

STATE OF NORTH DAKOTA

**CAMPUS COMMUNITY
SERVICE INDICATORS
VIEW, ASSIGN, REMOVE, AND AUDIT
TRAINING MANUAL**

VERSION 8.0

Disclaimer

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SERVICE INDICATORS – VIEW, ASSIGN, REMOVE, AND AUDIT



OVERVIEW

Use service Indicators to provide or limit access to services at your institution for an individual. Service Indicators can hold or prevent an individual from receiving certain services. Service Indicators consist of one or more impact values identifying the types of specific services that are restricted or provided.

Examples of negative service indicators include no check cashing privileges, enrollment verification or transcript holds, suspend library privileges, hold student card, and denied registration for classes.

Examples of positive service indicators might include check-cashing privileges, front-of-line service, use of the gym, and special services for disabled students.

Examples of other service indicators include FERPA Privacy Release and Deceased indicator.

- Negative Service Indicators: 
- Positive Service Indicators: 
- Other Service Indicators:

FERPA Service Indicators: 

Deceased Service Indicators: **DECEASED**

After you define service impacts, you can group them to define service indicators and create service indicator codes. Next, you identify reasons for applying service indicators and create codes for those reasons. When you create service indicators and reason codes, administrative users with the appropriate security can assign service indicators to individuals. They can also remove an active service

indicator from an individual's record when that service or restriction no longer applies. Automated processes can also be used to assign or remove negative service indicators.

When a service indicator is assigned to an individual, the corresponding negative or positive service indicator button appears on most pages about that individual. One button can represent one or several service indicators. Click the buttons on any of those pages to transfer to the appropriate details page where you can determine how many and which restrictions apply.

The office or department placing the Service Indicator is recorded. In most cases only the office or department placing the Service Indicator will be able to remove it.

Appropriate security must be given to those who place or remove service indicators on accounts.

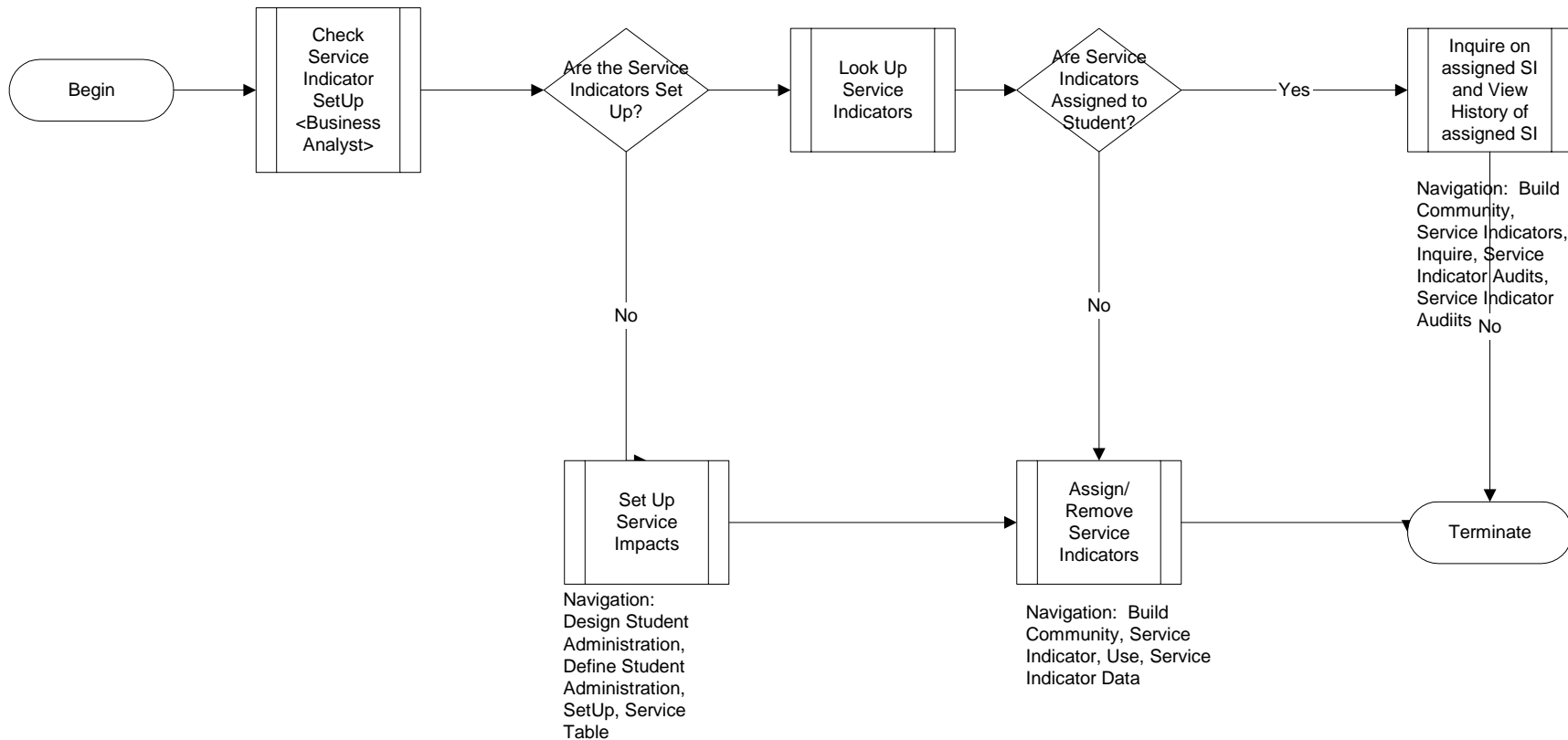
OBJECTIVES

After completing this section, you will be able to:

1. View a Service Indicator
2. Add a Service Indicator
3. Remove a Service Indicator
4. Audit Service Indicators

SERVICE INDICATOR –VIEW, ASSIGN, REMOVE, AND AUDIT BUSINESS PROCESS FLOW

This business process places Service Indicators on a Student’s Application.



WALKTHROUGH – VIEW SERVICE INDICATORS

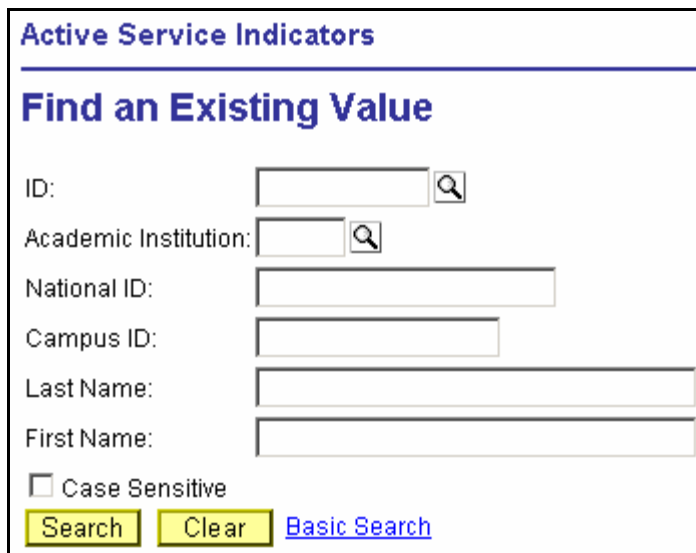
There are several ways to view active service indicators. You can select the service indicators whose details you want to view for an individual, you can view a summary of all the service indicators currently assigned to that individual, or you can view the history of any service indicators assigned to students. You can click the service indicator buttons on pages to review the positive or negative service indicators about an individual.


Watch for the Service Indicator icon to determine if a Service Indicator has been entered.

Users must be familiar with the positive and negative service indicators; and how they are placed and removed from a students application. Users working with service indicators must have appropriate security.

VIEW ACTIVE SERVICE INDICATORS

1. **Navigation:** Home > Build Community > Service Indicators (Student) > Inquire > Active Service Indicators > Service Indicator Detail



2. **Find an Existing Value**
 - a. Enter the individual's ID or a partial ID.
 - b. Enter the Academic Institution or use the  to select from the list of Academic Institutions. This will default to the institution noted in the specific user default field.
 - c. Click **Search**.

d. The **Service Indicator Detail** page is displayed.

The screenshot shows the 'Service Indicator Detail' page. At the top, there are tabs for 'Service Indicator Detail' (selected) and 'Service Indicator Summary'. Below the tabs, there are filters for 'Non-Employee', 'Non HRMS', and 'ID:'. A navigation bar includes 'Click on an item to view' and three radio buttons: 'All Service Indicators' (selected), 'Positive Service Indicators', and 'Negative Service Indicators'. Below this is a table header 'Service Indicator Detail' with 'View All', 'First', '1 of 2', and 'Last' links. The table contains one row with the following data:

| | | | |
|------------------------------|-------------------------------------|------------------------------|-----------------------|
| Academic Institution: | MASU1 Mayville State University | DateTime: | 01/08/2004 10:53:08AM |
| Service Indicator: | FSP Financial Aid Probation | Active Dt: | 01/08/2004 |
| Service Ind Reason: | PRCT Insufficient Credits Completed | | |
| Reference: | | | |
| Amount: | \$0.000 | Currency Code: | |
| Contact Person: | | | |
| Placed By: | | | |
| Placed Method: | Background | | |
| User ID | shanson | | |
| Department: | Business Office | | |
| Placed Process Name: | FA_SAP | Release Process Name: | |

At the bottom, there are navigation buttons: 'Return to Search', 'Next in List', and 'Previous in List'. A footer link reads 'Service Indicator Detail | Service Indicator Summary'.

e. Click the **Service Indicator Summary** tab to display the summary page.

The screenshot shows the 'Service Indicator Summary' page. At the top, there are tabs for 'Service Indicator Detail' and 'Service Indicator Summary' (selected). Below the tabs, there are filters for 'Non-Employee', 'Non HRMS', and 'ID:'. A navigation bar includes 'Click on an item to view' and three radio buttons: 'All Service Indicators' (selected), 'Positive Service Indicators', and 'Negative Service Indicators'. Below this is a table header 'Service Indicators Summary' with 'View All', 'First', '1-2 of 2', and 'Last' links. The table contains two rows of data:

| | | | |
|---------------------------|-----------------------------|---------------------|--------------------------------|
| DateTime: | 01/08/2004 10:53:08AM | Institution: | Mayville State University |
| Active Date: | 01/08/2004 | Department: | Business Office |
| Service Indicator: | FSP Financial Aid Probation | Reason: | Insufficient Credits Completed |
| <hr/> | | | |
| DateTime: | 01/05/2004 3:30:13PM | Institution: | Mayville State University |
| Active Date: | 01/05/2004 | Department: | |
| Service Indicator: | ADM Admission File Hold | Reason: | Admission File Hold |

At the bottom, there are navigation buttons: 'Return to Search', 'Next in List', and 'Previous in List'. A footer link reads 'Service Indicator Detail | Service Indicator Summary'.

WALKTHROUGH – ASSIGN OR REMOVE SERVICE INDICATORS

Before adding a Service Indicator, verify if it is already in place. (See previous pages “View Active Service Indicators”.)

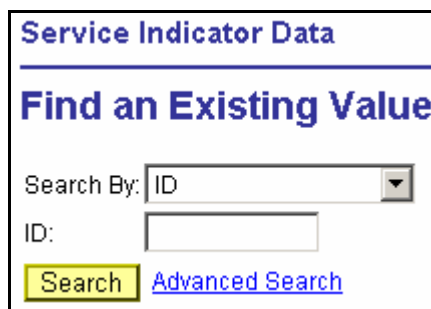
Your user profile determines which Service Indicators you will be able to add.

The office or department placing the Service Indicator is recorded.

In most cases only the office or department placing the Service Indicator will be able to remove it.

ASSIGN A SERVICE INDICATOR

1. **Navigation:** Home > Build Community > Service Indicators (Student) > Use > Service Indicator Data



The screenshot shows a web interface titled "Service Indicator Data". Below the title is a section "Find an Existing Value". It contains a "Search By:" dropdown menu with "ID" selected, an "ID:" text input field, a yellow "Search" button, and a blue "Advanced Search" link.

2. In the Search Dialog Box, key in the **ID** and click **Search**. (A partial ID can be entered from the list of IDs).
3. Select the student record from the listing.

- The **Service Indicator Data** page is displayed.

- Enter the Academic Institution . The Academic Institution should be displayed by default.
- Enter appropriate **Service Ind Active Term** .
This is only relative to enrollment holds. If left with "0000", as mentioned above all terms are impacted -- past, present and future. Result: Student cannot retroactively be enrolled in courses for previous terms. If a term code is specified, the hold applies to that and all future terms until hold is removed.
- Click the next to the **Service Indicator Cd** to select the appropriate result of the Service Indicator that you would like. (i.e. Enrollment Hold" or "Enrollment Barred").
- Click the next to the **Service Ind Reason Cd** to select your office or department as assigning the Service Indicator. (Options available here are dependent on operator security.)
- In **Active Dt**, enter the date that the Service Indicator is to take place. (aka "Effective Date")
- Use the scrollbar to move through all Service Indicators.
Note: You will see the negative or positive Service Indicator button(s). You can also view Service Indicators in any panel where you are

viewing student data and a related Service Indicator is in place. If you see one of these buttons, simply click on it to open its corresponding summary window: Information displayed includes view who created the Service Indicator.

11. Click **SAVE** to commit your changes to the database.
12. Go to **Use** and then back into **Service Indicator Data** to view the Service Indicator sign as been assigned.

REMOVE A SERVICE INDICATOR

Only the office or department that placed the Service Indicator will be able to remove it.

To view Service Indicators that have been removed, see “Auditing Service Indicators”.

1. **Navigation:** Home > Build Community > Service Indicators (Student) > Use > Service Indicator Data

2. In the Search Dialog Box, key in the **ID** and press **Enter**.

Service Indicators

ID: [.....]

Service Indicator Data View All First 1 of 1 Last

DateTime: 03/28/2002 8:58:48PM *Institution: PSUNV PSU [+ -]

Service Ind Active Term: 0000 Begin Term - Srv Indicatr Use *Active Dt: 03/28/2002 [BT]

*Service Indicator Cd: DC Deceased indicator

*Service Ind Reason Cd: DECEA Deceased label

Amount: 0.000 Currency: USD Dollar

Contact ID: 8664 Contact Person: Carroll,Bruce

Placed Person ID: 8664 Placed By: Carroll,Bruce

*Department: 10900 Operations Administration

Comments: [Empty text area with scrollbar]

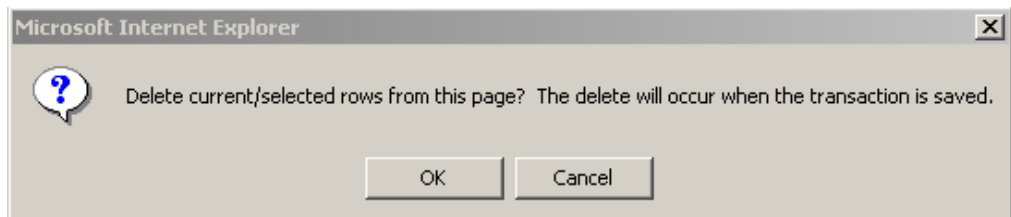
Placed Method: Manual Placed Prcs: Release Prcs:

User ID: PS Carroll,Bruce

- Use the scrollbar to find the Service Indicator to be removed. View All or click through each record for the student selected.

Service Indicator Data View All First 2 of 2 Last

- Click [-] button.
Note: This removes the Service Indicator from the panel you are in, but actually retains it for auditing purposes.



- Click **SAVE** to commit your changes to the database.
- Go to **Use** and then back into **Service Indicator Data** to view the Service Indicator sign has been removed.

WALKTHROUGH – AUDIT SERVICE INDICATORS

Use Service Indicator Audit to view a history of Service Indicators placed on a student record or to view the history of Service Indicators assigned by an individual.

This panel displays Service Indicators currently in place as well as those that have been removed.

VIEW HISTORY OF SERVICE INDICATORS ON A STUDENT RECORD

7. **Navigation:** Home > Build Community > Service Indicators (Student) > Inquire > Service Indicator Audits
8. The **Service Indicator Audits** page is displayed.

Service Indicator Audits

Find an Existing Value

User ID:

Date and Time Stamp:

EmplID:

Service Indicator Cd:

Service Indicator Date Time:

Academic Institution:

Service Ind Active Term:

Service Indicator Active Date:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

9. In the Search Dialog Box, key in the **EmplID**.
10. Enter the **Academic Institution**. Press **Enter**.
11. The **Service Indicator Audits** page is displayed for the ID selected.

| Service Indicator Audits | | | |
|--|-----------------------------|--------------------------------|-------------------------------|
| ID: | | | |
| Service Indicator Cd: | SF1 | Non Payment of Tuition and Fee | Positive Service Indicator? N |
| Service Ind Reason Cd: | TUT | | |
| Reference/Checklist: | | | |
| Amount: | \$0.000 | Currency: | USD |
| <hr/> | | | |
| Service Ind Date Time: | 11/21/2003 2:20:11PM | | |
| Service Ind Active Term: | 0410 | 2003 Fall | |
| Active Dt: | 11/21/2003 | | |
| Institution: | MASU1 | | |
| <hr/> | | | |
| Contact ID/Name: | | | |
| Placed Person ID/Name: | 0408803 | | |
| Department: | 3100 | | |
| Placed Method: | Manual | | |
| Placed Process Name: | Release Process Name: | | |
| <hr/> | | | |
| User ID | hkolson | | |
| Audit Date/Time: | 11/21/2003 2:22:40.060000PM | Action: | Add |
| Return to Search Next in List Previous in List | | | |

- The Service Indicator Audit information is displayed at the bottom of the page.
- If there is more than one indicator to view, use the **Next in List** and **Previous in List** buttons to move through each of the records.