Service Indicators—Place or Remove & Audit Service Indicators

Service Indicators—Place or Remove

When a student has a Service Indicator (typically a Hold) on their record, this is indicated on any student information page by the presence of an icon which indicates whether it is a negative indicator (meaning that service to the student is impacted), or a positive indicator (which can be used as an informational flag of some sort).

Negative Indicator icon:  
Positive Indicator icon: 

Service Indicators (Holds) can be placed or removed by authorized staff members. The user will have the ability to view all indicators, yet only certain Service Indicators are available for updating. The ability to place or remove specific Service Indicators is controlled by security setup for each user. Service indicators do not appear on printed transcripts.

Navigate to the Manage Service Indicators page:
Main Menu>Campus Community>Service Indicators>Manage Service Indicators

First is the Search screen. Below is the Advanced Search.

Using the Advanced Search, allows the use of Names or other types of ID numbers.

Once the desired criteria have been entered, Press Search.
Adding a Service Indicator:

- Be sure to check that the service indicator you want to place doesn’t already exist on the student’s record. You can do this by viewing the Service Indicator Summary area. Once you have determined that the service indicator you want to place doesn’t already exist by making sure that the Effect drop down box has the value of All. *Institution*—The value of University of Kansas will default in if your User Defaults are set correctly, but if not, use the drop down and select University of Kansas (the only value found in this drop down).

Then click on the Add Service Indicator link.

- Clicking on the Add Service Indicator link opens up the Add Service Indicator window and the new Service Indicator data needs be completed as outlined below.
The following fields must be completed:

- **Institution**-The value of UKANS will appear as a default if your User Defaults are set correctly, but if not, use the magnifying glass and select UKANS (the only value found in the magnifying glass). If the value of UKANS is **not** in this field and if you do a Look Up on Service Indicator Code (using the magnifying glass to the right), you will **not** get the list of values of the Service Indicators Codes which you are authorized to use.

- **Service Indicator Code**-Only those codes to which the user is authorized to update will appear in the lookup (the magnifying glass to the right of this field).

- **Service Ind Reason Code**-The Reason code will automatically appear if a code is defined as the default Service Ind Reason Code when the Service Indicator is setup. The Service Ind Reason Codes available for selection will be those that are directly linked to the Service Indicator Code, but if you would like to view the list of those values, you can by using the magnifying glass to the right of the Service Ind Reason Code field.

- **Description**-Will automatically fill in from the Service Indicator setup table.

- **Effect**-Will automatically display either Negative or Positive depending on which Service Indicator Code that has been added.

**Effective Period area**--

- **Start Term**-Will automatically default to 0000 which means the service indicator will impact the students for **all** terms. If a term is entered here the service indicator will impact the student for that term forward.

- **Start Date**-If this field is used it will default to today’s date.

**NOTE:** You will **not** need to put in values in the remaining two fields (End Term and End Date) in this area.

**Assignment Details area**—

- **Department**- Will automatically display the Department code and department description from the Service Indicator setup table.

- **Reference**- Will automatically display if a code is defined as the default Reference in the Service Indicator setup table

- **Amount**-This field is **not** being used.

**Contact Information area**—

- **Contact ID/Contact Person**-These fields are **not** being used.

- **Placed Person ID/Placed By**—These fields will automatically default the ID number and name of the USERID who added the service indicator once it has been applied to the student’s record.

**Comments**—
A place to add any detailed comments.

Once the information is completed, press the **Apply** button which saves the addition and then press the OK button.
Note the navigational bar at the top.

In the sample above, the row count shows 1 of 2, so this student has two Service Indicators on his/her record.
Releasing a Service Indicator:

Open the Manage Service Indicators page for the appropriate student. First find the service indicator you want to remove on the student’s record. Once you have determined the service indicator you want to release, click on the code.

This will open the Edit Service Indicator window. Then click on the Release button.

The following message will appear:

- Press OK if you wish to complete the release.
- The Service Indicator code will no longer be listed in the Code column.
Audit Service Indicators

The Manage Service Indicators page does not maintain history about the adding and releasing of service indicators. To get information about service indicator history, use the Audit Service Indicators page.

Navigate to the Audit Service Indicators page:
Main Menu>Campus Community>Service Indicators>Audit Service Indicators

First is the Search screen. There are several ways to search.

- The easiest and most efficient way to search is by the ID of a student. Simply type the 7 digit ID in the ID field. If you want to know about a specific hold for a student, you can add the Service Indicator Code to the search.

  Say, for example you wanted to know if student 1234567 had a NPY hold added and/or deleted. You would type 1234567 in the ID field and NPY in the Service Indicator Code field.

- You may also search by the student’s SSN (National ID; 555555555), Campus ID, or Last Name/First Name.

- Another search is by USER ID of the person who placed/released the hold in the User ID field. This is a very slow search and is not recommended because if the staff member has placed/released a lot of service indicators.

  **DO NOT** search just by service indicator code because this could cause a very lengthy search process.

Once you have the data in for your search, click on the Search button.
Viewing a Service Indicator Audit record:

Below are descriptions of the fields on a Service Indicator Audit record:

Under the Assignment tab--

- **ID and Name**—the ID number and name of the student.
- **Service Indicator Code**—the service indicator code.
- **Start Term**—if 0000, then stops all terms.
- **Start Date**—may list the date when the Service Indicator was either added or released either manually or through a process.
- **Action**—I=added manually or through a batch process  
  D=released manually or through a batch process  
  A=added manually or through a batch process  
  C=changed

Under the ID Data tab—

- **Birthdate**—the month and day of birth of the student.
- **Campus ID**—the legacy system’s student ID number (only six digits).
- **National ID and NID Country**—if USA is listed in the NID Country column, the National ID will the USA issued SSN, but another country is listed in the NID Country column, the National ID will be that country’s ID number.

Under the Date/Time tab--

- **User ID**—the user ID of who either added or released the service indicator.
- **Service Indicator Date Time**—the date and time of which the service indicator was added.
- **Audit Date Time**—same as for Adds—date and time of delete—actual audit date.

Clicking on the Service Indicator Code link under the Assignment tab will give even further the details from the Manage Service Indicators page :

- **ID and name**—the ID number and name of the student.
- **Institution**—the value will always be UKANS for the University of Kansas.
- **Service Indicator Code**—code and description.
- **Service Ind Reason Code**—the Reason Codes which is directly linked to the Service Indicator Code.
- **Effect**—either negative or positive.
- **Action**—Add or Delete indicating whether the service indicator was placed or removed.
- **Audit Date/Time**—same as for Adds—date and time of delete—actual audit date.
- **User ID**—user ID who added or released the service indicator.
- **Start Term, End Term, Start Date and End Date**—only the Start Term is being used.
- **Department**—the Department code and description of the department of the person who placed the service indicator.
- **Reference**—This is not used.
- **Amount**—This not used.
- **Contact ID/Contact Person**—the name and ID number of a specific person to contact about the service indicator.
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- **Placed Person ID/Placed By**—the name and ID number of the person who placed the service indicator.
- **Placed Method**—the possible values in this field are: manual (by hand) or background (by batch process).
- **Placed Process**—If the service indicator was placed by a PeopleSoft batch process, the process will be named.
- **Release Process**—If the service indicator was released by a PeopleSoft batch process, the process will be named.
- **DateTime**—the date and time that the service indicator was added/placed.

Can view all tabs at once.

Be sure to watch the Search Results navigational bar for possible additional rows that isn’t displaying. The sample above is showing 11 of 29 rows. In order to view all 29 rows, click on the View All. Also can sort by row headers.

**NOTE:** There are programs (batch processes) which are used to either place or release specific service indicators. Whether or not a service indicator that’s been placed by batch appears in the audit depends on the process that placed it. Some of the processes that were written to place and release service indicators will record in the audit table, but some will not. Therefore, not all service indicators placed/released by batch process will record in the audit table and show up on the Audit Service Indicators page.

All manual activity to place and release a hold will appear on the Audit Service Indicators page.