

Adding Service Indicators to a Student's Record

Overview

This process will show how to add service indicators to a student's record or account in SIS.

- Users must be granted Service Indicator and reason specific security by their campus data managers in order to add, change or delete service indicators.
- View-only Service Indicator security is generally a "view all" access which is also granted by the campus data managers.

NOTE: For more information/background on Service Indicators, see the *Understanding Service Indicators* job aid. For instructions on how to edit a service indicator, see the *Editing Service Indicators* job aid. For instructions on how to remove a service indicator, see the *Removing Service Indicators* job aid.

Steps

Add Service Indicators

1. Navigate to Service Indicators using one of these paths:
 - **Campus Community > Service Indicators (Student) > Manage Service Indicators**
 - **Self Service > Administrative Center** (click **VIEW DATA FOR STUDENTS** and enter the ID) > **General Info tab**, click **edit service indicators**.
2. Enter the appropriate ID for the student or **Last Name** and **First Name**.
3. Click **Search**. Results are returned by career/student. If multiple results are returned, select any of the rows for that student.
4. The *Manage Service Indicators* page will be displayed.

Manage Service Indicators

Ima Student 0000011111

Display: **Effect All** Institution Refresh

[+ Add Service Indicator](#)

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date	Services Stopped?
R20	Special Credit	Special Credit	IUBLA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUCOA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUEAA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUFWA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUINA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUKOA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUNWA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUSBA	0000	Bot			04/19/2005		No
R20	Special Credit	Multi Institutional	IUSEA	0000	Bot			04/19/2005		No

[+ Add Service Indicator](#)

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5. Verify the **Effect** field displays "**All**" to make sure that the Service Indicator you want to add is not already listed. If you change the value in the **Effect** field, you must click [Refresh](#) for the change to take effect. The **Effect** field is a filter. When you change it and click [Refresh](#), the grid will change based on your filter criteria.
 - If you accessed the *Manage Service Indicators* page from the **Campus Community** menu, the **Effect** field will default to **All**.
 - If you accessed the *Manage Service Indicators* page from the positive Service Indicator icon (✱) on one of the student pages, the **Effect** field will default to **Positive** and only the positive service indicators will be displayed.
 - If you accessed the *Manage Service Indicators* page from the negative Service Indicator icon (⊘) on one of the student pages, the **Effect** field will default to **Negative** and only the negative service indicators will be displayed.
6. (Optional) Select **Institution** from the drop down list (to see only service indicators for your institution) and click [Refresh](#) for the change to take effect. This field will automatically populate when your user defaults are set for institution.
7. Click [View All](#) to see all service indicators (including multi-institutional service indicators).

NOTE:

In the page shot above, Bot refers to "beginning of time" and impacts all terms. If the **Impact Description Exists** field has a **No** value, it indicates that there are no impacts stopping services. If there is a **Yes** in this field, then some services are impacted.

8. Click [+](#) [Add Service Indicator](#).
9. The *Add Service Indicator* page will be displayed.

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Add Service Indicator

Ima Student 0000011111

*Institution:

*Service Indicator Code:

*Service Ind Reason Code:

Effect:

Effective Period

Start Term: End Term:

Start Date: End Date:

Assignment Details

*Department:

Reference:

Amount: Currency:

Contact Information

Contact ID: Contact Person:

Placed Person ID: Placed By:

Comments

Services Impacted

No Impacts are associated with the selected Service Indicator Code.

Service Indicator Date Time: 11/20/2007 2:47:11PM
User ID: KKWADE Wade,Kathy

10. Enter the **Institution**. This field may automatically populate if your user defaults are set for institution.
11. Enter the **Service Indicator Code** or click to select from the list.
12. Enter the **Service Indicator Reason Code** or click to select from the list. Only the reason codes that are associated with the specific service indicator and for which you have security will be available.
13. In the **Effect** field, the system will automatically display either **Positive** or **Negative** whichever effect is associated with the service indicator you choose.
14. Enter the **Start Term** or **Start Date** the service indicator should take effect. **Start Date** will default to the system date.

NOTE: A service indicator can be term-based or date-based. They are placed or released based on the start and end information that you enter.

- Term: The impact will start and end for the terms that you specify. For example, if you enter a service indicator with the **Start Term** of 4082 and an **End Term** of 4082, the service impacts will be in effect only for the term of 4082. If you leave the **Start Term** as

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0000, the term-based impacts will be in effect for all terms. A **Start Term** value of 9999 means that term-based impacts will never take effect.

- **Date:** The impact will start and end on the dates that you specify. If you enter a **Start Date** of 08/22/2008 and an **End Date** of 12/31/2008, the service impacts will be in effect only for that date period. As soon as you enter a **Start Date**, the service indicator (or hold) will display on the student's record in Self Service as of the date entered.
- Both the Term and Date must be 'TRUE' for impact and for the service indicator to display for the student and administrators in Self-Service.

15. Enter the **End Term** or **End Date** the service indicator should cease to be valid. If no **End Date** or **End Term** is entered, service impacts will be in effect until the service indicator is released.

- When the Service Indicator has expired, the icon and information in the **Holds** box in the *Student Center* will still display. An active service indicator looks exactly the same as an inactive service indicator to the student in Self-Service.

NOTE: It is the responsibility of the Service indicators owner to monitor when the Service indicators should be deleted for the student.

16. The **Department** field will automatically populate. If necessary, you can override this and enter whatever is required.

17. (Optional field) Enter a **Reference** that may help in identifying the service indicator.

18. (Optional field) Enter the **Amount**, if needed. *This field is typically used by Student Financials.*

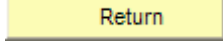
19. (Optional field) Specify the **Currency** in which the monetary amount is expressed. *This field is typically used by Student Financials.*

20. (Optional field) Enter the **Contact ID** and **Contact Person** of whom to contact with questions about this service indicator.

21. The system will automatically populate the **Placed Person ID** and **Placed By** fields with the current user's information. You can override this and change it to another **ID**, if necessary. You can not leave this field blank.

22. (Optional field) Enter **Comments** to further describe the reason for the service indicator. *Anything entered in this field will be viewable by all administrators who have access to view Service Indicators in SIS.*

23. (Optional) In the **Services Impacted** area click the code in the **Impact** column to access the *Service Impact Description* page, where you can view details about the impact associated with

that service indicator. Click  to return to the previous page.

Services Impacted		Customize Find View All			First	1 of 1	Last
Impact	Description	Basis - Date	Basis - Term	Term Category			
1 IENR	No initial enroll, drop add ok	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

24. Both the **Basis - Date** and **Term** check box will be selected to support IU processes. Impacts occur by Term if **Start Term** is entered. Otherwise, impact will start according to **Start Date**. Reminder: if no values are entered for the **End Term** or **End Date** fields, then the impact will remain in effect until manually released.

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25. The system automatically displays the current day and time when the service indicator was assigned. The system also tracks and displays the **User ID** of the user who is entering or changing information on the page.
26. Click or to save your changes. If you have not completed all the required fields, you will receive an error message. If you can't see the service indicator you just added, in the **Effect** field, select **ALL** and click [Refresh](#).