

CSU CI Service Indicator Usage

Initial Service Indicators:

Service Indicator	Impact
Remediation (ELM, EPT, EBL, RNM)	Warning message on Self Service, does not prevent Enrollment Actions
Immunization (IMZ)	Prevent Enrollment
Academic Standing	?
Financial Holds	?

1.0 Assigning Service Indicators

There are many locations from which you can place or release a service indicator on a student's record. This will be contingent on the security access that the user has been granted. Below is a list of the locations:

- Administer Financial Aid, Apply for Financial Aid, Use, Service Indicator Data, Service Indicator Data 1
- Administer Financial Aid, Package and Disburse Aid, Use, Service Indicator Data, Service Indicator Data 1
- Manage Student Financials, Maintain Customers, Use, Service Indicator Data, Service Indicator Data 1
- Manage Student Records, Manage Academic Records, Use, Service Indicator Data, Service Indicator Data 1
- Manage Student Records, Track Student Careers, Use, Service Indicator Data, Service Indicator Data 1

The page that is displayed below is one of the locations for placing or releasing service indicators

Navigation: Manage Student Records → Manage Academic Records → Use → Service Indicator Data

Service Indicators

Alejandra Harlin

ID: 100024648



Service Indicator Data

View All First 1 of 1 Last

DateTime:	06/04/2003 8:31:44AM	*Institution:	CICMP	CI		
Service Ind Active Term:	2028	Fall 2002	*Active Dt:	06/04/2003		
*Service Indicator Cd:	EPT	English Remediation Required				
*Service Ind Reason Cd:	EPT1	EPT1				
Amount:	0.000	Currency:	USD	Dollar		
Contact ID:		Contact Person:				
Placed Person ID:		Placed By:				
*Department:	540	Student Recruitment & Admission				
Comments:	<div style="border: 1px solid gray; height: 60px;"></div>					
Placed Method:	Manual	Placed Prcs:		Release Prcs:		
User ID	CITEST					

1.1.1 Place Service Indicators

1. After you have selected the student you want to place or release a service indicator on.
2. The institution and the current date will default in.
3. If you want to future date the service (the system will activate it at the chosen future date) change the default date. When you future date a service indicator the icon will not appear on the student's record until the indicator is active.
4. You can also choose to specify a specific term the service indicator is active for. A good example would be to have an advising service indicator be active for the student's first term. If you do not designate a term the service indicator will be valid for all terms.
5. Select a service indicator code from the list that is displayed after clicking on the magnifying glass.
6. Select a service indicator reason code from the list that is displayed after clicking on the magnifying glass.
7. If there is a monetary amount associated with the service indicator (i.e. – a library fine or parking ticket) that can be entered.
8. If you want to designate a contact they must be in the database. The choice of many schools is to specify the office and a general phone number in the comments section rather than have one individual listed. The choice is yours.

9. Save the page.
10. To add additional service indicators to the user, click on the “+” sign to insert another row and repeat the above process.
11.  The Negative Service Indicator button at the left will display on a page after a negative service indicator is assigned to a student and is currently effective for them.
12.  The Positive Service Indicator button at the left will display on a page after a positive service indicator is assigned to a student and is currently effective for them.

1.1.2 Release Service Indicators

1. To release a service indicator, you must first have permission to release it. If you get the error message you do not have access to delete the specific service indicator, and you need to have that access; see the whoever is maintaining this security for your campus and have them grant you the access.
2. Now click on the minus button and the row will be deleted.
3. Save the page.
4. If there is more than one service indicator repeat the process saving after each deletion.
5. If all of the service indicators have been deleted the icons will also no longer appear once you have tabbed out of this page.

2.0 Review Service Indicators

There are many locations in the system where you can review the active service indicators. Where each person can do this will be based on the security from the permission lists they have been granted. It is also possible to allow students to review their own service indicators if you build that into the Self-Service access that is developed and granted to them (Refer to the SA Student Security Setup Guide, ver. 8.0 in the System wide folder on the CMS website).

2.1 Service Indicator Detail

The Service Indicator Detail page allows you to review the details of the service indicators currently on a student based on three different options. You can select to view all of the service indicators, just the positive or just the negative service indicators.

Navigation: Administer Financial Aid → Apply for Financial Aid → Inquire → Service Indicator Data → Service Indicator Data

[Home](#) > [Administer Financial Aid](#) > [Apply for Financial Aid](#) > [Inquire](#) > **Active Service Indicators**

Service Indicator Detail		Service Indicator Summary	
Harlin,Alejandra		Non-Employee	Non HRMS
		ID:	100024648
Click on an item to view			
<input checked="" type="radio"/> All Service Indicators		<input type="radio"/> Positive Service Indicators	
<input type="radio"/> Negative Service Indicators			
Service Indicator Detail		View All	First 1 of 1 Last
Academic Institution:	CICMP Channel Islands	DateTime:	06/04/2003 8:31:44AM
Service Indicator:	EPT English Remediation Required	Active Dt:	06/04/2003
Service Ind Reason:	EPT1 EPT1		
Reference:			
Amount:	\$0.000	Currency Code:	USD
Contact Person:			
Placed By:			
Placed Method:	Manual		
User ID	CITEST		
Department:	Student Recruitment & Admission		
Placed Process Name:		Release Process Name:	

2.2 Service Indicator Summary

The Service Indicator Summary page allows you to review a list of service indicators currently assigned to an individual by the same three options as on the detail page.

Navigation: Administer Financial Aid → Apply for Financial Aid → Inquire → Service Indicator Data → Service Indicator Data

[Home](#) > [Administer Financial Aid](#) > [Apply for Financial Aid](#) > [Inquire](#) > Active Service Indicators

Service Indicator <u>Detail</u>		Service Indicator Summary	
Harlin,Alejandra		Non-Employee	Non HRMS ID: 100024648
<input checked="" type="radio"/> All Service Indicators		<input type="radio"/> Positive Service Indicators	
		<input type="radio"/> Negative Service Indicators	
Service Indicators Summary View All First 1 of 1 Last			
DateTime:	06/04/2003 8:31:44AM	Institution:	Channel Islands
Active Date:	06/04/2003	Department:	Student Recruitmnt & Admission
Service Indicator:	EPT English Remediation Required	Reason:	EPT1

[Return to Search](#)

2.3 Service Indicators Display

PEOPLE Soft

Home Help Sign Out

[Home](#) > [Build Community](#) > [Maintain People Data](#) > [Use A-K](#) > **Address Maintenance** [New Window](#)

Addresses

Taylor Engel ID: 000001950

Address Type View All First 1 of 1 Last

*Address Type: Permanent

Address History View All First 1 of 1 Last

*Effective Date: 01/02/2001

Country: USA United States

*Status: Active

Address 1: 4302 Miller Lane

Address 2:

Address 3:

City: Westchester

County:

Postal: 90235

State: CA California

Address Linkage

Linkage Type

Maintain Manually:

Address

Other Data

Phone Electronic Address

Save Return to Search Update/Display Include History Correct History

The page above displays the negative service indicator and the positive service indicator.

After a service indicator is assigned to an individual, the corresponding negative or positive service indicator button appears on most pages about that individual.

2.4 Service Indicator Audits

The Service Indicator Audit page is view only. It provides service indicator information for the student you selected.

Navigation: Build Community → Maintain People Data → Inquire → Active Service Indicators → Service Indicator Audits

Service Indicator Audits

Home > Build Community > Maintain People Data > Inquire > Service Indicator Audits [New Window](#)

ID: 000001950 Taylor Engel

Service Indicator Cd: ADV Advising **Positive Service Indicator?** N

Service Ind Reason Cd: ADVIS Advising

Reference/Checklist:

Amount: \$0.000 **Currency:** USD

Service Ind Date Time: 03/20/2002 8:24:04AM

Service Ind Active Term: 0000 Begin Term - Srv: Indicatr Use

Active Dt: 03/20/2002

Institution: CSUNR

Contact ID/Name:

Placed Person ID/Name: 000000009 Cochran, Lance

Department: 00001

Placed Method: Manual

Placed Process Name: **Release Process Name:**

User ID JROGERS

Audit Date/Time: 05/01/2002 8:11:41.000000AM **Action:** Delete

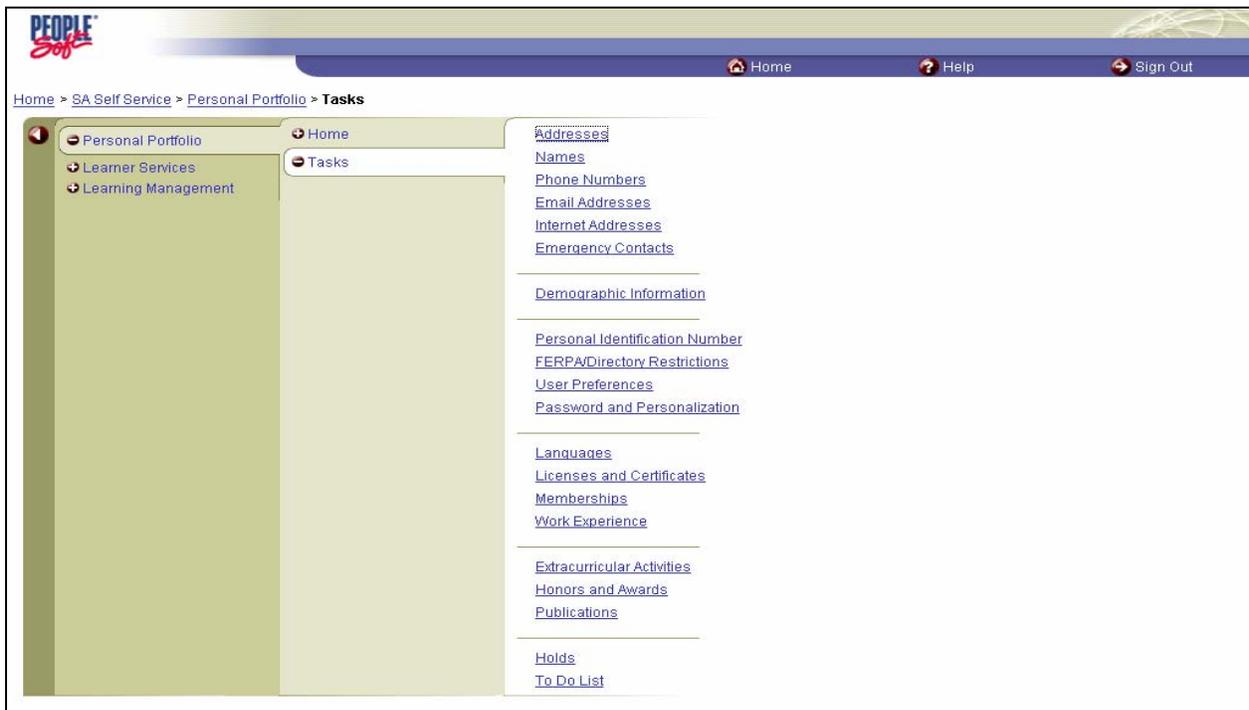
[Return to Search](#) [Next in List](#) [Previous in List](#)

3.0 Self-Service Indicators Data

PeopleSoft provides the capability for students to view their Service Indicators under the Holds and To Do's section of the PS Personal Portfolio home page. If you want to allow self-service users to do this, you must include this menu item in their primary permission list.

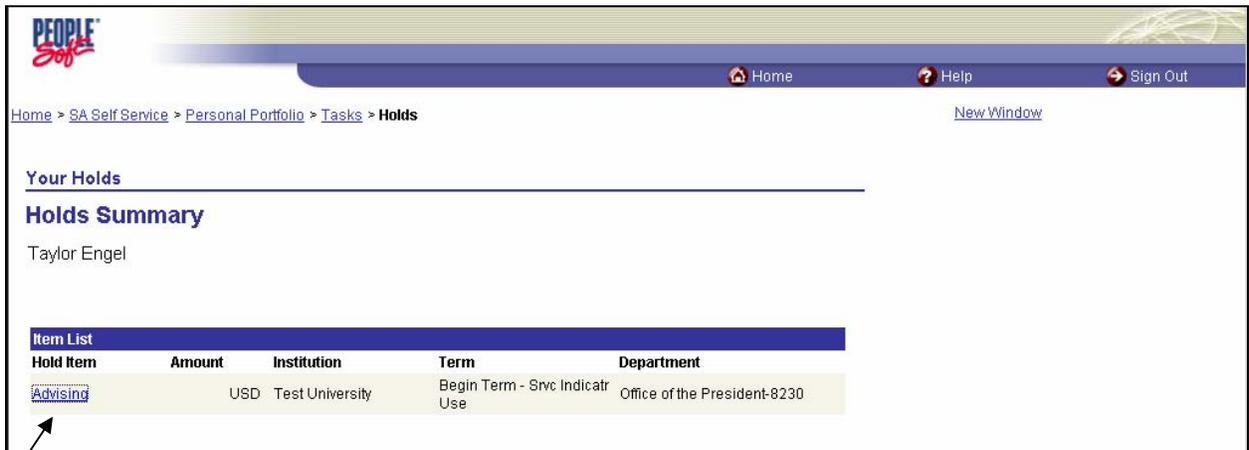
The student access to their own holds is represented by the screen shot below.

3.1 Student Self-Service Service Indicators



3.2 Holds

The student will see whatever service indicators have been placed on their record. If they don't have any, they will just get message "You have no Holds."



The student would then click on the Hold Item to get more details of how they can resolve this.

PEOPLE
Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Holds [New Window](#)

Your Holds

Hold Item

Taylor Engel

Advising

Reason and Contact

Institution: Test University
Term: Begin Term - Svc Indicatr Use
Reason: Advising
Department: Office of the President-8230
Contact:

Instructions

See your counselor to resolve this hold.

[Return to Holds Summary](#)

The student can then review the instructions to know what to do next to have the service indicator removed from their record. This particular service indicator is informational only. It does not restrict the student from enrolling or doing other activities. This is based on the service impact that is attached to the service indicator.