

Service Indicators—Place or Remove & Service Indicator Audit

Service Indicators—Place or Remove

When a student has a Service Indicator (typically a Hold) on their record, that is indicated on *any student information page* by the presence of an icon that 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 may have the ability to view all indicators; yet only certain Service Indicators are available to them 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 Service Indicator Data page:

Main Menu>Campus Community>Service Indicators (Student)>Service Indicator Data

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

Service Indicator Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: 1234567

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

[Basic Search](#)

Using the Advanced Search Link, opens the search that permits use of Names or other types of ID numbers.

When using the Basic Search link the easiest and probably most efficient is the EmplID number (which is the default Search By).

Service Indicator Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: begins

[Advanced Search](#)

- Once the desired criteria have been entered, Press Search.

Placing a Service Indicator:

Be sure to check that the service indicator you are wanting to place doesn't already exist on the student's record. You can do this by using the Service Indicator Data navigational bar either by clicking on the View All or by using the arrow keys. Once you have determined that the service indicator you are wanting to place doesn't already exist, you will then need to click on the Add a new Row (the plus button) button to the right of the Institution field.



- Clicking on the Add a New Row button opens a new, clean row and the new Service Indicator data may be completed as outlined below.

The following fields must be completed:




- Institution**-The value of UKANS will default in if your User Defaults are set correctly, but if not, you can simply type in UKANS. If the value of UKANS is **not** in this field and if you do a Look Up (using the magnifying glass to the right of the Service Indicator Cd field), you will **not** get the list of values of the *Service Indicator Cd* which you are authorized to use.
- Service Ind Active Term**-Is optional, but the current business practice will be always to place 0000 in this field (NOTE: 0000 will default into this field). Term should not be used if the expiration of the Service Indicator is to be open-ended. NOTE: Use of this field limits the enforcement of the Service Indicator to ONLY the term specified. If the Service Indicator is supposed to take effect for a future term, the user can future-date the *Active Dt* leaving the *Service Ind Active Term* field at 0000 or the user can leave current date as the *Active Dt* leaving the *Service Ind Active Term* field at 0000 (which are the default values for both of these fields).
- Active Dt**- The default is the current/system date – this controls when the Service Indicator appears on the record and when it begins to impact services, so it can be future-dated if needed.
- Service Indicator Cd**- (code) Only those codes to which the user is authorized will appear in the lookup.











- **Service Ind Reason Cd-** The Reason code will automatically fill in 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 Cd, but if you would like to view the list of those values, you can be using the magnifying glass to the right of the Service Ind Reason Code field.
- **Reference-** The Reference will automatically fill in if a code is defined as the default Reference when the Service Indicator is setup.
- **Department-** This one will also automatically fill in if the Department was defined as part of the Service Indicator setup.

The user may also wish to complete information about the Contact ID (ID of contact person; if the ID is unknown, the user can use the magnifying glass to the right of this field to do a look up by name) and Contact Person (if a Contact ID is put in, the Contact Person field will automatically filter in) and additional comments may be added as well. The Placed Person ID and Placed By fields will automatically filter in, putting the ID and name of the USERID/person who placed the hold.

- Once the information is completed, press Save.

Service Indicator Data

Joe Training 1234567   

Service Indicator Data		Find View All		First	4 of 4	Last
DateTime:	03/17/2006 2:08:26PM	Institution:	UKANS 	KU	 	
Service Ind Active Term:	0000 	All Terms	Active Date:	03/17/2006		
Service Indicator Code:	FAH 	CLAS Advising Hold				
Service Ind Reason Code:	FAHL 	CLAS Advising Hold				
Reference:	<input type="text"/>					
Contact ID:	<input type="text"/> 	Contact Person:	<input type="text"/>			
Placed Person ID:	1013199 	Placed By:	Schuler,Christine Marie			
Department:	1910000 	Freshman-Soph Advising Ct-FSAC				
Comments:	<div style="border: 1px solid gray; height: 50px;"></div>					
Placed Method:	Manual	Placed Process:				
User ID:	CSCHULER	Placed By:	Schuler,Christine Marie			






Note the navigational bar at the top of the data screen.

Service Indicator Data



In this sample, the student has four Service Indicators, so the row count shows 1 of 4 and the navigational links are enabled. With these links enabled this allows the user to move between Service Indicator rows.

Removing a Service Indicator:

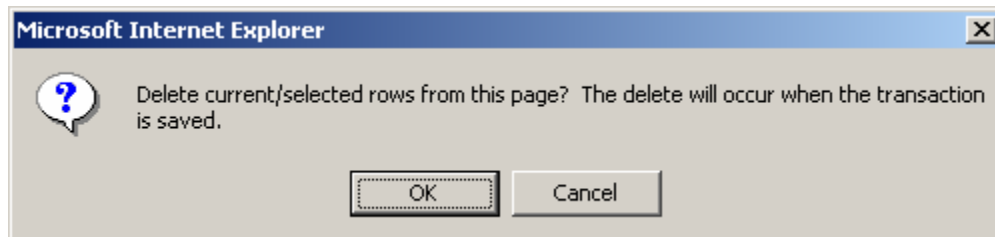
Once a Service Indicator is on a record there are two methods for removing (or inactivating) a particular Indicator. The choices are to remove the Service Indicator from the record or change the Service Indicator.

To completely remove a Service Indicator, open the Service Indicator Data page for the appropriate student. First find the service indicator you are wanting to remove on the student's record. You can do this by using the Service Indicator Data navigational bar either by clicking on the View All or by using the arrow keys. Once you have determined that the service indicator you are wanting to remove, you will then need to click on the Delete a new Row (the minus button) to the right of the Institution field.



- Click on the Delete a Row button.

The following message will appear:



- Press OK if you wish to complete the deletion.
- Pressing OK will cause the fields on the Service Indicator page to revert to blank fields.
- Then you will need to press the Save icon in order for the system to acknowledge the deletion of the row. If you do a Return to Search and then go back into the page, the Service Indicator icon should no longer be visible.

Replacing one Indicator with a new Service Indicator:

- Delete the Row for the old Indicator as instructed previously. This will give the user a Service Indicator row with blank fields.
- Complete the fields with the new Service Indicator data as instructed previously.
- Press Save.

Note: For Service Indicators, PeopleSoft does not provide the ability to activate and inactive Service Indicators to retain history. One possible method to retain the data is to record an Indicator using a specific term. This would allow the Indicator to remain on a record but would not impact functions for any term other than the one recorded.

- To exit this page, click on the Return to Search button.

Service Indicator Audit

The Service Indicator Data page does not maintain history about the replacing and removal of service indicators. To get information about service indicator history, use the Service Indicator Audits page.

Navigate to the Service Indicator Audits page:

Main Menu>Campus Community>Service Indicators (Student)>Service Indicator Audits

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

- The easiest and most efficient way to search is by the KUID 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 Cd to the search.

Say, for example you wanted to know if student 1234567 had a NPY hold placed and/or removed. You would type 1234567 in the IID field and NPY in the Service Indicator Cd field.

- You may also search by the student's SSN (National ID), Campus ID, or Last Name/First Name.
- The second way to 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. The system only returns the first 300 results. If the staff has placed a lot of service indicators, consider adding "Service Indicator Active Term" to the search.
- DO NOT search by typing the name of a service indicator code.

Service Indicator Audits

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

User ID:

Date and Time Stamp:

ID: 1234567

Service Indicator Cd:

Service Indicator Date Time:

Academic Institution: UKANS

Service Ind Active Term:

Service Indicator Active Date:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

Search Results

[View All](#)

User ID	Date and Time Stamp	ID	Service Indicator Cd	Service Indicator Date Time	Academic Institution	Service Ind Active Term	Service Indicator Active Date	Date of Birth	Name	National ID Country
JBOND	11/04/2005 11:01:42.000000AM	DCL	DCL	11/04/2005 11:01:20AM	UKANS	0000	11/04/2005	01/15	Training,Joe Jayhawk	USA
JBOND	11/04/2005 11:01:42.000000AM	PKL	PKL	11/04/2005 11:01:34AM	UKANS	0000	11/04/2005	01/15	Training,Joe Jayhawk	USA
JBOND	11/21/2005 1:55:14.000000PM	PKL	PKL	11/21/2005 1:54:55PM	UKANS	0000	11/21/2005	01/15	Training,Joe Jayhawk	USA
JBOND	11/21/2005 1:56:25.000000PM	PKL	PKL	11/21/2005 1:54:55PM	UKANS	0000	11/21/2005	01/15	Training,Joe Jayhawk	USA
JVANRUYV	05/04/2005 3:39:49.000000PM	PKL	PKL	01/29/2004 12:00:00AM	UKANS	0000	01/29/2004	01/15	Training,Joe Jayhawk	USA
LOPER	01/14/2004 1:18:54.000000AM	NPY	NPY	01/14/2004 1:18:54AM	UKANS	0000	01/14/2004	01/15	Training,Joe Jayhawk	USA
LPINEGAR	07/13/2004 10:41:00.000000AM	EDW	EDW	07/13/2004 10:40:49AM	UKANS	0000	07/13/2004	01/15	Training,Joe Jayhawk	USA
MAHUSLIG	08/20/2003 11:06:30.000000AM	WOF	WOF	01/01/1900 12:00:00AM	UKANS	0000	01/01/1900	01/15	Training,Joe Jayhawk	USA
NDEMBY	01/21/2004 1:40:30.000000PM	NPY	NPY	01/14/2004 1:18:54AM	UKANS	0000	01/14/2004	01/15	Training,Joe Jayhawk	USA
SFBATCH	04/21/2003 2:31:57.000000AM	NPY	NPY	04/21/2003 12:00:00AM	UKANS	0000	04/21/2003	01/15	Training,Joe Jayhawk	USA
SFBATCH	04/23/2003 4:37:04.000000AM	NPY	NPY	04/23/2003 12:00:00AM	UKANS	0000	04/23/2003	01/15	Training,Joe Jayhawk	USA
SFBATCH	04/30/2003 3:50:46.000000AM	NPY	NPY	04/30/2003 12:00:00AM	UKANS	0000	04/30/2003	01/15	Training,Joe Jayhawk	USA
SFBATCH	05/06/2003 5:19:42.000000AM	NPY	NPY	05/06/2003 12:00:00AM	UKANS	0000	05/06/2003	01/15	Training,Joe Jayhawk	USA
TPARKER	05/02/2005 4:24:48.000000PM	EDW	EDW	07/13/2004 10:40:49AM	UKANS	0000	07/13/2004	01/15	Training,Joe Jayhawk	USA

Viewing a Service Indicator Audits record:

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

- *ID*--the ID number and name of the student.
- *Service Indicator Cd* (code)—the service indicator code and description.
- *Positive Service Indicator*—the value in this field will be ‘N’ (not a positive service indicator) or ‘Y’ for yes (positive service indicator).
- *Service Indicator Reason Cd (code)*--the Reason Codes that are directly linked to the Service Indicator Cd. This comes from the Service Indicator Data page.
- *Reference/Checklist*—This is not used.
- *Service Ind Date Time*—the date and time of the action. This comes from the Service Indicator Data page.
- *Service Ind Active Term*—the value will most generally be 0000 All Terms. This comes from the Service Indicator Data page.
- *Active Dt*—the date in which the service indicator was made active. This comes from the Service Indicator Data page.

- *Institution*—the value will always be UKANS for the University of Kansas. This comes from the Service Indicator Data page.
- *Contact ID/Name*—the name and ID number of a specific person to contact about the service indicator. This comes from the Service Indicator Data page.
- *Placed Person ID/Name*—the name and ID number of the person who placed the service indicator. This comes from the Service Indicator Data page.
- *Department*—the Department code of the person who placed the service indicator. This comes from the Service Indicator Data page.
- *Placed Method*—the possible values in this field are: manual (by hand) or background (by batch process)
- *Placed Process Name*—If the service indicator was placed by a batch process, the process will be named.
- *Release Process Name*—If the service indicator was released by a batch process, the process will be named.
- *USER ID*—the ID number and name of the person who placed or removed the service indicator.
- *Date and Time Stamp*—the date and time that the service indicator was either placed or removed.
- *Action*—the possible values are Add or Delete, indicating whether the service indicator was placed or removed.

Service Indicator Audits

ID: **Name:** 1234567 Training,Joe Jayhawk
Service Indicator Cd: NPY Past Due Balance **Positive Service Indicator?** N
Service Ind Reason Code: NPY No Payment; Account past due
Reference/Checklist:

Service Ind Date Time: 05/06/2003 12:00:00AM
Service Ind Active Term: 0000 All Terms
Active Dt: 05/06/2003
Institution: UKANS

Contact ID:
Placed Person ID/Name:
Department: 1510000
Placed Method: Background
Placed Process Name: JSF237 **Release Process Name:**

User ID SFBATCH **Name:**
Date and Time Stamp: 05/06/2003 5:19:42.000000AM **Action:** Delete



Use the Next in List or the Previous in List to view all the rows for a specific Service Indicator Cd (code).

NOTE: There are programs (batch processes) which are used to either place or remove 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 Service Indicator Audits page.

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