Viewing, Placing and Releasing Service Indicators

Business Process Guide

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Viewing, Placing and Releasing Service Indicators Overview

Service indicators are used to provide or limit access to services for students. Service indicators can be holds to prevent an individual from receiving certain services or positive indicators to designate special services to be provided or used as a tracking device for reporting purposes.

- **Negative Service Indicators** consist of one or more impact values identifying the type of services that will be restricted. Examples of negative service indicator impacts include transcript holds and denied registration for classes.
- **Positive Service Indicators** do not have impact values but may be used as criteria when providing some services.

⚠️ The **Negative Service Indicator** icon appears on a page when negative service indicators are assigned to the student.

⭐ The **Positive Service Indicator** icon appears on a page when positive service indicators are assigned to the student.

When a student has a service indicator, any user of the system with security to view service indicators can view them. Only those users who are given the appropriate security to place or release service indicators can actually edit them.

Before You Begin

**Prerequisites and Assumptions**

Before you can successfully perform the Placing and Releasing Service Indicators process, it is assumed that each of the following conditions has been met:

- There is a need for a service indicator
- You are authorized to place or release the service indicator.
Attention: Please be aware many of the MyCWU CS user guides/ BPGs were developed for a previous version of MyCWU. We are working on updating these, but in the meantime there may be instances where you encounter slight discrepancies between what the guide advises and what you see on your screen. In most cases these changes are purely cosmetic, but there may be some impacts on functionality as well. If you have questions regarding these guides, please contact reg@cwu.edu.

1.0 Viewing, Placing and Releasing Service Indicators

If you have access to the Advisor Center, you may choose to view/edit service indicators through the navigation path listed directly below. If so, refer to the directions in the Service Indicators section of the “Advisor Center” guide.

Navigation: Main Menu > Campus Solutions > Self Service > Advisor Center > Advisee General Info > Service Indicators

If you do not have access to the Advisor Center, follow the navigation path listed directly below to access the Manage Service Indicators search page. Continue with the directions in this guide.

Navigation: Main Menu > Campus Solutions > Campus Community > Service Indicators (Student) > Manage Service Indicators

Steps for Finding the Student:

1. On the Manage Service Indicators search page, enter the student’s CWU ID number into the EmpID field.
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Or, if the ID of the individual is not known, you may search using the student’s Last Name (or a portion of it). This search will display all students whose last name meets the criteria you entered into the search field.

Another option is to carry out a search using both the Last Name and First Name fields (may enter just a portion of each). If you wish to use the First Name field to search, you must also enter at least a portion of the last name into the Last Name field.

2. Click the Search button.

3. To clear the information you entered into the fields on this page, click the Clear button.

If there happens to be more than one student by the name on which you searched, or if the student has more than one Academic Career, etc., then you will need to click on the link (that will appear at the bottom of your search page under Search Results) for the student whose information you wish to view. If there is only one student by that name, or if you searched by the student’s ID number and the student has only one Academic Career, then your search will take you directly into the student’s information.

Tips for Working with the Manage Service Indicators Page:

1. The FERPA Restriction icon appears on the Manage Service Indicators page when a student has requested that his/her information NOT be released. By clicking on the icon you can view a reminder of the student’s FERPA restrictions.
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2. When the Manage Service Indicators page opens, it defaults to showing All of the student’s service indicators. You may choose to display only the Negative or only the Positive service indicator(s) by clicking the dropdown arrow for the Effect field and choosing the respective type of service indicator. Then click on the Refresh link or button. The page will refresh to display only the type of service indicator that you indicated.

3. You may need to click the left and right arrows or the View All link in the Service Indicator Summary title bar to view additional service indicators associated with the student. You will know there is additional information to view if the left and right arrows are active and the numbering between them says something other than 1-5 of 5, etc. (i.e. 1-2 of 3, etc.).

4. To VIEW additional information about one of the student’s service indicators listed on the Manage Service Indicators page, click the link for the service indicator under the Service Indicator Summary title bar. Doing so will open either the Edit Service Indicator page (if it is a service indicator that you have the security to edit) or the View Service Indicator page (if you only have the security to view the service indicator). Refer to the directions in section 1.1 below.

5. To PLACE (add) a service indicator for the student, click on the Add Service Indicator link above or below the Service Indicator Summary table on the Manage Service Indicators page. Doing so will open the Add Service Indicator page. Refer to the directions in section 1.2 below.

6. To RELEASE one of the student’s service indicators listed on the Manage Service Indicators page, click on the link for the service indicator under the Service Indicator Summary title bar. Assuming you have the security to release that service indicator, the Edit Service Indicator page will display. Refer to the directions in section 1.3 below.

7. To work with another student’s service indicators, click the Return to Search button to return to the Manage Service Indicators search page. Return to the directions under Steps for Finding the Student in section 1.0 above.

1.1 Viewing Service Indicators

Follow the directions in section 1.0 above to access the View Service Indicator page. Please note that, if your security allows you to edit the service indicator on whose link you clicked, then the page that opens here will be the Edit Service Indicator page. Your security will determine which page actually opens. The information you can view on either page is the same. The difference is that the Edit Service Indicator page will have a Release button in the upper right corner. The View Service Indicator page will not.
1. On the View Service Indicator or Edit Service Indicator page, the Service Ind Reason Code indicates why the service indicator was placed.

2. The Description field may reveal additional information about the Service Indicator.

3. The Start Term has no system functionality. It will usually be set to 0000. Processes that look at service indicators refer to the Start Date rather than the Start Term field.

4. Department indicates the department to which the service indicator belongs.

5. The Comments field will be used to reveal additional details, if any, regarding the service indicator. For the positive service indicator INF (Release of Information), the Comments field will indicate the information that may be released, to whom, and for how long. Student Affairs maintains this data, and they should be notified if there is a problem.

6. To view any services that may be impacted by the service indicator, refer to the Services Impacted field.
When finished viewing the service indicator details, click the [OK] or [Cancel] button at the bottom of the View Service Indicator or Edit Service Indicator page to return to the Manage Service Indicators page. Return to the directions under Tips for Working with the Manage Service Indicators page in section 1.0 above.

1.2 Adding (Placing) Service Indicators

Follow the directions in section 1.0 above to access the Add Service Indicator page.

Tips for Placing Service Indicators:

1. The Institution field should default in with CWUID. If it does not, enter CWUID into this field.
2. Enter the Service Indicator Code, if known. You may use the magnifying glass to look up the appropriate Service Indicator Code. Service Indicator Codes have security assigned to them. You will only see the Codes for which you have the security to place.

See Caution note below regarding characters to avoid in the Comments field.
3. The Service Ind Reason Code is a way of further defining the service indicator. Some service indicators have more than one reason; others have just one. Service Indicator Reasons have security assigned to them. You will only see the Reasons for which you have the security. Assuming that it doesn’t automatically default in once you’ve entered the Service Indicator Code, enter the Service Ind Reason Code, if known. You may use the magnifying glass to look up the appropriate Service Indicator Reason Code.

4. Enter 0000 as the Start Term for the service indicator. This field has no system functionality. Processes that look at service indicators refer to the Start Date rather than the Start Term field. If an actual term is indicated, the service indicator doesn’t display in self service after the end date of that term.

5. Enter the Start Date. This date is what controls when this service indicator will take effect for the student, such as to prevent a transcript or registration. In most situations, this date should be entered as the current date. Please speak with your supervisor if you think the date should be entered as anything other than the current date.

6. Department should default in based on the Service Ind Reason Code that was chosen. This field can be overridden but should only be done after consulting with your supervisor.

7. When finished entering information into the appropriate fields, click the button to save the information. Click if you do not wish to save.

8. You will be returned to the Manage Service Indicators page, where you can view the service indicators that are in effect for the student. Return to the directions under Tips for Working with the Manage Service Indicators page in section 1.0 above.

1.3 Releasing Service Indicators

Follow the directions in section 1.0 above to access the Edit Service Indicator page.

If the View Service Indicator page displayed instead, you do not have the security to release that particular service indicator. If that is the case, you may only view the information about it. Refer to the directions for “Viewing Service Indicators” in section 1.1 above.
Tips for Releasing Service Indicators:

Those users who have the appropriate security in Safari may release certain service indicators.

1. Please note that you may exit the Edit Service Indicator page at any time by clicking the OK or Cancel button at the bottom of the page. Return to the directions under Tips for Working with the Manage Service Indicators Page in section 1.0 above.

2. If you have the security to release the service indicator you are viewing on the Edit Service Indicator page, you will see a Release button in the upper right corner of the page. Click the button to release the service indicator.
3. When the dialogue box displays to verify that you wish to release the service indicator, click the [OK] button to verify the release. **This is actually the point where the release of the service indicator takes effect.** You will be returned to the **Manage Service Indicators** page, where you can view the service indicators that are in effect for the student. Return to the directions under **Tips for Working with the Manage Service Indicators Page** in section 1.0 above. Or...

Click the [Cancel] button if you have changed your mind and do not wish to release the service indicator. You will be returned to the **Edit Service Indicator** page. Return to the directions under **Tips for Releasing Service Indicators** in this section above.

- **If you accidentally release a service indicator that you did not intend to release, contact the Registrar’s Office at ext. 3001.**