in JOUR 430.

You must be admitted to the program or division of Journalism to enroll in this class.

Dean, James K. Gentry, 230 Steufler-Flint, 864-4795

The School of Journalism has established the policy that any students found to have falsely acquired enrollment material or to have otherwise falsified enrollment material or to have aided other students to falsely acquire or falsify enrollment material will be dropped from Journalism classes and will be subject to other possible disciplinary action.

The school of Journalism reserves the right to cancel the enrollment of students who fail to attend the first class or laboratory meeting.

Students also will be dropped from Journalism classes if they lack the prerequisites.

For freshman Fall 2002 and thereafter, all Journalism classes except 103 Media and Society, 210 Visual Communications, 422 Advertising, 455 Writing for Journalistic Media, 458 Broadcast Reporting, 468 Digital Imaging, 498 First Amendment and Society, are open only to Journalism majors and minors in professional schools with a Journalism concentration.

Please note that most Journalism classes require admission to the school.

Students may not add non-core sections in Journalism after August 27, 2003, without departmental permission.

Effective with the Fall 2003 semester and thereafter, application deadlines are September 1 for spring admission and February 1 for summer and fall admission. Change-of-School Forms are available in Student Services after the deadline. If space is available and not competitive, please consult the 2003-2004 Undergraduate Catalog and Journalism Advising Center.

Students conduct, analyze, and apply research to developing strategies and guide decision. In addition to studying research methods, students develop critical-thinking skills by defining research problems, exploring possible solutions, identifying insightful solutions, prerequisites: Completion of or concurrent enrollment in JOUR 422.
Student Career

The Student Career page displays the status of a student’s career and information about that career. **NOTE: This page does not show that the student was Term Activated or Enrolled in a specific term. It merely indicates their Career status at a given point in time.**

Following this navigation, select Student Career:
Basic Student Information>Student Career

If ID number is used for the search, the Student Career page should open immediately.

For each level of data, Academic Career, Student Career Nbr. and Academic Program Status, there will be a navigational bar at the top.

In the screen shot above, the student has two Careers on his record so the first navigational bar reflects a choice of 2 of 2 because it’s on the second Career row of two.
The second navigational bar indicates 1 of 3, which means the student has more than one Student Career Nbr. in this particular Career. (Each Career number points to a change in the student’s Academic Program or a new activation in the same Career and Program.

Selecting View All opens all occurrences of Student Career Nbrs. for the student for specific career. Refer to the screen shot below for an example of this.

### Student Career

<table>
<thead>
<tr>
<th>Student Career Nbr: 2</th>
<th>Effective Date</th>
<th>Academic Program Status</th>
<th>Program Action</th>
<th>Institution</th>
<th>Acad Prog</th>
<th>Admit Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/15/1992 Discontinued</td>
<td>Discontinuation</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1990Fall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/27/1990 Active in Program</td>
<td>Activate</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1990Fall</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Career Nbr: 1</th>
<th>Effective Date</th>
<th>Academic Program Status</th>
<th>Program Action</th>
<th>Institution</th>
<th>Acad Prog</th>
<th>Admit Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/23/2004 Completed Program</td>
<td>Completion of Program</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1996Spring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/25/2004 Active in Program</td>
<td>Application for Degree</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1995Spring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/22/2002 Active in Program</td>
<td>Plan Change</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1996Spring</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Career Nbr: 0</th>
<th>Effective Date</th>
<th>Academic Program Status</th>
<th>Program Action</th>
<th>Institution</th>
<th>Acad Prog</th>
<th>Admit Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/21/2005 Completed Program</td>
<td>Completion of Program</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1992Fall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/21/2006 Active in Program</td>
<td>Application for Degree</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1992Fall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/21/2006 Active in Program</td>
<td>Readmit</td>
<td>KU</td>
<td>UnderGrad</td>
<td>1992Fall</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In the screen shot below, the third navigational bar and continuing navigational bars indicates how many rows for each student career number listed under a specific career.

## Student Career

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Continuing Education</th>
<th>Person ID:</th>
<th>1234567</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Career Nbr:</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td>Action Date</td>
<td>Academic Program Status</td>
<td>Program Action</td>
</tr>
<tr>
<td>08/18/2004</td>
<td>02/21/2006</td>
<td>Admitted</td>
<td>Admit</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Undergraduate</th>
<th>Student Career Nbr:</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>Action Date</td>
<td>Academic Program Status</td>
<td>Program Action</td>
</tr>
<tr>
<td>05/16/1982</td>
<td>05/15/1982</td>
<td>Discontinued</td>
<td>Discontinuation</td>
</tr>
<tr>
<td>08/27/1980</td>
<td>05/27/1980</td>
<td>Active in Program</td>
<td>Activate</td>
</tr>
</tbody>
</table>
Student Degrees

Following this navigation, select Student Degrees:
Basic Student Information>Student Degrees

You can view the honor on the Degree Honors component on the Student Degrees page (along with the degrees, degree plans, degree sub-plans and degree dates).
Relations With Institution Detail Page

This page indicates if a person has a current or former relationship with the University.

Following this navigation, select Relations with Institution:
Basic Student Information>Relations with Institution

Security will dictate who will have the capability to update this page.

Relations with Institution

<table>
<thead>
<tr>
<th>Role</th>
<th>Currently Is Act</th>
<th>Manual Maintenance</th>
<th>Has Been Act</th>
<th>Manual Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni (A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Applicant (As)</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Aid (Fa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect (Pc)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student (St)</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Financials (Fr)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter (RCr)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advisor (AVs)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor (IST)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friend (FND)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Since there is no actual text in the table cells, I will assume a typical structure for such a table.]

- Alumni (A): If the individual has graduated from the institution.
- Student Applicant (As): If the individual is currently applying to the institution.
- Employee: If the individual is currently employed by the institution.
- Financial Aid (Fa): If the individual is currently receiving financial aid.
- Prospect (Pc): If the individual is currently considered a prospect for admission.
- Student (St): If the individual is currently a student.
- Student Financials (Fr): If the individual has financial information recorded.
- Recruiter (RCr): If the individual is a recruiter.
- Advisor (AVs): If the individual is an advisor.
- Instructor (IST): If the individual is an instructor.
- Friend (FND): If the individual is a personal friend.
Student Term Search

The Student Term Search provides a display of all terms in which a student was active and possibly eligible to enroll. NOTE: This page does not confirm that the student was actually enrolled in classes.

Using this navigation, select Student Term Search:
Basic Student Information>Student Term Search

- Entering the ID of the student is the most efficient search method.
- Alternately, the Campus ID (former system or KUID), the National ID (Social Security Number) or a combination of the Last Name and all or part of the First Name may be used.

After choosing a search method and entering the selection criteria, press the Search button.

This is the Search result:

![Student Term Search Table]

<table>
<thead>
<tr>
<th>Academic Career</th>
<th>Term</th>
<th>Academic Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuing Education</td>
<td>2004 Mid Fall</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2004 Spring</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2003 Fall</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2003 Summer</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2003 Spring</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>2002 Fall</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>1999 Spring</td>
<td>University of Kansas</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>1994 Spring</td>
<td>University of Kansas</td>
</tr>
</tbody>
</table>

[Search result table with options to save, return to search, and modify]
There is a navigational bar on this page, which, depending on the result returned might be active.

**Student Term Search**

On the sample shown, the choices on the bar are active since the data for this student is large enough to fill more than one page. The *First, Last* and arrow links allow the user to move from one page of data to another. The *View All* link opens a longer page with all rows visible. The row count on this student is 1-8 of 16. The student has 16 terms of activation, all of which does not fit on a single display page.

The information displayed on this page is the Academic Career for the term shown, the Academic Institution and the Eligible to Enroll flag. The Eligible to Enroll flag indicates that the student had term activation for the term shown and was eligible to enroll for that term. This page does not indicate the student actually enrolled.
Residency Data

Following this navigation, select Residency Data:
Basic Student Information>R Residency Data

The Residency Data page gives you official residency data by career.

<table>
<thead>
<tr>
<th>Residency Official 2</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Residency Data</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Next</th>
<th>Last</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Career</td>
<td>Undergraduate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Official Residency Data</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Next</th>
<th>Last</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>UKANS</td>
<td>University of Kansas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Term</td>
<td>2002</td>
<td>1900 Spring</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residency</td>
<td>KS</td>
<td>In State</td>
<td>Residency Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Viewing Term Activation

The Term Activation page group provides access to student data that includes historical and current terms. A student must be “term activated” for a given term in order to enroll in Self-Service or be enrolled by the Registrar’s Office. This page does not include specific class enrollment information.

Follow this navigation, select Term Activation:

**Basic Student Information>Term Activate a Student**

There are several search options available here.

- Enter the student ID
- Enter the Campus ID (former system ID or KUID)
- Enter the National ID (Social Security number)
- Enter a Last Name and all or part of a First Name

If the Student ID is available, it is the most efficient way to search for a record.

If using Name as the search, the result may be a list of students.

To select from the list, simply click on any field on the line that is the correct student. If only one student matches the search criteria, the Term Activation page will open.
The following items can be viewed on the Term Activation page:

**Academic Career** - This component displays all of a student’s career term records by academic career.

**Academic Institution** - The system populates an academic institution, taking the value from the User Defaults component. Any valid academic institution can be specified here, but a record may be added only if the student is active in an academic program at that academic institution as of the start date of the specified term.

**Term** - The system displays all active terms for a student.

**Student Career Number** - By default, the system sets the student career number to zero, which is the first academic program from the Student Program/Plan page and identifies the student’s primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student’s academic level and load. The student career number may be overridden, for instance, for students in dual programs. Once the student career number is overridden in one term it rolls from term to term.

**Override All Academic Levels** - This check box would be selected to modify all academic level fields on this page. If this check box is cleared, the system uses the academic level defaults established on the Academic Level Table page.

**Override Projected Level** - This check box would be selected to modify the student’s projected academic level. Once checked, the Academic Level - Projected field becomes available to edit. If this check box is cleared, the system uses the academic level defaults established on the Academic Level Table page.

**Academic Level - Projected** - The system displays the student’s projected academic level at the start of the term, which will be the student’s actual academic level, provided that the student passes all in-progress units from previous terms. This field is used for checking enrollment restriction and tuition calculation, among other things. This field may be an overridden value if either the Override Projected Level check box or the
Override All Academic Levels check box is selected. For example, a student’s projected level may be overridden when it is known that your academic institution will be receiving the student’s transfer credit, but the credit has not yet been entered into the student’s official record.

**Academic Level - Term Start** - By default, the system displays the student’s academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. This level may be overridden if the Override All Academic Levels check box is selected.

**Academic Level - Term End** - By default, the system displays the student’s academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. This level may be overridden if the Override All Academic Levels check box is selected.

**Level Determination** - By default, the system displays the level determination value from the Level/Load Rules Table component, based upon the academic career for the student on this page.

**Academic Year** - By default, the system displays the academic year, based upon the term.

**Load Determination** - By default, the system displays the load determination value from the Level/Load Rules Table component, based upon the academic career for the student on this page.

**Form of Study** - The system, by default, sets the student’s form of study to *Enrollment*, but this default value may be overridden. The value of *Enrollment* tells the system that this form of study is unit-based. These translate values may be modified, with the exception of the *Enrollment* value.

**Academic Load** - The system displays the student’s academic load, which is calculated by units enrolled.

**Billing Career** - The system, by default, sets the student’s billing career to the academic career in the student’s career term record. The tuition calculation process uses the student’s billing career to calculate the student’s tuition.

If the student is active in more than one academic career in the same term, tuition calculation and billing might be consolidated under a single academic career. If so, the billing career for all of the student’s career term records is set to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. To consolidate tuition calculation to just the undergraduate career, the undergraduate career would be set as the billing career for both the student’s undergraduate term record and graduate term record.

**Eligible to Enroll** - The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. The check box is cleared to prevent the student from enrolling in classes for the specified term.

For example, this check box might be cleared when posting transfer credit to a student’s career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.
Searching for Classes

Class Search allows viewing of the classes scheduled for a particular term. There are several locations from which a Class Search may originate, including various enrollment functions.

Following this navigation, select Class Search:
Catalog/Schedule of Classes>Class Search

- Select University of Kansas as the Institution (This may pre-populate through the user default setup.)
- Using the drop down, select the Term.
- Enter or select the Course Subject or enter the Class Nbr.
Upon selecting the Additional Search Criteria drop down button, the **Class Search Criteria** screen appears as shown below:

![Class Search Criteria Screen](image)

To speed up a search, complete as many of the selection criteria fields as possible. **The user is required to enter at least 2 items.** Because the Schedule of Classes is usually quite large, searches with limited criteria can be very slow.

The first two fields listed above are good choices for initial criteria.
- Course Subject may be selected using the green select subject button. This is a required field.
- Enter the Course Number (if known)

**NOTE:** The Course Attribute and Course Attribute Value fields are helpful fields for departments and advisors during advising.
Completing some of the following fields will help accelerate the search:

- ‘Is Exactly’ match if the search is to find the exact Course Number.
- Select the Course Career.
- Show Open Classes Only – this checkbox eliminates classes that have reached capacity.
- Course Component can be used as criteria if the class is a single component class or if you only want to search for one specific component, for example, Lecture.
- Enter Campus if known.
- Enter Location if known, such as Lawrence Campus or Medical Center Campus.
- Press the Search button that appears at the bottom of the page.

This is a sample of the Search Results:

From within either search, class details may be obtained by pressing the Class Number link or the Section link icon. That will open another page with additional information about the class including the Description from the Course Catalog.
Class Search Detail:

ACCT 320 - 1000 Financial Accounting II
University of Kansas | 2010 Spring | Lecture

Class Details
- Status: Open
- Career: Undergraduate
- Dates: 1/14/2010 - 5/14/2010
- Grading: AE(C)/[PT]

Meeting Information
- Days & Times: TuTh, 8:00AM - 9:15AM
- Room: Summerville 424
- Instructor: Kevin Smith
- Meeting Dates: 01/14/2010 - 05/14/2010

Enrollment Information
- Enrollment Total: 51
- Wait List Capacity: 0
- Wait List Total: 0
- Available Seats: 7

Notes
School of Business Accounting
- Course scheduling information: (785) 864-7300
- Undergraduate
- Courses coded enrollment restricted are open to School of Business students only. Please refer to the website (www.business.ku.edu) or the staff in 205 Summerfield for clarification.
- The Business School strictly enforces prerequisites for all business courses. Students who enroll in a course without completing the appropriate prerequisites may be administratively dropped without notice in the first week of the semester. Petitions for readmission to the course(s) will not be accepted.
- Admission to the School of Business is competitive. Application deadlines are September 15 for spring admission and February 15 for summer and fall admission. Contact the School of Business Student Services Center, 205 Summerfield Hall, for specific details.
- Graduate
- Admission in all graduate-level courses (BUS 703 and above) requires admission to the Business Division of the Graduate School (SBE Summerfield) or a special permission number issued by the Director of Roster's Programs or the Dean's Office.
- All students enrolled in School of Business courses will be charged Business Differential tuition in addition to University tuition and fees. For additional information please go to www.kenan.ku.edu.

The View Search Results button either at the top or at the bottom of the page will return you to the results page and from there, you can either select another section to view or return to the search window by using the Start a New Search button.
Catalog Search

The Catalog Search permits the user to enter a minimum of search criteria to view descriptive details about a course. The Catalog Search is not term specified and thus does not confirm that a particular course is offered in any specific term.

Following this navigation, select Course Catalog Search:
Catalog/Schedule of Classes>Course Catalog Search

### Course Catalog Search

#### Search Criteria

Enter institution and subject. Catalog number is optional.

<table>
<thead>
<tr>
<th>Required Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Institution</em></td>
<td>University of Kansas</td>
</tr>
<tr>
<td><em>Subject Area</em></td>
<td>ACCT</td>
</tr>
<tr>
<td><em>Catalog No</em></td>
<td>320</td>
</tr>
</tbody>
</table>

* Required Field

- Select the Institution from the drop down arrow. (This may pre-populate from the user default setup.)
- Either enter the 2-4 character Subject or select the Subject from the magnifying glass.
- Enter the Catalog number if known.
- Press the Search button.
A page will open with course descriptions and additional catalog details. The size of the resulting list is dependent on your Search criteria. The list will show all catalog numbers for the Subject if a catalog number is not specified.

Course Catalog Search

Catalog Search Results

University of Kansas | Accounting

ACCT 320 - Financial Accounting II

Course Detail

<table>
<thead>
<tr>
<th>Units</th>
<th>5 units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grading Basis</td>
<td>AE(H')FI</td>
</tr>
<tr>
<td>Course Component</td>
<td>Lecture Required</td>
</tr>
</tbody>
</table>

Enrollment Information

<table>
<thead>
<tr>
<th>Enrollment Requirement</th>
<th>Student must have completed ACCT 201 (BUS 241) to enroll in this course.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Attribute</td>
<td>Prerequisite Indicated</td>
</tr>
</tbody>
</table>

Description

A study of generally accepted accounting principles (GAAP) underlying the preparation and interpretation of general-purpose financial statements, with emphasis on the principles of revenue recognition, matching revenue and related costs, and the determination of proper balance sheet valuations of assets and liabilities. The asset side of the balance sheet is the primary emphasis through the entire financial statements are used in examples throughout the course. Prerequisite: ACCT 201.

- To exit the Search Results, click on the Return to Search button at the bottom of the Results page.
Course Catalog Summary

The Course Catalog Summary provides detailed information from the Course Catalog, such as the unit range, details about the course offering and components.

Using the navigation shown, select Course Catalog Summary:
Catalog/Schedule of Classes>KU Crse Catalog Summary

Complete as many of the search fields as possible to make the search process efficient.

⚠️ Warning: This search will allow you to press the Search button without entering any selection criteria. The Catalog at KU is quite large and this practice is not advisable, indeed doing so could seriously impact the performance of the system.

These fields should always be completed:
- Select the Institution.
- Select the Subject.

Additionally, these fields are recommended:
- Enter the Catalog Nbr.

Optional Fields:
- Enter the Campus.
- Enter the Course ID if known.
- Enter all or part of the description (title) of the course. If using Description, it is advisable to leave the "Case Sensitive" box unmarked. Marking it limits the search to an exact match of the case you use in the Description field. (For example if Earth was typed in and the box marked, then EARTH would not be found.)

After selection criteria have been entered, Press Search.
If the specific catalog number was not used in the search, the result will be a list of courses within the subject area. Below is a sample of the Results list:

- From the list, select the course you wish to view by clicking on any field on the line for that course.
That will open the Course Catalog Summary page:

**Course Catalog Summary**

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Financial Acctg II</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Effective Date:** 01/01/2006  
**Status:** Active  
**Equivalent Course Group:**

<table>
<thead>
<tr>
<th>Grading Basis</th>
<th>Min Units</th>
<th>Max Units</th>
<th>Progress Unit</th>
<th>Crs Cnfct</th>
<th>Allowd Unt</th>
<th>Allowd Comp</th>
</tr>
</thead>
<tbody>
<tr>
<td>011</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1</td>
</tr>
</tbody>
</table>

**Course Offering:**

<table>
<thead>
<tr>
<th>Institution</th>
<th>Acad Group</th>
<th>Subject</th>
<th>Catalog</th>
<th>Acad Org</th>
<th>Approved</th>
<th>Career</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>UKANS</td>
<td>BUS</td>
<td>ACCT</td>
<td>220</td>
<td>ACCT</td>
<td>Approved</td>
<td>Undergrad</td>
<td>KULC</td>
</tr>
</tbody>
</table>

**Course Component:**

<table>
<thead>
<tr>
<th>Component</th>
<th>Instructor Contact Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>Optional 4.080</td>
</tr>
</tbody>
</table>
Class Sections

The Class Sections page group provides a quick snapshot of Class information for a particular subject, catalog number and section(s) in a given term.

Follow this navigation, select Update Sections of a Class:
Catalog/Schedule of Classes>Update Sections of a Class

A search page will open. This search is considered the Advanced Search method.

The more criteria that is entered, the better and faster the search will process. The following items will produce an efficient search.

- Select the Academic Institution.
- Select the Term.
- Select the Subject Area.

Warning: It is not advisable to do a search with less than three criteria. The Class table is quite large and a search without at least three criteria may result in an error.

- Select the Catalog number if known.
- Alternately a combination of Institution, Term and Course ID or Description may be used. Description may be used in connection with Institution and Term and may contain all or a portion of the title of the class. If using Description, the Case Sensitive box does have an impact on the results. For example, if Case Sensitive is checked and the entry in Description is "intro," then the title that included INTRO will not be found. However, if the Case Sensitive box is left unmarked, using "intro" will locate the title that includes the word INTROD.

Campus and Course Offering Number may be used to further narrow a search that already has some of the criteria above.

- The Clear button will clear all criteria out of the fields.

Warning: The Basic Search should not be used to access the Class Section pages. There are not enough criteria used in the Basic Search to have a successful result.

- After entering the selection criteria, Press the Search button.
The Class Section page group will open.

There are two pages (tabs) in this page group.

The basic class information appears at the top of the Class Status page. The Course ID, Institution, Term, Subject Area, Catalog Nbr. and the title information are displayed, along with the career.

There is a navigational bar (labeled Class Sections) on which links may be active if the resulting rows of data are more than one screen can display. In the sample above there are only enough rows to fill one screen so the links are disabled. The View All link will open a long screen with all the rows that are available. The First, Last and Left and Right arrow links allow movement from one page of data to another. In the sample shown, the row count shows 1-3 of 3, indicating that all rows will appear on the same page.
The fields shown on the Class Status page are:

- **Session** - The type of session (Regular, Summer) in which the class will be offered.
- **Sect** – The Class Section number identifies a specific meeting time and day for the class in a specific term.
- **Class Nbr** – The Class Nbr that is unique to the Class Section and is used when enrolling. The Class Nbr is similar to the legacy system Line Number.
- **Component** – The Component type for the Section, for example Lecture or Discussion.
- **Enrollment Status** – The current status of the class, which would be Open or Closed (indicating the class is full or cancelled).
- **Class Type** – Indicates whether the class is an Enrollment section (usually the graded component of the class) or Non-Enrollment Section (often the Lab or Discussion component).
- **Class Stat** – This indicates whether the class is Active for the term. The possible values are: A=Active, X= Cancelled, S=Stop Enrollment, T=Tentative.
- **Assoc** – The Class Association number, also a number that helps identify the section and indicates any ties between sections.
- **Auto Enrl 1** – Indicates any related class that will automatically be added to the student’s schedule when enrolling in the primary section. (For example a student may select the Lecture section and a Lab section is automatically placed on the student schedule.)
- **Auto Enrl 2** - Indicates a possible related class that will automatically be added to the student’s schedule when enrolling in the primary section.
- **Resection** – Indicates the existence of a resection to section rule – if the primary section is closed the student would be placed in an alternate section automatically.
- **Add & Drop Consent** - Indicates the class requires permission to enroll or drop. Currently, we are not using Drop Consent.
  - N= No consent required
  - I= Instructor consent
  - D= Department Consent
- **Schd Print** - Indicates whether or not this particular class and section will appear in the online Schedule of Classes as well as in the printed Schedule of Classes.
To view the Class Enrollment Limits page, simply click on the Class Enrollment Limits page (tab).

The Class Enrollments Tab contains the enrollment data for the class as of the time the page is opened. The Session, Section, Class Nbr and Component are repeated on this page for easy identification of the specific section being viewed.

The fields shown on the Class Enrollment Limits page are:

- **Enrl Cap** – The enrollment capacity limit defined for each section shown.
- **Enrl Tot** – The actual current enrollment in the class at the time of the search. This is real-time data.
- **Wait Cap** – The maximum number of waitlist spaces that will be allowed.
- **Wait Tot** – The actual current number of students on the waitlist as of the time of the search.
- **Min Enrl** – The minimum enrollment that will be allowed for the class to be taught.
- **Room Capacity** – The room capacity limit defined by the Fire Marshall for each section shown.
- **Facility ID** – The actual room the class will be instructed in. If a room is not yet assigned, 'unassigned' will be listed. If the class meets in multiple rooms, then 'multiple' will be listed.