

Green Hills University

Student Services — Student Services Agent Guide (Operational Template)

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1. Introduction

This document is an operational guide for the Student Services Agent at Green Hills University (GHU). It outlines procedures and recommended scripts for handling course enrollment, schedule planning, graduation guidance, campus resources, financial aid advising, and transcript/records requests. All content is fictitious and intended as a template for adaptation to local policies and systems.

2. Contact channels and office hours

Student Services — Green Hills University Office hours: - Monday to Friday: 08:30 — 17:30 (in-person and phone). - Extended email support during registration weeks and finals. Primary contact channels: - Email: studentservices@greenhills.edu - Phone: Campus line ext. 4300 - Online appointment scheduler: <https://studentservices.greenhills.edu/appointments> (fictitious) - Walk-in at Student Center, 2nd floor (by appointment during peak periods). Service expectations: - Initial response to email/ticket within 2 business days normally; expedited during peak registration periods. - Appointments reserved for complex academic planning or appeals.

3. Course enrollment and schedule planning

Scope: - Assist students with course selection, enrollment deadlines, prerequisite checks, schedule conflicts, and plan adjustments. Core responsibilities: - Review degree audit and academic plan for the student. - Check prerequisites and co-requisites and advise on substitutions or waiver requests. - Help build a balanced schedule considering course load, time conflicts, and work commitments. - Advise on full-time/part-time status and implications for financial aid and campus housing. Step-by-step workflow: 1) Intake: collect student ID, program/major, academic level, and goals (e.g., graduate on time, change major). 2) Degree audit: run the degree audit report and highlight remaining required and elective credits. 3) Enrollment actions: - Demonstrate how to enroll via the Student Portal; for blocked enrollments, identify hold type (financial, academic advisor approval, immunization). - For closed courses: advise on waitlist procedures and alternatives. 4) Conflict resolution: - If schedule conflict exists, propose alternatives, check for equivalent course sections, or approve overload requests when criteria met. 5) Documentation: - Log counseling notes, recommended plan, and any forms submitted (e.g., overload request, prerequisite override). Advising tips: - Encourage early planning each term and confirm registration at the add/drop deadline. - Discuss contingency plans if courses are canceled or full.

4. Graduation requirements and checklists

Scope: - Verify students' eligibility for graduation, guide them through application processes, and prepare checklists for degree completion. Key elements: - Degree audit review: confirm completion of major requirements, electives, general education, credit minimums, and residency requirements. - GPA thresholds: check cumulative and major GPAs against program-specific graduation criteria. - Capstone/Thesis/Internship requirements: verify supervisor approvals, paperwork, and submission deadlines. - Holds and outstanding obligations: identify and resolve financial holds, library fines, or missing documentation. Graduation workflow: 1) Pre-application review (6–12 months before expected graduation): - Run a pre-grad audit and provide a checklist to the student. - Identify missing coursework or outstanding requirements. 2) Graduation application: - Provide the online application link and explain deadlines, fees (if any), and commencement options. - Collect supporting documents (transfers, previous degrees, name change forms). 3) Final audit and clearance: - After grades are posted, perform final audit; notify student of any issues. - Coordinate with Registrar to post degree and generate diploma. 4) Post-graduation services: - Provide information about alumni status, transcript holds removal, and forwarding contact information. Sample quick checklist (to give to students): - Verify all major requirements complete. - Confirm minimum total credit hours met. - Resolve any financial or library holds. - Submit graduation application by published deadline. - Confirm name and diploma mailing address.

5. Campus resources and facilities

Scope: - Provide guidance on campus facilities, support services, and points of contact for student needs. Common resources agents should know: - Academic Advising Office: degree planning, major changes. - Library Services: lending policies, research support, interlibrary loan. - Career Services: internships, CV review, employer engagement. - Counseling and Wellness: mental health support, referrals. - Disability Services: accommodations and exam arrangements. - IT Service Desk: technical support, software access. - Facilities and Housing: maintenance requests, housing assignment. - Student Life and Clubs: event calendars and student organization registration. How to assist students: - Provide direct links and contact persons for each service. - Book appointments on behalf of students when appropriate. - Escalate urgent welfare or safety concerns to Campus Security and Student Affairs. Facility booking and equipment: - Explain how to reserve study rooms, labs, or AV-equipped classrooms. - Provide guidance on equipment loans (laptops, cameras) and policies for use.

6. Financial aid and scholarship guidance

Scope: - Assist students with understanding financial aid options, scholarship programs, and application timelines. Types of aid: - Need-based grants, merit scholarships, work-study programs, and emergency funds. Agent responsibilities: - Explain application processes, deadlines, eligibility criteria, and required documentation. - Direct students to the Financial Aid Office for detailed award calculations and appeals. - Provide information on payment plans, due dates, and tuition refund policies. Workflow for common requests: 1) Initial inquiry: - Gather basic financial information, student status (domestic/international), and dependency status. 2) Scholarship guidance: - Review available scholarships, typical selection criteria, and deadlines. - Assist with letters of recommendation requests workflow. 3) Emergency aid: - Triage student requests and refer urgently to Emergency Grants committee when needed. 4) Appeals and verification: - Explain documentation required for verification and assist students in submitting items to Financial Aid. Privacy and compliance: - Adhere to data privacy rules when handling financial documents. - Never share sensitive financial details over insecure channels.

7. Transcript and academic records requests

Scope: - Provide services for official and unofficial transcript requests, grade verifications, enrollment confirmations, and records maintenance. Types of requests: - Unofficial transcript: for student review—often available instantly through the portal. - Official transcript: sealed and sent to third parties or provided electronically via authorized vendors. - Enrollment verification: for employers, insurance, or loan deferment. - Grade reports and degree verifications. Processing steps: 1) Verify identity and consent for release (FERPA considerations for U.S.-style models; adapt to local laws). 2) For unofficial copies: show student how to access via portal or provide a printout after identity verification. 3) For official transcripts: - Collect recipient details, delivery method (mail/electronic), and applicable fees. - Route the request to Registrar for processing and dispatch. 4) Turnaround times: - Unofficial: immediate. - Official (standard): 3–7 business days after payment/clearance; expedited options available for additional fee. 5) Fees and holds: - Inform students of any outstanding balances that may prevent issuance. - Provide receipts and tracking numbers for mailed transcripts. Record retention: - Maintain retention schedules for academic records consistent with institutional policy and legal requirements.

8. Escalation and collaboration with academic departments

When to escalate: - Academic petitions, grade appeals, residency disputes, or complex graduation exceptions should be escalated to the relevant academic department or Academic Affairs. Collaboration tips: - Use clear, documented communication with department chairs and faculty. - Provide timelines and follow-up notes in the ticket or case file. - Facilitate meetings between students and faculty when mediation is needed. Escalation matrix (summary): - Student Services Agent: intake and first-line advising. -

Department Advisor/Undergraduate Coordinator: curriculum issues and petitions. - Academic Affairs: policy exceptions and final approvals. - Registrar: records changes and official determinations.

9. Templates, forms and annexes

Common templates and forms: - Course override request form. - Graduation application form. - Transcript request form. - Financial aid appeal form. - Enrollment verification request. Sample transcript request form fields: - Student name, ID number, date of birth. - Recipient name and address/email. - Type: official/electronic/unofficial. - Payment confirmation number. - Signature and date. Annex: sample graduation checklist (brief) - Confirm remaining credits. - Check capstone/thesis completion. - Verify GPA requirements. - Submit graduation application and fees. - Clear all holds and confirm diploma details.

10. FAQ and quick references

Q: How soon can I get my official transcript? A: Standard processing is 3–7 business days after payment and holds clearance. Expedited processing may be available. Q: My course is full. How do I get in? A: Ask to be placed on the waitlist; contact the department for override requests and submit a course override form if eligible. Q: What happens if I miss the graduation application deadline? A: Late petitions may be considered with departmental approval; otherwise the student will be reviewed for the next graduation term. Q: Where can I find scholarship opportunities? A: Check the Student Services portal, departmental scholarship pages, and Financial Aid announcements. Regularly updated lists are published each semester. Contacts quick list: - Registrar: registrar@greenhills.edu | ext. 4400 - Financial Aid: finaid@greenhills.edu | ext. 4410 - Career Services: careers@greenhills.edu | ext. 4420 - Counseling: counseling@greenhills.edu | ext. 4430