



**INDIANA UNIVERSITY**

**SIS Course Training Guide**

**Student Financials  
Customer Services for Departmental Staff**

## Table of Contents

|   |           |
|---|-----------|
| <b>Course Objectives .....</b>                                  | <b>3</b>  |
| <b>Online Help Review .....</b>                                 | <b>3</b>  |
| <b>Accessing Student Financials Pages .....</b>                 | <b>4</b>  |
| <b>Account Summary .....</b>                                    | <b>5</b>  |
| <b>IU Global Account View.....</b>                              | <b>11</b> |
| <b>View Anticipated Aid.....</b>                                | <b>14</b> |
| <b>Bio/Demo Data .....</b>                                      | <b>17</b> |
| <b>Service Indicators .....</b>                                 | <b>19</b> |
| Viewing Service Indicators using the Account Summary Page ..... | 19        |
| <b>Identifying FERPA Restrictions .....</b>                     | <b>22</b> |
| <b>Getting Help.....</b>  | <b>24</b> |

## Course Objectives

Upon completion of this training, participants will know how to:

- Access Student Financials pages in SIS.
- View a student's account summary.
- View a student's account detail.
- View a student's payment line detail.
- View a student's account information via the Global Account View.
- View a student's anticipated aid.
- View Bio/Demo data for a student.
- View positive and negative Service Indicators.
- Identify FERPA Restrictions.

## Online Help Review

- Open Internet Explorer and navigate to:  
[http://ses.indiana.edu/campusServices/sisTraining/SIS9.0\\_onlineHelp/](http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/)
- Click the appropriate link in the menu on the left side or on the main page.
- Click on the appropriate link for the topic you want to view.
- To search the Online Help, click on **Search SIS 9.0 Training** in the left side menu.

## Accessing Student Financials Pages

Log in to OneStart ([www.onestart.iu.edu](http://www.onestart.iu.edu)) then sign in to SIS to access the Student Financials pages covered in this training guide.

1. To launch the SIS application, navigate to the *Services* tab.
2. Click **Administrative Systems** in the left side menu.

The screenshot displays the OneStart web interface. At the top, the 'Services' tab is selected and circled in red. In the left-hand navigation menu, 'Administrative Systems' is also circled in red. The main content area shows several service tiles: HRMS, TIME, EPIC - Departmental Tasks, SIS Launch, and IUIE. The 'SIS Launch' tile is circled in red, and a red arrow points to the 'Launch' button within this tile. The 'SIS Launch' tile contains a list of links: Problem Report, Incident Lookup, SIS Online Help, Access Request Management System, Data Managers, Troubleshooting, SES Training, Team Website, and Job Aids. The 'Administrative Systems' menu on the left includes links for HRMS, SIS, EPIC, TIME, Data Access, Library, Workflow, Faculty Systems, Group Quick Links, and Most Popular.

3. Locate the **SIS Launch** box and click Launch.
4. You will be asked to log in using a safeword card (if you have not done so already).
5. Once you are logged into the SIS application, you will be taken to the **Administrative Center**. From here, you can navigate to the appropriate Student Financials pages in the main menu as described in this manual.

## Account Summary

The *Account Summary* page enables you to view a summary of a student's account and displays information for only one Business Unit (Institution code) at a time.

**NOTE:** Your access to these navigation paths will depend on your individual security.

Navigation: **Student Financials > View Account Summary**

**Account Summary**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Business Unit: =

ID: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

[Basic Search](#) [Save Search Criteria](#)

1. The *Account Summary - Find an Existing Value* page will be displayed. Enter the student's **Business Unit**. This is the 5-character campus code (i.e., IUINA).
2. Enter the student's **ID** (or **Last** and **First Name**).  
The **ID** is the student's ten-digit system assigned identification number.
3. Click  to view the *Account Summary – Summary for all Terms* page.

This page allows you to view a student's account summary for all academic terms in which the student has activity.

**Account Summary**

---

**Summary for all Terms**

Jane Tshoreturningc 0000006263   
 Bloomington

**Current Bursar Account Balance:** 1,574.93 USD

| Term                                    |
|---|
| <a href="#">Spring 2008</a>             |
| <a href="#">Fall 2004</a>               |
| <a href="#">Fall Semester 2003-2004</a> |

[Return to Search](#)

- When the *Account Summary – Summary for all Terms* page is displayed, review **Student Name** and review **Student ID**.
- Review **Current Bursar Account Balance**. This is the full balance of the student’s entire account.
- Review **Term** and click the link for the appropriate term to view a student’s account summary for a specific term and business unit.

**Account Summary**

---

**Summary for Term**

Spring 2008

Jane Tshoreturningc 0000006263

**Bloomington**

|                              |              |
|------------------------------|--------------|
| Charge Activity:             | 3,594.93 USD |
| Payment Activity:            | -1,850.00    |
| Financial Aid Activity:      | 0.00         |
| Anticipated Aid Activity:    | 0.00         |
| Admissions Deposit Activity: | 0.00         |

[View Account Detail](#)

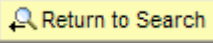
[Return](#)

- The **Term** listed at the top of the page is the academic term for which the account summary applies.
- Review **Student Name** and **ID**.
- Review **Campus**. This is the campus the student incurred the charges at for the term listed.
- Review **Charge Activity**. This is the total charges the student has incurred in that term.

11. Review **Payment Activity**. This is the total payment amount received from the student in that term.
12. Review **Financial Aid Activity**. This is the total amount of financial aid received for the student in that term.
13. Review **Anticipated Aid Activity**. This is the total amount of financial aid awarded to, but not yet disbursed to the student in that term.
14. The **Admissions Deposit Activity** is **not** used at IU at this time. Some departments do require pre-payments and they show up under the payment area.
15. Click the [View Account Detail](#) link to move to the *Account Summary – Account Detail for Term* page to view detailed information for each of the categories listed on the *Summary for Term* page. This page lets you view line items of account activity for a single term.

| <b>Account Summary</b>               |                                       |                    |     |
|--------------------------------------|---------------------------------------|--------------------|-----|
| <b>Account Detail for Term</b>       |                                       |                    |     |
| Spring 2008                          | <b>As of Date</b>                     | 01/16/2008         |     |
| Jane Tshoretturningc                 |                                       | 0000006263         |     |
| <b>Bloomington</b>                   |                                       |                    |     |
| <b>Charges</b>                       |                                       |                    |     |
| <u>Date Posted</u>                   | <u>Item Description</u>               | <u>Amount</u>      |     |
| 12/20/2007                           | Activity Fee                          | 58.87              | USD |
| 12/20/2007                           | Athletics Fee                         | 15.00              |     |
| 12/20/2007                           | Late Registration Fee                 | 210.00             |     |
| 12/20/2007                           | Resident Undergraduate Fees           | 2,993.10           |     |
| 12/20/2007                           | Student Health Fee                    | 87.96              |     |
| 12/20/2007                           | Technology Fee                        | 200.00             |     |
| 12/20/2007                           | Transportation Fee                    | 30.00              |     |
| <b>Total Charges:</b>                |                                       | 3,594.93 USD       |     |
| <b>Payments Received</b>             |                                       |                    |     |
| <u>Date Posted</u>                   | <u>Item Description</u>               | <u>Amount</u>      |     |
| 01/16/2008                           | Payment - Thank You                   | -350.00            | USD |
| 01/16/2008                           | Payment by Check                      | -1,000.00          |     |
| 01/16/2008                           | Payment by Cash                       | -500.00            |     |
| <b>Total Payments:</b>               |                                       | -1,850.00 USD      |     |
| <b>Self Service Pending Payments</b> |                                       |                    |     |
| <u>Reference Number</u>              | <u>Card Number's Last Four Digits</u> | <u>Amount</u>      |     |
|                                      |                                       | 0.00               |     |
| <b>Total Pending Payments:</b>       |                                       | 0.00 USD           |     |
| <b>Financial Aid</b>                 |                                       |                    |     |
| <u>Date Posted</u>                   | <u>Item Description</u>               | <u>Amount</u>      |     |
|                                      |                                       | 0.00               |     |
| <b>Total Financial Aid:</b>          |                                       | 0.00 USD           |     |
| <b>Anticipated Aid</b>               |                                       |                    |     |
| <u>Item Description</u>              | <u>Anticipated Aid</u>                |                    |     |
|                                      | 0.00                                  |                    |     |
| <b>Total Anticipated Aid:</b>        |                                       | 0.00 USD           |     |
| <b>Admissions Deposit Due</b>        |                                       |                    |     |
| <u>Short Description</u>             | <u>Description</u>                    | <u>Due Amount</u>  |     |
|                                      |                                       | 0.00               |     |
| <b>Total Admissions Deposit:</b>     |                                       | 0.00 USD           |     |
| <b>Refunds</b>                       |                                       |                    |     |
| <u>Status</u>                        | <u>Long Name</u>                      | <u>Item Amount</u> |     |
|                                      |                                       |                    |     |
| <b>Total Refunds:</b>                |                                       | 0.00 USD           |     |
| <a href="#">Return</a>               |                                       |                    |     |

1. The **Term** listed at the top of the page is the term (semester) the information is for.
2. Review **As of Date**. This is the last date the information was updated.
3. Review **Student Name** and **ID**.
4. Review **Campus**. The campus this account information is specific to.
5. Review **Charges** information. These fields display charges on the account for the term.
  - Review **Date Posted**. This is the date the charge was posted to the account.
  - Review **Item Description**. This is a description of the charge posted to the account.
  - Review **Amount**. This is the dollar amount of the charge posted to the account.
6. Review **Total Charges**. This is the total dollar amount of all combined charges on the account for the term.
7. Review **Payments Received** information. These fields display payments applied to the account for the term.
  - Review **Date Posted**. This is the date the payment was posted to the account.
  - Review **Item Description**. This is a description of the payment posted to the account.
  - Review **Amount**. This is the dollar amount of the payment posted to the account.
8. Review **Total Payments**. This is the total dollar amount of all combined payments on the account for the term.
9. Review **Self-Service Pending Payments** information. IU is using infiNET QPay as our self service vendor. Payments made via QPay or immediately posted to the account.
10. Review **Total Pending Payments**. This will always be zero at IU is using infiNET Qpay with immediate credit to the account.
11. Review **Financial Aid** information. These fields display any financial aid on the account for the term.
  - Review **Date Posted**. This is the date the financial aid was posted to the account.
  - Review **Item Description**. This is a description of the financial aid posted to the account.
  - Review **Amount**. This is the dollar amount of the financial aid posted to the account.
12. Review **Total Financial Aid**. This is the total dollar amount of all combined financial aid received on the account for the term.
13. Review **Anticipated Aid** information. These fields display any financial aid anticipated for the account for the term. If the expire date of the anticipated aid is before the current date, the aid does not appear on this page.
  - Review **Item Description**. This is a description of the anticipated aid item.
  - Review **Anticipated Aid**. This is the dollar amount of the anticipated aid item.
14. Review **Total Anticipated Aid**. This is the total dollar amount of all combined anticipated aid items for the term.
15. The **Admissions Deposit Due** information fields will **not** be used by IU at this time.
16. Review **Refunds** information. These fields display any refunds applied to the account for the term.
  - Review **Refund Nbr**: This number is automatically assigned in SIS.
  - Review **Status**. The status of the refund being applied to the account.
  - Review **Long Name**.
  - Review **Address Type**. The actual address selected from the refund page.
  - Review **Item Amount**. The dollar amount of the refund being posted to the account.

17. Review **Total Refunds**. This is the total dollar amount of all combined refunds posted to the account for the term.
18. Click the [Return](#) link to return to the *Summary for Term* page.
19. Click the [Return](#) link to return to the *Summary for all Terms* page.
20. Click  to view the Account Summary data for another student.

**Try It** - Complete Account Summary exercise 1 and exercise 2 in the workbook.

## IU Global Account View

The *IU Global Account View – Student Accounts* page is used to view overall activity on a student’s account. This account view allows you to access all account history for a multi-campus customer.

Navigation: **Student Financials > IU Global Account View**

### IU Global Account View

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID: begins with ▾

National ID: begins with ▾

Campus ID: begins with ▾

Last Name: begins with ▾

First Name: begins with ▾

Search
Clear
[Basic Search](#)
 [Save Search Criteria](#)

1. Enter the student’s **ID** (or **Last** and **First Name**).
2. Click Search.

### Student Accounts

EmpID: 000006249      Name: Tshnreturningf,Jane

Find    First 1-2 of 2    Last

**Business Unit:** IUBLA    Bloomington      **Total:** 2,801.13

Customize | Find | View All | First 1-3 of 3    Last

| Account Type | Account Number | Acct Term | Description | Balance  | Created    | Short Name |                                 |
|--------------|----------------|-----------|-------------|----------|------------|------------|---------------------------------|
| 1 Central    | CTR001         | 4048      | Fall 2004   | 0.00     | 05/13/2004 | Active     | <a href="#">Account Details</a> |
| 2 Central    | CTR001         | 4052      | Spring 2005 | 0.00     | 04/20/2005 | Active     | <a href="#">Account Details</a> |
| 3 Central    | CTR001         | 4082      | Spring 2008 | 2,801.13 | 12/20/2007 | Active     | <a href="#">Account Details</a> |

First 1-2 of 2    Last

**Business Unit:** IUINA    Indianapolis      **Total:** 993.21

Customize | Find | View All | First 1-2 of 2    Last

| Account Type | Account Number | Acct Term | Description | Balance | Created    | Short Name |                                 |
|--------------|----------------|-----------|-------------|---------|------------|------------|---------------------------------|
| 1 Central    | CTR001         | 4048      | Fall 2004   | 682.29  | 05/18/2004 | Active     | <a href="#">Account Details</a> |
| 2 Central    | CTR001         | 4082      | Spring 2008 | 310.92  | 12/20/2007 | Active     | <a href="#">Account Details</a> |

Return to Search
Notify

**NOTE:** The newest rows of information are always displayed at the bottom of the grids.

1. Review **EmplID**. This field displays the student's **ID** and the student's **Name**.
2. Review **Business Unit**. This field displays the campus code for the campus the student is enrolled at.
3. Review **Total**. This is the student's current outstanding balance for that campus. This balance includes the fees for the current term and all prior terms' unpaid fees.
4. Review **Account Type**. This field displays the type of account the charge or payment is for.
5. Review **Account Number**. The account number assigned to the line item by the SIS Student Financials application.
6. Review **Acct (Account) Term**. This field displays the 4-character term code.
7. Review **Description**. This field displays the term description.
8. Review **Balance**. This is the student's total charges due for each term.
9. Review **Created** date. This is the first activity date (transaction date) for this term.
10. Review **Short Name**. At IU this will always be "Active".
11. Click the [Account Details](#) link to move to the *Account Details* page.

| Student Accounts  |             |                   |           |            |          |              |  |
|---|-------------|-------------------|-----------|------------|----------|--------------|--|
| Account Details   |             |                   |           |            |          |              |  |
| Account Nbr:  |             | CTR001 - Spr 2008 |           | Balance:   |          | 2,801.13 USD |  |
| Debits:   |             | 3,594.93          |           | Credits:   |          | -793.80      |  |
| Applied:  |             | 793.80            |           | Unapplied: |          | 0.00         |  |
| <a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   <a href="#">1-8 of 8</a>   <a href="#">Last</a> |             |                   |           |            |          |              |  |
| Item Type   | Term        | Item Number       | Class Nbr | Amount     | Balance  |              |  |
| 1 Athletics Fee   | Spring 2008 | 000000000000012   |           | 15.00      | 0.00     | USD          |  |
| 2 Transportation Fee  | Spring 2008 | 000000000000013   |           | 30.00      | 0.00     | USD          |  |
| 3 Activity Fee  | Spring 2008 | 000000000000014   |           | 58.87      | 0.00     | USD          |  |
| 4 Student Health Fee  | Spring 2008 | 000000000000015   |           | 87.96      | 0.00     | USD          |  |
| 5 Technology Fee  | Spring 2008 | 000000000000016   |           | 200.00     | 0.00     | USD          |  |
| 6 Late Registration Fee   | Spring 2008 | 000000000000017   |           | 210.00     | 210.00   | USD          |  |
| 7 Resident Undergraduate Fees   | Spring 2008 | 000000000000018   |           | 2,993.10   | 2,591.13 | USD          |  |
| 8 Payment by Check  | Spring 2005 | 000000000000025   |           | -793.80    | 0.00     | USD          |  |

[Return](#)

1. Review **Account Nbr (Number)**. The account number assigned to the line item by the SIS Student Financials application.
2. Review **Balance**. This is the total outstanding balance the student owes on the account.
3. Review **Debits**. This is the total amount of debits to the account.
4. Review **Credits**. This is the total amount of credits to the account.
5. Review **Applied**. This field displays the total amount of payments received and applied to the account.
6. Review **Unapplied**. This field displays the total amount of payments received but not yet applied to the account. An example of this would be if a student has no housing charges, but

they had paid \$100 housing deposit. This deposit is restricted to pay housing only and since they have no housing charge, it would show up in the **Unapplied** field.

7. Review the following for each line item:
  - **Item Type:** The name or description of the line item.
  - **Term:** The term the line item was applied to the account.
  - **Item Number:** The system-assigned item number associated with the line item.
  - **Class Nbr:** This field is not used at this time.
  - **Amount:** The dollar amount of the line item.
  - **Balance:** The dollar amount still outstanding on a student's account after all debits and credits have been applied.
8. Click the [Return](#) link to return to the *IU Global Account View -Student Accounts* page.

**Try It** - Complete IU Global Account View exercise 1 in the workbook.

## View Anticipated Aid

### Basic Concepts (For all Student Service Offices)

- Awarded aid may be “anticipated” on the student account prior to when disbursement actually occurs. This allows the ability to generate a “net” bill with anticipated aid for the term subtracted from the billed charges.
- When aid is disbursed, cancelled or expires it no longer appears as anticipated aid.
  - Anticipated aid expires 30 days after the 1<sup>st</sup> disbursement date of a term or 30 days after the award date, whichever date is later.

### Advanced Concepts (For Financial Aid and Enrollment Services Offices)

- If a student has not met the eligibility criteria for the award, the anticipated aid could continue to appear as anticipated aid until it expires.
- Individual awards can be “expired” manually.
- When cash awards from a particular outside donor are “estimated” based on lists from the donor, these awards may be anticipated if the live award will auto-delete the “estimated” award.
- All item types for live aid should be anticipated with the exception of fee remissions.
- Fee remissions other than SSACI, HEA, AH and CORE 40 should never be anticipated.

### Navigation: **Student Financials > View Account Summary**

**Account Summary**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Business Unit: =

ID: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with


[Basic Search](#) [Save Search Criteria](#)

1. Enter the **Business Unit**.
2. Enter the student's **ID** (or **Last** and **First Name**).
3. Click .

**Account Summary**

---

**Summary for all Terms**

Jane Tshnreturningf 0000006249 

Bloomington

**Current Bursar Account Balance:** 2,801.13 USD

| Term                                    |
|---|
| <a href="#">Spring 2008</a>             |
| <a href="#">Spring 2005</a>             |
| <a href="#">Fall 2004</a>               |
| <a href="#">Fall Semester 2003-2004</a> |

[Return to Search](#)

- Click the link for the appropriate Term.

**Account Summary**

---

**Summary for Term**

Spring 2008

Jane Tshnreturningf 0000006249

**Bloomington**

|                                  |              |
|----------------------------------|--------------|
| Charge Activity:                 | 3,594.93 USD |
| Payment Activity:                | -1,850.00    |
| Financial Aid Activity:          | 0.00         |
| <b>Anticipated Aid Activity:</b> | <b>0.00</b>  |
| Admissions Deposit Activity:     | 0.00         |

[View Account Detail](#)

[Return](#)

- The **Anticipated Aid Activity** shows the total aid. Click the [View Account Detail](#) link to view detailed activity.

| <b>Account Summary</b>               |                                |               |     |
|--------------------------------------|--------------------------------|---------------|-----|
| <b>Account Detail for Term</b>       |                                |               |     |
| Spring 2008                          | As of Date                     | 01/16/2008    |     |
| Jane Tshnreturningf                  |                                | 0000006249    |     |
| <b>Bloomington</b>                   |                                |               |     |
| <b>Charges</b>                       |                                |               |     |
| Date Posted                          | Item Description               | Amount        |     |
| 12/20/2007                           | Activity Fee                   | 58.87         | USD |
| 12/20/2007                           | Athletics Fee                  | 15.00         |     |
| 12/20/2007                           | Late Registration Fee          | 210.00        |     |
| 12/20/2007                           | Resident Undergraduate Fees    | 2,993.10      |     |
| 12/20/2007                           | Student Health Fee             | 87.96         |     |
| 12/20/2007                           | Technology Fee                 | 200.00        |     |
| 12/20/2007                           | Transportation Fee             | 30.00         |     |
| <b>Total Charges:</b>                |                                | 3,594.93 USD  |     |
| <b>Payments Received</b>             |                                |               |     |
| Date Posted                          | Item Description               | Amount        |     |
| 01/16/2008                           | Payment - Thank You            | -350.00       | USD |
| 01/16/2008                           | Payment by Check               | -1,000.00     |     |
| 01/16/2008                           | Payment by Cash                | -500.00       |     |
| <b>Total Payments:</b>               |                                | -1,850.00 USD |     |
| <b>Self Service Pending Payments</b> |                                |               |     |
| Reference Number                     | Card Number's Last Four Digits | Amount        |     |
|                                      |                                | 0.00          |     |
| <b>Total Pending Payments:</b>       |                                | 0.00 USD      |     |
| <b>Financial Aid</b>                 |                                |               |     |
| Date Posted                          | Item Description               | Amount        |     |
|                                      |                                | 0.00          |     |
| <b>Total Financial Aid:</b>          |                                | 0.00 USD      |     |
| <b>Anticipated Aid</b>               |                                |               |     |
| Item Description                     | Anticipated Aid                |               |     |
|                                      | 0.00                           |               |     |
| <b>Total Anticipated Aid:</b>        |                                | 0.00 USD      |     |
| <b>Admissions Deposit Due</b>        |                                |               |     |
| Short Description                    | Description                    | Due Amount    |     |
|                                      |                                | 0.00          |     |
| <b>Total Admissions Deposit:</b>     |                                | 0.00 USD      |     |
| <b>Refunds</b>                       |                                |               |     |
| Status                               | Long Name                      | Item Amount   |     |
|                                      |                                |               |     |
| <b>Total Refunds:</b>                |                                | 0.00 USD      |     |
| <a href="#">Return</a>               |                                |               |     |

6. View the **Anticipated Aid**.

## Bio/Demo Data

Biographic and demographic data stored in the SIS system is located in the Bio/Demo Data component.

The Bio/Demo Data component contains information on addresses.

**NOTE:** Your access to these navigation paths will depend on your individual security.

Navigation: **Campus Community > Personal Information Student > Biographical (Student) > Addresses/Phones > Addresses**

### Addresses

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

---

EmplID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

Include History

[Basic Search](#)

1. Enter the student's **ID** (or **Last** and **First Name**).
2. Click .
3. Select the student in the **Search results** if necessary. The *Addresses* page is displayed.

**Addresses**

Jane Tshnreturningf 0000006249

Current Addresses Customize | Find | View All | First 1-2 of 2 Last

| Address Type            | Address   | Effective Date | Status | Edit/View Address Detail                 |
|-------------------------|---|----------------|--------|--|
| <a href="#">Home</a>    | 11102 University Pl<br>Oxford, IN 47252<br>Grant  | 08/26/2003     | Active | <a href="#">Edit/View Address Detail</a> |
| <a href="#">Billing</a> | 100 Fig Street<br>Bloomington, IN 47404<br>Monroe | 01/16/2008     | Active | <a href="#">Edit/View Address Detail</a> |

**Add Address**

Effective Date: 01/16/2008 Status: Active

Country: USA United States

Address: [Edit Address](#) [Address Linkage](#)

**Add Address Types**

- \* Home
- Mailing
- Business
- Check
- Dormitory
- Legal
- Campus
- Other
- \* Billing
- Other 2
- Permanent
- Preferred
- Veteran
- Student Home
- Diploma
- Foreign
- Local
- Non-IU Work
- Other
- Other 2
- Student Housing
- Work



\* Active address exists  
[Explain](#)

1. View the **Name** and **ID** of the student.
2. View the address information.
3. Click  to search for another student.

**Try It** - Complete Bio/Demo Data exercise 1 in the workbook.

## Service Indicators

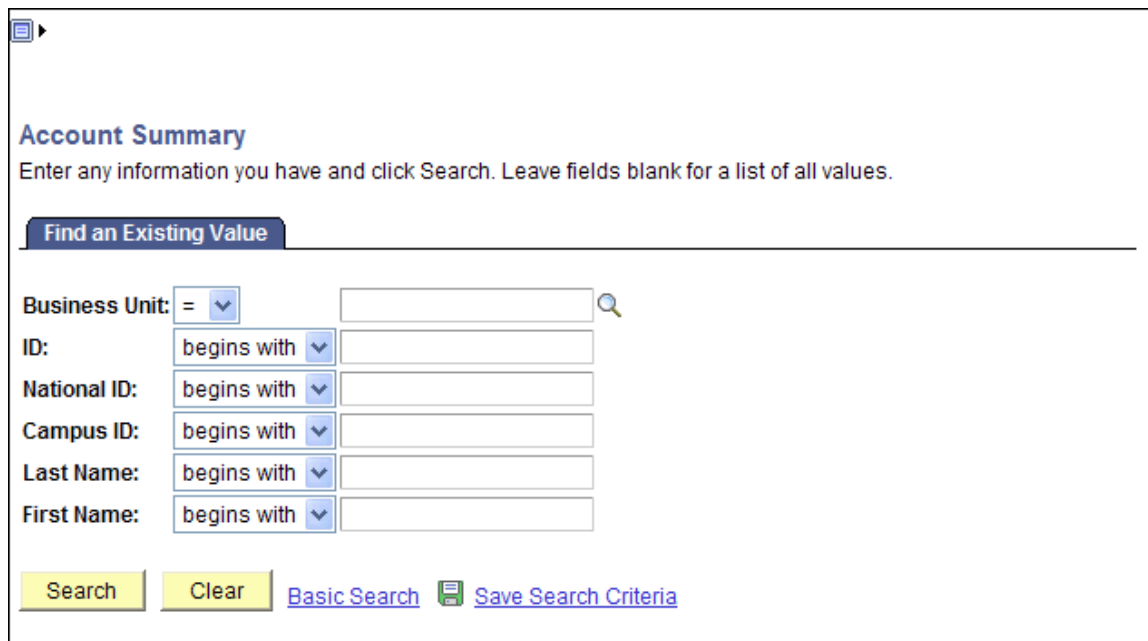
Most pages that display a student's information will display any appropriate Service Indicator Icons. For example, the *Customer Accounts* page shows them near the top of the page. Remember, there are several navigational paths where you can view a Service Indicator.

Service Indicators are pieces of information that are attached to a student's record. They can be attached to the student's record either manually or through certain automated processes (for example, the credit history or enrollment cancellation processes). Service Indicators are used to provide services (positive ) or restrict services (negative ). They can also be informational in nature, and not have any functionality associated with them. The Service Indicator icons appear throughout the Student Administration system pages. Each icon can represent one or several Service Indicators.

Each Service Indicator must have a Reason attached to it. Reasons are used to define "why" a Service Indicator was placed. Also, each Service Indicator can have one or many Impacts. The Impacts specify which services are provided or restricted by that Service Indicator. In general, Indiana University will be using Negative Service Indicators with an impact, but Positive Service Indicators will be more for informational purposes only, with no associated Impact.


## Viewing Service Indicators using the Account Summary Page

Navigation: **Student Financials > View Account Summary**



**Account Summary**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Business Unit: =  


ID: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with


[Basic Search](#)  [Save Search Criteria](#)

1. Enter the **Business Unit**.
2. Enter the student's **ID** (or **Last** and **First Name**).
3. Click .

**Account Summary**

---

**Summary for all Terms**

Jane Tshnreturningj 0000006257 



Bloomington

**Current Bursar Account Balance:** 8,243.43 USD


| Term                                    |
|---|
| <a href="#">Spring 2008</a>             |
| <a href="#">Summer 2005</a>             |
| <a href="#">Spring 2005</a>             |
| <a href="#">Fall 2004</a>               |
| <a href="#">Fall Semester 2003-2004</a> |


[Return to Search](#) [Notify](#)

You can quickly learn more about the Service Indicator by clicking the icon.

- Click the positive Service Indicator icon () or the negative Service Indicator icon () to move to the *Manage Service Indicators* page.
  - If you click on the positive service indicator icon, only the positive service indicators will be displayed.
  - If you click on the negative service indicator icon, only the negative service indicators will be displayed.
  - You can choose to view all of the Service Indicators, only the positive or only the negative Service Indicators. To change your selection, select **All**, **Positive** or **Negative** from the **Effect** drop down menu and click [Refresh](#). The **Effect** field is a filter. When you change it and click [Refresh](#), the grid will change based on your filter criteria.

**Manage Service Indicators**

Jane Tshnreturningj 0000006257 

Display: **Effect**  Institution  [Refresh](#) 

[+ Add Service Indicator](#)

| Service Indicator Summary |                    |                    |             |            |                        |          |                      |            |          |                   |
|---------------------------|--------------------|--------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|-------------------|
| Code                      | Code Description   | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date | Services Stopped? |
| G01                       | Bursar Encumbrance | Other              | IUBLA       | 0000       | Bot                    |          |                      | 08/02/2010 |          | Yes               |

[+ Add Service Indicator](#)

[Cancel](#)

- You can also view only Service Indicators for your campus. Select your campus in the **Institution** drop down menu and click [Refresh](#).

- To display further information about any Service Indicator, positive or negative, click the link in the **Code** column. The *View Service Indicator* page displays the full details about the Service Indicator(s). If you have “Display Only” access, the fields will not be enabled.

### View Service Indicator

Jane Tshnreturningj 0000006257

\*Institution:  Bloomington

\*Service Indicator Code:  Bursar Encumbrance

\*Service Ind Reason Code:  Other

Description:

Effect: Negative

**Effective Period**

Start Term:  Bot End Term:

Start Date:  End Date:

**Assignment Details**

\*Department:  Bursar Office

Reference:

Amount:  Currency:

**Contact Information**

Contact ID:  Contact Person:

Placed Person ID:  Placed By:

Placed Method: Manual

Placed Process: Release Process:

**Comments**

**Services Impacted** Customize | Find | View All |  First 1-3 of 5 Last

|   | Impact                | Description                    | Basis - Date                        | Basis - Term                        | Term Category |
|---|-----------------------|--------------------------------|-------------------------------------|-------------------------------------|---------------|
| 1 | <a href="#">ENVER</a> | Prevent enrollmnt verification | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| 2 | <a href="#">IENR</a>  | No initial enroll, drop add ok | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| 3 | <a href="#">NPD</a>   | No Personal Deferment          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |

Service Indicator Date Time: 05/14/2004 2:27:35PM

User ID: UATRIN Person,Ima

- This page shows the details of the Service Indicator, including when it was placed and the **User ID** of the person who placed the indicator, as well as any services that may be impacted. From this page, you may return to the previous page by clicking .

**Try It** - Complete Service Indicators exercise 1 in the workbook.

## Identifying FERPA Restrictions


FERPA restrictions are generally identified during an inquire process. It is **CRUCIAL** to **ALWAYS** look first for the privacy shade icon when opening a student's record.

The **Family Educational Rights & Privacy Act (FERPA)** is a federal law designed to protect the privacy of a student's education record. The law applies to all schools which receive funds under an applicable U.S. Education Department program. FERPA applies only to student records. It carries no authority over employee records.

Under FERPA, institutions may designate certain limited student information as directory/public information. Institutions in compliance with FERPA provide that, with the exception of directory/public information, all student records are confidential and available only to the student.

Indiana University (IU) modeled a policy, the "IU Release of Student Information Policy", from FERPA. This IU policy defines "directory/public information" at IU. This directory/public information is limited to the following:


- Name
- Address
- E-Mail Address
- Phone
- Major field of study
- Dates of attendance
- Admission or enrollment status
- Campus
- School, college or division
- Class standing
- Degrees and awards
- Activities
- Sports
- Athletic information

A privacy shade icon () indicates that the student has designated certain information as non-releasable.

Callers requesting information about a student who has placed FERPA restrictions on their directory/public information should be referred to the Office of the Registrar.

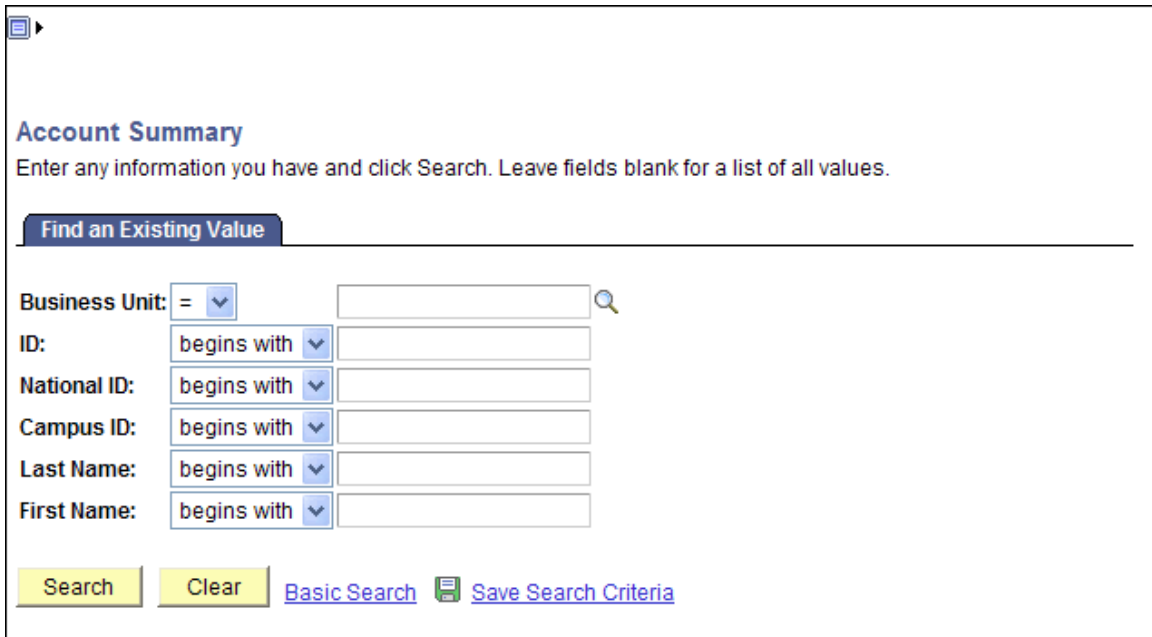
If there is a directory exclusion preventing release of certain information to the public, the data is considered "confidential". However, University officials with a legitimate need still have access to the restricted information.

To rescind a restriction, the student must submit a written request to the Office of the Registrar asking that the restriction be removed.

If there is no privacy shade icon () displayed on the record, there is no special permission required to release directory/public information.

|              |   |
|--------------|---|
| <b>NOTE:</b> | Bursar information such as balances, refund amounts, status, etc. should <b>NEVER</b> be released to third parties. If you receive questions from parties other than the student about this type of information please refer the individual to the Bursar's Office. |
|--------------|---|

Navigation: **Student Financials > View Account Summary**



The screenshot shows the 'Account Summary' search page. At the top, there is a search bar with a magnifying glass icon. Below it, the text reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A blue button labeled 'Find an Existing Value' is positioned above a horizontal line. Below the line, there are several search criteria fields: 'Business Unit:' with a dropdown menu and a search icon; 'ID:' with a 'begins with' dropdown and a search icon; 'National ID:' with a 'begins with' dropdown; 'Campus ID:' with a 'begins with' dropdown; 'Last Name:' with a 'begins with' dropdown; and 'First Name:' with a 'begins with' dropdown. At the bottom of the search area, there are buttons for 'Search' (highlighted in yellow), 'Clear', 'Basic Search', and 'Save Search Criteria'.


1. Enter the **Business Unit**.
2. Enter the student's **ID** (or **Last** and **First Name**).
3. Click **Search**.



The screenshot shows the 'Account Summary' results page. The title is 'Summary for all Terms'. The student's name is 'Jane Tshnreturnngi' and the ID is '000006255'. The location is 'Bloomington'. The 'Current Bursar Account Balance' is '3,779.66 USD'. Below this, there is a table with the following data:

| Term                        |
|-----------------------------|
| <a href="#">Spring 2005</a> |
| <a href="#">Fall 2004</a>   |

At the bottom of the page, there are buttons for 'Return to Search' and 'Notify'. A red circle and arrow highlight a privacy shade icon (a computer monitor with a slash through it) in the upper right corner of the page.

Notice the privacy shade icon (  ) in the upper right quarter of the page. This indicates that FERPA restrictions have been applied to this record. This indicator will be visible on all student-specific pages. If this icon appears on the student's account, refer any callers to the Office of the Registrar.

|              |   |
|--------------|---|
| <b>NOTE:</b> | Bursar information such as balances, refund amounts, status, etc. should <b>NEVER</b> be released to third parties. If you receive questions from parties other than the student about this type of information please refer the individual to the Bursar's Office. |
|--------------|---|

## Getting Help

The SIS Online Help website is available at:

[http://ses.indiana.edu/campusServices/sisTraining/SIS9.0\\_onlineHelp/](http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/)

You may submit a request for assistance to the SIS Help Desk by completing the web form at:

<http://ses.indiana.edu/campusServices/sisHelpDesk/>

If you are accessing the SIS application via the OneStart portal, you may contact the SIS Help Desk by clicking on the Problem Report link. This link is located in the **SIS Launch** box on the *Administrative Systems* page or in the **SIS Support** box on the *SIS* page.

If you need to request changes to your security access or add new users, please work directly with your campus Data Manager. A list of Data Managers may be found at:

<http://datamgmt.iu.edu/CDS/managers.html>. This link is also available in the **SIS Support** box on the *SIS* page in OneStart.