UR Student for Students
(In preparation for F20 Registration)

Presenter:
Sean Hanna, Academic Advising Subject Matter Expert
What is UR Student?

- **View Student Profile**
  - View majors, minors and clusters
  - View academic history

- **View Academic Dashboard**
  - See holds
  - See advisors (Student Support Network)
  - Important links
  - See registration appointment

- **Create a Saved Schedule and Register**

- **Drop and Swap Courses (during drop/add period)**

- **Request Permission for a Course Section Pre-requisite Override**
Student Access v. UR Student

- Student Access will be available through Summer 2020, but will be replaced by the Academic dashboard in UR Student, which is available to students today.
- Fall 2020 registration takes place in UR Student ([www.rochester.edu/urstudent](http://www.rochester.edu/urstudent))
- Summer 2020 registration takes place in legacy Web Registration system
Some terminology has changed in the new system...

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition or former equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Section</td>
<td>CRN or course reference number</td>
</tr>
<tr>
<td></td>
<td>Course with the meeting place,</td>
</tr>
<tr>
<td></td>
<td>time &amp; instructor assigned</td>
</tr>
<tr>
<td>Academic Unit</td>
<td>School or Department</td>
</tr>
<tr>
<td>Academic Level</td>
<td>Graduate, undergraduate, medical....</td>
</tr>
<tr>
<td>Academic Period</td>
<td>The “term” courses were offered in</td>
</tr>
<tr>
<td></td>
<td>Each school has its own academic calendar</td>
</tr>
<tr>
<td>Program of Study</td>
<td>Major, minor, doctoral program, instrument, etc.</td>
</tr>
<tr>
<td>Student Cohort</td>
<td>Replaces “Advisor” field in legacy system</td>
</tr>
<tr>
<td></td>
<td>Used to apply an attribute to a group of students where there is no field in the system (e.g., Class Year)</td>
</tr>
<tr>
<td>Student Summary</td>
<td>Location of basic information on student</td>
</tr>
<tr>
<td>Advisee Notes</td>
<td>Notes created by advisor in student record to be viewed by other advisors and administrators (not for students view)</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>Term by term description of a student’s course plan</td>
</tr>
<tr>
<td>Academic History</td>
<td>A student’s registrations and grades</td>
</tr>
<tr>
<td>Current Classes</td>
<td>A student’s registrations – whether graded or ungraded – for the current academic period</td>
</tr>
</tbody>
</table>
How we define success*

**FOR STUDENTS**
- Able to onboard to UR Student successfully
- Able to register for classes successfully
- Transcripts are accurate
- Billing is accurate and account information can be accessed in real time
- Refunds are received in a timely manner
- Financial assistance is accurately credited in a timely manner: Financial aid awards, Graduate tuition awards, Employee tuition benefits, other waivers and discounts
- 1098-T tuition tax reporting is accurate

**FOR INSTRUCTORS AND ADVISORS**
- Able to grade successfully
- Able to access the information needed to advise students (need will vary by school)

**FOR ADMINISTRATORS**
- Able to manage course catalog and course schedule
- Reporting to National Student Clearinghouse is accurate
- Able to maintain compliance with federal and state regulations
- Revenue is appropriately recognized
- Reporting is accurate and meets audit requirements

* The rollout of UR Student will follow the academic calendar so that the first time each activity occurs in UR Student will be for Fall 2020
Class Year v. Class Standing

- Your class year is being translated into a class standing, so for the remainder of Spring 2020 Class Standing values will work like this:
  - Class of 2023 = First-Year
  - Class of 2022 = Sophomore
  - Class of 2021 = Junior
  - Class of 2020 = Senior
  - Class of T5/E5 = Fifth Year

- After the Spring 2020 semester ends, Class Standing will begin to look toward Fall 2020 for translation from Class Year, as follows:
  - Class of 2024 = First-Year
  - Class of 2023 = Sophomore
  - Class of 2022 = Junior
  - Class of 2021 = Senior
  - Class of T5/E5 = Fifth Year
Demo of UR Student
View Student Profile

- Click on the student photo and then "View Profile"
Viewing the Student Profile

Academic Progress
- Psychology [PSY] Intended B.A. Major
- 0 Satisfied of 1 Requirements

Student Information
- Student ID
- Student Status: Active
- Academic Level: Undergraduate
- Class Standing: Sophomore
- Academic Unit: School of Arts and Sciences
- Primary Program of Study: Psychology [PSY] Intended B.A. Major

Account Activity
- Total Account Balance: 0.00
- Due Now: 0.00

Contact Information - Public
- Email: student@u.rochester.edu

Current Classes
- Enrolled Sections - Spring 2020 AS&E
Rocky is an intended Psychology major...

- Students can see their majors, minors, and clusters on the Academics Overview tab under Programs of Study.
View Academic History

- View the full academic history under the Academic History tab.
- Ungraded courses and those form the current semester are found under the Current Classes tab.
Back to the Home page – Notice the Inbox and Applications section

- Click on the UR symbol on the top left to return to the home screen at any time.
- See the Inbox and Academic dashboard.
Click on the Academics icon and sees his Academic dashboard

- Notice that Rocky has an onboarding hold with 5 actions to complete (these actions can also be viewed in his Inbox).
- Rocky can see his advisors in the Important Contact Support Network section.
- Click on “Find Course Sections” to see the Fall 2020 course schedule.
Go back to home page and view inbox items to complete Continuing Student Onboarding

- Every student must complete Continuing Student Onboarding to remove their Onboarding Hold and be eligible to register.
- Click the Inbox icon on the top right of the home page or the “Go to Inbox” link at the bottom of the Inbox section to see the view Inbox details and take action.
Complete Onboarding steps in Inbox - WalkMe

- Click on each Inbox item, follow instructions, and click “Submit” and then “Done” to complete the onboarding steps.
- The first step asks you to download the WalkMe browser extension, which provides you with a tour of UR Student and some helpful tips for the screens you are using.
Complete Onboarding steps in Inbox – Update Contact Info

- The second step asks you to review and update your contact information. Scroll down to see the detail in each section. Click “Edit” to make changes to address, phone or home email.
- Once complete, click “Approve” and then click “Done.”
Complete Onboarding steps in Inbox – Review Friends and Family

- UR Student allows you to identify Friends and Family and provide details related to their relationship to you.
- You have the ability to grant Friends and Family access to UR Student to view and pay your bill from the Bursar’s Office. Click the “Add” button to add a person to this section and follow the instructions to grant permission.
Complete Onboarding steps in Inbox – 1098-T Consent

- If you want to receive your 1098-T tax document electronically, check the box agreeing to the terms and conditions.
- Then, click “Submit” and then click “Done.”

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<table>
<thead>
<tr>
<th>Actions (5)</th>
<th>Archive</th>
</tr>
</thead>
<tbody>
<tr>
<td>View: All</td>
<td>Sort By: Newest</td>
</tr>
</tbody>
</table>

**Consent to Receive Form 1098-T Electronically**

5 day(s) ago

**Note:** 1098-T forms are generated annually for students if they have qualifying financial activity on their student account for a given calendar year. The consent below will be in effect starting with the 2020 calendar year for 1098-T forms generated in January of 2021. For more information about how to use 1098-T forms please contact your tax preparer.

**Consent:** I consent to receive my IRS Form 1098-T, Tuition Statement, electronically from University of Rochester (UR). I understand that if I do not consent to receive my Form 1098-T electronically, a paper copy will be provided. I understand that I can withdraw this consent or request a paper copy by following the instructions at [https://www.rochester.edu/adminfinance/bursar/1098T.htm](https://www.rochester.edu/adminfinance/bursar/1098T.htm).

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Yes, I have read and consent to the terms and conditions

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**Process History**

- **Nancy Specht**
  - Continuing Student Registration Onboarding Event – Step Completed
- **To Do:** Activate student Workday account – Not Required
- **Workday Service**
  - Service: Apply Student Hold – Step Completed
  - Service: Apply Student Hold – Not Required
- **Workday Service**
  - 5 days ago
Complete Onboarding steps in Inbox – Student Financial Responsibility Agreement

- Click the PDF document to review the Student Financial Responsibility Agreement.
- Once you have read the agreement, click the “I Agree” box to affirm your consent.
- Click the “Submit” button and then click “Done.”
Click on Academics dashboard – Search for Course Sections for Registration

- Now that the Onboarding Hold has been removed, it is a good time to start viewing Fall 2020 courses and creating a Saved Schedule. First, go to your Academics dashboard and click on “Find Course Sections.”
Choose the correct academic calendar

- Each UR school has its own calendar, so Fall 2020 AS&E for courses offered by AS&E.
- Some courses you are looking for may appear on another school’s calendar (e.g., MBI 220 found on Fall 2020 SMD Graduate Studies). **Please note: Course sections from a non-ASE calendar cannot be added to a Saved Schedule and must be registered for individually.**

Find Course Sections URSTU N1201
Search for course sections

- Use the subject facets on the left of the screen or the search bar in the middle of the screen to find course sections you may be interested in (keyword or subject code search)
- Arts and Sciences course sections have changed from 3-letter to 4-letter subject codes (e.g., PSY is now PSYC)

Type keywords to find courses by title or search by subject code (e.g., PSYC)
Use the “carrot” to see the full course details

- You can click on the “carrot” to see additional details on a course section, including instructor, instructional format, and enrollment capacity
- **Pro Tip**: Right click on the course sections title to open it in a new tab in order to add to a “Saved Schedule” or register
Save Schedule or Register

- Before the registration window opens, you can still work on your registration for the upcoming semester by creating a Saved Schedule.
- Click the “Add to Schedule” button to add the course you are viewing to a Saved Schedule.
- You can create multiple Saved Schedules if you have multiple scheduling options that you are considering.

The Register button will only appear during your registration window when you do not have any holds.
Creating a Saved Schedule

- If you are creating a new Saved Schedule, click on "Create Schedule to Register" in the "Schedule" field.
- Once you create a Saved Schedule, you can choose meeting times for your desired courses.
- The Saved Schedule will warn you if you are not eligible to register for a particular course when; you have time overlaps between course sections, if you are repeating a course, and you are over your enrollment unit limit.
Choose Semester and Name Saved Schedule

- You will be prompted to choose an academic period for your Saved Schedule (e.g., Fall 2020 AS&E).
- Name your Saved Schedule (e.g., Fall 2020 V1). Remember, you can create as many of these as you would like.
Select meeting times

- Select the meeting time and grading basis (Graded or Audit) in order to add the course section to your saved schedule.

<table>
<thead>
<tr>
<th>Course Listing</th>
<th>PSYC 267 - Gendr Diff in Social Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Blank Description</td>
</tr>
<tr>
<td>Units</td>
<td>0 - 4 Semester Units</td>
</tr>
</tbody>
</table>

**Lecture**

<table>
<thead>
<tr>
<th>Select</th>
<th>Section</th>
<th>Eligible</th>
<th>Section Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Meeting Patterns</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PSYC 267-1 - Psychology of Gender</td>
<td></td>
<td>Open</td>
<td>08/26/2020</td>
<td>12/18/2020</td>
<td>Tues/Thurs</td>
<td>2:00 PM - 3:15 PM</td>
</tr>
</tbody>
</table>

**Grading Basis**: Graded

**Units**: 4

**Unit Type**: Semester Units
View Saved Schedule

- From this screen you can start registration (if your registration window is open and you have no holds) or you can view this Saved Schedule (View schedule Button).

Click here to view all of your saved schedules for the academic period
Return to “Find Course Sections” to search for additional course sections

- Return to the Find Course Sections report in order to search for additional courses.
- Open course section in a new tab.
- Add course section to Saved Schedule

Right click to open in a new tab
Add course section to Saved Schedule

- Continue building out your Saved Schedule by adding additional course sections.
- Creating Saved Schedules before registration day should allow you to register more easily.

View Course Section

<table>
<thead>
<tr>
<th>Course</th>
<th>ECON 108 - Principles of Economics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Period</td>
<td>Fall 2020 AS&amp;E</td>
</tr>
<tr>
<td>Status</td>
<td>Open</td>
</tr>
<tr>
<td>Start/End Date</td>
<td>08/26/2020 - 12/18/2020</td>
</tr>
<tr>
<td>Grading Basis</td>
<td>Audit</td>
</tr>
<tr>
<td>Units</td>
<td>4 Semester Units</td>
</tr>
<tr>
<td>Description</td>
<td>The fundamentals of microeconomic and macroeconomic theory, with applications; preparation for subsequent economics courses.</td>
</tr>
</tbody>
</table>

Instructional Formats  | Lecture       |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled/Capacity</td>
<td>1/165</td>
</tr>
<tr>
<td>Meeting Patterns</td>
<td>Dewey Room 1101</td>
</tr>
</tbody>
</table>

Instructor

Michael Rizzo

Notes

Once the registration window is open, this button can be used to start the registration process.
Select meeting times for additional courses

- Again, select the meeting times and choose the Grading Basis

<table>
<thead>
<tr>
<th>Course Listing</th>
<th>ECON 108 - Principles of Economics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The fundamentals of microeconomic and macroeconomic theory, with applications; preparation for subsequent economics courses.</td>
</tr>
<tr>
<td>Units</td>
<td>0 - 4 Semester Units</td>
</tr>
</tbody>
</table>

### Lecture

<table>
<thead>
<tr>
<th>Select</th>
<th>Section</th>
<th>Eligible</th>
<th>Section Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Meeting Patterns</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ECON 108-2 - Principles of Economics</td>
<td></td>
<td>Open</td>
<td>08/26/2020</td>
<td>12/18/2020</td>
<td>Mon/Wed/Fri</td>
<td>9:00 AM - 9:50 AM</td>
</tr>
</tbody>
</table>

### Recitation

<table>
<thead>
<tr>
<th>Select</th>
<th>Section</th>
<th>Eligible</th>
<th>Section Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Meeting Patterns</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ECON 108-12 - Principles of Economics - Rec</td>
<td></td>
<td>Open</td>
<td>08/26/2020</td>
<td>12/18/2020</td>
<td>Thursday</td>
<td>6:15 PM - 7:30 PM</td>
</tr>
</tbody>
</table>
Repeat Warning

- A Warning will display if a course section is added that would represent a repeat. (i.e., a course for which the student already earned credit.)
Meeting Conflict Error

- An error is created when two course sections with conflicting meeting times are added to the same Saved Schedule.
Once the registration window opens that Saved Schedule can be used for a potentially simpler registration process.

After you have created your Saved Schedule, you can use this button to register when your registration window opens.
Add additional courses once registration has been initiated

- When the registration window opens and registration is initiated the student can add additional courses.

Click the plus sign (+) to add additional course sections and choose meeting times.

Click here to finish registration
After registration - View My Courses

- From the Academic dashboard, click View My Courses to see multiple views of the course schedule.
View My Courses

- View schedule and edit registration from the View My Courses page

### Psychology [PSY] Intended B.A. Major

**Fall 2020 AS&E**

<table>
<thead>
<tr>
<th>My Enrolled Courses</th>
<th>6 items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Listing</strong></td>
<td><strong>Units</strong></td>
</tr>
<tr>
<td>PSYC 152 - Machinery of the Human Brain</td>
<td>4</td>
</tr>
<tr>
<td>PSYC 267 - Gendr Diff in Social Behavior</td>
<td>4</td>
</tr>
<tr>
<td>ECON 108 - Principles of Economics</td>
<td>4</td>
</tr>
<tr>
<td>MATH 143 - Calculus III</td>
<td>4</td>
</tr>
</tbody>
</table>
View My Courses in Student Schedule Format

- Click “View Schedule” to see a weekly calendar of your meeting times
Drop and Swap Courses

- Use the Drop and Swap Course buttons to from the View My Courses page.
- Swap allows the student to drop and add a course section at the same time.

View My Courses

Psychology [PSY] Intended B.A. Major

Fall 2020 AS&E

My Enrolled Courses 6 Items

<table>
<thead>
<tr>
<th>Units</th>
<th>Grading Basis</th>
<th>Section</th>
<th>Instructional Format</th>
<th>Meeting Patterns</th>
<th>Registration Status</th>
<th>Instructor</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Graded</td>
<td>PSYC 152-1 - Language &amp; Psycholinguistics</td>
<td>Lecture</td>
<td>Mon/Wed</td>
<td>12:30 PM - 1:45 PM</td>
<td>Registered</td>
<td>Chung-Lin Yang</td>
<td>08/26/2020</td>
</tr>
<tr>
<td>4</td>
<td>Graded</td>
<td>PSYC 267-1 - Psychology of Gender</td>
<td>Lecture</td>
<td>Tues/Thurs</td>
<td>2:00 PM - 3:15 PM</td>
<td>Registered</td>
<td>Marie-Joelle Estrada</td>
<td>08/26/2020</td>
</tr>
<tr>
<td>4</td>
<td>Graded</td>
<td>ECON 108-10 - Principles of Economics-Rec</td>
<td>Recitation</td>
<td>Thursday</td>
<td>3:25 PM - 4:40 PM</td>
<td>Registered</td>
<td>Michael Rizzo</td>
<td>08/26/2020</td>
</tr>
<tr>
<td>4</td>
<td>Graded</td>
<td>MATH 143-3 - Calculus III - Rec</td>
<td>Recitation</td>
<td>Tuesday</td>
<td>4:50 PM - 6:05 PM</td>
<td>Registered</td>
<td>Wayne Peng</td>
<td>08/26/2020</td>
</tr>
<tr>
<td>4</td>
<td>Graded</td>
<td>MATH 143-1 - Calculus III</td>
<td>Lecture</td>
<td>Mon/Wed</td>
<td>3:25 PM - 4:40 PM</td>
<td>Registered</td>
<td>Wayne Peng</td>
<td>08/26/2020</td>
</tr>
</tbody>
</table>

> My Dropped/Withdrawn Courses

<table>
<thead>
<tr>
<th>Enrolled Units</th>
<th>16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load Status</td>
<td>Full-time</td>
</tr>
</tbody>
</table>
Drop and Swap Courses

- After choosing the course section to drop, choose the course section to add.
- Click OK.

Swap Student Course Registration

Select a course to add and register in and replace the course you want to drop.

- New Course
- New Section

Course to Drop: PSYC 267 - Gendr Diff in Social Behavior

Course to Add: PSYC 219 - Research Methods in Psych

Eligible: Yes
Request Course Section Pre-requisite Override

- If a course requires instructor permission, choose the Request Course Section Pre-requisite Override option from the Academic dashboard.
Request Course Section Pre-requisite Override

- Choose the Course and Course Section that requires permission from the instructor
Request Course Section Pre-requisite Override

- Enter a comment to explain to the instructor why you should be permitted to join the course and click “Submit.”
- The student will receive a notification with the instructor decision. If approved, the student can then register for the course sections that requires permission.
UR Student Web-Portal for Students

http://www.rochester.edu/urstudent/project/student/

• See links to tutorials and resources to help you to use UR Student and prepare for registration