Adding Service Indicators to a Student’s Record

Overview

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

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

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

Steps

Add Service Indicators

1. Navigate to Service Indicators using one of these paths:
   - Campus Community > Service Indicators (Student) > Manage Service Indicators
   - Self Service > Administrative Center (click view data for students) and enter the ID) > General Info tab, click edit service indicators.

2. Enter the appropriate ID for the student or Last Name and First Name.

3. Click Search. Results are returned by career/student. If multiple results are returned, select any of the rows for that student.

4. The Manage Service Indicators page will be displayed.
Adding Service Indicators to a Student’s Record

5. Verify the **Effect** field displays “All” to make sure that the Service Indicator you want to add is not already listed. If you change the value in the **Effect** field, you must click **Refresh** for the change to take effect. The **Effect** field is a filter. When you change it and click **Refresh**, the grid will change based on your filter criteria.

   - If you accessed the **Manage Service Indicators** page from the **Campus Community** menu, the **Effect** field will default to **All**.
   - If you accessed the **Manage Service Indicators** page from the positive Service Indicator icon (🌟) on one of the student pages, the **Effect** field will default to **Positive** and only the positive service indicators will be displayed.
   - If you accessed the **Manage Service Indicators** page from the negative Service Indicator icon (⭕) on one of the student pages, the **Effect** field will default to **Negative** and only the negative service indicators will be displayed.

6. (Optional) Select **Institution** from the drop down list (to see only service indicators for your institution) and click **Refresh** for the change to take effect. This field will automatically populate when your user defaults are set for institution.

7. Click **View All** to see all service indicators (including multi-institutional service indicators).

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

8. Click **Add Service Indicator**.

9. The **Add Service Indicator** page will be displayed.
10. Enter the **Institution**. This field may automatically populate if your user defaults are set for institution.

11. Enter the **Service Indicator Code** or click ![search](image) to select from the list.

12. Enter the **Service Indicator Reason Code** or click ![search](image) to select from the list. Only the reason codes that are associated with the specific service indicator and for which you have security will be available.

13. In the **Effect** field, the system will automatically display either **Positive** or **Negative** whichever effect is associated with the service indicator you choose.

14. Enter the **Start Term** or **Start Date** the service indicator should take effect. **Start Date** will default to the system date.

**NOTE:** A service indicator can be term-based or date-based. They are placed or released based on the start and end information that you enter.
Adding Service Indicators to a Student’s Record

- Term: The impact will start and end for the terms that you specify. For example, if you enter a service indicator with the Start Term of 4082 and an End Term of 4082, the service impacts will be in effect only for the term of 4082. If you leave the Start Term as 0000, the term-based impacts will be in effect for all terms. A Start Term value of 9999 means that term-based impacts will never take effect.

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

- Both the Term and Date must be ‘TRUE’ for impact and for the service indicator to display for the student and administrators in Self-Service.

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

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

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

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

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

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

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

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

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

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

23. (Optional) In the Services Impacted area click the code in the Impact column to access the Service Impact Description page, where you can view details about the impact associated with that service indicator. Click Return to return to the previous page.

24. Both the Basis - Date and Term check box will be selected to support IU processes. Impacts occur by Term if Start Term is entered. Otherwise, impact will start according to Start Date.
Adding Service Indicators to a Student’s Record

Reminder: if no values are entered for the End Term or End Date fields, then the impact will remain in effect until manually released.

25. The system automatically displays the current day and time when the service indicator was assigned. The system also tracks and displays the User ID of the user who is entering or changing information on the page.

26. Click OK or Apply to save your changes. If you have not completed all the required fields, you will receive an error message.

If you can’t see the service indicator you just added, in the Effect field, select ALL and click Refresh.