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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

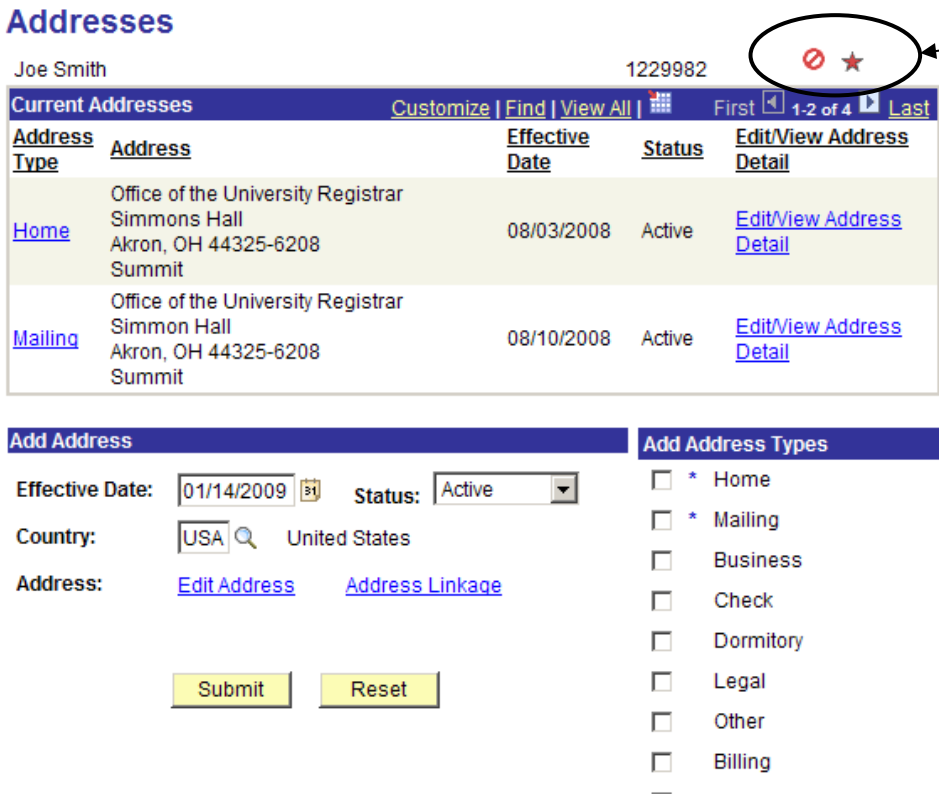


There are both Positive and Negative Service Indicators at The University of Akron. A Negative Service Indicator, also referred to as a “Hold,” is added to a student’s record when services are being restricted. An example of a Negative Service Indicator would be a student cannot register for courses 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:  <b>Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones &gt; Addresses</b></p> <p>Enter the Student's <b>EmplID</b> or use the <b>Last Name</b> and <b>First Name</b> fields.</p> <p>Click on the <b>Search</b> button. If necessary, select the record from the search results.</p> <p>Use the ID, 1229982 and click on the <b>Search</b> 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
<a href="#">ENR</a>	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:  The University of Akron

\*Service Indicator Code:  Prevent enrollment

\*Service Ind Reason Code:  Advising hold

Description:

Effect: Negative

Effective Period			
Start Term:	<input type="text" value="4087"/>	2008 Fall	End Term: <input type="text" value="4097"/> 2009 Fall
Start Date:	<input type="text" value="01/14/2009"/>		End Date: <input type="text"/>

Assignment Details	
*Department:	<input type="text" value="004690"/> Academic Advisement
Reference:	<input type="text"/>
Amount:	<input type="text" value="0.000"/> Currency: <input type="text" value="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
<a href="#">ADV</a>	Permission to register early	Potential Athlete	AKRON	4037	2003 Fall			04/15/2003	
<a href="#">ADV</a>	Permission to register early	Transfer Provisional Students	AKRON	4033	2003 Sum			03/03/2003	
<a href="#">ADV</a>	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**

- 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](#)

If necessary, use the ID, 1229982 in class. Click on the **Search** button.
- The Manage Service Indicators page displays.

**Manage Service Indicators**

Joe Smith 1229982

Display: Effect  Institution  [Refresh](#)

[+ Add Service Indicator](#)

Service Indicator Summary									
Customize   Find   View All									
First <input type="text" value="1-4 of 4"/> Last									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
<a href="#">ADV</a>	Permission to register early	Transfer Provisional Students	AKRON	4033	2003 Sum			03/03/2003	
<a href="#">ADV</a>	Permission to register early	Potential Athlete	AKRON	4037	2003 Fall			04/15/2003	
<a href="#">ADV</a>	Permission to register early	Honors Post Secondary	AKRON	4031	2003 Sprng			12/11/2002	
<a href="#">ENR</a>	Prevent enrollment	Advising hold	AKRON	4087	2008 Fall	4097	2009 Fall	01/14/2009	

[+ Add Service Indicator](#)
- 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 **EmpIID** 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

Service Indicator Summary		Customize   Find   View All   First 1 of 4 Last							
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	

**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
<a href="#">ENR</a>	<a href="#">Prevent enrollment</a>

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.

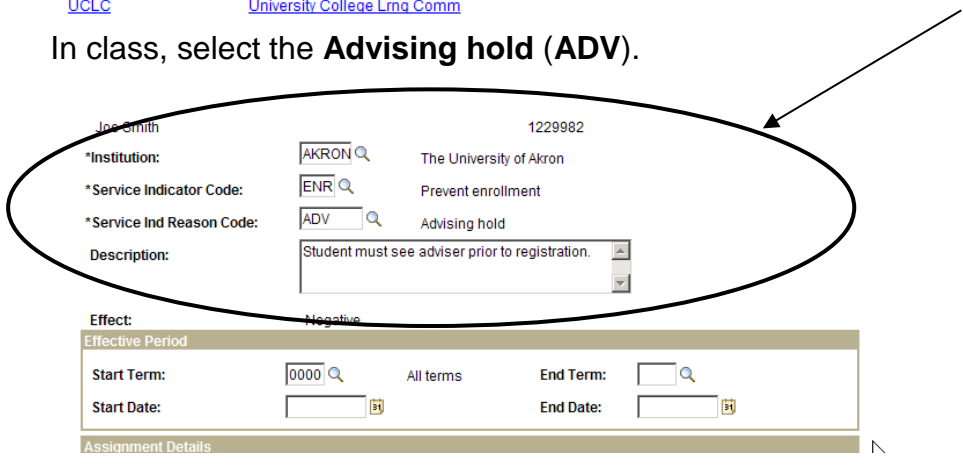
**Look Up Service Ind Reason Code**

**Search Results**

View All First  1-8 of 8  Last

Service Ind Reason Code	Description
<a href="#">ADV</a>	<a href="#">Advising hold</a>
<a href="#">DGCOL</a>	<a href="#">Tran. to degree granting coll</a>
<a href="#">GENED</a>	<a href="#">Gen Ed Requirement Not Met</a>
<a href="#">PEND</a>	<a href="#">Pending Final Transcript</a>
<a href="#">PRO</a>	<a href="#">Undergraduate Provisional</a>
<a href="#">UCLC</a>	<a href="#">University College Lrnq Comm</a>

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



Joe Smith 1229982

\*Institution:  The University of Akron

\*Service Indicator Code:  Prevent enrollment

\*Service Ind Reason Code:  Advising hold

Description:



Effect: Negative

Effective Period

Start Term:  All terms End Term:

Start Date:  End Date:

Assignment Details

Steps
<p>6. Select <b>Start Term</b>. 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 <b>Start Date</b>. Use the <b>Choose a Date</b>  button to select a date from the calendar. This field indicates the date the Service Indicator becomes active.</p> <p><b>Note:</b> <b>Start Term</b> and <b>Start Date</b> are minimum requirements when adding a Service Indicator.</p>
<p>8. The <b>Placed Person ID</b> defaults based on the User ID.</p>
<p>9. Use the <b>Comments</b> area to enter any additional notes about the Service Indicator.</p>
<p>10. <b>OPTIONAL:</b></p> <p>Select an <b>End Term</b> and <b>End Date</b>. 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: <b>Campus Community &gt; Service Indicators &gt; Manage Service Indicators</b>	
<b>Manage Service Indicators</b>	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
<input type="text" value="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"/> <a href="#">Basic Search</a> <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
<a href="#">ADV</a>	Permission to register early	Potential Athlete	AKRON	4037	2003 Fall			04/15/2003	
<a href="#">ADV</a>	Permission to register early	Honors Post Secondary	AKRON	4031	2003 Sprng			12/11/2002	
<a href="#">ADV</a>	Permission to register early	Transfer Provisional Students	AKRON	4033	2003 Sum			03/03/2003	
<a href="#">ENR</a>	Prevent enrollment	Advising hold	AKRON	4091	2009 Sprin			01/21/2009	
<a href="#">ENR</a>	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:

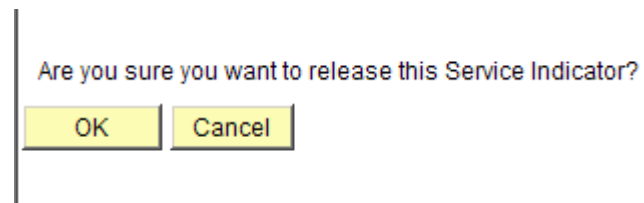
Amount:  Currency:

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.



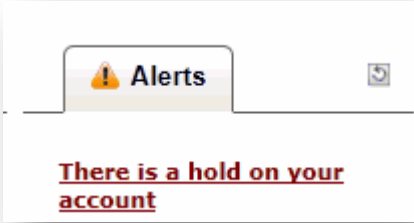
## Lesson 4: Viewing Holds (as Student) from Student Self Service Via My Akron

### Discussion

A student can access their holds by logging into the portal, My Akron, at <http://myuakron.edu> with their UANetID and password.

### Viewing Holds in the Student Self Service

Steps
1. Log in to My Akron with your <b>Uanet ID</b> and <b>password</b> .
2. Enter your UANetID and password.
3. You are now logged in to the portal. Click the <b>My Experience</b> tab.
4. The right side of the screen lists “Alerts”. If you have no holds, the following message will appear: “ <b>You Have no alerts at this time</b> ”. If you have any holds, you will be notified of them in this location. Click the message to obtain additional informaton on the hold.



## 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**

<b>Service Indicator Code</b>	<b>Description</b>
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