

STUDENT INFORMATION SYSTEM (SIS)

STUDENT GUIDE









In addition to local adjustments to fulfill enhancement requests, the system receives regular vendor updates & patches. At time of publication, all features and screenshots are current. An electronic version of this guide, along with other manuals and guides can be found at *case.edu/registrar/sisguides.html*



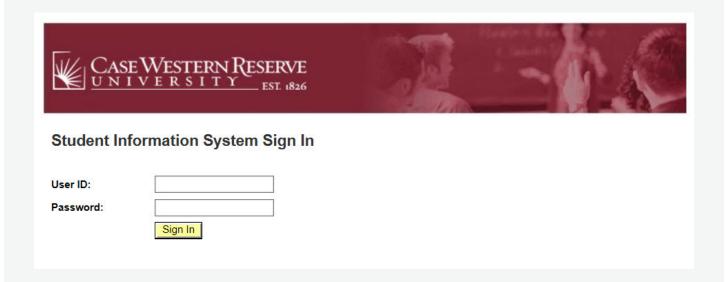
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HOW TO SIGN IN

Signing in is simple and secure.

The URL to access the system is www.case.edu/sis Sign in using your Case Network ID and the associated password.



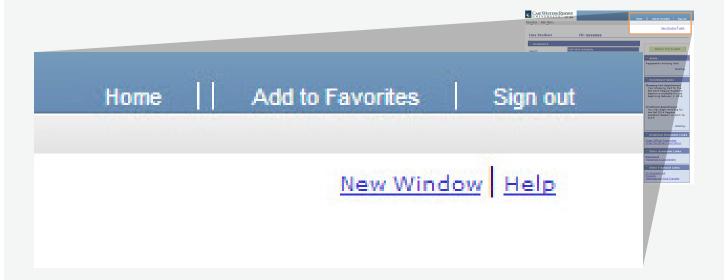
TIPS

- User ID & password are case sensitive.
 The user ID must be entered in lowercase letters (example: abc123).
- Do not share your log in information with anyone. Your password will never be needed for troubleshooting purposes.
- Once in SIS, do not use the Internet browser's back button, as this could cause loss of information.
- > Some reports will require you to set your web browser to allow pop-ups.

HOW TO SIGN OUT

Signing out is easy and convenient.

Sign out of the system by clicking the Sign Out link on the blue tab in the upper-right corner of any screen.



TIPS

> Always sign out, especially if you are using a public computer.

IMPORTANT SECURITY FEATURE

SIS automatically signs you out after 60 minutes of inactivity.

STUDENT CENTER: OVERVIEW

The Student Center is the main launching point for accessing academic, financial and personal information.

ACADEMICS

In this section you can view your weekly class schedule. There are also links to other academic features of SIS, such as Enrollment, Course History and Grades.

FINANCES

From here you can view an account summary. It also contains financial links such as Account Inquiry, Account Activity, Charges Due, Payments and Pending Financial Aid. This section also provides a link to view billing information and make an online payment.

PERSONAL INFORMATION

You can update personal contact information, add Authorized Users, set User Preferences and update Emergency Contact information. For more information on setting up authorized users see the Student Financial Guide at www.case.edu/registrar/sisguides.html

- 1 **Academic Links.** Access additional functionality of SIS including grade reports, Advisement Reports and What-If Reports.
- 2 **This Week's Schedule.** Displays this week's classes for the current term. Click the Weekly Schedule link to see those classes in a weekly grid.
- 3 **Enrollment Shopping Cart.** Use the Shopping Cart to select classes prior to enrollment. Classes can be validated prior to the Enrollment Appointment date.
- 4 **Health Waiver.** The CWRU **Medical Plan** fee is automatically charged on a per semester basis.* Once registered for one or more credit hours a button appears to allow the health insurance fee to be waived. Students that have health coverage are eligible to waive the Medical Plan fee.

 *No medical plan fee is charged for the summer term.
- 5 **Finances.** View summary account information, opt out of other optional fees, and link to other detailed account activity.

STUDENT CENTER: OVERVIEW



- **Personal Information.** View and update contact information including permanent and local address, home phone number and email address. Also link to authorized user setup and emergency contact information.
- **Search for Classes.** Click the Search for Classes button to transfer to the searchable schedule of classes.
- **Holds.** Displays any holds associated with your record. Holds can prevent registration, release of transcripts or other activities.

- **Enrollment Dates.** Displays information on when you can begin to enroll in classes.
- **My Advisors.** Displays advisor(s) name and contact information. You can also choose to add a designated advisor. Designated advisors have access to your academic and personal information, however, they cannot release advising holds.
- **Links.** These links allow access to additional academic and financial resources.

CLASS SEARCH

The Search for Classes screen provides a variety of criteria to refine your search.

- 1 Select the appropriate Term from the Term dropdown list.
- 2 Enter the Course Subject under which the course is listed in the Catalog, or click the Select Subject button to view an alphabetized list of subjects from which to choose.
- 3 Enter the course number that identifies the course in the catalog.
- 4 Select the appropriate career for the course you are searching for from the Course Career dropdown list.
- 5 The Academic Group field will narrow results to courses in a particular academic group, for example the Schools of Engineering and Management.
- 6 Limit the results to particular times, days of the week, instructor and keyword.
- 7 The Course Component, Campus, Building, Course Attributes and Course List dropdown lists allow further refinement of search results.
- 8 Click the Search button to see the results.
- 9 Click the Section link for more details on the course.

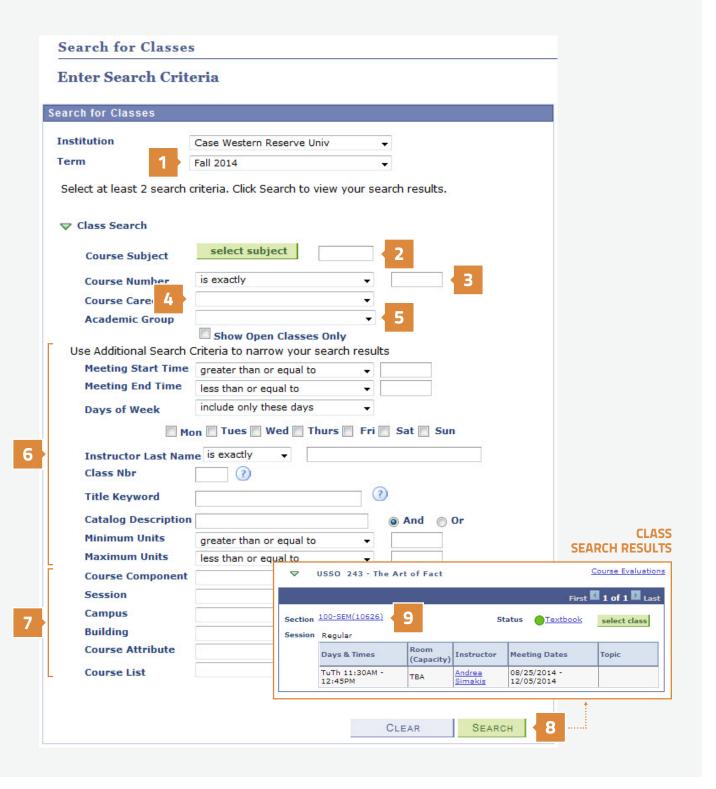
TIPS

Class Number Each class offering of a course is assigned a unique four or five-digit number when created.

Class Section Each class offering is assigned a class section number that makes it easily identifiable within the course.

Course Career To search for courses offered in a given career, select the name of the career from the list provided. To search all careers, leave the field blank. Course Career denotes the academic level of study at which the course is taught. For example, ACCT 101 has a career of Undergraduate (not Management) and MGMT 701 has a career of Graduate (not Management).

CLASS SEARCH



ENROLLMENT SHOPPING CART

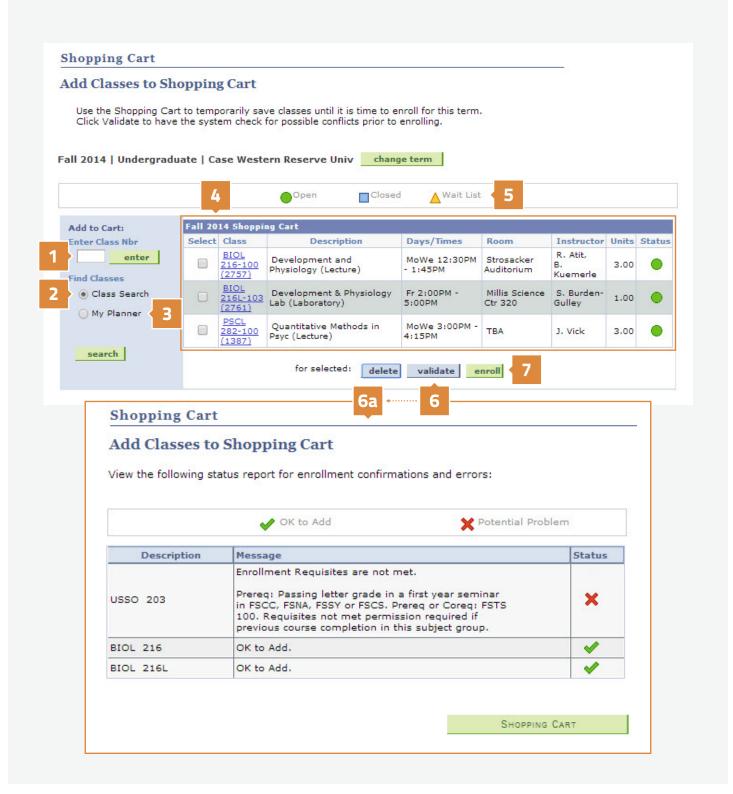
The Enrollment Shopping Cart holds the classes selected from the schedule until it is time to enroll.

Students can validate the contents of their Shopping Cart ahead of their Enrollment Appointment to see if there are any potential problems that would prevent registration.

From the Student Center click the Enrollment Shopping Cart link to get started. If more than one Term is open for enrollment, a choice of Terms will be offered. Select the appropriate Term by clicking in its radio button. Click Continue.

- 1 Enter the Class Number, if known, to add it to the Shopping Cart.
- 2 Select the radio button next to Class Search to select a class from the searchable schedule of classes.
- 3 Select the radio button next to My Planner to select classes from the Planner. Classes must be present in the Planner to use this feature.
- 4 This section shows classes that have been added to the Shopping Cart.
- 5 The status column shows one of three icons to indicate the status of the class:
 - An Open icon indicates the class is open.
 - A Closed icon indicates the class is closed.
 - △ A Wait List icon indicates there is a wait list.
- 6 Once classes are in the cart, select one (or more) and click the Validate button.
- 6a After clicking validate a status report appears. The validation process checks for time conflicts, prerequisites, and the need for instructor or departmental permission. There is a status indicator and a message displayed next to each class. The message indicates if the class is OK to add to your schedule, or if a potential problem could prevent registration for a class.
- 7 You must click the Enroll button once your Enrollment Appointment date has arrived in order to register for the selected classes.

ENROLLMENT SHOPPING CART



The Permissions screen enables students to submit permission requests to instructors.

Permission requests apply to those classes that can be added by instructor consent only, are closed due to enrollment capacity, or have a time conflict with another class on a student's schedule. Permission can also be requested for those classes for which a student hasn't met the prerequisite requirements.

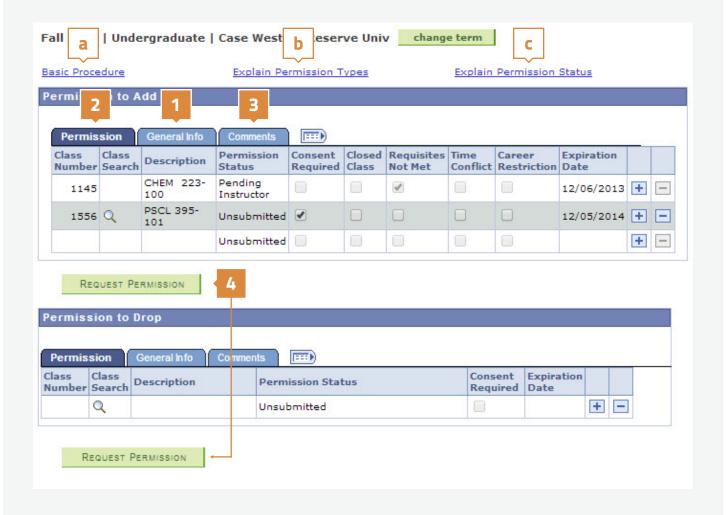
- 1 Use the General Info tab to enter the classes for which permission must be requested.
- 2 Click on the Permission tab to select the appropriate permit(s) required.
- 3 Use the Comments tab to leave a message for the instructor to which the request is being sent.
- 4 Request permission by clicking the Request Permission(s) button.

Additional Information Links

- a Click on the Basic Procedure link for specific directions on using the Permission screen.
- b Click the Explain Permission Types link for more information. Permission Type explanations can also be found on the next page.
- c Click Explain Permission Status for more information on the stages of permission requests.

TIPS

> Permissions are different from Holds. Holds that prevent registration must be addressed in order to permit any registration activity. Permissions are optional and apply on a per class basis. Permissions are granted at the discretion of the instructor or other university official.



Types of Permissions

PERMISSION TYPE

EXPLANATION

Consent Required

A class may be coded by the department as requiring either instructor or department consent. Consent type required may be either add consent or drop consent. Details regarding whether or not a class requires add or drop consent are available on the searchable schedule of classes.

Closed Class

Classes that reach their enrollment limits require permission to override the limit. Note: Some classes may have "Reserve Capacities" such that a department may set aside seats for a particular type of student (e.g., juniors, biology majors, etc.). If all non reserved seats are taken, students not meeting Reserve Capacity criteria will not be allowed to register unless Closed Class permission is granted. If all reserved seats are taken, students meeting Reserved Capacity criteria will not be allowed to register unless Closed Class permission is granted. Even if a class shows a status of "open" or it appears as if there are seats available, it still may be closed to students not meeting Reserve Capacity requirements.

Requisites Not Met

Departments determine whether or not a course requires pre-requisites, co-requisites or other course requirement conditions. If the student has not met these requirements, registration for the course is not allowed unless "Requisites Not Met" permission is granted.

PERMISSION TYPE

EXPLANATION

Time Conflict

Students may not register for classes that have any meeting day/ time overlaps with each other. The student may request permission to override a time conflict from the instructor of the class that will be missed. Students should NOT request permission from the instructor of the class that will not be missed. Even if permission is granted for time conflict, students must still register for course(s) in person.

Career Restriction

Some schools have restrictions on students such that they may not register for courses outside of their own career without receiving permission from either the student's registrar or dean or the course career's registrar or dean. E.g., Law students may not register in Applied Social Science courses without permission from the law school registrar or applied social science school registrar.

IMPORTANT NOTE

Requesting and receiving Permission to Add does not automatically enroll a student in the class. Similarly, requesting and receiving Permission to Drop does not automatically drop a student from a class. Once a student receives permission, the student must complete the appropriate registration process to add or drop the course.

REGISTRATION

The Student Information System makes it possible for your registration to go smoothly.

Here is a checklist to follow to help avoid potential registration issues:

- From the Shopping Cart, search for classes
- ✓ Validate Shopping Cart
- Obtain class permissions, if necessary
- ✓ Enroll on or after the Enrollment Appointment date

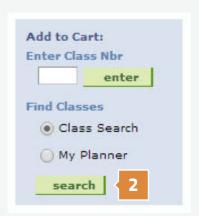
ADDING A CLASS

Adding classes can be accomplished in a couple of ways – directly from the Enroll link in the upper left hand corner of the Student Center, or by clicking the Enrollment Shopping Cart link. The Enrollment Shopping Cart is covered on page 10 of this guide.

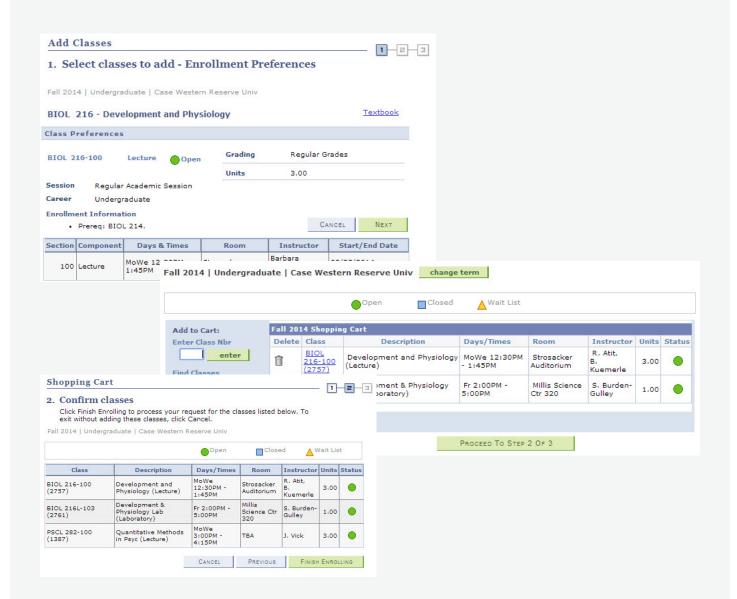
1 Click on the Enroll link in the upper left hand corner of the Student Center. If multiple terms are open for enrollment, you will need to choose the term for which you want to enroll from the options available.



- 2 Search for a class to add by either entering a class number, performing a class search or from a list of classes you've placed in your Planner. Once you have found the class in which you wish to enroll, click the Select button.
- 3 Review the details of the class and click the Next button. This will put the class in your Shopping Cart.
- 4 When ready to enroll in the course, click Proceed to Step 2 of 3.
- 5 Click the Finish Enrolling button.



REGISTRATION



A results screen will appear to show the results of the add. If the add was successful, you will see a status of success with a in the status column. If the add was unsuccessful, you will see an error message and an in the status column.

There are a few reasons why the add may be unsuccessful:

- > It may be outside of the drop/add period.
- > Permission may be needed to drop/add the class.

DROP A CLASS

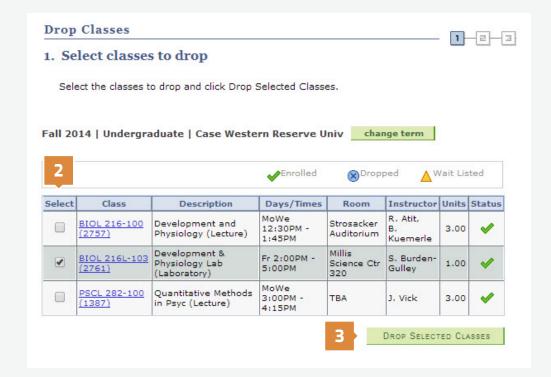
Click on the Enroll link in the upper left hand corner of the Student Center.

- 1 Click the Drop tab to see a list of classes that can be dropped (not shown in image below).
- 2 Select the class(es) to drop.
- 3 Click the Drop Selected Classes button.
- 4 Confirm the selection and click the Finish Dropping button (not shown in image below).

A results screen will appear to show the results of the drop.

There are a few reasons why the drop may be unsuccessful:

- > It may be outside of the drop/add period.
- > Permission may be needed to drop/add the class.



NOTE

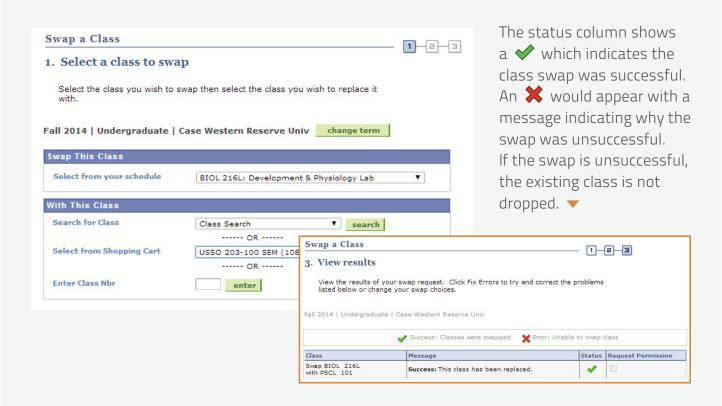
Please contact your school for policy and procedure on dropping classes for each term.

SWAP A CLASS

Swap allows for dropping and adding classes at the same time. The existing class will be dropped only if the target class can be added.

Click on the Enroll link in the upper left hand corner of the Student Center.

- 1 Click the Swap tab to go to the Swap a Class screen (not shown in image below).
- 2 From the dropdown list, select the class to drop.
- 3 Choose a class to replace the class being dropped. You can:
 - a. Perform a Class Search and select a class from the searchable schedule of classes.
 - b. Select a class from the Shopping Cart.
 - c. Enter a Class Number (if known).
- 4. Verify the selection and click the Finish Swapping button (not shown in image below).

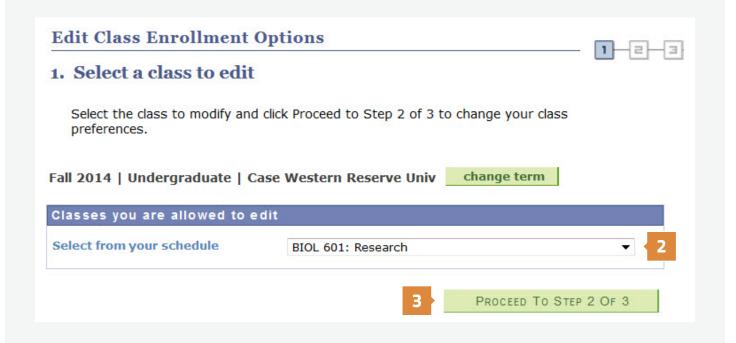


EDIT A CLASS

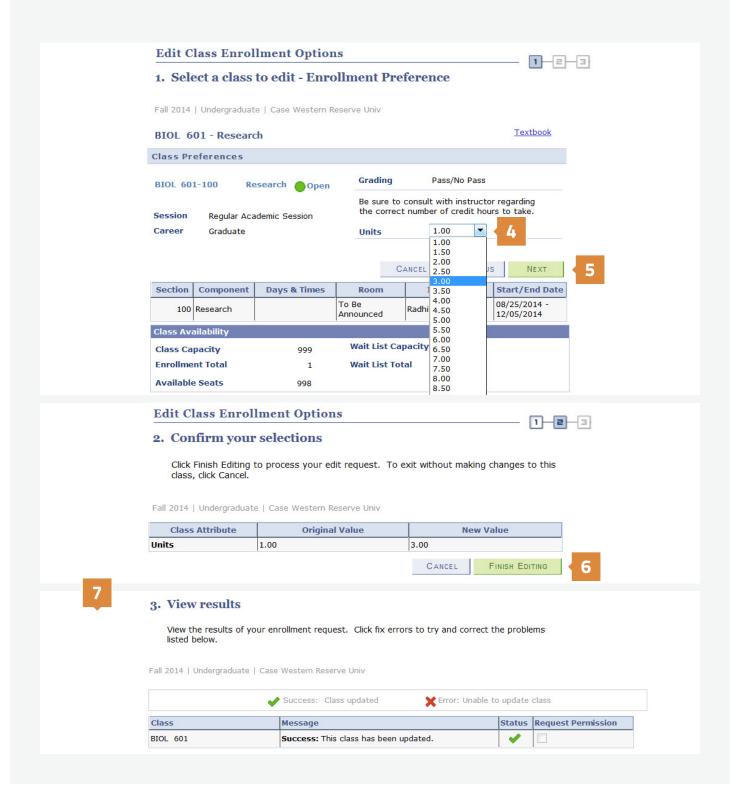
Edit allows you to change the credit hours enrolled in a variable credit hour course. This can only be accomplished through the end of the drop/add period for the term.

Click on the Enroll link in the upper left hand corner of the Student Center.

- 1 Click the Edit tab to go to the Edit Class Enrollment Options screen (not shown).
- 2 From the dropdown list select the class you wish to edit.
- 3 Click the Proceed to Step 2 of 3 button.
- 4 From the Units dropdown list, select the number of units from the options available.
- 5 Click the Next button.
- 6 Confirm your selection and then click the Finish Editing button.
- 7 A results screen will appear which will show the status of the edit.



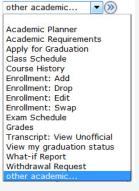
EDIT A CLASS



VIEWING COURSES & GRADES

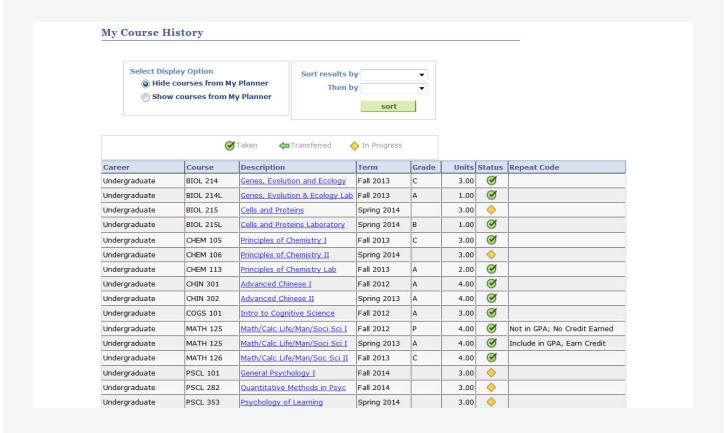
There are a few ways to view courses and grades. Use the Course History screen, Grades screen or Unofficial Transcript to see grades and a list of courses.

These screens can be accessed from the Student Center using the other academic dropdown list.



COURSE HISTORY

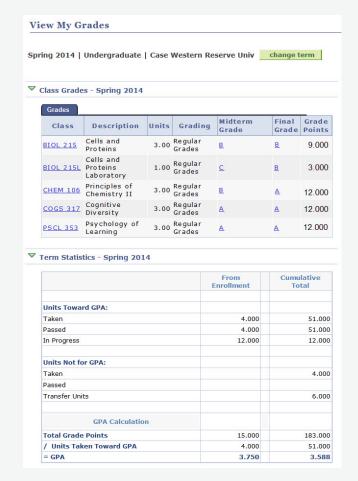
The Course History screen shows the classes that are completed, transferred or in progress. The grades are shown for courses that have been completed.



VIEWING COURSES & GRADES

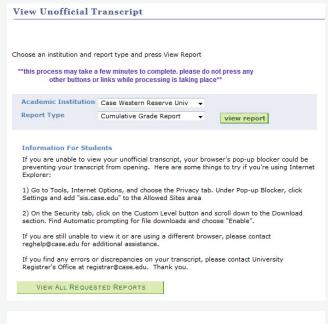
GRADES

The View My Grades screen lists grades and grade point statistics by Term.



UNOFFICIAL TRANSCRIPT

The cumulative grade report/unofficial transcript shows completed courses, grades received, and statistics per Term.



IMPORTANT NOTE

In order to view the report, you may need to set your web browser to allow pop-ups.

REPORTS & MY PLANNER

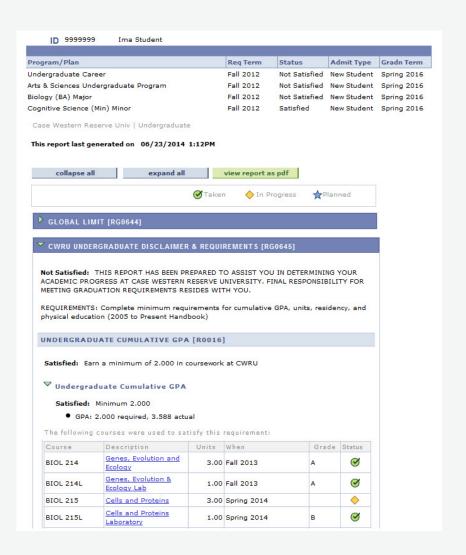
The Student Information System allows for real time access to the same reports advisors can see: the Advisement Report and What-If Report.

The Advisement Report, What-If Report, and My Planner features show past, present and future enrollment plans.

ADVISEMENT REPORT

The Advisement Report compares completed coursework against requirements that must be fulfilled in order to graduate. It displays completed requirements, requirements to complete, and courses that can be used to complete them.

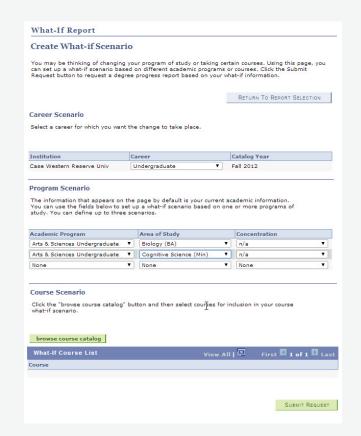
Not available for all schools. Contact your Registrar if unable to view.



REPORTS & MY PLANNER

WHAT-IF REPORT

A What-If Report shows how completed courses fit into a new program.



MY PLANNER

My Planner is an optional feature for the convenience of students who wish to plan ahead. Please note that courses may not actually be offered for the term(s) selected.

Graduate studies students: Classes cannot be added to My Planner. See pages 26-27.



GRADUATE STUDENTS

PLANNED PROGRAM OF STUDY

Students in the School of Graduate Studies create a PPOS using the My Program tab functionality of SIS.

Click on the My Program tab to browse the course catalog, add courses to the PPOS, and submit it for approval.

To navigate to My Program, choose the Plan link in the Student Center and then choose the My Program tab.

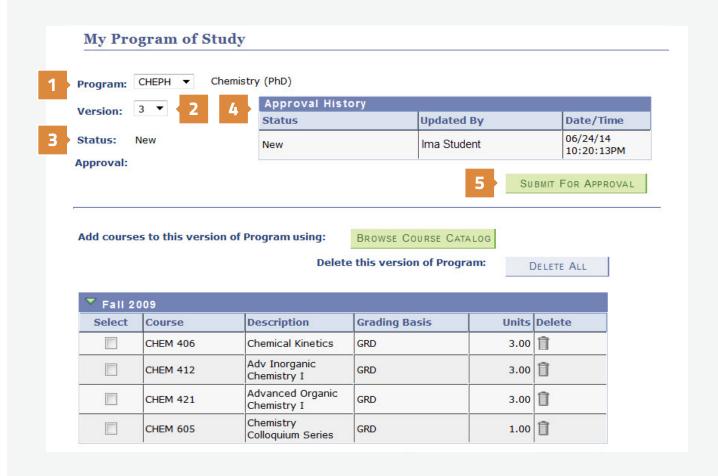
- 1 Select an Academic Program from the dropdown list.
- 2 The Version dropdown list displays the current version of the PPOS by default. Prior versions of the PPOS can also be accessed.
- 3 PPOS approval Status.
- 4 Approval History.
- 5 Click here to submit a new PPOS for Approval.
 The Submit for Approval button requests advisor approval.
- 6 Variable credit hour courses will have a Units field in which to enter a credit hour value.
- 7 Move selected courses into Terms.

NOTE

For further information about PPOS please contact the School of Graduate Studies.

GRADUATE STUDENTS

PLANNED PROGRAM OF STUDY



Select	Course	Description	Grading Basis	Units	Delete
	CHEM 425	Phys Meth for Determ Org Struc	GRD	3.00	î
	CHEM 429	Chem Aspects of Living Systems	GRD	3.00	Û
	CHEM 502	Spec Topics in Inorganic Chem	GRD	6 3.00	î
	CHEM 605	Chemistry Colloquium Series	GRD	1.00	î

PLANNED PROGRAM OF STUDY

Requesting Changes to the Official Planned Program of Study

An approved official Planned Program of Study can be viewed on the My Program tab. Changes can be requested to the PPOS on the My Program tab. Clicking the Request Changes to My Program button creates a new version of the PPOS from which courses can be removed, added, or moved to another Term.

- 1 Every time a change to the PPOS is requested, a new version is created. Click on the Version dropdown list to select and view a previous version of your PPOS.
- 2 Click on the Request Changes to My Program button.
- 3 If a class has a prerequisite, it will be noted in the Prereq column.

NOTE

The Submit for Approval button must be clicked in order for your advisor to see the updates.

GRADUATE STUDENTS

PLANNED PROGRAM OF STUDY



FINANCES

The Finances section allows you easy access to view financial information.

1 Account Inquiry

View account details or make a payment.

2 Account Activity

View up-to-the-minute account activity and history.

3 Manage Student Refunds

Enroll in direct deposit for refunds from financial aid disbursements and any other overpayments. Request online that refunds be applied to future terms.

4 Payments

View all credits applied to your account.

5 Pending Financial Aid

View financial aid that is expected to post to your account. (Please verify with the Office of University Financial Aid that all required documents are complete.)

6 View Billing Statements/Make a Payment

View your billing statements and make payments to your account.

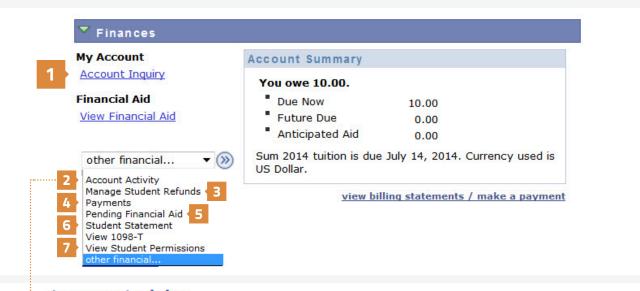
7 View Student Permissions

Use this section to grant financial aid permission to pay the 121 Fitness Center fee (graduate and professional students only).

TIPS

> A guide to financial services at Case Western Reserve University is available at case.edu/studentaccounts

FINANCES



Account Activity



Transaction	S	Find View	10 🗖 F	irst 🛮 1-15	of 15 🗖
Posted Date	Item	Term	Charge	Payment	Refund
01/17/2014	Payment	Spring 2014		13,800.50	
01/13/2014	CWRU Grant	Spring 2014		1,500.00	
12/21/2013	Health Fee Waiver	Spring 2014		808.00	
12/13/2013	Health Plan	Spring 2014	808.00		
12/13/2013	RTA Transportation	Spring 2014	25.00		
12/13/2013	Undergraduate Activity Fee	Spring 2014	165.50		
12/13/2013	Undergraduate Tuition	Spring 2014	20,710.00		
			☑ Fii	rst 1-15 of 1	Last

Currency used is US Dollar.

PERSONAL INFORMATION

The Personal Information section allows easy access to view and update addresses, phone numbers, privacy settings and more.

1 Authorized Users

Click the Authorized User link to set up an authorized user account for parents, spouses or other third parties who you would like to have access to your student financials and/or class schedules and grades.

2 Demographic Data

This area displays a personal data summary.

3 Emergency Contacts

Click the Emergency Contact link or emergency contact tab to view, add, or update emergency contacts.*

4 Names

Click on the Names link or Names tab to request a preferred name.

5 Addresses, Phone Numbers, Email Addresses

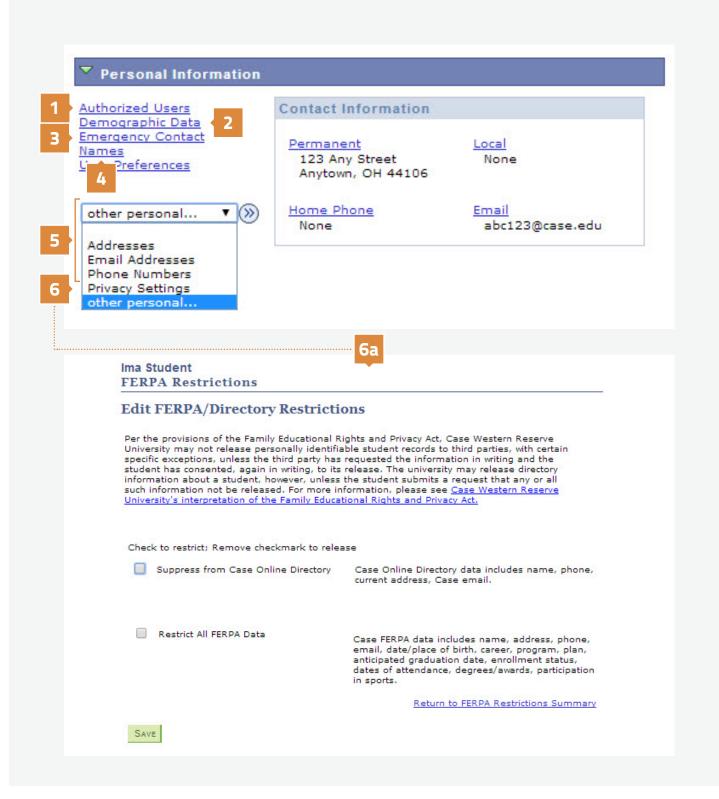
Using the links in the other personal drop down list, you can update your own information including addresses, phone numbers, personal email address and privacy settings. Several address and phone number types are available.*

6 Privacy Settings

Click the Privacy Settings link to view your current FERPA restriction settings. Click the Edit FERPA/Directory Restrictions button if you wish to suppress your data. There are two options available as indicated in the image on the next page of this guide.

*SIS will prompt you to verify emergency contacts, addresses and other contact information twice a year.

PERSONAL INFORMATION



GLOSSARY

SIS TERM	DEFINITION			
Academic Career	Term that classifies both students and curricula as belonging to one of nine categories: Undergraduate, Graduate, Management, Law, Medicine, Applied Social Sciences, Nursing, Dental, and Non-degree.			
Academic Group	Academic Group denotes the school that "owns" the course and the school from which the instructors have teaching appointments. For example, ACCT 101 has an academic group of Weatherhead School of Management and MGMT 701 has an academic group of Weatherhead School of Management.			
Academic Organization	Colleges, schools, and departments that conduct curricular studies at CWRU. Academic Organizations are responsible for maintaining their class schedules in SIS each term.			
Academic Plan	The method by which a student pursues their studies. For undergraduate students, majors and minors are Academic Plans. In the School of Graduate Studies, Plan A and Plan B options are Academic Plans.			
Academic Program	The program to which a student is admitted and/or from which he or she graduates. For example, there is an undergraduate Academic Program in the College of Arts and Sciences. In the School of Graduate Studies, an Academic Program is the scholarly pursuit to which the student is admitted; for example, the doctorate program in Astronomy.			
Advisement Report	Compares the classes & benchmarks that a student has achieved towards fulfilling graduation requirements. Advisement Reports list each class a student has completed, grades achieved (if applicable), credits earned (if applicable), and classes yet to be taken to fulfill requirements.			
Authorized User	Students can set up Authorized User accounts for parents, spouses or other third parties whom they would like to have access to Academic Information, Financial Information or both.			
Course Component	To search for courses by component type, choose a component type from the list provided. For example, if you wanted to see lab courses, choose "Laboratory" from the list.			

GLOSSARY

SIS TERM	DEFINITION			
Designated Advisor	Designated advisors are added in SIS by a student. These advisors will be able to see academic and personal information for the student in SIS; however, they will not be able to release holds. A designated advisor can be any staff or faculty member at the university. It is strongly encouraged that students have a discussion with the potential designated advisor prior to adding them in SIS.			
Enrollment Appointment	The date a student may begin to register for classes.			
Planner	A self-service tool that enables students to select courses they want to take in upcoming semesters from the Course Catalog. For students in the School of Graduate Studies, the Planner is attached to My Program, which allows students, advisors, and the School to view, approve, or deny changes to a student's Planned Program of Study (PPOS).			
Service Indicators	Also known as Holds on the Student Center screen. Can be positive or negative. Negative service indicators may prevent students from enrolling in upcoming terms. Advising Holds, for example, are negative and are applied to students who are required to see an advisor prior to registration. Advisors can remove the Advising Hold once they have met with a student.			
Shopping Cart	Works with the Schedule of Classes and holds the classes in which a student wants to enroll before submitting an enrollment request. Students enroll in classes via their shopping cart once their enrollment appointment (or open enrollment) arrives. Advisors can view their advisees' Shopping Carts before enrollment.			
Sub-Plan	A track or concentration that the student is following within an Academic Plan.			
Term	The internal name for a semester and year. For example, Fall 2014 is a term.			
What-If Report	A report that asks, "What if this student were to change majors?" Compares the student's current curriculum and benchmark achievements with a proposed major and minor combination, and lists the requirements that would and would not be satisfied if the student were to make a change.			

