MANAGING SERVICE INDICATORS (HOLDS)

Service Indicators are used to flag students' records with important information. Certain Negative Service Indicators may prevent an individual from receiving specific services. Examples of negative service indicators include denied registration for classes and transcript holds. The other type of Service Indicator is designated as Positive. This might be an acknowledgment that a transcript was received, for example. You may also hear the term "Informational Hold." Unlike the Negative and Positive Holds, an Informational Hold does not have an impact in the database.

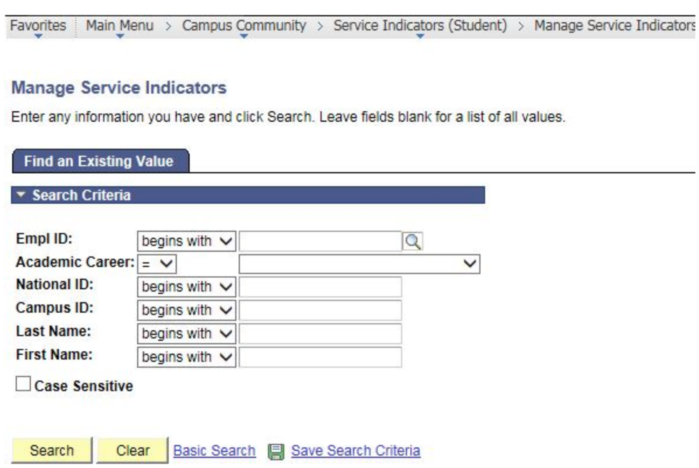
To better understand Service Indicators, read the document entitled **Introduction to Service Indicators (Holds)**.

Viewing, Placing, and Releasing Service Indicators

You can navigate to the Service Indicator page for a person using one of these options (security access will determine which options you can use):

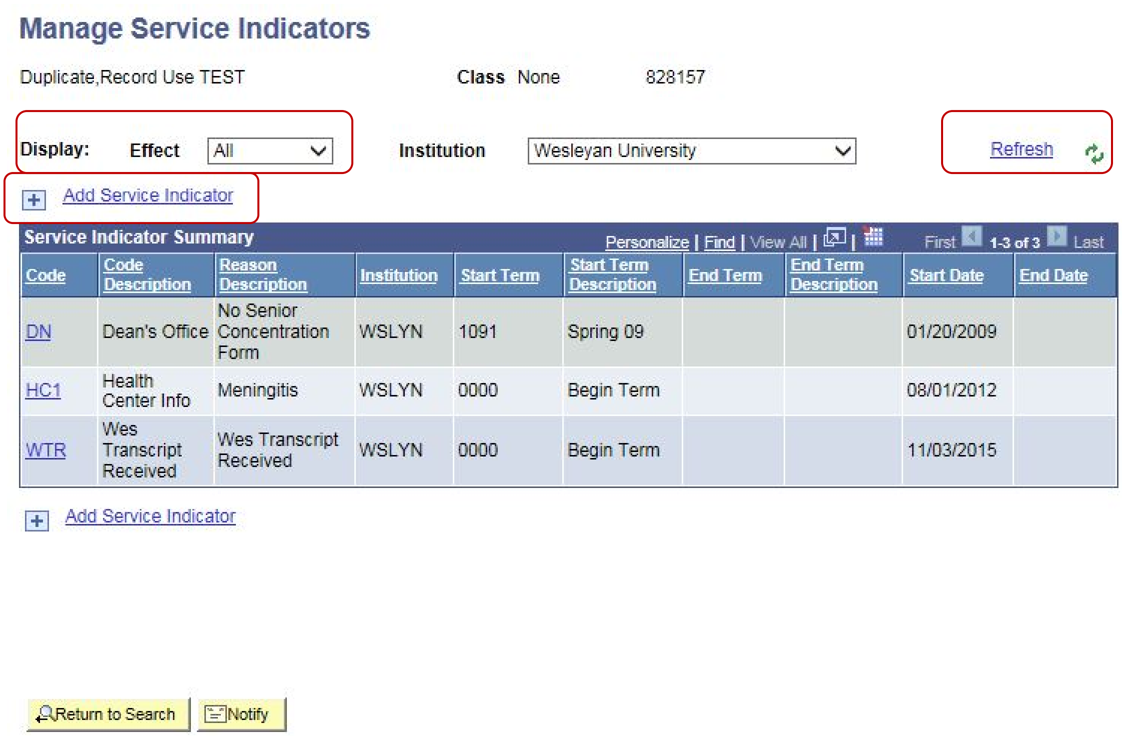
- Main Menu>Campus Community>Service Indicators (Student)>Manage Service Indicators
- Main Menu>Campus Community>Service Indicators>Person>Manage Service Indicators

1. **Service Indicator** Search Page:
   a. **Search for the student by using one of these options:**
      i. Wes ID – **Empl ID** field
      ii. Social Security number - **National ID** field
      iii. Student's name - **Last Name** and **First Name** fields as applicable

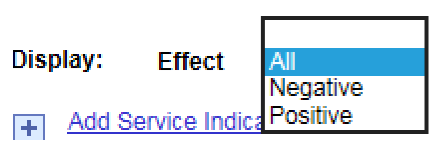


   b. Click on the **Search** button. If multiple results are found, click on the appropriate result to open the student's record.

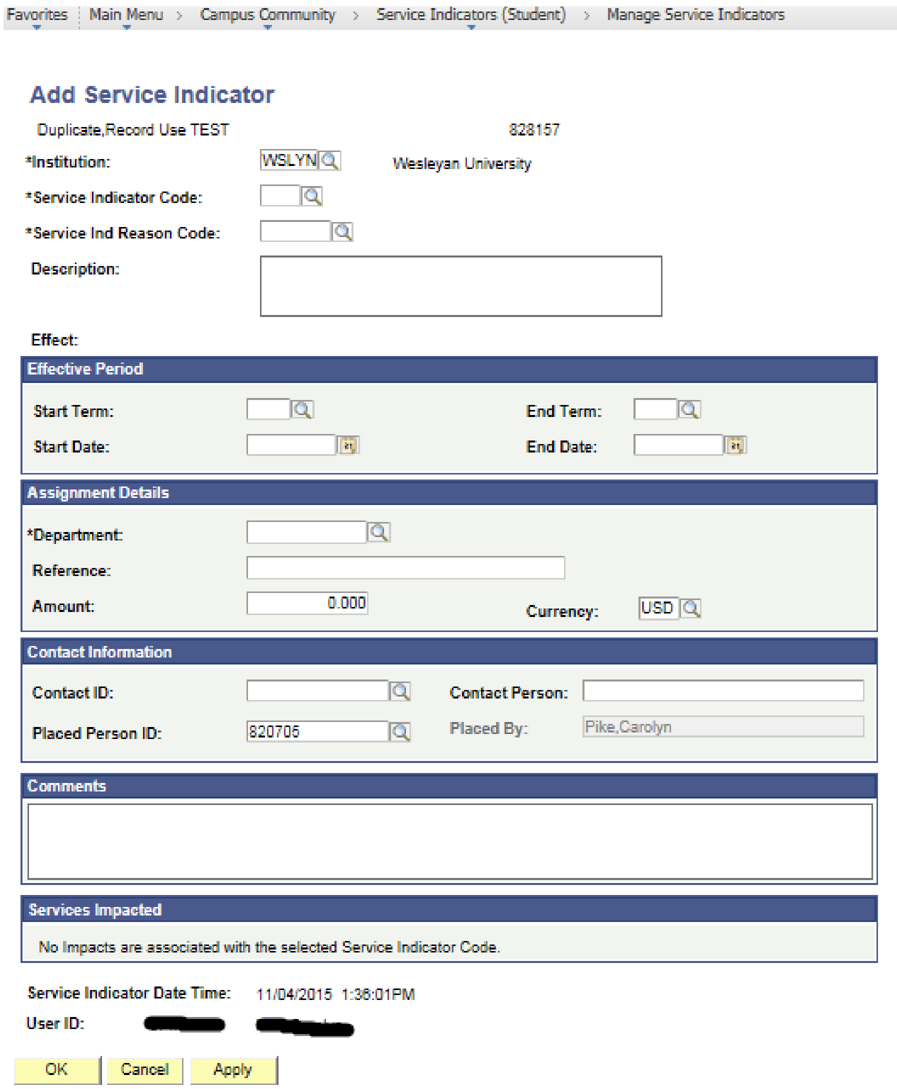
2. The **Manage Service Indicators** page opens.
   a. If you have access to place or release a Service Indicator currently appearing for the student, the field backgrounds will be white; otherwise, they will be gray.
   b. The following displays a sample for which there are currently three active Service Indicators. They are displayed alphabetically by Service Indicator Code.



   c. Note that next to **Display: Effect**, the word "All" is in the dropdown box. If you click on the arrow, you will see three filters to view the Holds. You must click Refresh to display data according to the Effect that you enter.



3. **Adding a Service Indicator**
   a. If a student already has one or more Service Indicators, a new row must be inserted.
      i. Click the Plus button in the upper or lower left.
      ii. Or you can click on the Add Service Indicator link.
   b. ***Do not overwrite any row that is already there.***
   c. The **Add Service Indicator** page opens.


Favorites | Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators

Add Service Indicator

Duplicate,Record Use TEST 828157

*Institution:	WSLYN	Wesleyan University	
*Service Indicator Code:			
*Service Ind Reason Code:			
Description:			
Effect:			

Effective Period

Start Term:		End Term:	
Start Date:		End Date:	

Assignment Details

*Department:			
Reference:			
Amount:	0.000	Currency:	USD

Contact Information

Contact ID:		Contact Person:	
Placed Person ID:	820706	Placed By:	Pike,Carolyn

Comments

Services Impacted

No Impacts are associated with the selected Service Indicator Code.

Service Indicator Date Time: 11/04/2015 1:36:01PM

User ID: [redacted] [redacted]

OK | Cancel | Apply

d. The Institution, WSLYN, should automatically be filled in from your User Defaults. If it is blank, type WSLYN.

  i. If you would like to set up your User Defaults so these types of fields automatically populate, you can click these instructions: User Defaults.

e. Press tab to move to next field.

f. Enter the Service Indicator Code by either typing it in or selecting it from the dropdown menu named Look Up Service Indicator Code.

  i. Note: The codes accessible to users are based on security access. Most users only have access to certain codes.

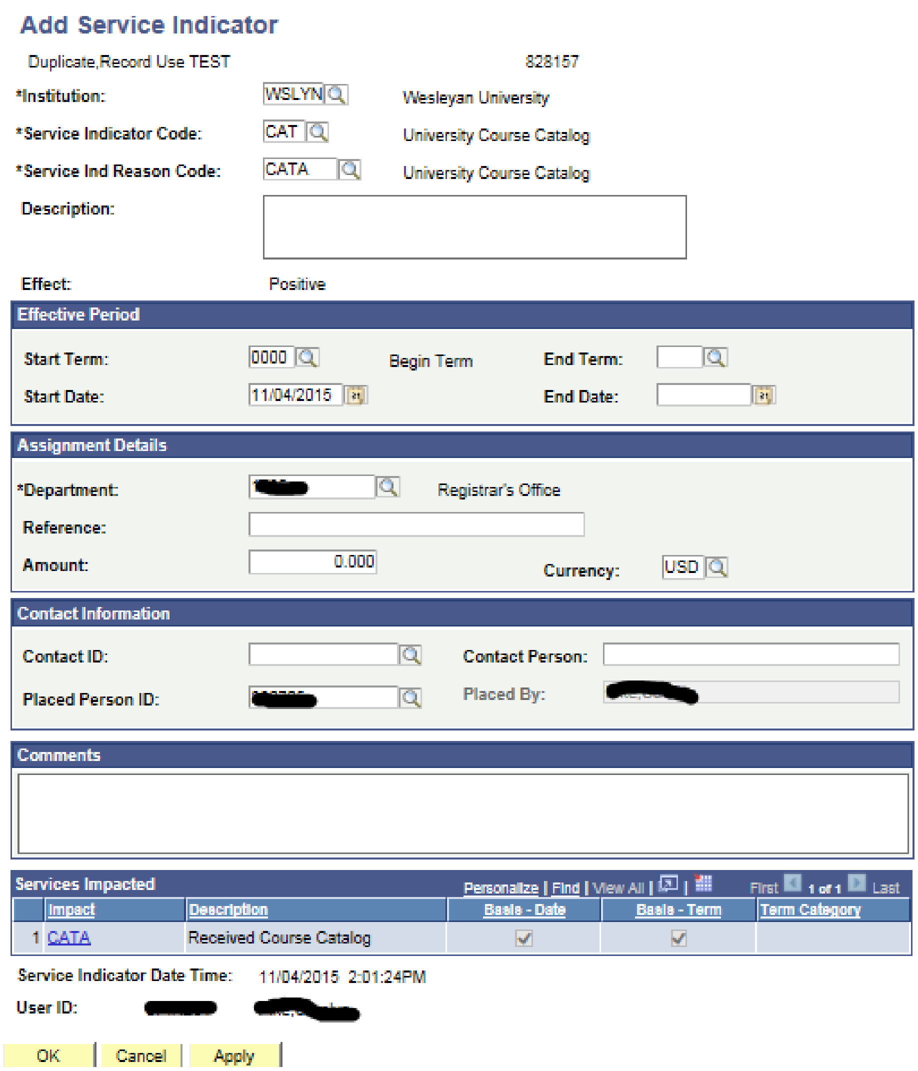
  ii. In this example, the Service Indicator Code is CAT (University Course Catalog).

  iii. The next field, containing the Service Indicator Reason Code, is populated with the code of CATA (University Course Catalog).

    1. That is the only Reason associated with this Hold.

2. Only the reason codes that are associated with the specific Service Indicator on the Service Indicator Codes page are available.

g. The Add Service Indicator page now looks as follows:



Add Service Indicator

Duplicate,Record Use TEST 828157

*Institution: WSLYN Wesleyan University

*Service Indicator Code: CAT University Course Catalog

*Service Ind Reason Code: CATA University Course Catalog

Description:

Effect: Positive

Effective Period

Start Term: 0000 Begin Term End Term:

Start Date: 11/04/2015 End Date:

Assignment Details

*Department: [redacted] Registrar's Office

Reference:

Amount: 0.000 Currency: USD

Contact Information

Contact ID: Contact Person:

Placed Person ID: [redacted] Placed By: [redacted]

Comments

Services Impacted Personalize | Find | View All | First 1 of 1 Last

	Impact	Description	Basis - Date	Basis - Term	Term Category
1	CATA	Received Course Catalog	✓	✓	

Service Indicator Date Time: 11/04/2015 2:01:24PM

User ID: [redacted] [redacted]

OK | Cancel | Apply

h. **Effect**: The system displays the effect associated with the service indicator that you select. Values are Positive or Negative, and in this instance it is Positive. Click the Refresh link to change each value.

i. **Effective Period**:

   i. **Start Term** and **End Term**:

      1. Enter the term during which the Service Indicator should become valid for the ID, and enter the term during which it should cease to be valid for the ID.
      2. A Start Term value of 0000 means that term-based impacts will be in effect for all terms.

3. A Start Term value of 9999 means that term-based impacts will never take effect.
4. If no End Term value is entered, term-based impacts will be in effect until the service indicator is released.

ii. **Start Date** and **End Date**:
1. Enter the date on which the service indicator should become valid for the ID, and enter the date on which it should cease to be valid for the ID. The default is today's date.
2. If no End Date value is entered, date-based Impacts will be in effect until the service indicator is released.

j. **Assignment Details**:

i. **Department**: Enter the code for the department that is responsible for placing the service indicator (or requesting its placement) on the individual's record.

ii. **Reference**: You can enter a reference number or other data that may assist in tracking and identifying the service indicator and its resolution.

iii. **Amount**: Enter the monetary amount, if any, that is required to satisfy the reason for this service indicator.

iv. **Currency**: Specify the currency in which the monetary amount is expressed.

k. Contact Information:

i. **Contact ID** and **Contact Person**: You can enter the ID and name of the person to contact with questions about this service indicator.

ii. **Placed Person ID** and **Placed By**:
1. The system displays the current user's ID and name.
2. You can override this value to enter whatever your institution requires.
3. You can enter the ID or, if no ID exists, you can enter the name of the person who placed the Service Indicator on the individual's record. Enter the name in the lastname;firstname format. Alternatively, you can identify the person who requested that the Service Indicator be placed on the record.

l. **Comments**: You may enter comments to further describe or identify the reason for the service indicator.

m. **Services Impacted**:

i. **Impact**: Click the code in the Impact column to access the Service Impact Description page, where you can view details about the impact.

ii. **Basis - Date** or **Basis – Term**:
1. The system indicates whether the service impact is set to be considered or disregarded (both manually or in the automated process) based on the begin and end values that you specify for the service indicator.
2. When the Basis - Term check box is selected, the impact will start and end for the terms that you specify.
3. If the Basis - Date check box is selected, the impact will start and end on the dates that you specify.

4. If either or both of the check boxes are selected but you enter no values for the End Term or End Date fields, then the impact will remain in effect until manually released.

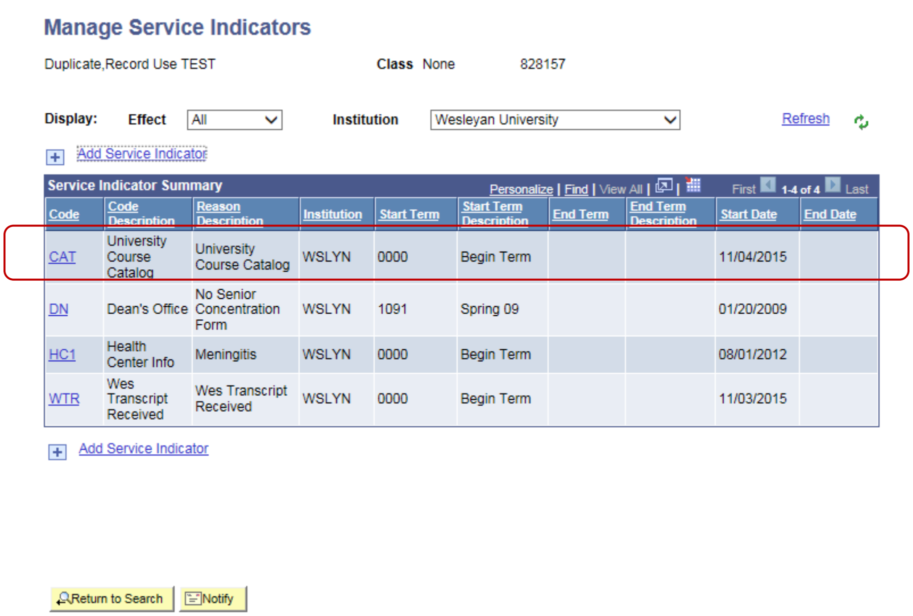
n. **Term Category**:
   i. Appears only if the impact is term-based.
   ii. *Note: This value is provided for informational purposes for administrative users. Delivered processes do not consider the term category.*
   iii. Displays the term of the service impact as it is associated with the Service Indicator on the Service Indicator Codes page. If the term falls within the Start Term and End Term period and a term category appears, you must determine whether the category of that term matches the category shown. If it does not, you should consider the impact not in effect. For example, a student applies for a parking permit for the Fall 2007 term, which has a term category of Regular. You assign the Service Indicator with a parking impact to the student, but the impact has an associated term category of Summer. Because the Term Begin and End Dates of the Service Indicator do not fall within the dates of the summer term, the impact is not in effect.

o. **Service Indicator Date Time**: The system displays the current day and time when the service indicator was assigned.

p. **User ID** and **Name**: The system displays the ID of the user who is entering or changing information on the page.

q. Click the **Okay** button.

r. You are returned to the **Manage Service Indicators** page which now includes the new Service Indicator.



Manage Service Indicators

Duplicate,Record Use TEST Class None 828157

Display: Effect All Institution Wesleyan University Refresh

Add Service Indicator

Service Indicator Summary — Personalize | Find | View All | First 1-4 of 4 Last

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
CAT	University Course Catalog	University Course Catalog	WSLYN	0000	Begin Term			11/04/2015	
DN	Dean's Office	No Senior Concentration Form	WSLYN	1091	Spring 09			01/20/2009	
HC1	Health Center Info	Meningitis	WSLYN	0000	Begin Term			08/01/2012	
WTR	Wes Transcript Received	Wes Transcript Received	WSLYN	0000	Begin Term			11/03/2015	

Add Service Indicator

Return to Search Notify

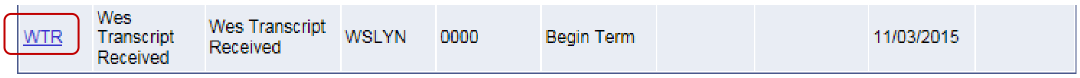
s. To enter Service Indicators for additional students, click on the Return to Search button and continue data entry.

4. Removing a Service Indicator

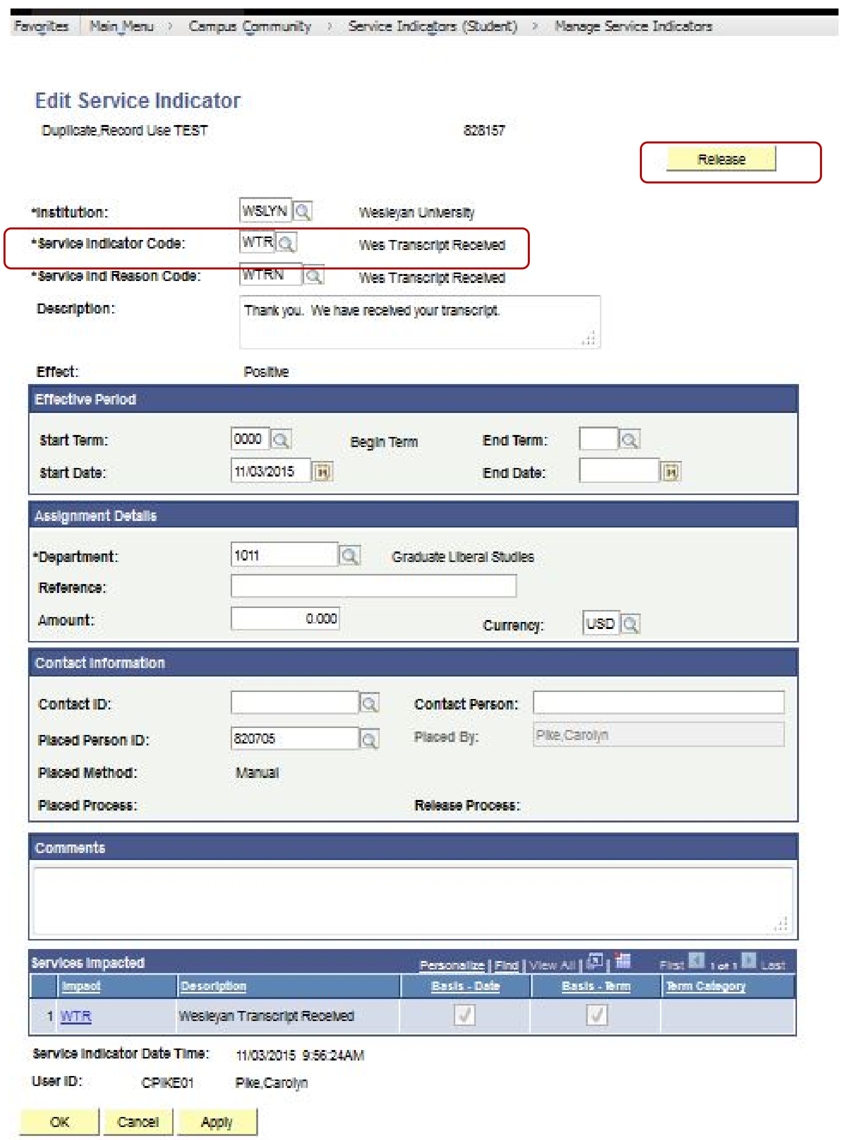
a. To release a Service Indicator, you must access the **Edit Service Indicator** page.

b. Start by opening the **Manage Service Indicators** page for the student.

c. Click on the Code link for the desired Service Indicator. In this example, it is the last Hold in the list, WTR (Wes Transcript Received).

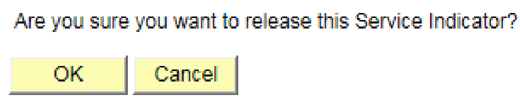


d. The **Edit Service Indicator** page opens.

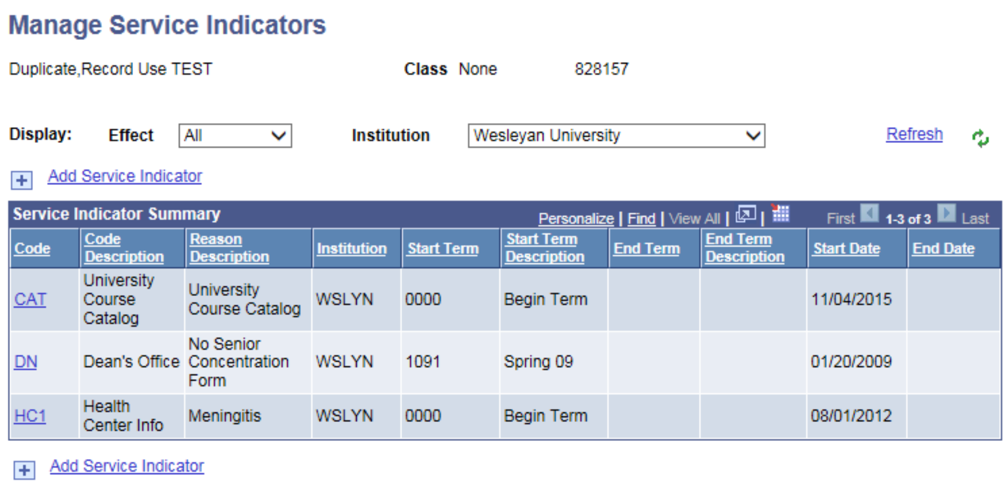


e. The following fields are specific to the **Edit Service Indicator**. Otherwise, the fields and pages are the same as described for the **Add Service Indicator** page.

f. **Release**:
   i. Available only if the user has release security for the Institution, Service Indicator, and Reason.
   ii. Click to release this Service Indicator from assignment to the ID.
   iii. You will see the following. .



   iv. Click OK, and the system releases the Service Indicator and redirects you to the **Manage Service Indicators** page, which displays an updated list of the ID's Service Indicators



Manage Service Indicators

Duplicate,Record Use TEST   Class None   828157

Display: Effect All   Institution Wesleyan University   Refresh

Add Service Indicator

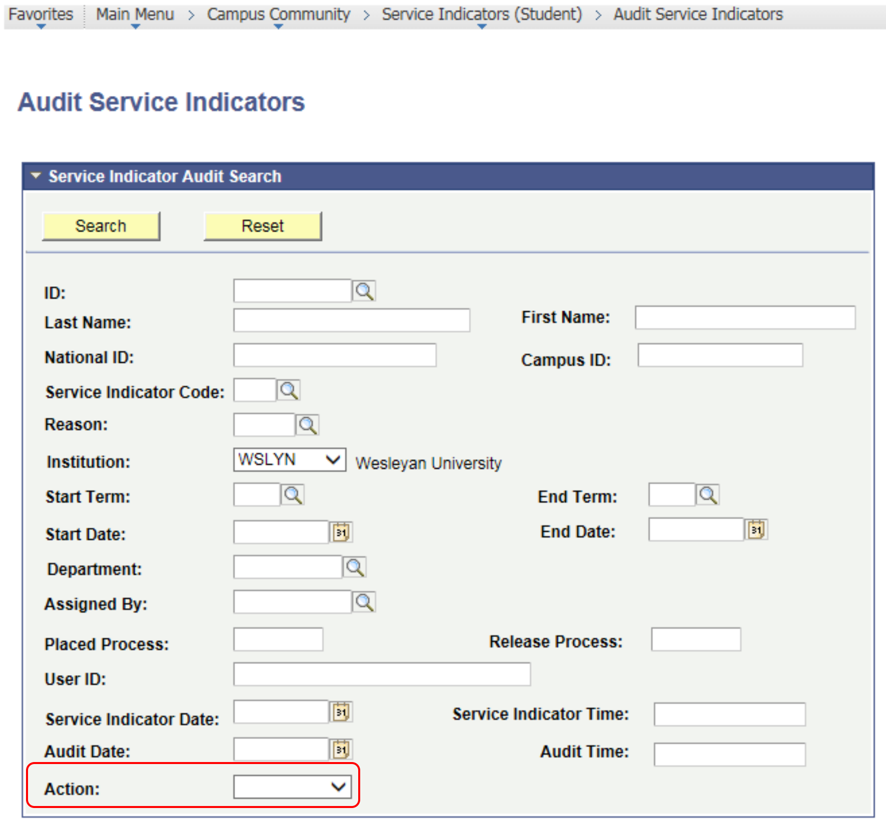
Service Indicator Summary   Personalize | Find | View All | First 1-3 of 3 Last

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
CAT	University Course Catalog	University Course Catalog	WSLYN	0000	Begin Term			11/04/2015	
DN	Dean's Office	No Senior Concentration Form	WSLYN	1091	Spring 09			01/20/2009	
HC1	Health Center Info	Meningitis	WSLYN	0000	Begin Term			08/01/2012	

Add Service Indicator

5. Service Indicator Audit

a. In PeopleSoft Campus Solutions Version 9.0 you can view the Service Indicator history for an individual through the **Audit Service Indicators** page.
b. You can enter as much or as little data as required to define your search.
   i. For example, you can enter a Service Indicator and search for all IDs to whom that indicator is assigned.
   ii. Alternatively, you can enter the Service Indicator Code, Institution, Start Term and Start Dates, and Assigned By ID and then search for all IDs within that Institution to whom the indicator was assigned by the Assigned By ID and will become valid in that term on that date.
c. Navigate to the page: **Campus Community > Service Indicators > Audit Service Indicators.** The blank page opens as follows. Note that the Institution is filled in. As mentioned earlier, this is because the **User Defaults** were set to do this.



d. **Search**:

i. Enter criteria to define the search, and then click Search.

ii. When you click Search, the system redirects you to a different view of the page, the **Service Indicator Audits** search results list view, which lists Service Indicator information based on that search.

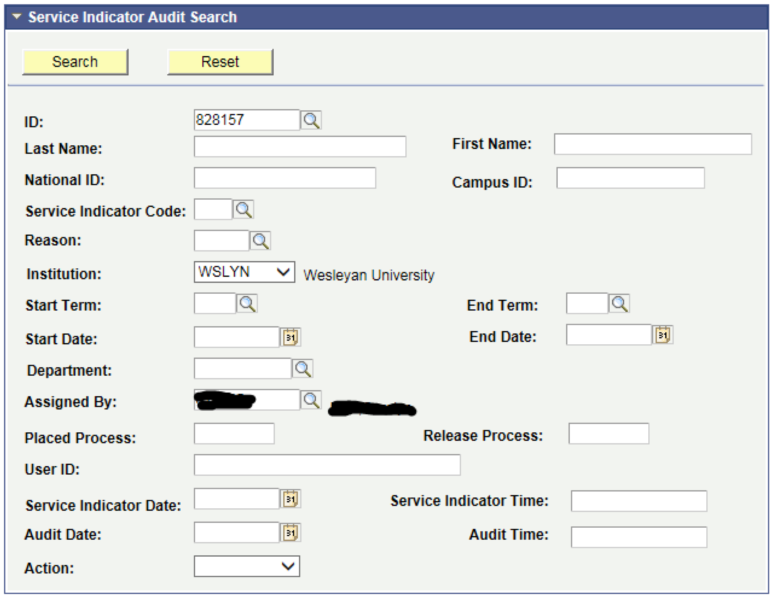
iii. You can search in many combinations on the **Audit Service Indicators** page. In addition to the lookup fields designated by the magnifying glass, you'll observe that the Action field is a dropdown which you can use to narrow your search to Add, Change or Delete.

iv. In this example, the two criteria are:

ID: 828157

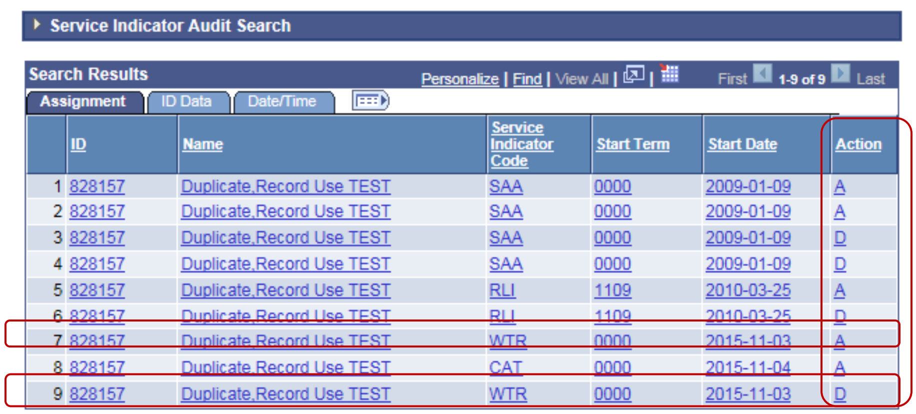
Assigned By: [the Wes ID of the person who placed/released the holds for this person]

Audit Service Indicators



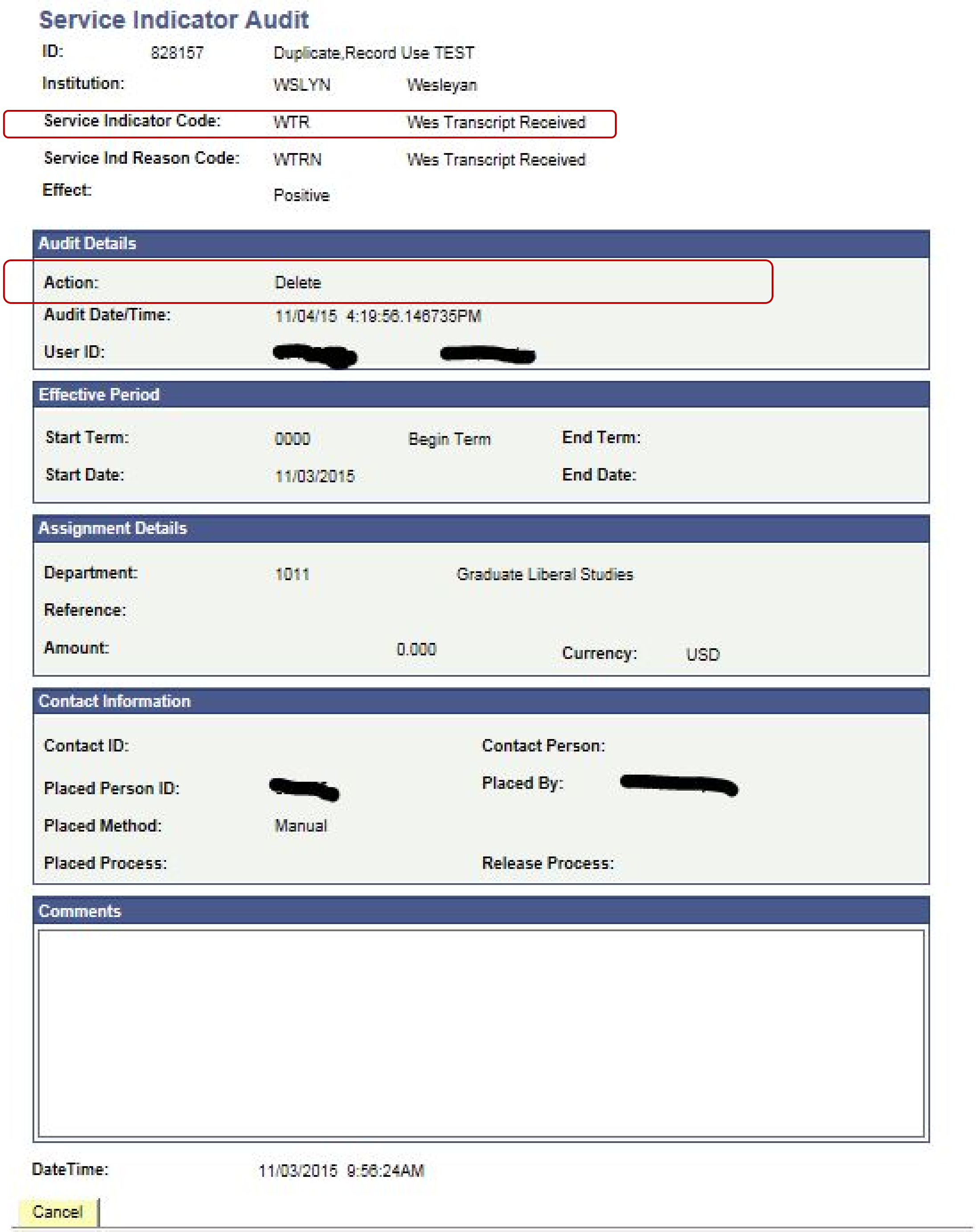
1. The resulting page when you click Search is the **Audit Service Indicators** page:

Audit Service Indicators



	ID	Name	Service Indicator Code	Start Term	Start Date	Action
1	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	A
2	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	A
3	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	D
4	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	D
5	828157	Duplicate,Record Use TEST	RLI	1109	2010-03-25	A
6	828157	Duplicate,Record Use TEST	RLI	1109	2010-03-25	D
7	828157	Duplicate,Record Use TEST	WTR	0000	2015-11-03	A
8	828157	Duplicate,Record Use TEST	CAT	0000	2015-11-04	A
9	828157	Duplicate,Record Use TEST	WTR	0000	2015-11-03	D

2. Under **Action**, the letter “A” stands for Add and “D” stands for Delete. There may also be a letter “C” standing for Change.
3. You can see that Row 7 and Row 9 reference the Service Indicator Code of WTR, Row 7 being when the Hold was added and Row 9 being when the row was deleted. If you click on Row 9, you will open the **Service Indicator Audit** page:



Service Indicator Audit

ID: 828157 Duplicate,Record Use TEST
Institution: WSLYN Wesleyan
Service Indicator Code: WTR Wes Transcript Received
Service Ind Reason Code: WTRN Wes Transcript Received
Effect: Positive

Audit Details

Action: Delete
Audit Date/Time: 11/04/15 4:19:56.146735PM
User ID: [redacted] [redacted]

Effective Period

Start Term: 0000 Begin Term End Term:
Start Date: 11/03/2015 End Date:

Assignment Details

Department: 1011 Graduate Liberal Studies
Reference:
Amount: 0.000 Currency: USD

Contact Information

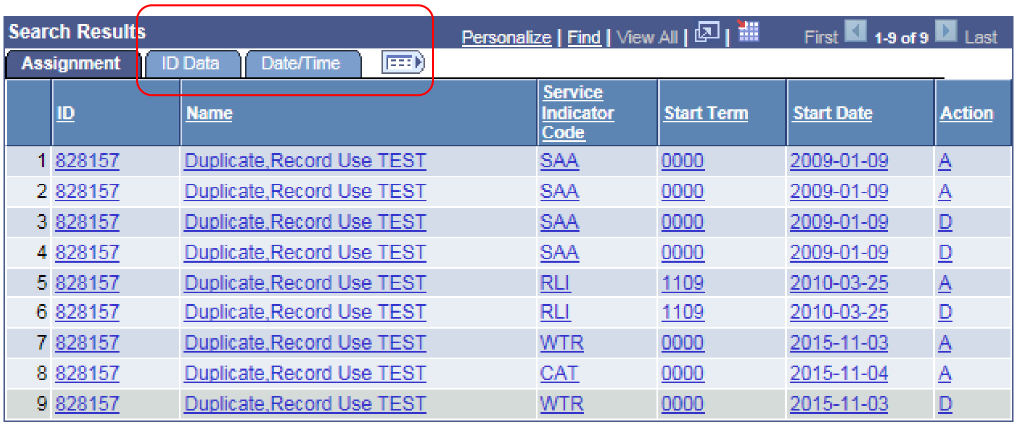
Contact ID: Contact Person:
Placed Person ID: [redacted] Placed By: [redacted]
Placed Method: Manual
Placed Process: Release Process:

Comments

DateTime: 11/03/2015 9:56:24AM

Cancel

4. To return to the **Audit Service Indicators** page, click the Cancel button.
5. When on the **Audit Service Indicators** page you can also view extended information about all of the rows by clicking on any of these tabs to the right of the Assignment tab:


Search Results — Personalize | Find | View All | First 1-9 of 9 Last

Assignment | ID Data | Date/Time

	ID	Name	Service Indicator Code	Start Term	Start Date	Action
1	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	A
2	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	A
3	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	D
4	828157	Duplicate,Record Use TEST	SAA	0000	2009-01-09	D
5	828157	Duplicate,Record Use TEST	RLI	1109	2010-03-25	A
6	828157	Duplicate,Record Use TEST	RLI	1109	2010-03-25	D
7	828157	Duplicate,Record Use TEST	WTR	0000	2015-11-03	A
8	828157	Duplicate,Record Use TEST	CAT	0000	2015-11-04	A
9	828157	Duplicate,Record Use TEST	WTR	0000	2015-11-03	D

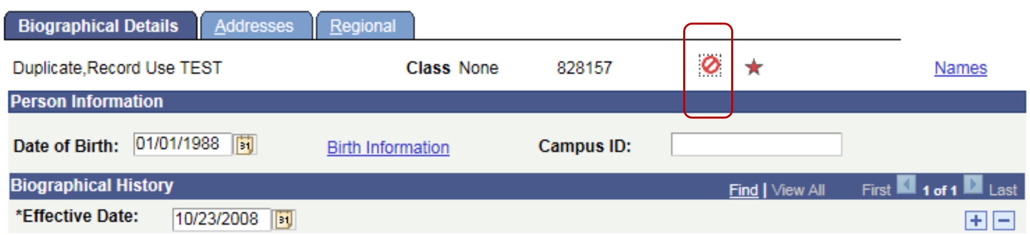
6. Service Indicator Buttons (Symbols)

a. When a service indicator is assigned to an individual, the corresponding Service Indicator button displays on each page for that individual. One or both symbols may appear:

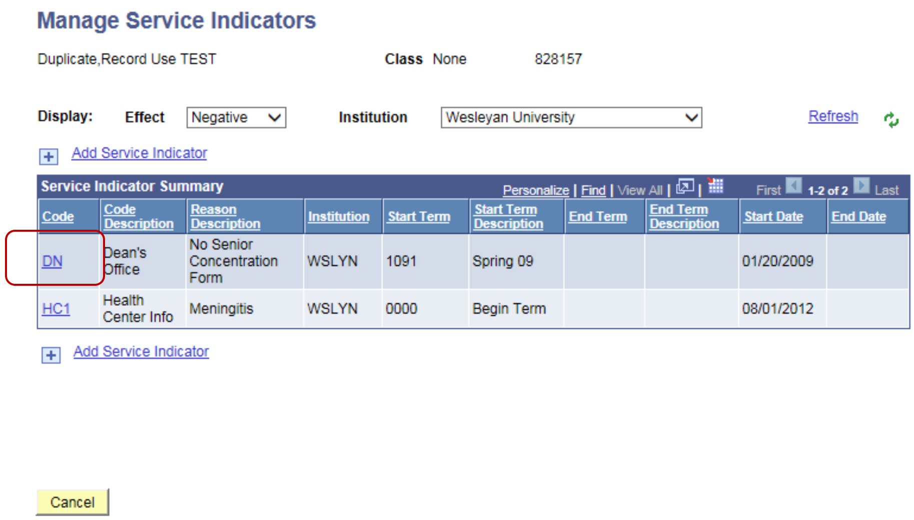
b. The symbolizes Positive Service Indicators and the symbolizes either Negative or Informational Service Indicators.

c. If you have access, you can click the Service Indicator button on any page to link to the Service Indicator Detail sub-page where you can view the details of specific service indicators corresponding to that person.

d. In this example, both positive and negative buttons appear on the following page.



e. When the negative button is clicked, the Manage Service Indicators page opens, displaying only the negative Service Indicators.



f. If you click on the Code in the first row, the **Edit Service Indicator** page opens for that Service Indicator.