

Advisement Template:

Professional Advisor (HEO)



CUNYfirst Campus Solutions User Access Request Form - Production

Please note: This form is required in order to request access to the PeopleSoft system. This form must be approved by the employee's supervisor. Employees may NOT approve or grant access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the effective date of the personnel action.

EMPLOYEE INFORMATION SECTION:

Last Name: _____ First Name: _____

CUNYfirst (Empl ID) *: _____ Job Title: _____

☐ * Check here if you do NOT have a CUNYfirst User ID & if this is a NEW request for a CUNYfirst User ID (leave CUNYfirst User ID blank)

Business Unit / Campus: _____ Dept / Office: _____

Work Phone: _____ Ext: _____ CUNY email address: _____

CONFIDENTIALITY STATEMENT (must be signed by the Employee):

I understand that the data obtained from any CUNYfirst system is considered confidential and NOT to be shared with anyone who is not authorized to receive such data.

I understand that I am individually accountable for the use of my User ID in the CUNYfirst system. Improper use of my User ID could lead to revocation of access rights and further disciplinary proceedings in accordance with CUNY policies, rules and regulations, and applicable collective bargaining agreements.

Employee's Signature: _____ Date: _____

Action Requested (Check Only One): **Add Access** ☐ **Revise Existing Access** ☐ **Delete Access** ☐

Add Delete Common Roles

☐ ☐ CU_CSCS_Common	Assign to all CS users with the exception of Self-Service users.
☐ ☐ CU_CSSS_Student_Srvcs_Center	Assign to administrative staff who need to view info about a student via Student Services Center
☐ ☐ CU_CSSS_StudCenter_FinPages	Adds Financial Pages to Student Services Center.
☐ ☐ CU_QUERY_RUN	Run and view queries using Query Viewer

Add Delete Self-Service Roles

☐ ☐ CU CS SS Advisor	Access to the student advisement center.
☐ ☐ CU CS SS Instructor	Access to CS Instructor (Faculty) self-service
☐ ☐ CU CS SS Student	Access CS Student Self-Service

Add Delete SR - Faculty Workload Roles

☐ ☐ CU_CSSR_Coord_Faculty_Workload	Access to run Instructor/Advisor reports; u/d Instructor/Advisor Table; u/d Instructor schedule
☐ ☐ CU_CSSR_View_Faculty_Workload	Access to View Faculty Workload - View Only
☐ ☐ CU_CSSR_Faculty_Workload_Rpts	Access to Run Faculty Workload Reports
☐ ☐ CU_CSSR_Update_Instrctr_Wrkld	Access to update Instructor Workload
☐ ☐ CU_CSSR_Instructor_Advisor	Update/display the Instructor/Advisor Table
☐ ☐ CU_CSSR_Instructor_Advrs_CORR	Update/display the Instructor/Advisor Table (CORRECTION Mode)
☐ ☐ CU_CSSR_Administer_Fac_Wkld	Add, u/d faculty assignment types and instructor assignment class.

Add Delete SR-Class Schedule / Course Catalog Roles

☐ ☐ CU_CSSR_Administer_Crse_Catalog	Add, u/d, print course catalog; add, u/d enroll reqs; view enroll req summary; u/d class sched
☐ ☐ CU_CSSR_Admin_Crse_Catalog_CORR	Administer Course Catalog with CORRECTION
☐ ☐ CU_CSSR_Admin_Crse_Catalog_VIEW	Administer Course Catalog - View Only
☐ ☐ CU_CSSR_View_Course_Cls_Setup	View Course / Class Setup; view enrollment requirements; u/d advising Student groups
☐ ☐ CU_CSSR_Class_Schedule	Add, u/d combined sections; print class sched; add, u/d class sections, schedule new courses
☐ ☐ CU_CSSR_Administer_Class_Sched	Add, u/d class sched; run class notes/exam code reports; add class notes, exam codes, and global notes tables.
☐ ☐ CU_CSAD_PreReq_View	View Only access to configured prerequisite rules.
☐ ☐ CU_CSSR_Class_Maintainer	Create class waitlists, permissions and enrollment blocks; process mass enrollments
☐ ☐ CU_CSSR_Roll_Curriculum_Forwrd	Roll Curriculum Forward
☐ ☐ CU_CSSR_Administer_Term_Setup	Administer Term Setup, Term/Session and Academic Calendar
☐ ☐ CU_CSSR_Combined_Sections	Update/display sections combined table

Add Delete **SR - Enrollment**

☐	☐	CU_CSSR_Enroll_Appt_Maintainer	Assign to staff responsible for maintaining student enrollment appointments.
☐	☐	CU_CSSR_Enroll_Stdnt_Maintain	Access to Quick Enroll students.
☐	☐	CU_CSSR_Quick_Admit	Access to Quick Admit Students for SR Staff.
☐	☐	CU_CSSR_Enrollmnt_Reqst_Viewer	Display enroll requests (update if SACR allows). Run and print enrollment verifications.
☐	☐	CU_CSSR_Enrollmnt_Requirements	Add, u/d enrollment reqs, pre-requisite and co-requisite courses.

Add Delete **SR - Registrar Roles**

☐	☐	CU_CSSR_Base_Student_Records	Assign to all Student Records users.
☐	☐	CU_CSSR_Acad_Advisor_Maintain	U/d and CORRECTION to Student Advisor where advisor(s) are assigned to a student.
☐	☐	CU_CSSR_Administer_Grades	Post grades; run grade lapse process, missing immun.; Grade assignment process
☐	☐	CU_CSSR_Administer_Roster	Add, u/d grade rosters, class rosters; generate attendance rosters
☐	☐	CU_CSSR_Administer_NSC	Assign to staff responsible for exchanging info with the National Student Clearinghouse.
☐	☐	CU_CSSR_Block_Enroll_Maintaine	This role should be assigned to people who will manage and maintain block enrollments.
☐	☐	CU_CSSR_Configure_Facilities	Add, u/d facility table, including buildings, room characteristics; run facility reports.
☐	☐	CU_CSSR_Crs_Catalog_Maintainer	Assign to staff that are responsible for maintaining course catalog.
☐	☐	CU_CSSR_EndTrm_Act_Maintainer	Assign to staff who are responsible for processing and maintaining end of term activities.
☐	☐	CU_CSSR_Grade_Maintainer	Assign to staff who are responsible for maintaining student grades.
☐	☐	CU_CSSR_Graduation_Maintainer	Assign to staff responsible for processing and maintaining graduation activities.
☐	☐	CU_CSSR_Grade_Reports	Run and display Grade Reports
☐	☐	CU_CSSR_Grade_Roster_View	Assign to staff responsible for maintaining student milestones.
☐	☐	CU_CSSR_Milestone_Maintainer	Assign to staff responsible for maintaining student milestones.
☐	☐	CU_CSSR_Stdnt_Grp_Maintainer	Maint Groups; Add, u/d programs, plans, subplans, attributes, degrees, careers. u/d/CORR Advisor information; u/d person communication, checklists, comments.
☐	☐	CU_CSSR_Term_Activate_Maintain	Assign to staff responsible for maintaining term activation for students.
☐	☐	CU_CSSR_Term_Withdrawal	Assign to staff who will be executing the term withdrawal processes.
☐	☐	CU_CSSR_Transcript_Maintainer	Add, u/d batch transcript requests; u/d existing requests; u/d transcript text (non-term specific); run transcript report purge process.
☐	☐	CU_CSSR_Transfer_Credit	Assign to staff responsible for updating transfer credit data and processes.
☐	☐	CU_CSSR_Transfer_Credit_Maint	Assign to staff responsible for configuring transfer credit rules.
☐	☐	CU_CSSR_ProgPlan_Maintainer	Program Plan Maintainer
☐	☐	CU_CSSR_ProgPlan_Maintainer_VW	Program Plan Maintainer - View Only
☐	☐	CU_CSSR_ProgPlan_Maintain_CORR	Program Plan Maintainer - CORRECTION
☐	☐	CU_CSSR_3C_Communications	Assign to staff responsible for maintaining setup and configuration values for 3C

Add Delete **Admissions Office Roles**

☐	☐	CU_CSAD_Add_Applicant	Assign to staff that are responsible for adding applications.
☐	☐	CU_CSAD_Administer_Admissions	Assign to staff responsible for administering admissions and running admissions processes.
☐	☐	CU_CSAD_Maintain_Applications	Assign to staff responsible for adding, updating and correcting applications for admission
☐	☐	CU_CSAD_Mass_Change	Assign to staff responsible for running Admissions batch processes.
☐	☐	CU_CSAD_Transfer_Credit	Assign to staff that are responsible for updating transfer credit data and processes.
☐	☐	CU_CSAD_Test_Score_Maintain	Assign to staff that are responsible for updating academic test data for a student
☐	☐	CU_CSSR_Create_Maintain_Org_VW	View Organizations

Add Delete **Campus Community (Shared Data) Roles**

☐	☐	CU_CSCC_Administer_Immuniz	Assign to staff responsible for maintaining the Immunization Table.
☐	☐	CU_CSCC_Barcode_Vendor	Assign to staff responsible for creating data extracts provided to barcode vendors.
☐	☐	CU_CSCC_Citizenship_Data	U/d Citizenship and Passport data for an individual student
☐	☐	CU_CSCC_Disability_User	Assign to staff requiring access to CS disability data.
☐	☐	CU_CSCC_Disability_User_VIEW	View Only access to CS disability data.
☐	☐	CU_CSCC_Immunizations	Assign to staff responsible for updating immunization data for students.
☐	☐	CU_CSCC_Student_Health_Update	Assign to staff that update immunization, and health test data for students.
☐	☐	CU_CSCC_Student_Health_View	View immunization, accommodation, and health test data
☐	☐	CU_CSCC_POI_Health_Update	Update Personal Information Health data (not only Students)
☐	☐	CU_CSCC_POI_Health_View	View Personal Information Health data (not only Students)
☐	☐	CU_CSCC_POI_Personal_Info	Update Personal Information for any person in the CS database (not only Students)
☐	☐	CU_CSCC_POI_Personal_Info_VW	Personal Information for any person in the CS database - Display Only (not only Students)
☐	☐	CU_CSCC_POI_PersonInfo_Corr	Assign to staff that require CORRECTION access to Personal Info for any person.(not only Students)
☐	☐	CU_CSCC_POI_Update	Add/Update a Person access for any person in the CS database (not only Students)
☐	☐	CU_CSCC_POI_View	Add/Update a Person access for any person in the CS database - Display Only (not only Students)
☐	☐	CU_CSCC_Srvs_Indc_Maintainer	Assign to staff who maintain service indicators and run mass assign processes.
☐	☐	CU_CSCC_SEVIS_F-VISA	Intended for users who are responsible for maintaining F VISA information.
☐	☐	CU_CSCC_SEVIS_J-VISA	Intended for users who are responsible for maintaining J VISA information.
☐	☐	CU_CSCC_Student_Personal_Info	Assign to staff that require UPDATE access to Personal Information for any STUDENT (no job record).
☐	☐	CU_CSCC_Stud_Person_Info_Corr	Assign to staff that require CORRECT HISTORY UPDATE access to Personal Information for any STUDENT (no job record).
☐	☐	CU_CSCC_Stud_Person_Info_VW	Assign to staff that require DISPLAY ONLY access to Personal Information for any STUDENT (no job record)
☐	☐	CU_CSCC_Student_Update	Add/Update a Person's Bio Data for any STUDENT (no job record) in the CS database
☐	☐	CU_CSCC_Student_View	View a Person's Bio Data for any STUDENT (no job record) in the CS database - Display Only
☐	☐	CU_CSCC_Veteran_Rep	This role is intended for users who are responsible for updating and viewing Veterans Affairs data.
☐	☐	CU_CSCC_Person_Comments	Add Person Comments in 3C's

Add Delete **Reports**

☐	☐	CU_CSAD_ALL	Admissions Users - All Reports
☐	☐	CU_CSAD_ONLY	Admissions Reports
☐	☐	CU_CSSF_ALL	Student Financials Users - All Reports
☐	☐	CU_CSSF_ONLY	Student Financials Reports
☐	☐	CU_CSSR_ALL	Student Records Users - All Reports
☐	☐	CU_CSSR_LTD	Limited Records Financials Reports
☐	☐	CU_CSSR_ONLY	Student Records Reports
☐	☐	CU_CSSI_ONLY	Service Indicators Reports
☐	☐	CU_CSSR_Health_Services	Health Services Reports

Add Delete

Student Financials (Bursar) Roles

☐	☐	CU_CSSF_Base_Student_Financial	This role should be assigned to all Student Financials users.
☐	☐	CU_CSSF_Administer_Cashiering	Assign to users who administer cashiering functions.
☐	☐	CU_CSSF_Cancellation	Assign to SF Cancellation users.
☐	☐	CU_CSSF_Cashiering	Assign to users who perform cashiering functions.
☐	☐	CU_CSSF_Collections	Assign to users who perform collections functions.
☐	☐	CU_CSSF_Conversion	SF Conversion
☐	☐	CU_CSSF_County_Chargeback	Assign to users that are responsible for processing county chargeback.
☐	☐	CU_CSSF_Corporate_Bills	Assign to users who perform corporate billing functions.
☐	☐	CU_CSSF_Enrollment_Deposit	Assign to users who perform enrollment deposit functions.
☐	☐	CU_CSSF_ePayment_Reconcil	Assign to users who perform e-payment reconciliation.
☐	☐	CU_CSSF_Refunding	Assign to users who perform refunding functions.
☐	☐	CU_CSSF_Sallie_Susp	Assign to users responsible for processing Sallie Mae inbound files and processes.
☐	☐	CU_CSSF_Stud_Acct_Stmt_Rpt	Student Account Statement Report
☐	☐	CU_CSSF_Stud_Recv_Rpt	Student Financials Student Receivables Report
☐	☐	CU_CSSF_Student_Bills	Assigned to staff that that perform student billing functions.
☐	☐	CU_CSSF_Summary_Of_Grants	Student Financials Summary of Grants
☐	☐	CU_CSSF_Third_Party	Assigned to staff that perform third party billing functions.
☐	☐	CU_CSSF_Tuition_Calc_Rpt	Assigned to staff responsible for processing tuition calculation verification reports.

Add Delete

Student Admin Configuration

☐	☐	CU_CSFA_Setup_and_Config_VW	View Access to Financial Aid setup and Config
☐	☐	CU_CSSF_Administer_Student_Fin	This high-level SF role should be assigned to users who manage SF processes.
☐	☐	CU_CSSF_Setup_and_Config	Student Financials Setup and Config
☐	☐	CU_CSSR_3C_Setup_and_Config	Assign to staff responsible for maintaining setup and configuration values for 3C (Comments, Communications, Checklists).
☐	☐	CU_CSSR_ACAD_Config_Display	Display Only - Academic Structure - Central Configuration (includes programs, plans, subplans, careers, etc).
☐	☐	CU_CSSR_ACAD_Config_Display	Display Only - Academic Structure - Central Configuration (includes programs, plans, subplans, careers, etc).
☐	☐	CU_CSSR_ACAD_Config_Display_SA	Display only access to Install Student Administration page.
☐	☐	CU_CSSR_ACAD_Config_Instit_Tbl	Update Institution Table (High level access)
☐	☐	CU_CSSR_ACAD_Config_Instl_SA	Update access to Install Student Admin page. To be granted very selectively.
☐	☐	CU_CSSR_ACAD_Config_Reports	Assign to staff who run SR Academic Structure Configuration Reports
☐	☐	CU_CSSR_ACAD_Config_Rpt_Cds	Central office access ONLY to HEGIS, CIP, and Field of Study table access
☐	☐	CU_CSSR_ACAD_Config_Rpt_Cds_DO	Display only of HEGIS, CIP, and Field of Study tables
☐	☐	CU_CSSR_ACAD_Conversion	Crosswalk of legacy data - for conversion only!
☐	☐	CU_CSSR_ACAD_Installation_DO	View access to Install Student Admin page.
☐	☐	CU_CSSR_Setup_and_Config	Assign to staff responsible for maintaining Student Records setup and configuration values.
☐	☐	CU_CSSR_Setup_and_Config_Rpts	Assign to staff that have a need to run Student Records setup reports.
☐	☐	CU_CSSR_View_Setup_and_Config	Assign to staff that have a need to view Student Records setup and configuration values.

Add Delete

Financial Aid Roles

☐	☐	CU_CSFA_Base_Financial_Aid	Assigned to all Financial Aid users.
☐	☐	CU_CSFA_SAP_INQUIRY	Satisfactory Academic Progress Inquiry
☐	☐	CU_CSFA_Award_Override	Manually award students with Professional Judgement - overrides ALL Financial Aid rules.
☐	☐	CU_CSFA_Disburse_Override	Access to override authorization and disbursement rules to force aid to disburse.
☐	☐	CU_CSFA_File_Mgmt_CORR	CORRECT HISTORY access to load incoming data files for ISIR, COD, NSLDS, etc. processing, including delete ISIR/NSLDS data.
☐	☐	CU_CSFA_Maintain_FA_Term_CORR	CORRECT HISTORY access FA Term records.
☐	☐	CU_CSFA_Maintain_SAP_CORR	CORRECT HISTORY access to SAP functions for schools after they have gone live with CUNYfirst Financial Aid.
☐	☐	CU_CSFA_Process_Auth_Disb	Access to manual and batch pages for Authorize and Disburse Aid.
☐	☐	CU_CSFA_R2T4	Access to the Return to Title IV (R2T4) worksheets and reports necessary for tracking R2T4 status, and performing R2T4 functions.
☐	☐	CU_CSFA_Package_Aid	Access to all aspects of packaging Financial Aid, including mass packaging (batch) reports, and the "View Workstudy Approvals" page.
☐	☐	CU_CSFA_Process_Loans	access to all facets of Financial Aid Loan functionality.
☐	☐	CU_CSFA_Manage_ISIRs	Access to process and correct ISIR data, including ISIR reports, suspense management, etc.
☐	☐	CU_CSFA_Dept_Awards	Assign to people in OTHER offices who need to post specific awards to Financial Aid (Athletic Scholarships, Honors Awards, etc.).
☐	☐	CU_CSFA_Maintain_Budgets	Access to create and maintain student budgets manually.
☐	☐	CU_CSFA_Maintain_FA_Term	Access to Add, Update, Change FA Term records manually.
☐	☐	CU_CSFA_Maintain_SAP	Access to SAP functions for schools after they have gone live with CUNYfirst Financial Aid.
☐	☐	CU_CSFA_View_Financial_Aid	This role allows View Only access to most of the pages in the Financial Aid area. This should be used for Financial Aid office staff only.

Add Delete

Interfaces

☐	☐	CU_CSFA_TAP	TAP Disbursements Interface
☐	☐	CU_CSSR_ACAD_ASTA_INTFC	CUNY ASTA Interface
☐	☐	CU_CSSR_ACAD_CAS_INTFC	CUNY CAS Interface
☐	☐	CU_CSSR_Faculty_Workload_Intfc	Faculty Workload Interface Processor
☐	☐	CU_CSSR_Faculty_Workload_IR	Assign to staff in Institutional Research who are responsible for running the CUNYfirst-to-IR interface for Faculty Workload processes.
☐	☐	CU_CSSR_Faculty_Wrk_Intfc_I537	Assign to staff that will be running the I537 Faculty Workload Interface.

Add Delete

CUNY CEMLI Roles

☐	☐	CU_CSCPSR_DeansList_Admin	
☐	☐	CU_CSCPSR_DeansList_Setup_Adm	
☐	☐	CU_CSCPSR_DEGREEWORKS_ATBCUADM	
☐	☐	CU_CSCPSR_DEGREEWORKS_CAMPUSAD	
☐	☐	CU_CSCPSR_DEGREEWORKS_CUNYADM	
☐	☐	CU_CSCPSR_DEGREEWORKS_CUNYVIEW	
☐	☐	CU_CSCPSR_Tech_System_Config	

CUNYfirst Campus Solutions User Access Request Form

EMPLOYEE:

Last Name:

First Name:

User's Primary Permission List	Users Row Level Security

*** Data Permissions (SACR) Security ***

Secure Student Administration

Copy Data Permissions (SACR) from EMPLID: _____

Security Type	Value
Academic Institution Determines the academic institutions that a user can access. (QNS01, QCC01 etc)	_____
Institution / Campus	MAIN
Institution / Career Determines the career that a user can access.	☐ UGRD ☐ GRAD ☐ LAW ☐ UKCC ☐ ULAG ☐ CBAC ☐ GGRD ☐ SOJ ☐ SPSG ☐ SPSU
Academic Program Determines the academic programs that a user can access.	☐ All or ☐ Specific _____
Academic Plan Determines the academic plan that a user can access.	☐ All or ☐ Specific _____
Academic Org Determines the academic Organization that a user can access.	☐ All or ☐ Specific _____
Admissions Action Determines Admission Actions a user is allowed to set.	☐ All or ☐ Specific _____
Program Action Determines the Program Actions a user is allowed to set.	☐ All or ☐ Specific _____
Application Center Set specific application center to User ID, Or assign ALL.	☐ All or ☐ Specific _____
Enrollment Security Restricts enrollment access to groups of students and time periods.	☐ Specific _____
Student Group (list groups and Inquire / Update) Determines access to student groups.	_____
Service Indicators (list codes and reasons) (Place / Release) Determines access to service Indicators	_____
Transcript Report Determines the transcript types users have security access to.	☐ ALL or ☐ ADVMT ☐ OFFIC ☐ REG1 ☐ REG2 ☐ STDNT ☐ UNOFF ☐ XFERI ☐ Other _____
Test ID Security Determines access to test scores.	☐ All or ☐ Specific _____

Secure Student Financials

Security Type	Value
Business Unit (QNS01, QCC01 etc)	
Cashier's Office (Bursar only)	☐ No Access ☐ Cashiering Office ☐ Backup Cashiering Office
SetID (QNS01, QCC01 etc)	
Institution Set (QNS01, QCC01 etc)	

MANAGERIAL REQUEST:

Business Unit / Campus:	Department / Office:
Last Name, Requesting Supervisor:	First Name:
Signature, Requesting Supervisor:	Date:

BUSINESS OWNER APPROVAL:

Last Name:	First Name:
Signature:	Date:

SPECIAL CONSIDERATIONS OR COMMENTS: (List additional roles required below)
