

STATE OF NORTH DAKOTA

CAMPUS COMMUNITY
SERVICE INDICATORS
SET UP
TRAINING MANUAL

VERSION 8.0

Disclaimer

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SERVICE INDICATORS – SET UP

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.

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.

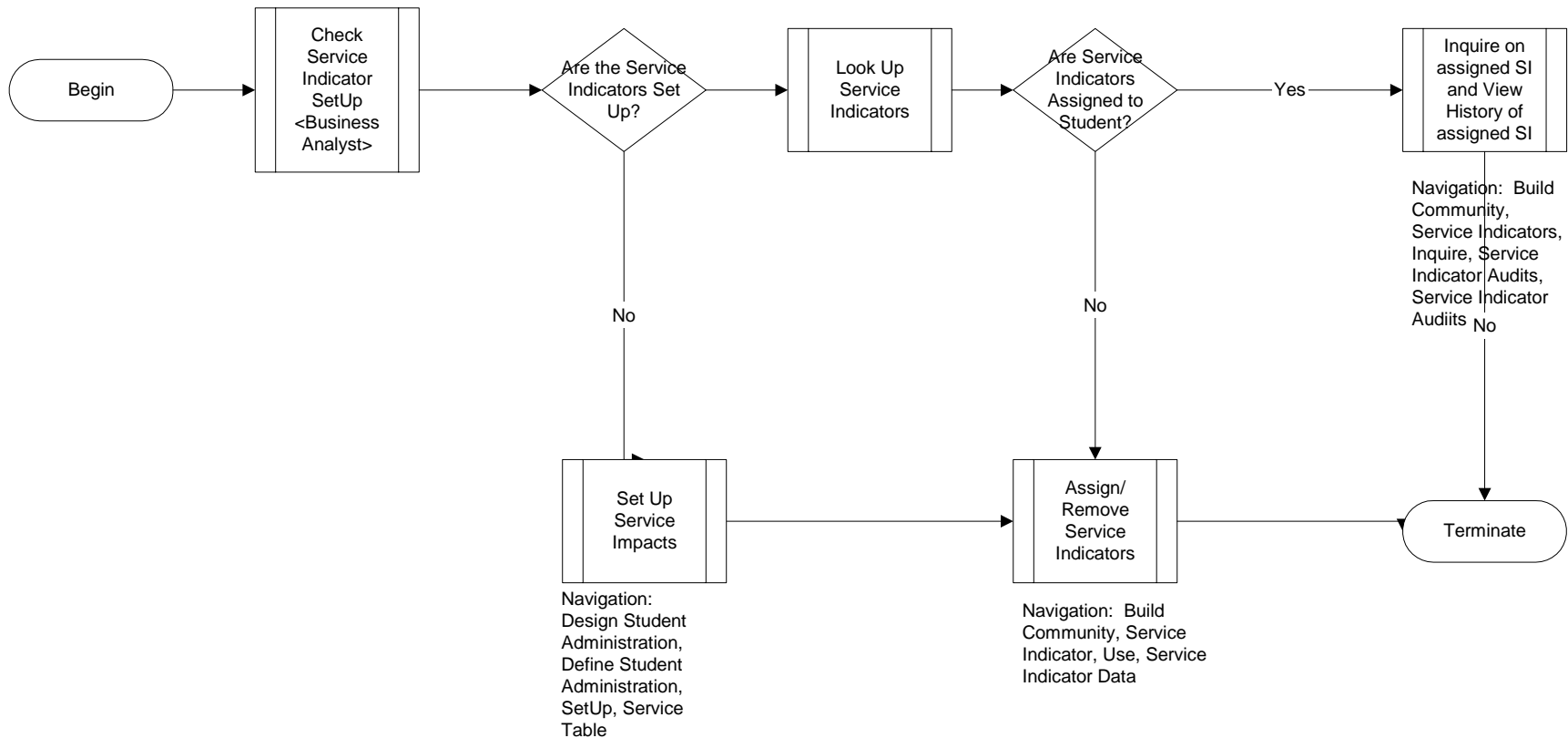
OBJECTIVES

After completing this section, you will be able to:

1. Set Up a Service Indicator Table
2. Set Up a Service Indicator

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

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



WALKTHROUGH – SERVICE INDICATOR TABLE SET UP

Service indicators consist of service impacts and service indicator reasons that make each service indicator unique.

To set up service indicators three steps need to be completed when adding:

1. **Define service impact values** on the Service Table page.
2. **Define service indicator codes** on the Service Indicator Codes page. (This includes attaching service impact values to each service indicator.)
3. **Define service indicator reason codes** for each service indicator on the Service Indicator Reasons page.

SERVICE TABLE

To use the PeopleSoft delivered service impact related services (such as blocking enrollment), you must set up and **NEVER** modify the following service impact codes for every institution in your system:

- AENR – No Enrollment, Drop Allowed
- CENR – Prevents all enrollment
- ENVER – No Enrollment Verification
- IENR – Prevent Initial Enrollment

These service impacts each have a unique usage within the system.

ADD SERVICE IMPACT VALUE

- Navigation:** Home > Design Student Administration > Define Student Administration > Setup > Service Table
OR
 Home > Manage Student Records > Manage Academic Records > Setup > Service Table
OR
 Home > Manage Student Records > Track Student Careers > Setup > Service Table
- The **Find an Existing Value** page is displayed.

- Click on **Add a New Value**.

- Enter Academic Institution .
Note: When the is displayed, you can type in a partial Academic Institution name and then press . The system will display the matches for the partial Academic Institution name entered **OR** you can leave the Academic Institution name blank and press . The **Lookup Academic Institution** page will be displayed and you can press **Lookup** to display the Academic Institution list to select from. You will

automatically return to the **Add a New Value** page after selecting the Academic Institution.

5. Enter Service Impact.
6. Click **Add**.
7. The **Service Table** page is displayed.

Service Table

Academic Institution: MASU1 Mayville State University

Service Impact: ADCON

Service Details

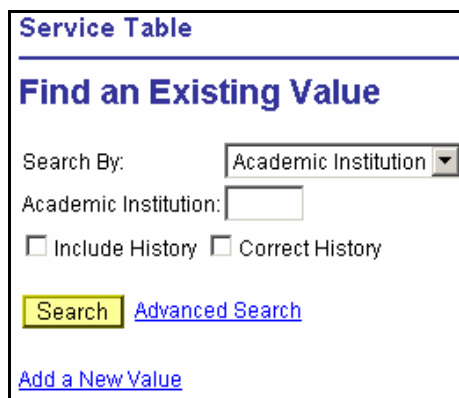
*Effective Date	*Status	*Description	Short Description	Positive Service Impact	System Function
01/02/1900	Inactive	Do Not Use	GracPeriod	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Save](#)
[Return to Search](#)
[Add](#)
[Update/Display](#)
[Include History](#)
[Correct History](#)

8. **Service Details**
 - a. **Effective Date:** Enter the effective date.
 - b. **Status:** Select the Status from the drop box.
 - c. **Description:** Enter a description for the Service Impact Code.
 - d. **Short Description:** Enter a short description.
 - e. **Positive Service Impact:** Select to indicate that the impact provides a service (as opposed to denying or restricting one).
 - f. **System Function:** Select this check box to identify the service impact as one that is called by PeopleSoft program logic. For example, you must define the *CENR* service impact for each institution in our system because it is used by enrollment process logic.
 - g. Click **SAVE** to commit your changes to the database.

REMOVE SERVICE IMPACT VALUE

1. **Navigation:** Home > Design Student Administration > Define Student Administration > Setup > Service Table
OR
Home > Manage Student Records > Manage Academic Records > Setup > Service Table
OR
Home > Manage Student Records > Track Student Careers > Setup > Service Table
2. The **Find an Existing Value** page is displayed.



The screenshot shows a web form titled "Service Table" with a sub-header "Find an Existing Value". Below the header, there is a "Search By:" label followed by a dropdown menu currently showing "Academic Institution". Underneath is a text input field labeled "Academic Institution:". There are two checkboxes: "Include History" and "Correct History", both of which are unchecked. At the bottom of the form, there is a yellow "Search" button, a blue link for "Advanced Search", and another blue link for "Add a New Value".

3. Click on the drop box for **Search By**. Select **Service Impact**.



This screenshot is identical in layout to the previous one, but the dropdown menu for "Search By:" now displays "Service Impact". The text input field is now labeled "Service Impact:". The "Include History" and "Correct History" checkboxes remain unchecked. The "Search" button, "Advanced Search" link, and "Add a New Value" link are still present at the bottom.

4. Enter the **Service Impact** to be removed.

- The **Service Table** page is displayed for the selected Service Impact.


Service Table

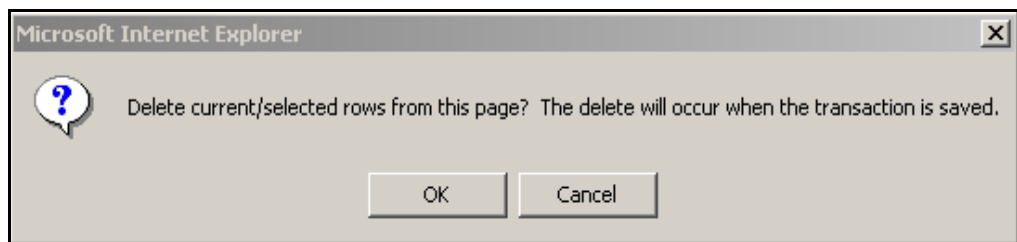
Academic Institution: MASU1 Mayville State University

Service Impact: ABC

Service Details

*Effective Date	*Status	*Description	Short Description	Positive Service Impact	System Function
05/14/2004	Active	ABC Test Service Impact	ABC	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click on the **Correct History** button on the lower right.
- Click on the  button, in the **Service Details** section, to delete. The following message will be displayed to indicate the delete will occur when the transaction is saved.



- Click **OK** to continue the delete.
- Click **SAVE** to commit your changes to the database.

WALKTHROUGH – SERVICE INDICATOR SET UP

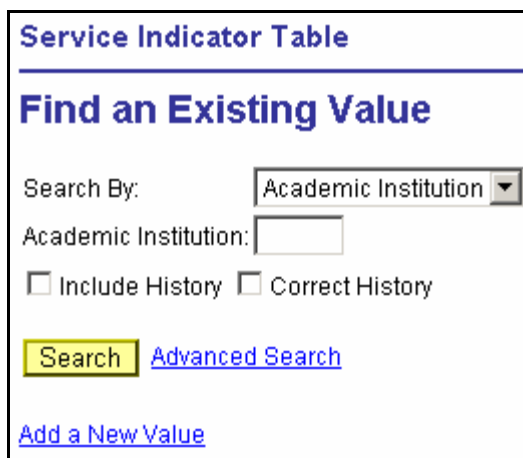
At this point, you have defined service impacts, you have identified reasons for applying a service indicators, and have created codes for those reasons.

After 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.

CREATE SERVICE INDICATOR CODE

Create service indicators code, for both positive and negative service indicators. You can also remove service indicators on this page.

1. **Navigation:** Home > Design Student Administration > Define Student Administration > Setup > Service Indicator Tables
OR
Home > Manage Student Records > Track Student Careers > Setup > Service Indicator Tables
OR
Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Tables
2. The **Service Indicator Table – Find an Existing Value** page is displayed.



ADD A NEW SERVICE INDICATOR CODE

1. Click on **Add a New Value**.

Service Indicator Table

Add a New Value

Academic Institution:

Service Indicator Cd:

Add

[Find an Existing Value](#)

2. **Add a New Value**

- a. Enter Academic Institution .
- b. Enter Service Indicator Code.
- c. Click **Add**.
- d. The **Service Indicator Codes** page is displayed.

Service Indicator Codes | Service Indicator Reasons

Academic Institution: MASU1 Mayville State University

Service Indicator Code: ABC

Service Indicator Details View All First 1 of 1 Last

*Effective Date: 05/10/2004 *Status: Active

*Description:

Short Description:

Default Reason:

Deceased Indicator

Display Deceased Label

Positive Service Indicator

Set No Default

Service Indicator Impact View All First 1 of 1 Last

*Service Impact:

Term Category:

Description:

Save **Add** **Update/Display** **Include History** **Correct History**

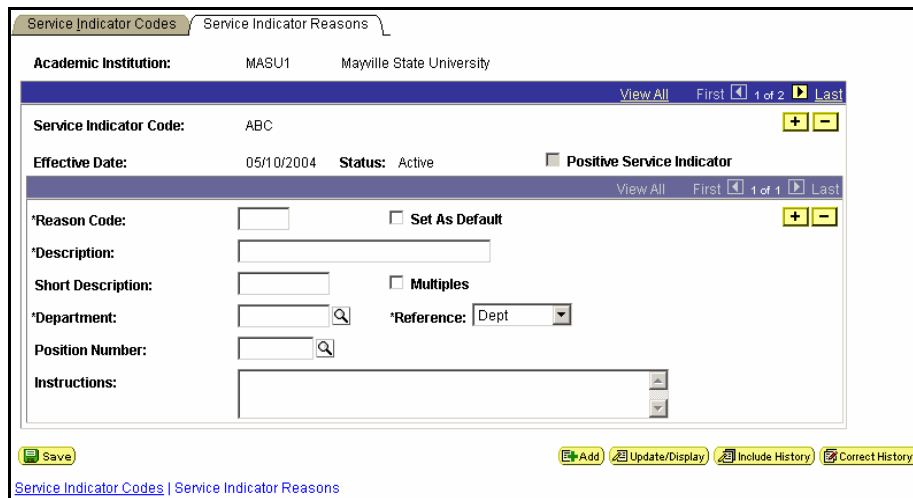
[Service Indicator Codes](#) | [Service Indicator Reasons](#)

3. In the **Service Indicator Details** section, complete the required information:
 - a. **Effective Date:** Enter the effective date.
 - b. **Status:** Select the Status from the drop box.
 - c. **Description:** Enter a description for the Service Indicator Code.

- d. **Short Description:** Enter a short description.
 - e. **Deceased Indicator:** Select to display the word *DECEASED* at the top of pages about individuals to whom this indicator is assigned in the future.
WARNING: Select the Display Deceased Label check box **only** when creating a death service indicator. Selecting this for any other service indicator could cause the system to apply the deceased label to individuals who are not deceased. If this happens, substantial manual effort may be required to remove the deceased label from each individual's record.
 - f. **Positive Service Indicator:** Select to indicate that the service indicator identifies a privilege or service to be provided. For example, if you define a positive service indicator of *Conference Guest* and associate the service impact of *Front of Line*, then any person assigned the Conference Guest service indicator should receive front-of-line service at your institution.
 - g. **Set No Default:** Select to prevent the system from displaying default values in the Service Indicator Reason Code and Department fields on the Service Indicators page.
4. In the **Service Indicator Impact** section, complete the required information:
- a. **Service Impact:** Identifies the service that is either restricted or provided by this service indicator.
 - b. **Term Category:** Specify the single term category for which the service impact is valid. If you do not specify a term category, the service impact becomes valid for *all* terms.
Values for this field are delivered with your system as translate values. You can modify these translate values.
 - c. **Description:** Enter comments to further describe or identify the service impact as it relates to this service indicator.

SERVICE INDICATOR REASONS

1. Select the **Service Indicator Reasons** tab.
2. The **Service Indicator Reasons** page is displayed.



3. On the **Service Indicator Reasons** page, define and associate service indicator reasons.

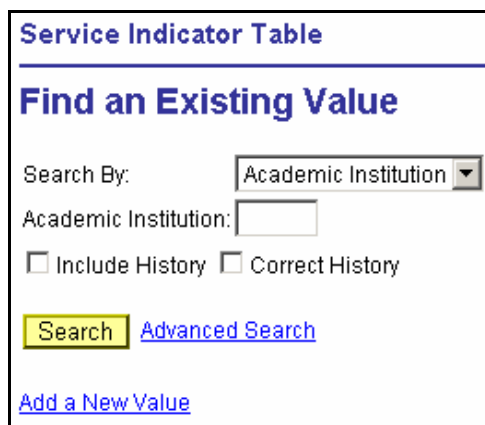
- a. **Positive Service Indicator:** Indicates that the service indicator identifies a privilege or service to be provided (as opposed to denied or restricted).
- b. **Reason Code:** Enter a code for the service indicator reason that you are creating.
- c. **Set As Default:** Select to associate this reason with the service indicator. You can select only one default reason for each service indicator.
When you save the page, the system displays this reason beside the Default Reason field label on the Service Indicators Codes page. When you assign the service indicator on the Service Indicator Data 1 page, the system displays this as the default reason (unless the Set No Default check box next to the Default Reason field on the Service Indicators Codes page is selected, in which case, no default reason displays).
- d. **Description:** Type in the description for the code.
- e. **Short Description:** Type in the short description for the code.

- f. **Multiples:** Select to indicate that multiples of this service indicator can be assigned to the same student.
For example, if a student has many overdue library fines, selecting this option will allow the service indicator to be entered for each fine.
 - g. **Department:** Select the department at your institution, from the Department Table page, that is responsible for this service indicator.
 - h. **Reference:** Specify the entity (*Department, Department and Instructor, or Department Bill # and Instructions*) that identified the need for this service indicator.
Values for this field are delivered with your system as translate values. You can modify these translate values.
 - i. **Position Number:** Select the ID of the person or office that identified the need for this service impact.
 - j. **Instructions:** Enter comments or instructions to further describe or define this service indicator reason, or to identify what an individual must do to qualify for the removal of a negative service indicator.
The text that you enter here appears as the instructions for this hold on the Holds Details page in PeopleSoft Personal Portfolio Collaborative Application.
4. Click **SAVE** to commit your changes to the database.

CORRECT OR REMOVE SERVICE INDICATOR CODES

You may correct or remove a service indicator code, for both positive and negative service indicators.

- Navigation:** Home > Design Student Administration > Define Student Administration > Setup > Service Indicator Tables
OR
 Home > Manage Student Records > Track Student Careers > Setup > Service Indicator Tables
OR
 Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Tables
- The **Service Indicator Table – Find an Existing Value** page is displayed.



Service Indicator Table

Find an Existing Value

Search By:

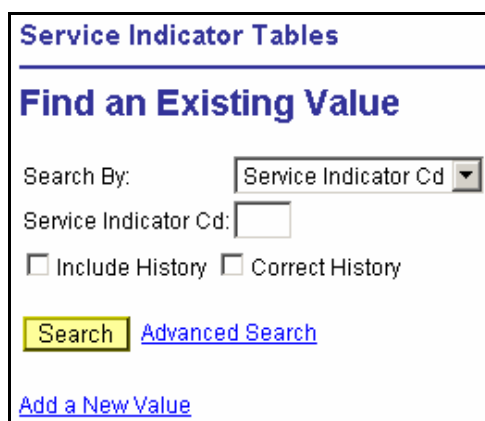
Academic Institution:

Include History Correct History

[Advanced Search](#)

[Add a New Value](#)

- Click on the drop box for **Search By**. Select **Service Indicator Cd**.



Service Indicator Tables

Find an Existing Value

Search By:

Service Indicator Cd:

Include History Correct History

[Advanced Search](#)

[Add a New Value](#)


- Enter the **Service Indicator Code** to be corrected or removed.

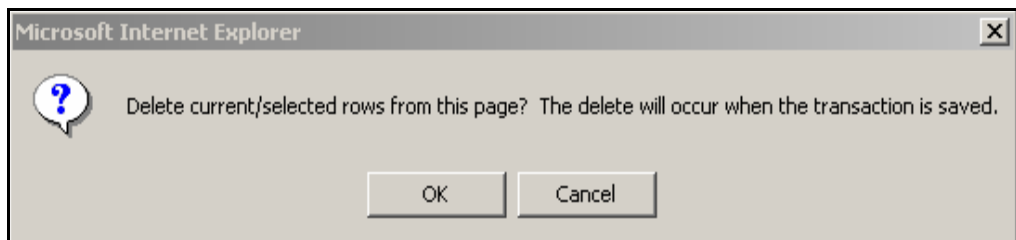
5. Click on **Search**.
6. The **Service Indicator Codes** page will be displayed for the selected Service Indicator Code.

To CORRECT SERVICE INDICATOR CODES

1. Click on the **Correct History** button on the lower right.
2. Correct data in the desired fields.
3. Click **SAVE** to commit your changes to the database.
4. To verify the Service Indicator Code was corrected you can exit the page and return to view the changes were saved.

To REMOVE SERVICE INDICATOR CODES

1. Click on the **Correct History** button on the lower right.
2. Click on the  button, in the **Service Indicator Details** section, to delete. The following message will be displayed to indicate the delete will occur when the transaction is saved.



3. Click **OK** to continue the delete.

4. The **Effective Date** and **Status** fields will display data and all other fields will be blank.
5. Click **SAVE** to commit your changes to the database.