Enrollment: Add, Drop & Swap Courses

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Student Records

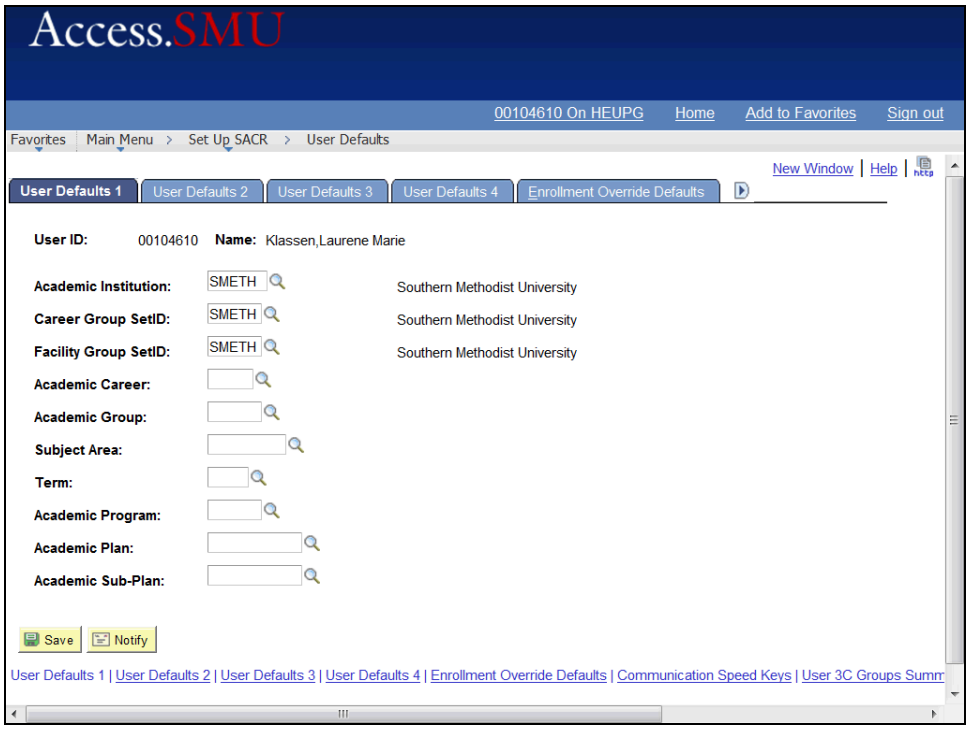
Enrollment

Set User Defaults

Procedure

Step	Action
1.	Setting defaults are optional. The selected fields can be overridden on any page in the system if necessary.

Step	Action
2.	Click the **Set Up SACR** link. ▷ Set Up SACR
3.	Click the **User Defaults** link. User Defaults

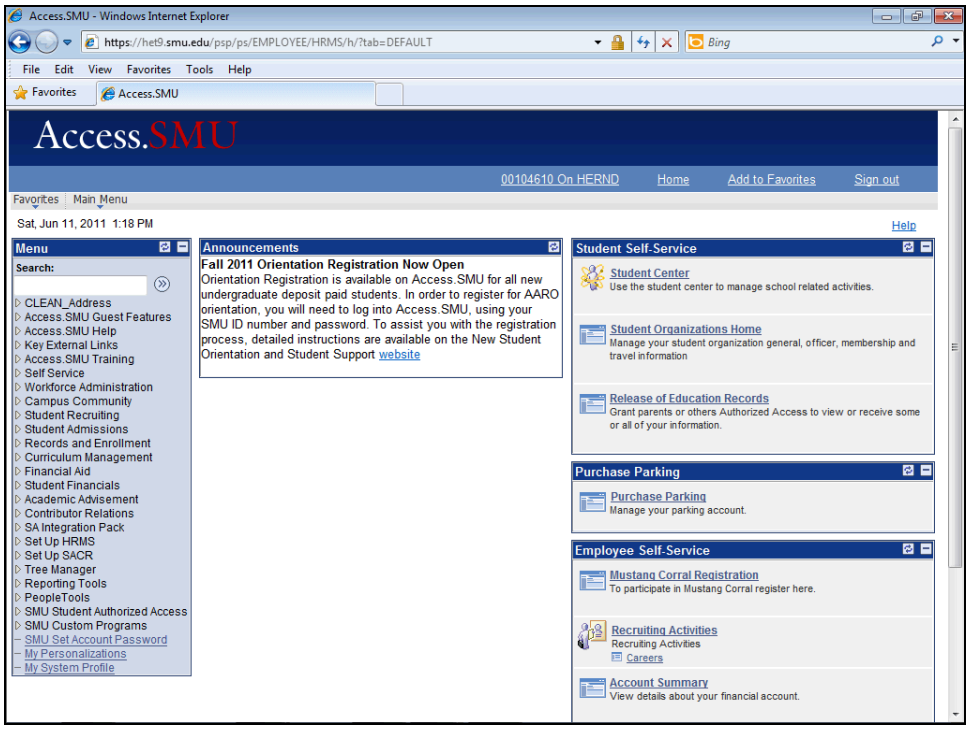


Step	Action
4.	The first three fields: **Academic Institution, Career Group SetID,** and **Facility Group ID** will be populated with "SMETH" (for Southern Methodist University). Other fields that may be helpful to auto-fill are Academic Career, Academic Group, and Term. Having these fields auto-populate can be of value when working with enrollment, admissions and academic scheduling.
5.	Click the **Look Up Academic Career** icon.
6.	Click the **Look Up** button.
7.	Select an entry from the **Academic Career** search results.
8.	Click the **Look Up Academic Group** icon.
9.	Click the **Look Up** button.
10.	Select an entry from the **Academic Group** results.
11.	Click the **Look Up Term** icon.

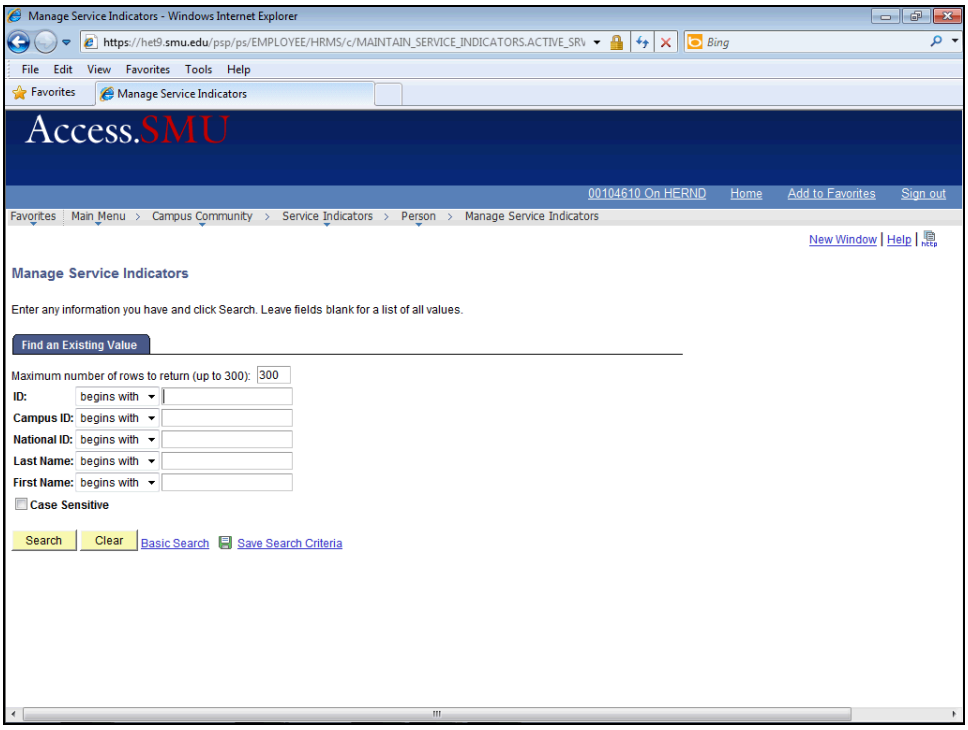
Step	Action
12.	Click the **Look Up** button. Look Up
13.	Select an entry from the **Term** search results.
14.	Click the **Save** button. Save
15.	**End of Procedure.**

View Service Indicator (Holds on a Student's Account)

Step	Action
1.	Service Indicator Codes are used to indicate whether SMU community members should be provided - full or limited - access to services on campus. They can be positive or negative and a person may have both types attached to his or her record. Negative service indicators, are mostly used as holds to prevent an individual from receiving certain services, whereas positive service indicators, are used to designate that special services should be provided or that the person has indicated their communication preferences. SMU uses service indicators as a flag that "something is going on" with that person's Access.SMU account that may require further investigation. For example, a person may owe $1.00 for an overdue library book. Each Service Indicator may be applied with one or more Service Impact codes. The following are the service impact codes and their associated meanings for Student Records: Some of the Service Impact Codes that you may see are: **AENR** - Allow drops only; No Adds **BILL** - Do Not Send a Bill **CENR** - Block All Enrollment Activity **DIPL** - Diploma Hold **IENR** - Initial Enrl Block - Add/Drop OK **READ** - No Readmit **TRAN** - Transcript Hold A single service indicator may have no impact, one impact, or many different impacts on a person's Access.SMU account. Follow the navigation path to view Service Indicators.



Step	Action
2.	Click the **Campus Community** link. ▷ Campus Community
3.	Click the **Service Indicators** link. Service Indicators
4.	Click the **Manage Service Indicators** link. Manage Service Indicators



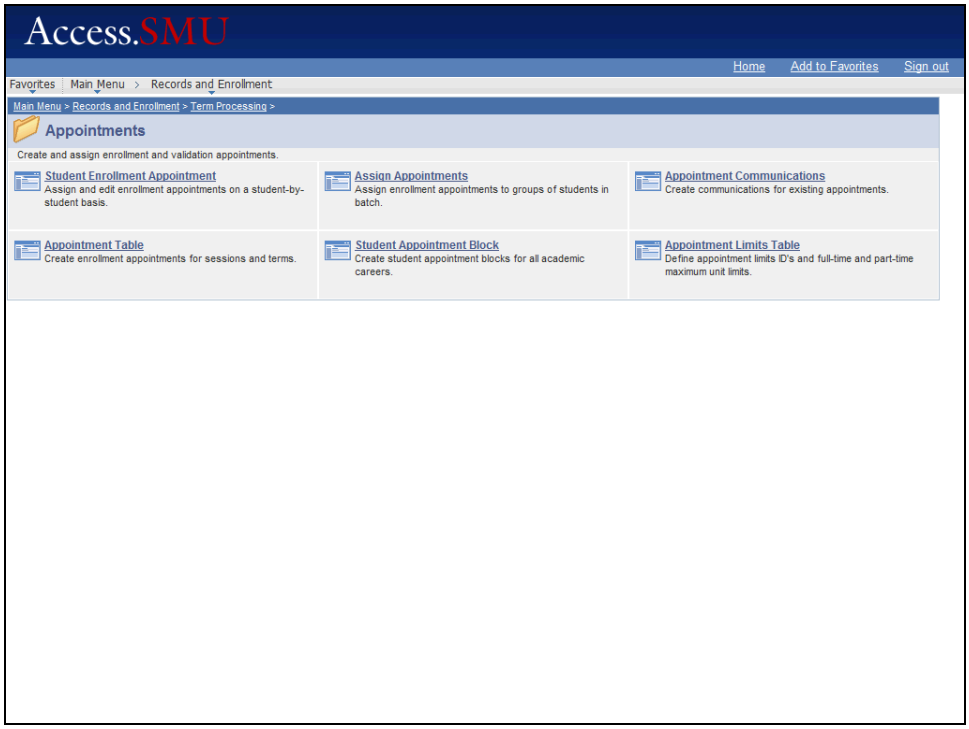
Step	Action
5.	Enter the desired information into the **ID** field.
6.	Click the **Search** button. Search
7.	Click the desired Service Indicator **Code** link to review additional information.
8.	A **Description** is provided. **Services Impacted** will be displayed at the bottom of the page.
9.	**End of Procedure.**

Enrollment Appointment

View Enrollment Appointment

Step	Action
1.	Unless a student is new to SMU and is enrolling for the very first time, students must enroll during their designated enrollment appointment time.
2.	Click the **Records and Enrollment** link. Records and Enrollment
3.	Click the **Term Processing** link. Term Processing

Step	Action
4.	Click the **Appointments** link. Appointments

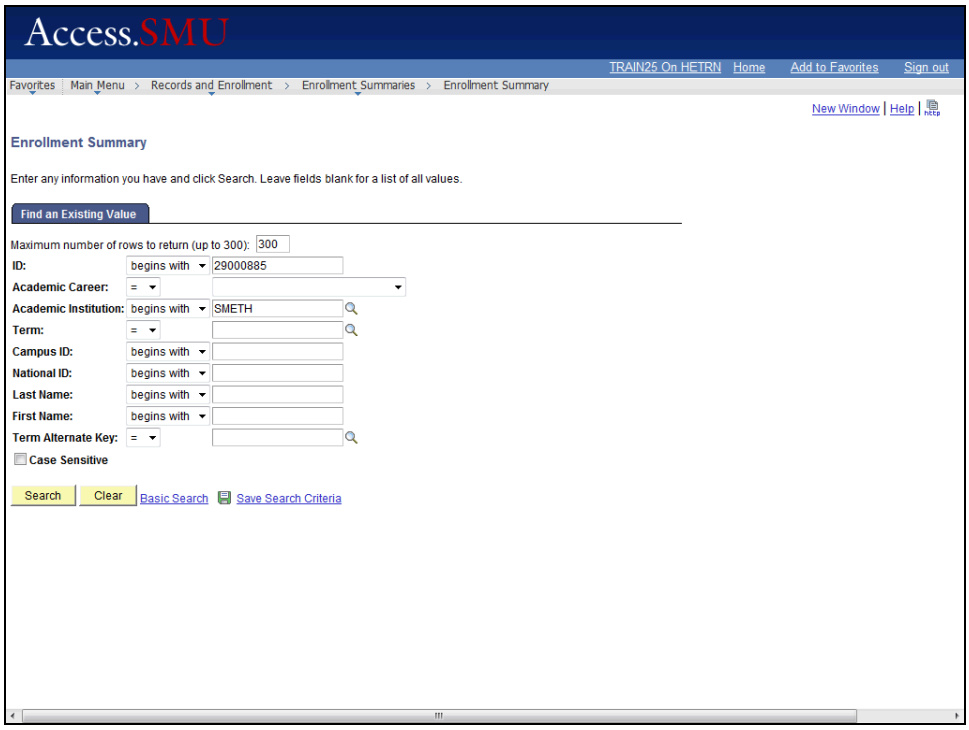


Step	Action
5.	Click the **Student Enrollment Appointment** link. Student Enrollment Appointment
6.	Enter the desired information into the **ID** field.
7.	Click the **Search** button. Search
8.	Click the desired **Term**.
9.	In order to enroll, a student must have a valid appointment time. Only the Registrar's staff in the Enrollment & Scheduling area can override an appointment time. **Note:** Though an **End Date** displays, SMU policy allows the student to enroll until the **5th** day of class for Fall and Spring terms and the **3rd** day of class for the Summer term.
10.	**End of Procedure.**

Check for Negative Service Indicator's from the Appointment

Step	Action
1.	Click the **Records and Enrollment** link. ▷ Records and Enrollment

Step	Action
2.	Click the **Enrollment Summaries** link. Enrollment Summaries
3.	Click the **Enrollment Summary** link. Enrollment Summary

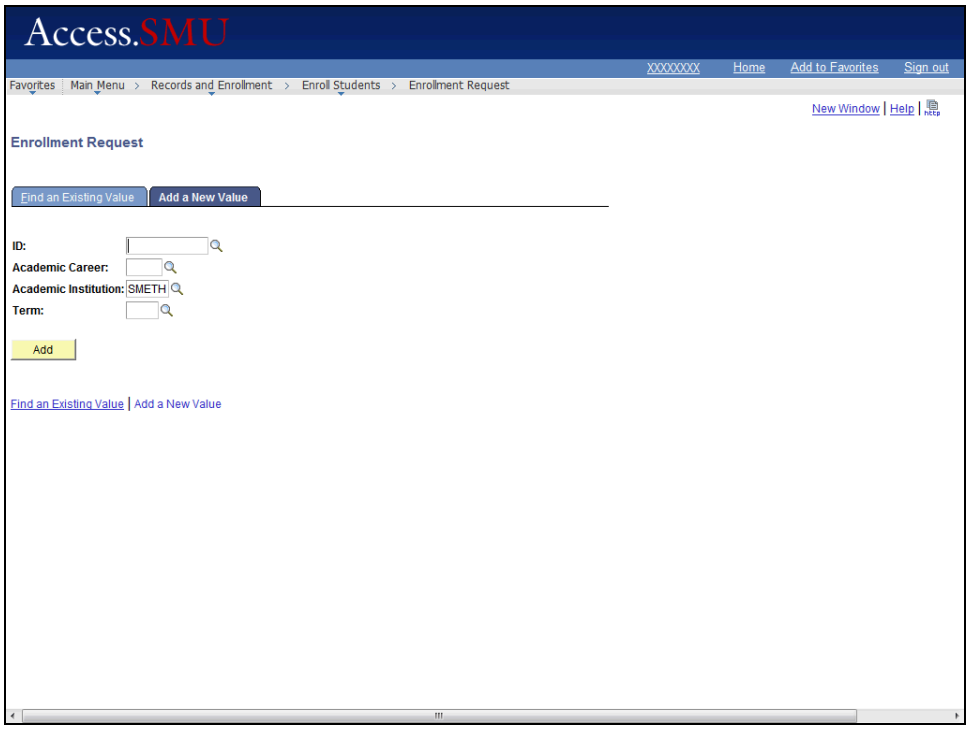


Step	Action
4.	Enter the SMU ID into the **ID** field.
5.	Click the **Search** button. Search
6.	Select the appropriate **Term** from the search results.
7.	Click the **Negative Service Indicators** icon.
8.	Click the code link to view the desired service indicator.
9.	Service indicator information will display. Scroll to the bottom of the page to see the services impacted.
10.	**End of Procedure.**

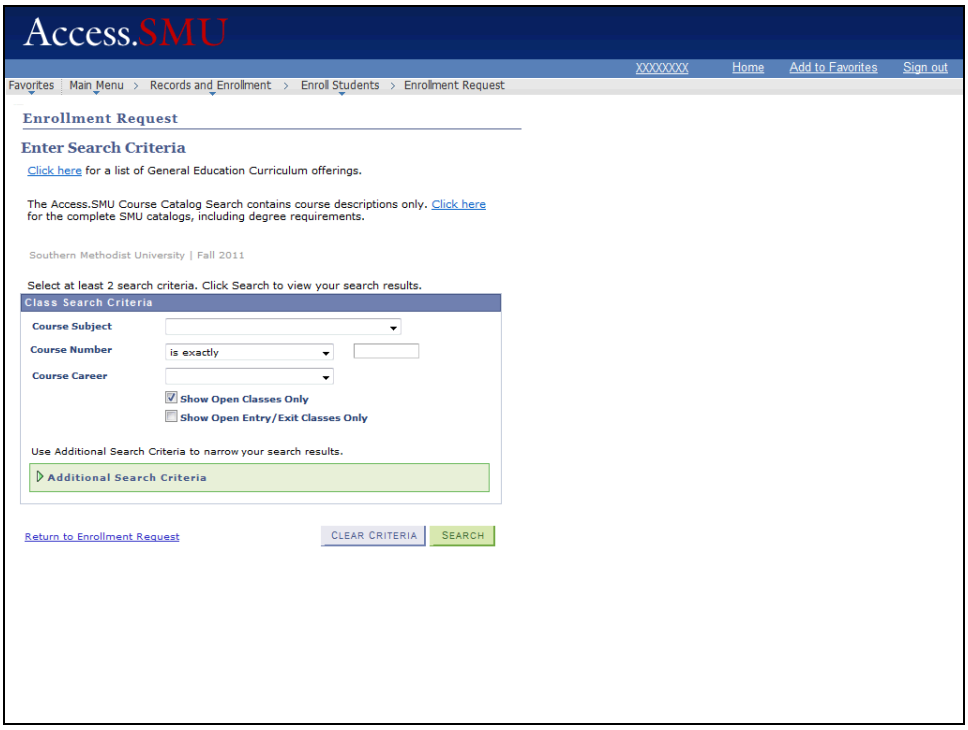
Enrollment, Add, Drop & Swap

Add Class to a Student Schedule

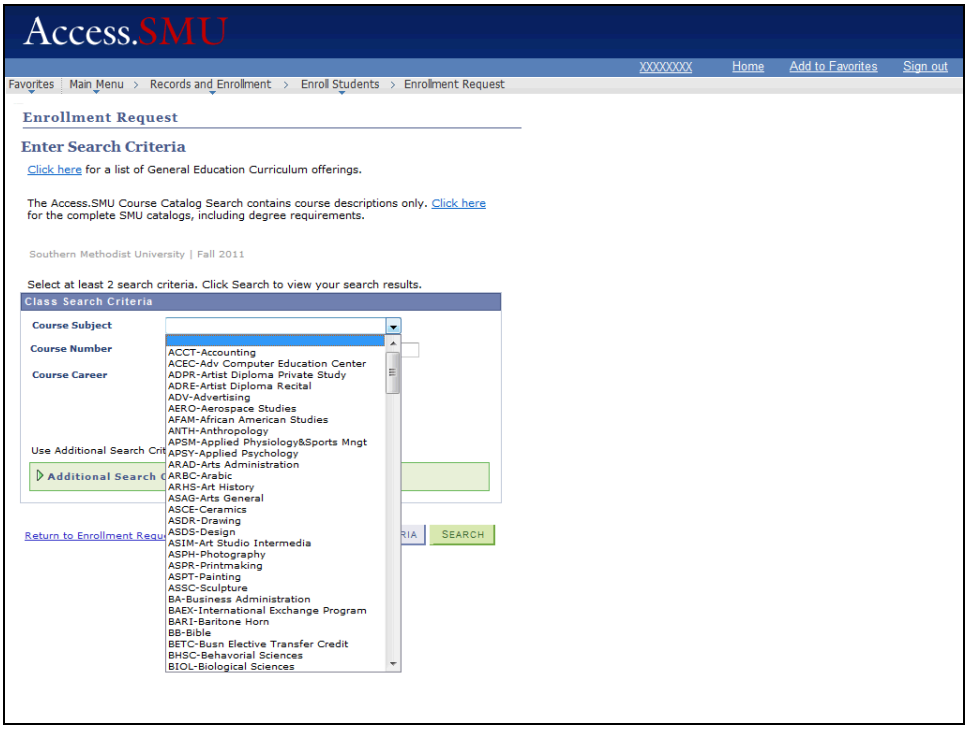
Step	Action
1.	Click the **Records and Enrollment** link. ▷ Records and Enrollment
2.	Click the **Enroll Students** link. Enroll Students
3.	Click the **Enrollment Request** link. Enrollment Request



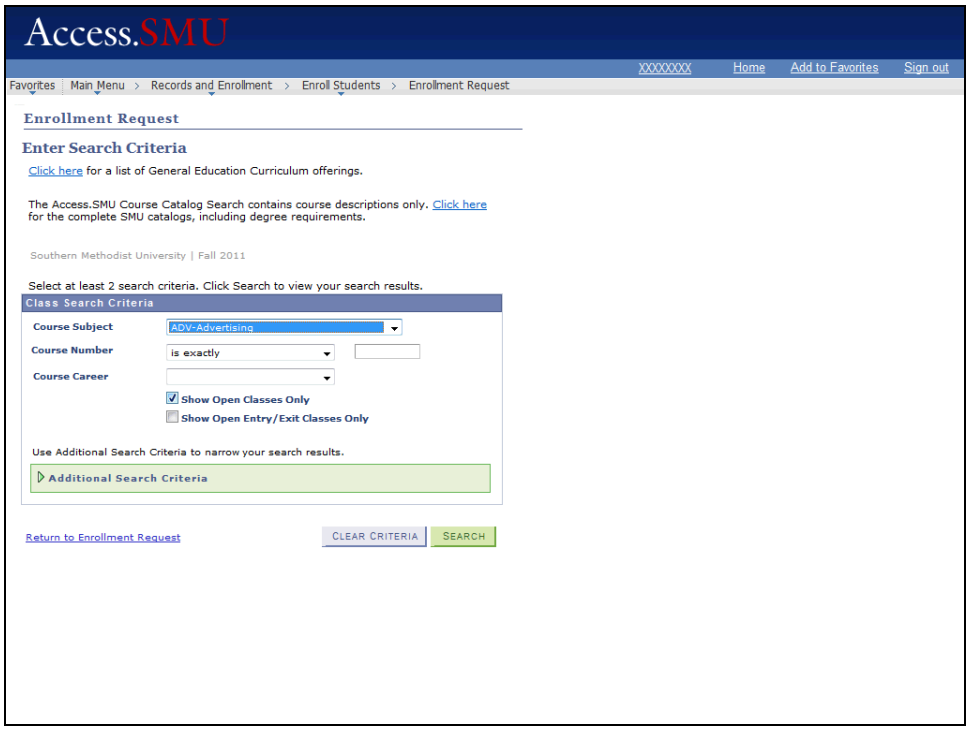
Step	Action
4.	By default, you will be on the Add a New Value tab. Keep this tab selected. Enter the SMU ID into the **ID** field.
5.	Click the **Look up Academic Career** icon.
6.	Click the **Look Up** button. Look Up
7.	Select the appropriate entry from the search results.
8.	Click the **Look up Term** icon.
9.	Click the **Look Up** button. Look Up
10.	Select the appropriate **Term** from the search results.
11.	Click the **Add** button. Add
12.	**Note:** Check for a **Negative Service Indicator** icon before continuing and resolve any enrollment restrictions.
13.	Click the **Class Nbr Look Up** icon.



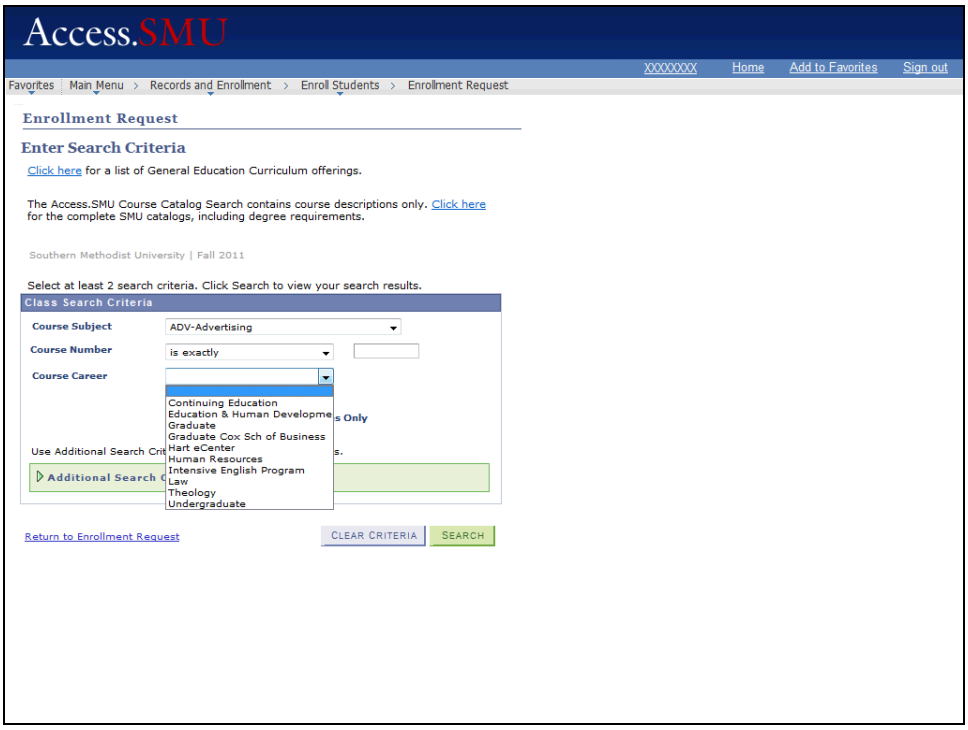
Step	Action
14.	Click the **Course Subject** list.



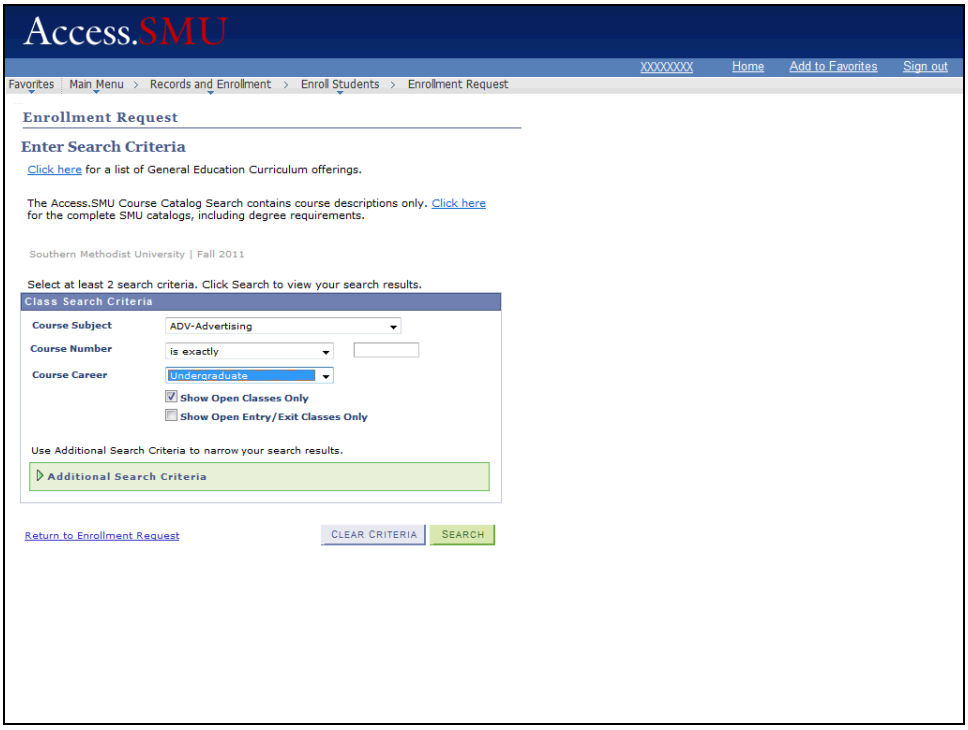
Step	Action
15.	Select the appropriate **Course Subject** from the list.



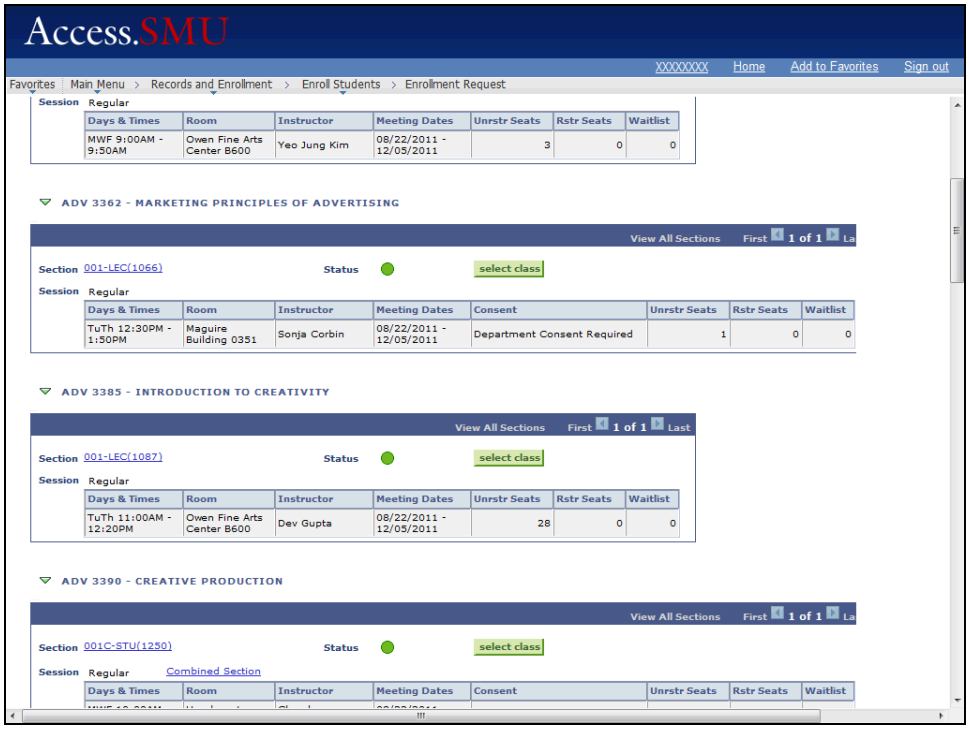
Step	Action
16.	Click the **Course Career** list.



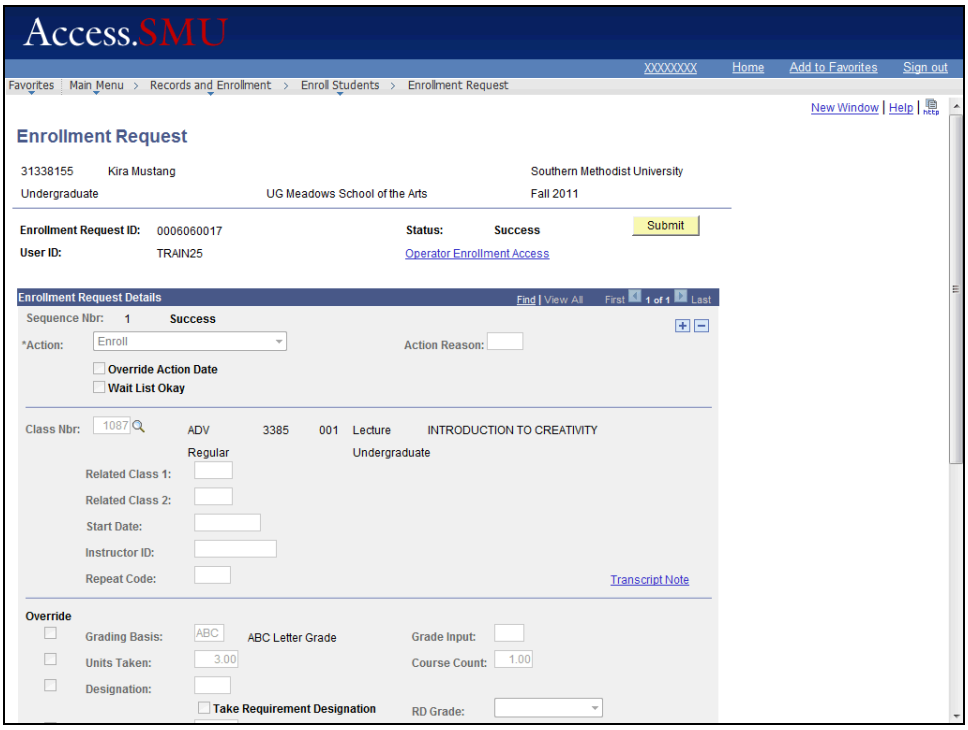
Step	Action
17.	Select the appropriate **Course** from the list.



Step	Action
18.	Click the **Search** button. SEARCH



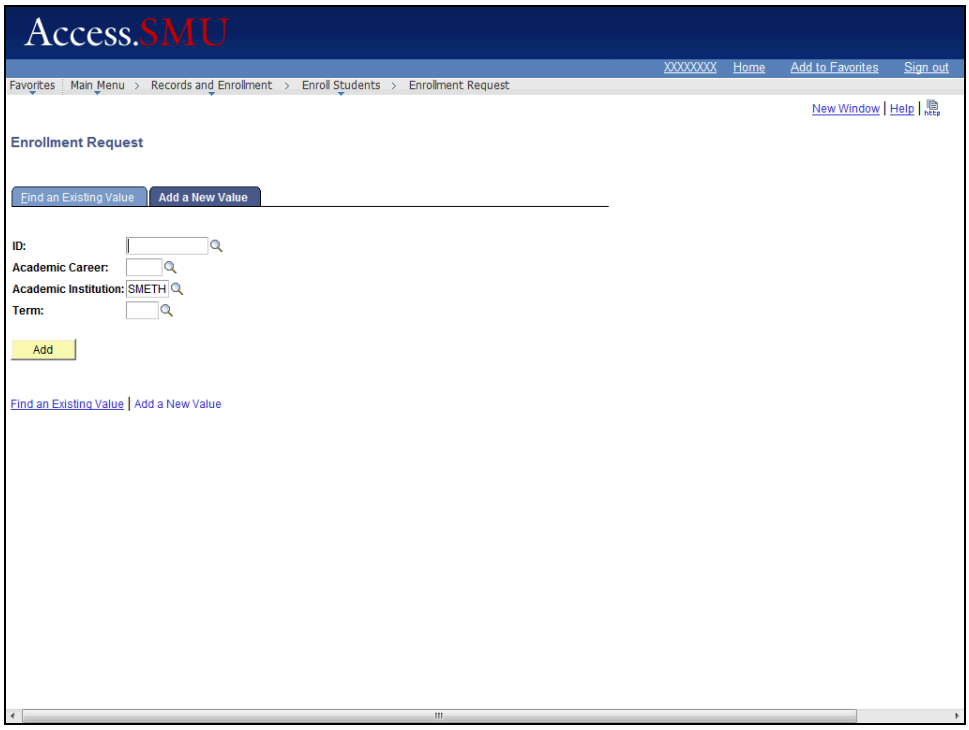
Step	Action
19.	Search results are displayed. Use the scrollbar to find the desired **Course Number** and **Section Number**. Click the **Select Class** button to add the class to the **Enrollment Request**. select class
20.	The selected class has now been populated into the appropriate fields. If the class has a related lab, discussion, or other related section, click on the **Look Up** icon next to the **Related Class** field(s) and select a section.
21.	Click the **Submit** button. Submit



Step	Action
22.	Verify that the classes have been successfully posted. The **Status** field will show **Success** and **Sequence Nbr** field will indicate an **Enrollment Request ID**.
23.	If additional classes need to be **Added**, click on the **Add a new row +** button to insert a new row and repeat the procedure until the enrollment process is complete.
24.	**End of Procedure.**

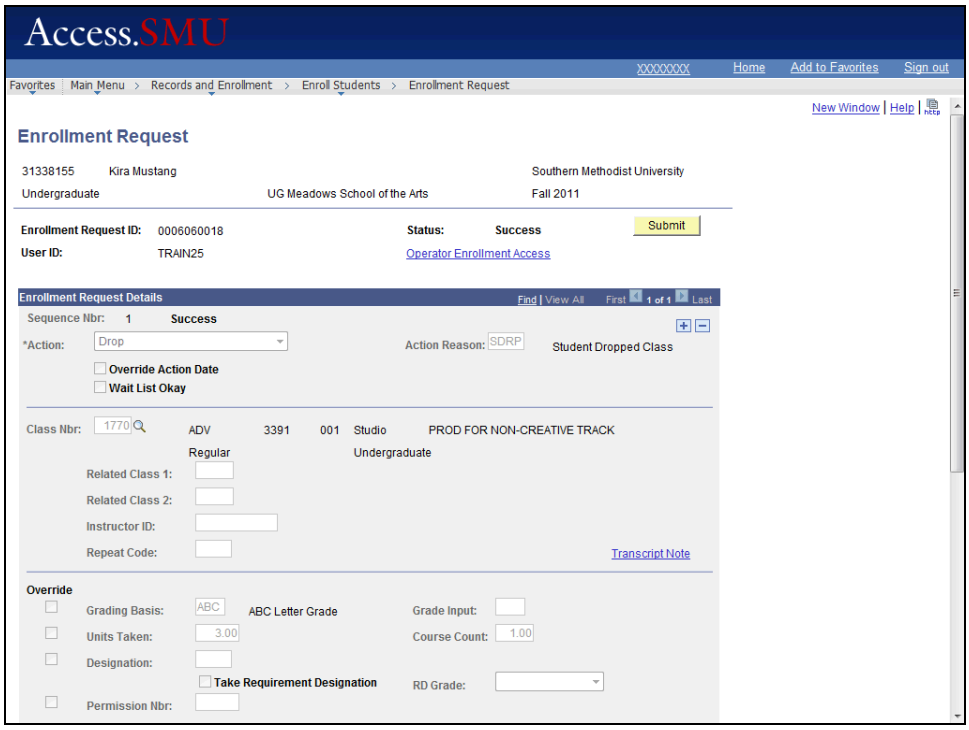
Drop Class from Student Schedule

Step	Action
1.	Click the **Records and Enrollment** link. ▷ Records and Enrollment
2.	Click the **Enroll Students** link. Enroll Students
3.	Click the **Enrollment Request** link. Enrollment Request



Step	Action
4.	Enter the SMU ID into the **ID** field.
5.	Click the **Look up Academic Career** icon.
6.	Click the **Look Up** button. Look Up
7.	Select the appropriate **Career** from the search results.
8.	Click the **Look up Term** icon.
9.	Click the **Look Up** button. Look Up
10.	Select the appropriate **Term** from the search results.
11.	Click the **Add** button. Add
12.	Click the **Action** list. Enroll
13.	Select the **Drop** item from the list. Drop

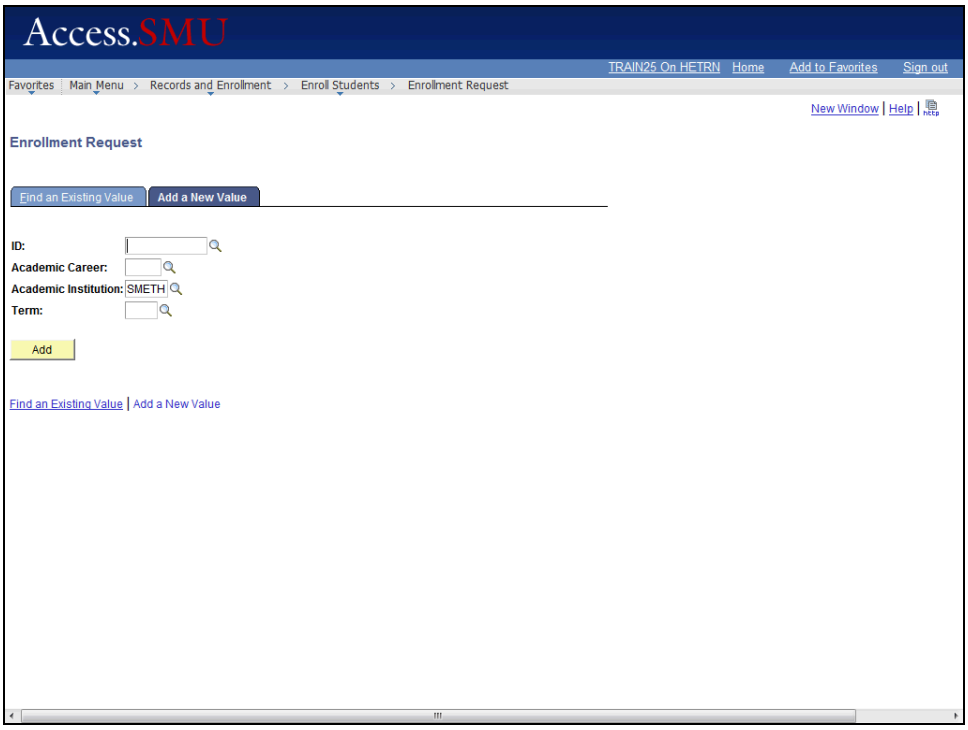
Step	Action
14.	Click the **Look up Action Reason** icon. **Note:** Drop is the only Enrollment process that requires using the **Action Reason** field.
15.	Click the **Look Up** icon. Look Up
16.	Select the appropriate **Enrollment Action Reason**. Student Dropped Class
17.	Click the **Class Nbr Look Up** icon.
18.	The search returns only the classes in the student's schedule. Select the **Enrollment Select Checkbox** for the class you want to drop from the schedule.
19.	To drop the student from additional classes, click the blue plus sign to add rows for more classes. **CAREFUL!** Be sure you are on the right row while you are editing a student's schedule.
20.	Click the **Submit** button. Submit



Step	Action
21.	Verify that the classes have been successfully dropped. The **Status** field will show **Success** and **Sequence Nbr** field will show an **Enrollment Request ID**.
22.	You have successfully dropped the class(es). **Note:** Although the classes have been dropped, this enrollment history will still be a part of the student's record, but not a part of their transcript.
23.	**End of Procedure.**

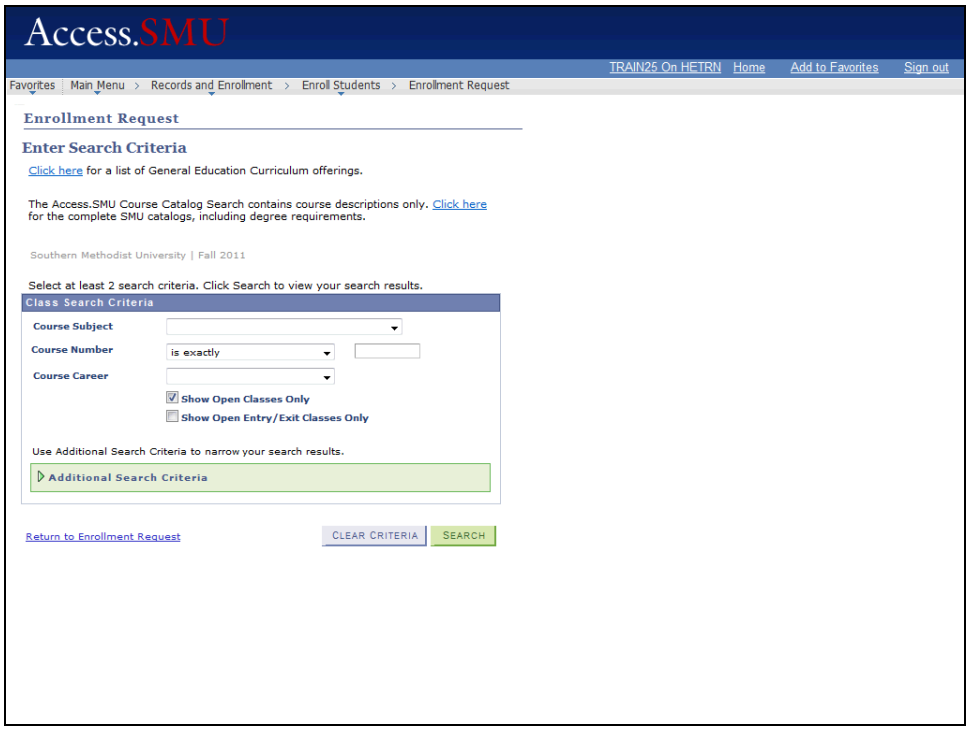
Swap Class from Student Schedule

Step	Action
1.	Click the **Records and Enrollment** link. ▷ Records and Enrollment
2.	Click the **Enroll Students** link. Enroll Students
3.	Click the **Enrollment Request** link. Enrollment Request

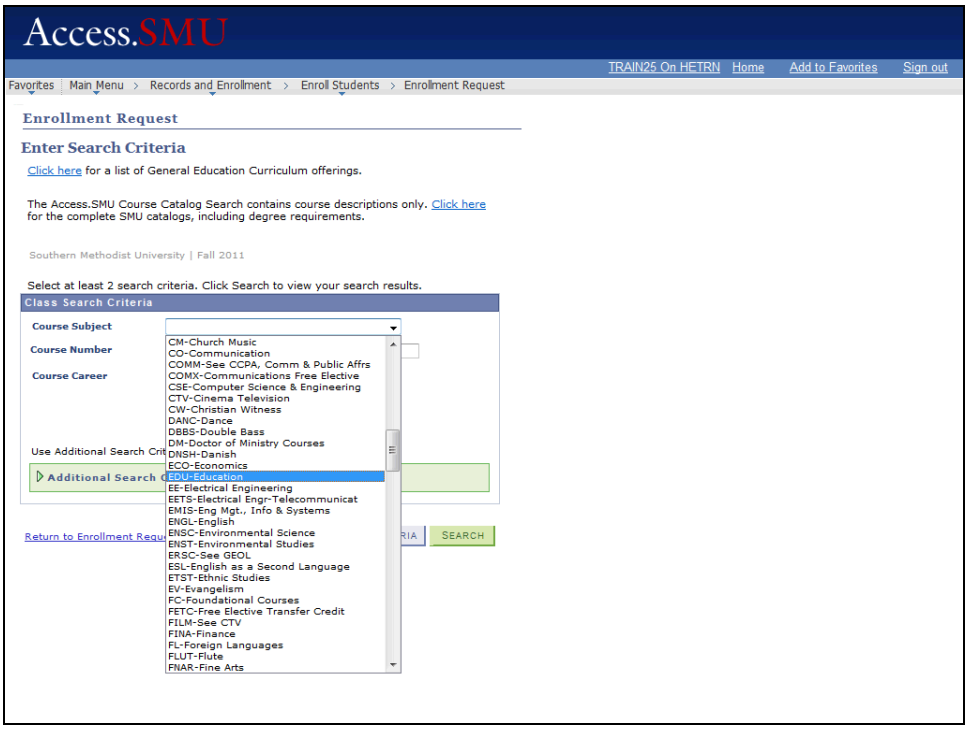


Step	Action
4.	Enter the desired information into the **ID** field.
5.	Click the **Look up Academic Career** icon.
6.	Click the **Look Up** button. Look Up
7.	Click the desired **Career** from the search results.
8.	Click the **Look up Term** icon.
9.	Click the **Look Up** button. Look Up
10.	Select the desired **Term** from the search results.
11.	Click the **Add** button. Add
12.	Click the **Action** list. Enroll
13.	Click the **Swap Courses** item from the options. Swap Courses
14.	Click the **Class Nbr Look Up** icon.

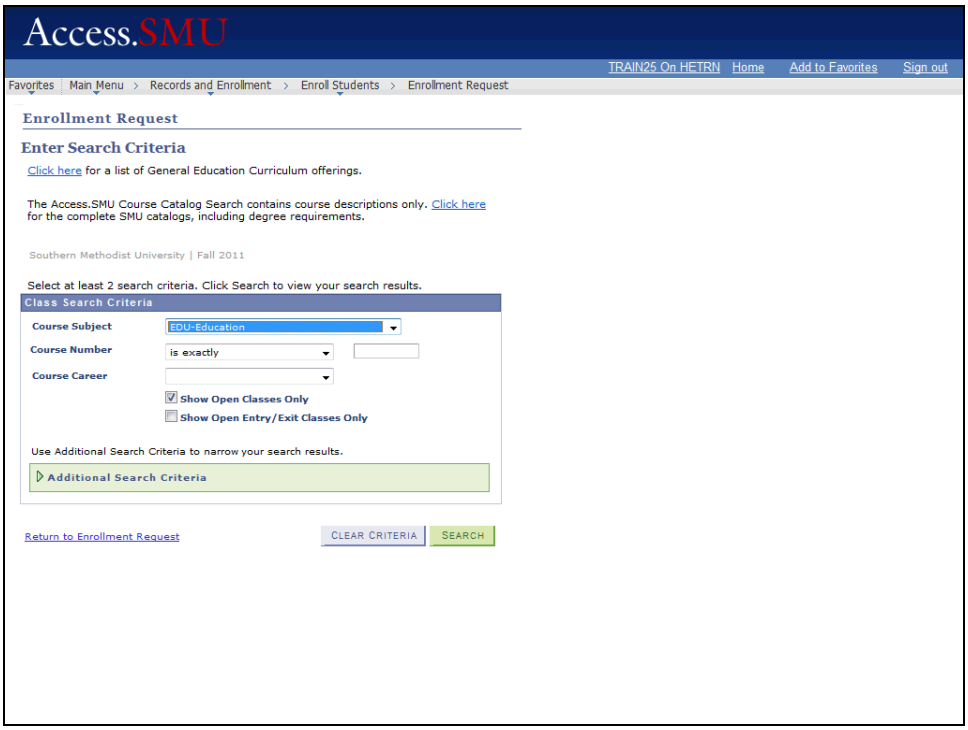
Step	Action
15.	Select the **Enrollment Select** button for the class you want to swap out.
16.	Click the **Change To Look Up** icon.



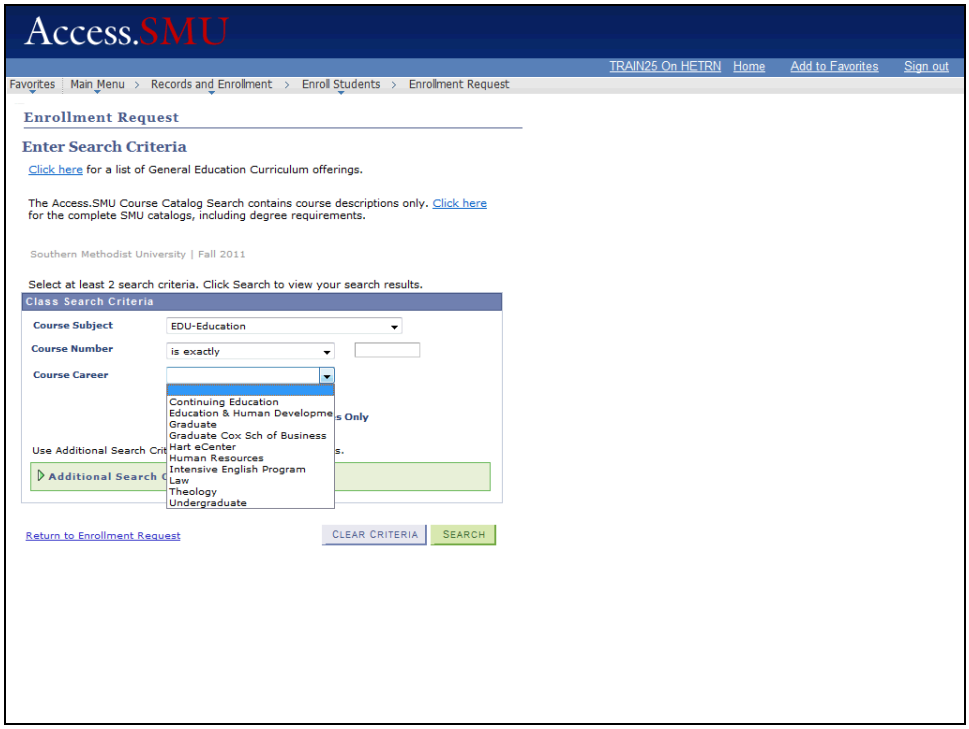
Step	Action
17.	Click the **Course Subject** list.



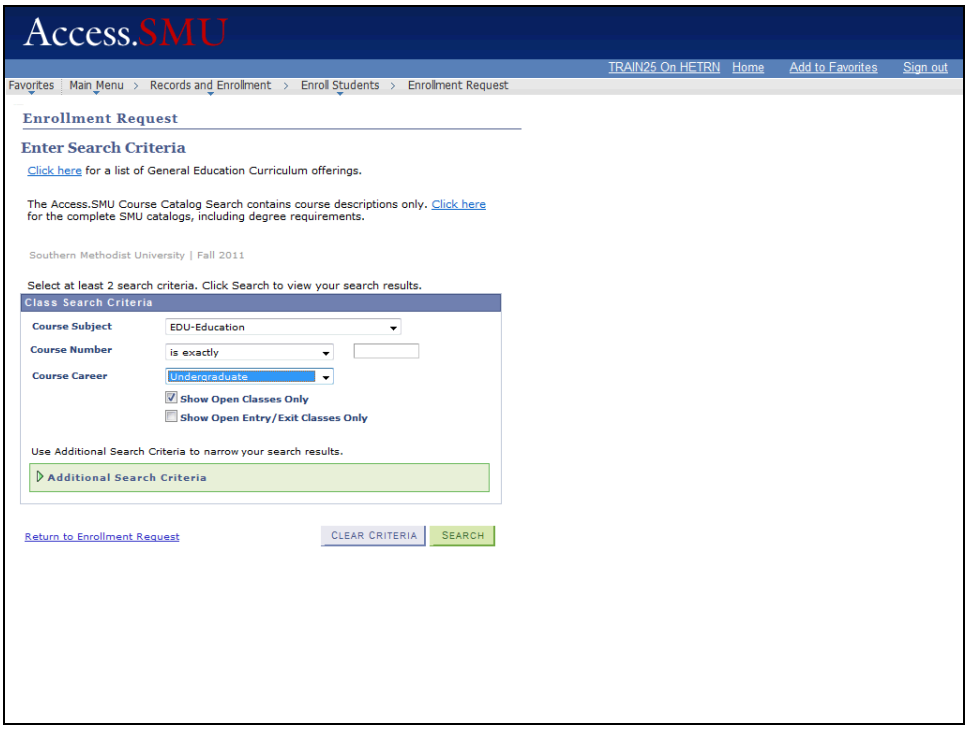
Step	Action
18.	Select the appropriate **Course Subject** from the list of options. EDU-Education



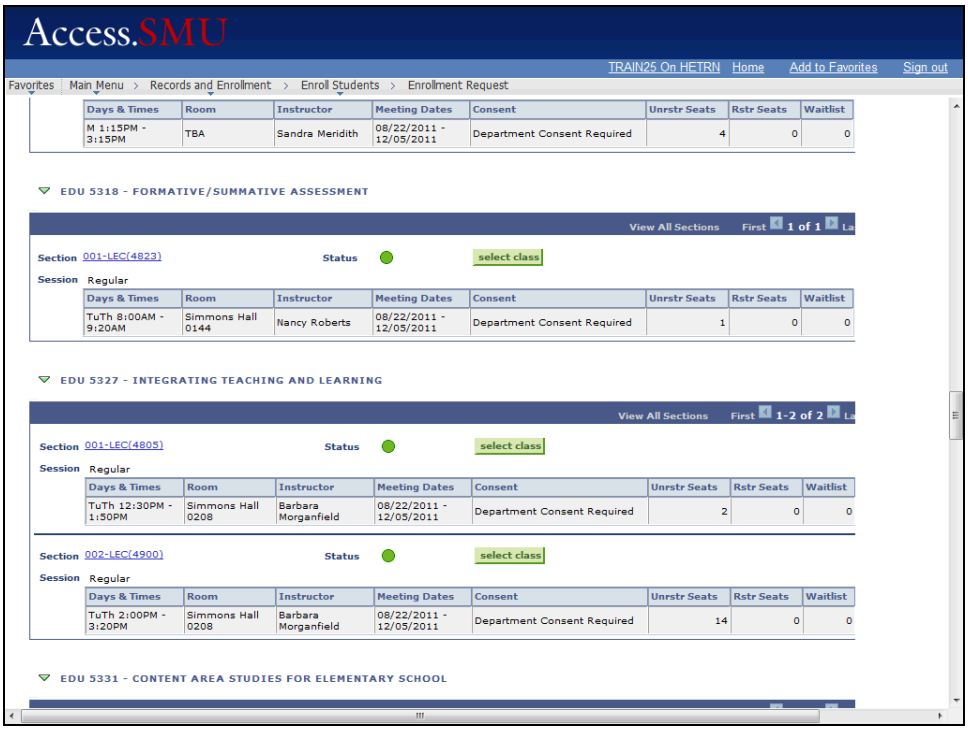
Step	Action
19.	Click the **Course Career** list.



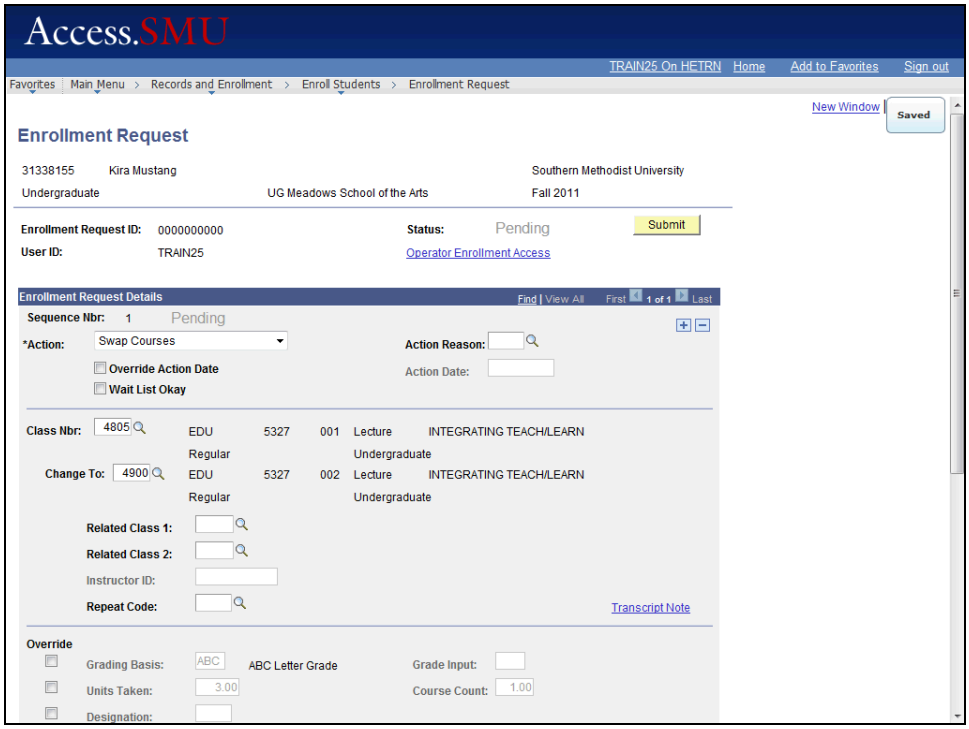
Step	Action
20.	Select the desired **Course Career**.



Step	Action
21.	Click the **Search** button. SEARCH



Step	Action
22.	Look for the class that you want to swap in and click the **Select Class** button of that class. select class
23.	**Note:** If the added class has a lab, discussion, or other **Related Class**, click on the **Look Up** icon next to the **Related Class** field(s) and select a section for the **Related Class**.



Step	Action
24.	Click the **Submit** button. Submit
25.	Resolve any **Error Messages** and re-submit until the process shows **Success**.
26.	**End of Procedure.**

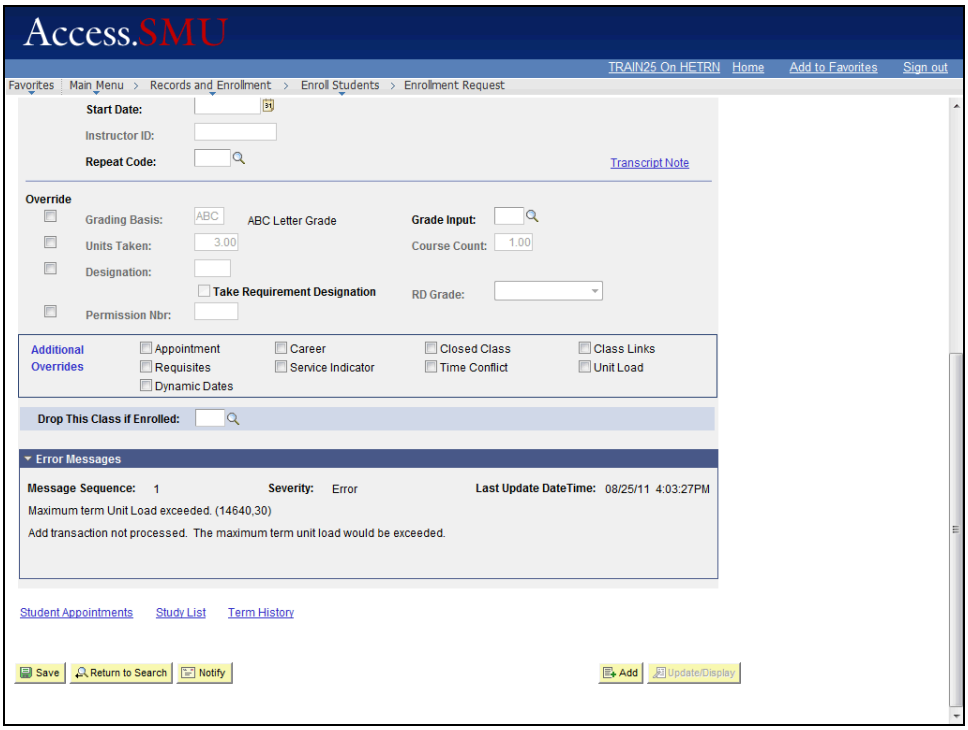
Enrollment Error Messages: How to Resolve

The most common reasons for errors when posting an enrollment are **time conflicts**, **need for overrides** (full classes, requisites not met, etc), or a **missing related class**.

The status of "**Errors Found**" will appear in the **Status** field in the Enrollment Request header and the status "**Errors**" will appear in the status field under the Enrollment Request Details (blue bar) on the class(es) that has caused the error.

Use the top & bottom of the Enrollment Request Page to view Error Messages, Resolve them, and Resubmit the enrollment.

Step	Action
1.	"**Errors Found**" appears in the **Status** field in the **Enrollment Request** header. "**Errors**" appears in the **Sequence Nbr** field located below the **Enrollment Request Details** bar - of the class associated with the error.
2.	Scroll down the page to the **Error Messages** section.



Step	Action
3.	Click the appropriate **Additional Overrides** checkbox option.

Step	Action
4.	**Note:** Check if there is more than one error. Be sure to read all **Enrollment Error** messages closely - they will indicate what **Additional Overrides** may be appropriate to use.
5.	Click the **Submit** button. Submit
6.	Re-submit if necessary until the **Status** field shows **Success**.
7.	**End of Procedure.**

Enrollment Summaries: Print Official SMU Study List

Step	Action
1.	Click the **Records and Enrollment** link. Records and Enrollment
2.	Click the **Enrollment Summaries** link. Enrollment Summaries
3.	Click the **Enrollment Summary** link. Enrollment Summary
4.	Enter the desired information into the **ID** field.
5.	Click the **Search** button. Search
6.	Click the desire **Term** link.
7.	Click the **View All** link to see the complete class list. View All
8.	Click the **Print Study List** link. Print Study List
9.	Click the **Report Manager** link. Report Manager
10.	Click the **Refresh** button. Refresh
11.	Ensure that the status has been **Posted**. (If not, you may need to wait a minute and click refresh again.) Click the **Individual Student Study List** link. Individual Student Study List
12.	Click the **Zoom In** button to enlarge the study list.

Step	Action
13.	Click the **Close** button.
14.	To return to the search page, click the **Go back to Enrollment Summary** link. Go back to Enrollment Summary
15.	**End of Procedure.**