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Course Objectives

This course is intended for faculty, staff, and student employees who are users of the PeopleSoft Student Administration/Human Resources (SA/HR) system and are responsible for reviewing, adding, or removing Service Indicators from student records. The navigation and instructions for these tasks will be reviewed.

At the end of this class, you will be able to:

- Describe Positive and Negative Service Indicators
- Inquire on a Service Indicator
- Add a Service Indicator
- Remove (Delete) a Service Indicator



Lesson 1: About Service Indicators

Discussion

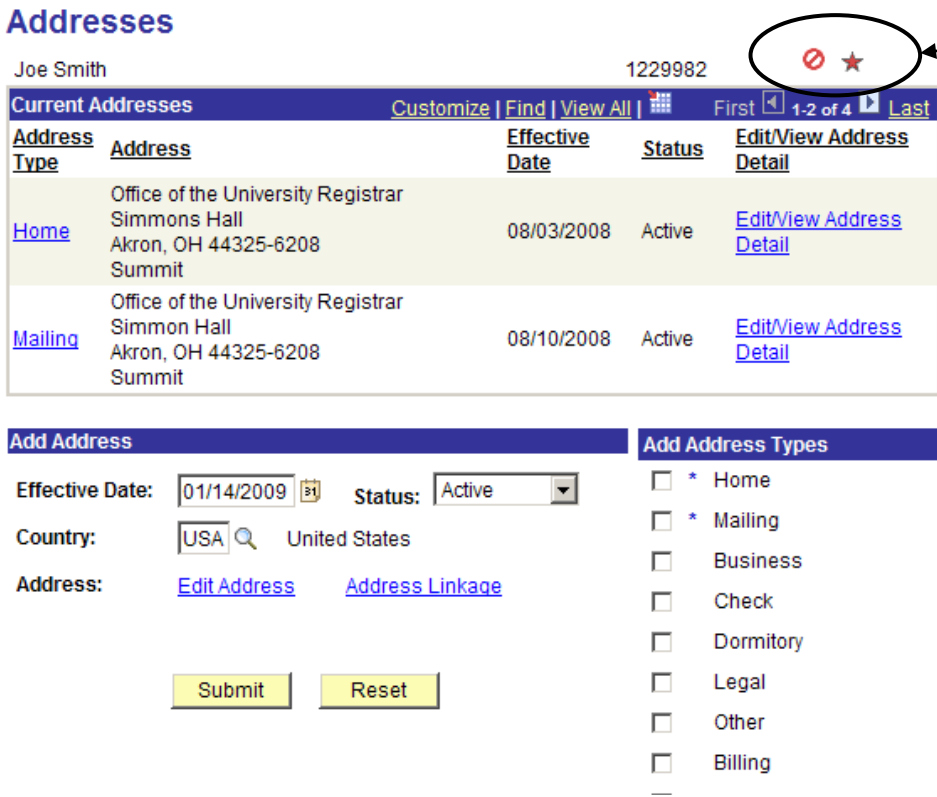


There are both Positive and Negative Service Indicators at The University of Akron. A Negative Service Indicator, also referred to as a “Hold,” is added to a student’s record when services are being restricted. An example of a Negative Service Indicator would be a student cannot register for courses due to nonpayment of tuition. A Positive Service Indicator is added to the student’s record when there are special privileges available for that student. An example of a Positive Service Indicator would be that a student can register early because they are an Honors Student.

Service Indicators become effective for the term noted and remain in effect for that term and all subsequent terms until the service indicator is removed. You can manually add a Service Indicator and then remove it from an individual’s record when it no longer applies.

Service Indicator Inquiry

When assigning a Service Indicator, the corresponding positive  or negative  Service Indicator button will display on most pages in the PeopleSoft system regarding that individual. Click on the Service Indicator button to view which services or restrictions apply. Only one of each button will show on a page, regardless of how many restrictions have been applied to the record.

Viewing Service Indicators on PeopleSoft Pages

| Steps |
|--|
| <p>1. In class, navigate to the following page: Campus Community > Personal Information > Biographical > Addresses/Phones > Addresses</p> <p>Enter the Student's EmplID or use the Last Name and First Name fields.</p> <p>Click on the Search button. If necessary, select the record from the search results.</p> <p>Use the ID, 1229982 and click on the Search button.</p> |
| <p>2. The Addresses page displays.</p>  <p>3. In the upper right corner of the page, you will see the Negative  and Positive  Service Indicator buttons as seen above.</p> <p>They will only display if there is an active Service Indicator on the record.</p> |


Steps

4. To find additional information about the Service Indicator, click on the button.

In class, click on the **Negative**  **Service Indicator**.

Manage Service Indicators

Joe Smith 1229982

Display: Effect **Negative** Institution The University of Akron Refresh 

[+ Add Service Indicator](#)

| Service Indicator Summary | | | | | | | | | |
|---------------------------|--------------------|--------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| Code | Code Description | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
| ENR | Prevent enrollment | Advising hold | AKRON | 4087 | 2008 Fall | 4097 | 2009 Fall | 01/14/2009 | |

[+ Add Service Indicator](#)

5. For additional information, such as who placed the hold on the record, click on the link for the Indicator in the **Code** column.

In class, click on the **ENR** link.

Joe Smith 1229982 Release

*Institution: AKRON The University of Akron

*Service Indicator Code: ENR Prevent enrollment

*Service Ind Reason Code: ADV Advising hold

Description: Student must see adviser prior to registration.

Effect: Negative

| Effective Period | | | | | |
|------------------|------------|-----------|-----------|------|-----------|
| Start Term: | 4087 | 2008 Fall | End Term: | 4097 | 2009 Fall |
| Start Date: | 01/14/2009 | | End Date: | | |

| Assignment Details | |
|--------------------|----------------------------|
| *Department: | 004690 Academic Advisement |
| Reference: | |
| Amount: | 0.000 |
| Currency: | USD |

Contact Information

Review the page.

Click on the **Cancel** button, at the bottom of the page to return. Click on the **Cancel** button again to return to the Addresses page.

Steps

6. Click on the **Positive** ★ **Service Indicator** button.
[Manage Service Indicators](#)

Joe Smith 1229982

Display: Effect **Positive** Institution The University of Akron Refresh

[+ Add Service Indicator](#)

| Service Indicator Summary | | | | | | | | | |
|---------------------------|------------------------------|-------------------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| Code | Code Description | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
| ADV | Permission to register early | Potential Athlete | AKRON | 4037 | 2003 Fall | | | 04/15/2003 | |
| ADV | Permission to register early | Transfer Provisional Students | AKRON | 4033 | 2003 Sum | | | 03/03/2003 | |
| ADV | Permission to register early | Honors Post Secondary | AKRON | 4031 | 2003 Sprng | | | 12/11/2002 | |

[+ Add Service Indicator](#)

7. For additional information, such as who placed the indicator on the record, click on the link for the Indicator in the **Code** column.

8. Click on the **Home** link to return to the Home page.

Service Indicators Page

Steps

1. Navigate to the following page:
Campus Community > Service Indicator > Manage Service Indicator

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

Find an Existing Value

ID:

Campus ID:

National ID:

Last Name:

First Name:

[Basic Search](#) [Save Search Criteria](#)

If necessary, use the ID, 1229982 in class. Click on the **Search** button.

2. The Manage Service Indicators page displays.

Manage Service Indicators

Joe Smith 1229982

Display: Effect Institution [Refresh](#)

[+ Add Service Indicator](#)

| Service Indicator Summary | | | | | | | | | |
|---------------------------|------------------------------|-------------------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| Code | Code Description | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
| ADV | Permission to register early | Transfer Provisional Students | AKRON | 4033 | 2003 Sum | | | 03/03/2003 | |
| ADV | Permission to register early | Potential Athlete | AKRON | 4037 | 2003 Fall | | | 04/15/2003 | |
| ADV | Permission to register early | Honors Post Secondary | AKRON | 4031 | 2003 Sprng | | | 12/11/2002 | |
| ENR | Prevent enrollment | Advising hold | AKRON | 4087 | 2008 Fall | 4097 | 2009 Fall | 01/14/2009 | |

[+ Add Service Indicator](#)

3. On this page, you will see a list of all Service Indicators.

To narrow the search, you can use the **Effect** drop down to select Positive or Negative to only display that type of Indicator. Click on the **Refresh** link.

Steps

4. To locate additional information for an Indicator, click on the link, for the respective Indicator, in the **Code** column.

Joe Smith 1229982 Release

*Institution: AKRON The University of Akron

*Service Indicator Code: ENR Prevent enrollment

*Service Ind Reason Code: ADV Advising hold

Description: Student must see adviser prior to registration.

Effect: Negative

Effective Period

Start Term: 4087 2008 Fall End Term: 4097 2009 Fall

Start Date: 01/14/2009 End Date:

Assignment Details

*Department: 004690 Academic Advisement

Reference:

Amount: 0.000 Currency: USD

Contact Information

Scroll down and click on the **OK** or **Cancel** button to return.

5. Click on the **Home** link to return to the Home page.

Lesson 2: Assigning Service Indicators

Discussion

This lesson will provide you with the information that you need to add a Service Indicator to a Student's Record.



Note: When you go to add a Service Indicator to a record, you will only see those indicators that you have security access to add.

Add a Service Indicator

Steps

- From the menu choose:
Campus Community > Service Indicators > Manage Service Indicators

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

Find an Existing Value

EmpID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

[Basic Search](#)

- Enter the Student's **EmplID** or use the **Last Name** and **First Name** fields.
Click on the **Search** button. If necessary, select the record from the search results.

Manage Service Indicators

Joe Smith 1229982


Display: Effect Institution [Refresh](#)

[+ Add Service Indicator](#)

| Code | Code Description | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
|------|------------------------------|-------------------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| ADV | Permission to register early | Transfer Provisional Students | AKRON | 4033 | 2003 Sum | | | 03/03/2003 | |
| ADV | Permission to register early | Potential Athlete | AKRON | 4037 | 2003 Fall | | | 04/15/2003 | |
| ADV | Permission to register early | Honors Post Secondary | AKRON | 4031 | 2003 Sprng | | | 12/11/2002 | |
| ENR | Prevent enrollment | Advising hold | AKRON | 4087 | 2008 Fall | 4097 | 2009 Fall | 01/14/2009 | |

[+ Add Service Indicator](#)

Steps

3. Click on the **Add Service Indicator** link or the **Add Service Indicator**  tool.

Joe Smith 1229982

*Institution: The University of Akron

*Service Indicator Code:

*Service Ind Reason Code:

Description:

Effect:

Effective Period

Start Term: End Term:

Start Date: End Date:

Assignment Details

*Department:

Reference:

Amount: Currency:

Contact Information

Contact ID: Contact Person:

Placed Person ID: Placed By:

Comments

Services Impacted


No Impacts are associated with the selected Service Indicator Code.

Service Indicator Date Time: 01/21/2009 7:59:36AM

User ID: AC615SW Wyszynski,Sara Ann

Steps

4. Enter a Service Indicator Code.

To select a Service Indicator Code from the Lookup List, click on the  **Lookup** button to the right of the field.

You will be returned a list of codes that you have security access to. Select the appropriate code to return.

Look Up Service Indicator Code


Search Results

View All First 1 of 1 Last

| Service Indicator Cd | Description |
|----------------------|--------------------|
| ENR | Prevent enrollment |

In class, select the **Prevent enrollment (ENR)** option.

5. Enter a Service Ind Reason Code.

To select a Service Ind Reason Code from the Lookup List, click on the  **Lookup** button to the right of the field.

You will be returned a list of codes. Select the appropriate code to return.

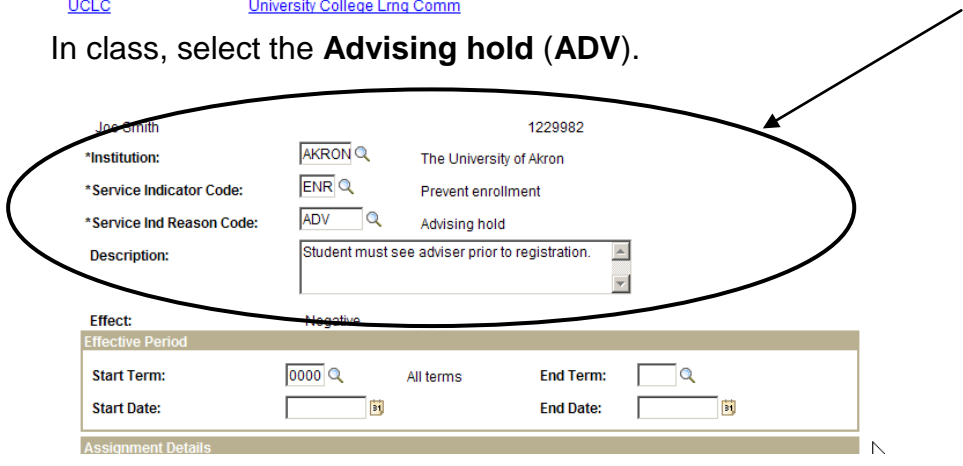
Look Up Service Ind Reason Code

Search Results

View All First 1-8 of 8 Last

| Service Ind Reason Code | Description |
|-------------------------|-------------------------------|
| ADV | Advising hold |
| DGCOL | Tran. to degree granting coll |
| GENED | Gen Ed Requirement Not Met |
| PEND | Pending Final Transcript |
| PRO | Undergraduate Provisional |
| UCLC | University College Lrnq Comm |

In class, select the **Advising hold (ADV)**.



Joe Smith 1229982

*Institution: AKRON The University of Akron

*Service Indicator Code: ENR Prevent enrollment

*Service Ind Reason Code: ADV Advising hold

Description: Student must see adviser prior to registration.



Effect: Negative

Effective Period

Start Term: 0000 All terms End Term:

Start Date: [] BY End Date: [] BY

Assignment Details

| Steps |
|---|
| <p>6. Select Start Term. Enter the term for which the Service Indicator should begin to affect the student's record.</p> <p>In class, enter the current term. In this example, enrollment for the term specified and all other terms after that term will be blocked.</p> <p>You can also enter a future term if that is when the hold needs to become active.</p> |
| <p>7. Select a Start Date. Use the Choose a Date  button to select a date from the calendar. This field indicates the date the Service Indicator becomes active.</p> <p>Note: Start Term and Start Date are minimum requirements when adding a Service Indicator.</p> |
| <p>8. The Placed Person ID defaults based on the User ID.</p> |
| <p>9. Use the Comments area to enter any additional notes about the Service Indicator.</p> |
| <p>10. OPTIONAL:</p> <p>Select an End Term and End Date. Use the Lookup  button if necessary to locate the appropriate term.</p> <p>The Service Indicator will become inactive at the date or term specified if you use this field.</p> |

Steps

11. Click on the **Apply** button.

Saved appears temporarily in the top right area of the page to indicate that the changes have been saved.

Joe Smith 1229982

*Institution: AKRON The University of Akron

*Service Indicator Code: ENR Prevent enrollment

*Service Ind Reason Code: ADV Advising hold

Description: Student must see adviser prior to registration.

Effect: Negative

Effective Period

Start Term: 4091 2009 Sprin End Term:

Start Date: 01/21/2009 End Date:

Assignment Details

*Department: 004690 Academic Advisement

Reference:

Amount: 0.000 Currency: USD

Contact Information

Contact ID: Contact Person:

Placed Person ID: 1280483 Placed By: Wyszynski, Sara Ann

Comments

This is a test.

Services Impacted Customize | Find | View All | First 1 of 1 Last

| Impact | Description | Basis - Date | Basis - Term | Term Category |
|--------|--------------------|-------------------------------------|-------------------------------------|---------------|
| 1 CENR | Affects enrollment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

Service Indicator Date Time: 01/21/2009 8:06:41AM

User ID: TRAIN20

OK Cancel Apply

12. Click on the **OK** button to return to the list of Service Indicators.

13. Click on the **Home** link to return to the Home page.

Lesson 3: Removing Service Indicators

Discussion

This lesson will provide you with the information that you need to remove Service Indicators from a Student's Record.

Remember, the name of the person (or department) who added the Indicator displays off the Manage Service Indicator page if you find you have questions about removing the hold.

Deleting Service Indicators

| Steps | |
|---|---|
| 1. From the menu choose: Campus Community > Service Indicators > Manage Service Indicators | |
| Manage Service Indicators | |
| Enter any information you have and click Search. Leave fields blank for a list of all values. | |
| Find an Existing Value | |
| EmplID: | <input type="text" value="begins with"/> <input type="text" value="1229982"/> <input type="button" value="Search"/> |
| Academic Career: | <input type="text" value="="/> <input type="text"/> |
| National ID: | <input type="text" value="begins with"/> <input type="text"/> |
| Campus ID: | <input type="text" value="begins with"/> <input type="text"/> |
| Last Name: | <input type="text" value="begins with"/> <input type="text"/> |
| First Name: | <input type="text" value="begins with"/> <input type="text"/> |
| <input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Save Search Criteria"/> | |

Steps

2. Enter the Student's **EmplID** or use the **Last Name** and **First Name** fields.

Click on the **Search** button. If necessary, select the record from the search results.

Manage Service Indicators

Joe Smith 1229982

Display: Effect Institution Refresh

[+ Add Service Indicator](#)

| Service Indicator Summary | | | | | | | | | |
|---------------------------|------------------------------|-------------------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| Code | Code Description | Reason Description | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
| ADV | Permission to register early | Potential Athlete | AKRON | 4037 | 2003 Fall | | | 04/15/2003 | |
| ADV | Permission to register early | Honors Post Secondary | AKRON | 4031 | 2003 Sprng | | | 12/11/2002 | |
| ADV | Permission to register early | Transfer Provisional Students | AKRON | 4033 | 2003 Sum | | | 03/03/2003 | |
| ENR | Prevent enrollment | Advising hold | AKRON | 4091 | 2009 Sprin | | | 01/21/2009 | |
| ENR | Prevent enrollment | Advising hold | AKRON | 4087 | 2008 Fall | 4097 | 2009 Fall | 01/14/2009 | |

[+ Add Service Indicator](#)

3. Click on the link in the **Code** column for the Service Indicator that you want to delete.

Joe Smith 1229982 **Release**

*Institution: The University of Akron

*Service Indicator Code: Prevent enrollment

*Service Ind Reason Code: Advising hold

Description:

Effect: Negative

Effective Period

Start Term: 2008 Fall End Term: 2009 Fall

Start Date: End Date:

Assignment Details

*Department: Academic Advisement

Reference:

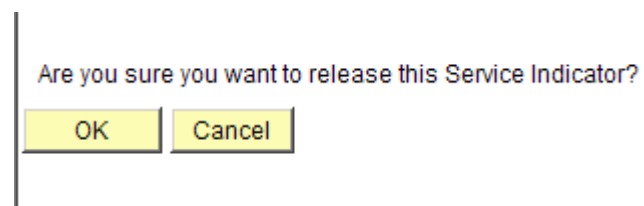
Amount: Currency:

In class, select the **ENR** (Code) for the Service Indicator that you just added in the last Lesson.

Steps

4. Click on the **Release** button.

This button will only display if you have security to add/remove the Service Indicator.



5. Click on the **OK** button to Release the Service Indicator and Save.

OR

Select the **Cancel** button to go back without releasing the Service Indicator.

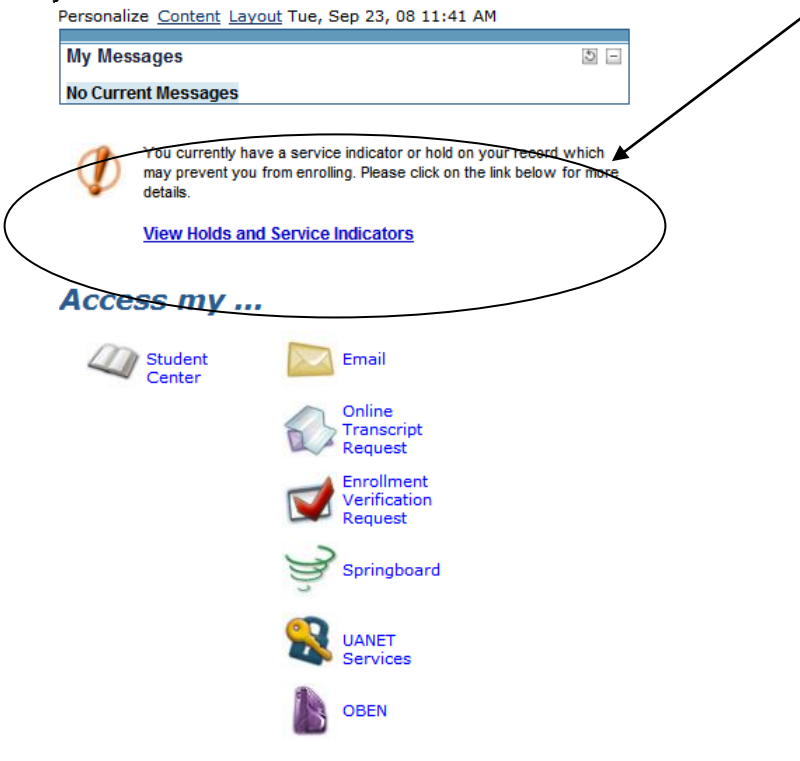








In class, click on the **OK** button to remove the Service Indicator.

Lesson 4: Viewing Holds (as Student) from Student Self Service Via ZipLine

Discussion

A student can access their holds by logging into the portal, Zipline, at <http://zipline.uakron.edu> with their UANetID and password. There is an online tutorial available for students to review to help them understand this tool. The tutorial can be found at <http://www.uakron.edu/its/learning/training/StudentV9.php>.

Viewing Holds in the Student Self Service

| Steps |
|---|
| 1. Log in to ZipLine with your Uanet ID and password . |
| 2. Click on the Log Me In! button. |
| <p>3. You are now logged in to the portal. On the My Page tab, in the top right corner, you will see a section for Holds.</p>  <p>Personalize Content Layout Tue, Sep 23, 08 11:41 AM</p> <p>My Messages No Current Messages</p> <p> You currently have a service indicator or hold on your record which may prevent you from enrolling. Please click on the link below for more details.</p> <p>View Holds and Service Indicators</p> <p>Access my ...</p> <ul style="list-style-type: none">  Student Center  Email  Online Transcript Request  Enrollment Verification Request  Springboard  UANET Services  OBEN |

Steps

4. Click on the link for **View Holds and Service Indicators**.

Below is a list of current Holds on your records. To filter your list of Holds, change the options below and click Go.

View your Holds by

Institution

Term

Department

go

| Item List | | | | | | | | |
|-------------------------------------|--------|-----|-------------------------|-------------------|----------|------------|----------|---------------------|
| Hold Item | Amount | | Institution | Start Term | End Term | Start Date | End Date | Department |
| Non Payment of Fees | | USD | The University of Akron | Affects all terms | | 10/15/2008 | | Loans & Receivables |
| Prevent enrollment | | USD | The University of Akron | 2008 Fall | | 09/01/2008 | | Registrar |

5. Click on the link in the **Hold Item** column to view details regarding the hold.

Your Holds

Hold Item

Nancy Bean

Prevent enrollment

Reason and Contact

Description: The University of Akron
Start Term: 2008 Fall
Start Date: 09/01/2008
Reason: See University Registrar
Department: Registrar
Contact: Debra Hayes

dllddk@yahoo.com

Instructions

University Registrar hold - see University Registrar

Return

You can use the link in the **Contacts** field to send an email in regards to the hold.

6. Click on the **Return** button to return to the previous page.

Appendix A: Service Indicators

Negative Service Indicators

| Service Indicator Code | Description |
|------------------------|--------------------------------|
| AGS | Selected for Attorney General |
| ATH | Hold on athlete's registration |
| AUD | Audit courses |
| CAN | Cancelled - non payment |
| DIS | Account Appealed/Disputed |
| DRP | No adds but allows drops |
| ENC | Enrollment Cancellation |
| ENF | Enrollment Cancellation Notice |
| ENH | Enrollment Cancellation Hold |
| ENR | Prevent enrollment |
| HRF | Hold Refunds |
| NBL | No Bill |
| NOP | Non Payment of Fees |
| PAM | Payment Arrangements Made |
| SAP | Standards of Academic Progress |
| TRA | Hold transcripts |
| TW | Withdrawal from classes |

Positive Service Indicators

| Service Indicator Code | Description |
|-------------------------------|--------------------------------|
| ADV | Permission to register early |
| CNV | Identifies converted student |
| CV2 | Converted T2 student |
| DEC | Deceased |
| GRD | Grad Assistantship |
| NSS | New Student Surcharge Override |
| PDL | PSEOP Distance Learning |
| PHA | PSEOP Honors Academy |
| PPO | Payment Plan Override |
| PTP | PSEOP Tech Prep |
| SNM | Send No Mail |
| SOL | Do Not Solicit |
| WLF | WAIVE LATE FEE |