

Service Indicators (Holds)

OBJECTIVE: Explain how to place or lift a service indicator (hold) on a student's record.

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<u>LESSON 3: LIFTING A SERVICE INDICATOR (HOLD).....</u>	<u>PG. 9</u>

NEED ADDITIONAL INFORMATION?

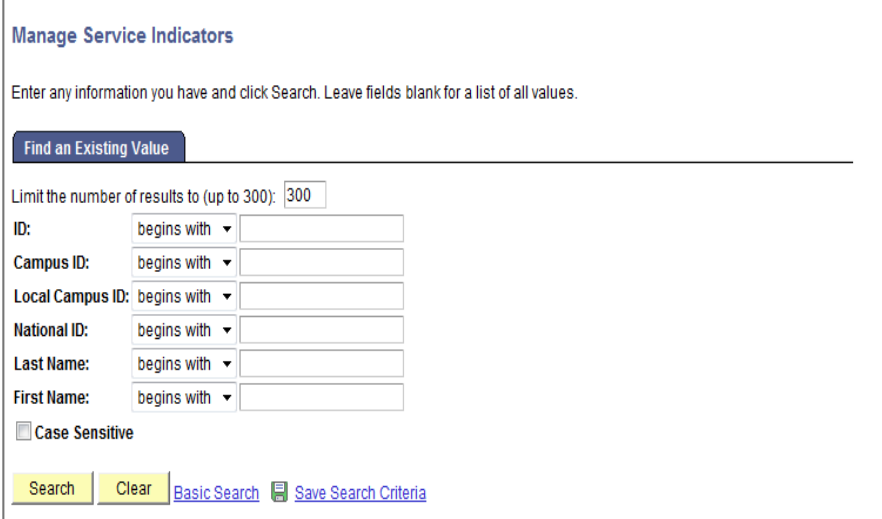
For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/contact.html> to locate the **CAMPUS COMMUNITY FUNCTIONAL LEAD.**

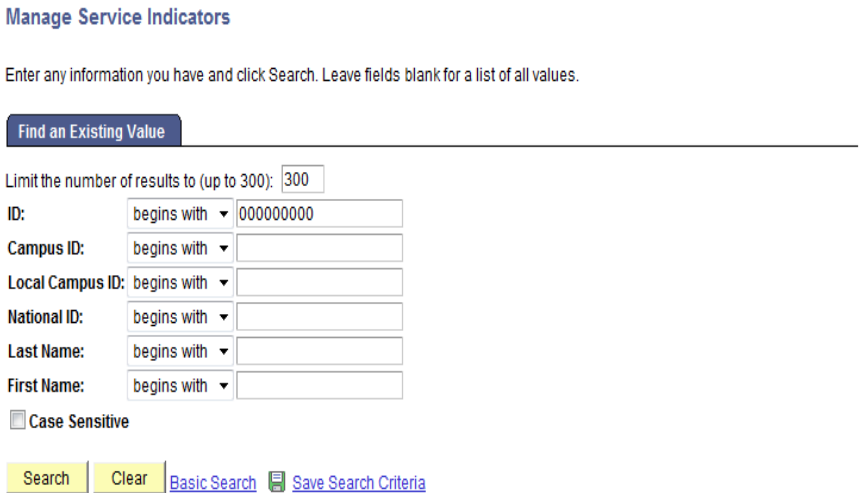
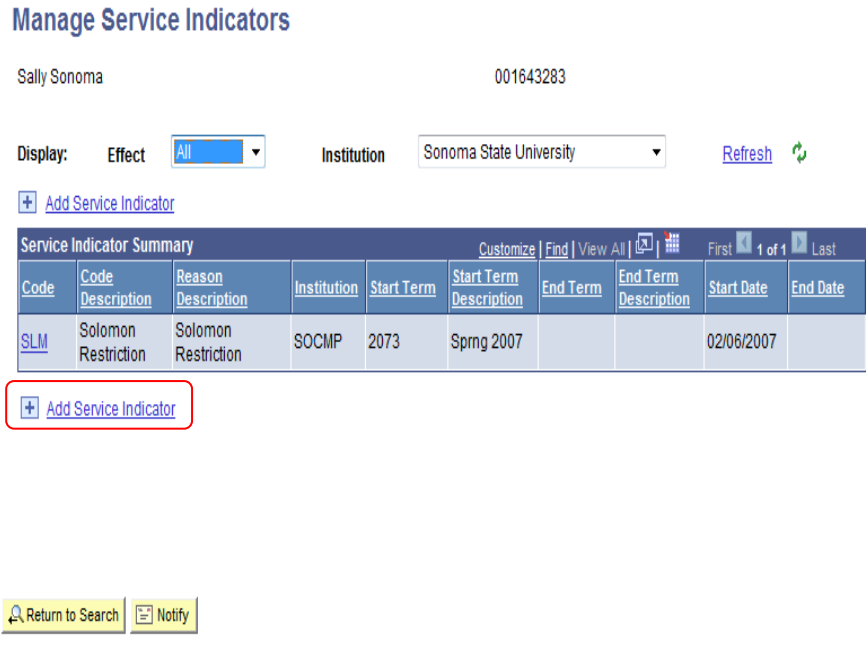
Lesson 1: Placing a Service Indicator (Hold)





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

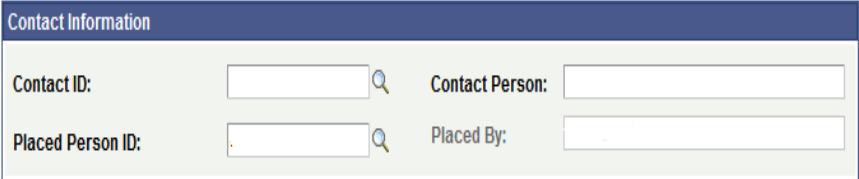
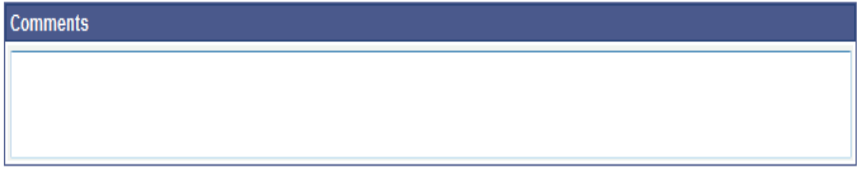
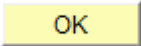
Introduction

Service Indicators (Holds) can be placed for students who are not yet in compliance with university regulations (i.e., WEPT, department advising, disqualification, etc.). This lesson will take you through the steps needed to put a hold on an individual student.

Step	Action	Screenshot
1	<p>Access the Manage Service Indicators page using the following navigation:</p> <p>Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators</p>	


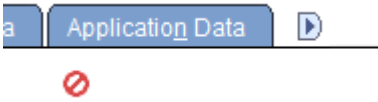
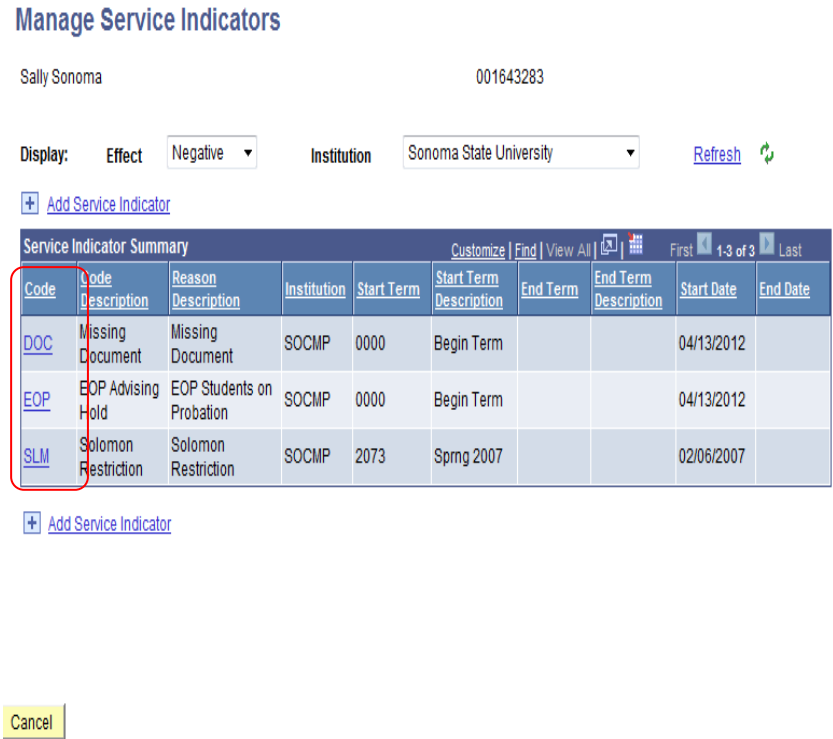
Step	Action	Screenshot
2	Enter the necessary information to look up the student who needs a service indicator added.	
3	When adding a new Service Indicator click the blue Add Service Indicator link.	

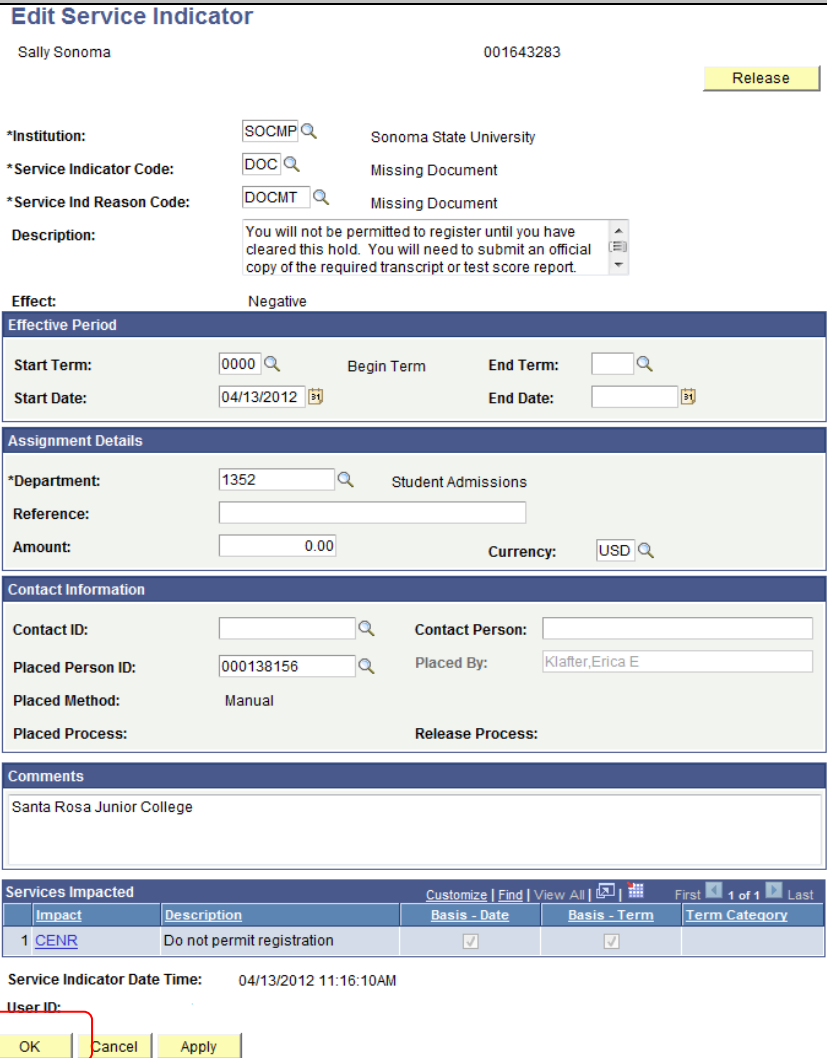
Step	Action	Screenshot
4	You will now be on the Add Service Indicator page. Institution will populate as SOCMP	<p>*Institution: <input type="text" value="SOCMP"/>  Sonoma State University</p>
5	Enter the Service Indicator Code	<p>*Service Indicator Code: <input type="text" value="DOC"/>  Missing Document</p>
6	Enter the Service Ind Reason Code	<p>*Service Ind Reason Code: <input type="text" value="DOCMT"/>  Missing Document</p>
7	<p>Under Effective Period you can decide when the service indicator will show up for a student and how long the service indicator will stay on the student's record. This can be determined by date or term.</p> <p>Note: If you would like the service indicator to stay on, until you verify that it should be removed you will want to enter 0000 in the Start Term and then the date you would like it to start showing up.</p>	 <p>The screenshot shows the 'Effective Period' section of a form. It includes fields for 'Start Term' (with value '0000'), 'Begin Term', 'End Term', 'Start Date' (with value '4/13/2012'), and 'End Date'. Each field has a search icon or a calendar icon next to it.</p>

Step	Action	Screenshot
8	<p>Under Contact Information, Contact ID will be blank if you want a contact listed when a student views this you will need to enter in that person's empl ID.</p> <p>Be aware that the students WILL see this person's name and email address through student self-service.</p>	 <p>The screenshot shows a 'Contact Information' form with four input fields: 'Contact ID', 'Contact Person', 'Placed Person ID', and 'Placed By'. Each field has a search icon to its right.</p>
9	<p>The Comments section is for internal purposes only.</p> <p>Be aware that a student WILL NOT be able to see the information contained in this field.</p>	 <p>The screenshot shows a 'Comments' section with a large, empty text area for entering comments.</p>
10	<p>Click the yellow OK button to get back to the Manage Service Indicators page.</p>	 <p>The screenshot shows a single yellow button with the text 'OK' centered on it.</p>

Lesson 2: Negative Service Indicators

Navigation: Any page for students with a Service Indicator (Hold)

Step	Action	Screenshot																																								
1	On any record page for a student with a Service Indicator (Hold), you will find this icon  indicating he or she has a hold. By clicking on the icon you can learn more about the hold.																																									
2	Click on the blue Code link for more information. For example DOC	 <p>Manage Service Indicators</p> <p>Sally Sonoma 001643283</p> <p>Display: Effect Negative Institution Sonoma State University Refresh</p> <p>+ Add Service Indicator</p> <table border="1"> <thead> <tr> <th>Code</th> <th>Code Description</th> <th>Reason Description</th> <th>Institution</th> <th>Start Term</th> <th>Start Term Description</th> <th>End Term</th> <th>End Term Description</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>DOC</td> <td>Missing Document</td> <td>Missing Document</td> <td>SOCMP</td> <td>0000</td> <td>Begin Term</td> <td></td> <td></td> <td>04/13/2012</td> <td></td> </tr> <tr> <td>EOP</td> <td>EOP Advising Hold</td> <td>EOP Students on Probation</td> <td>SOCMP</td> <td>0000</td> <td>Begin Term</td> <td></td> <td></td> <td>04/13/2012</td> <td></td> </tr> <tr> <td>SLM</td> <td>Solomon Restriction</td> <td>Solomon Restriction</td> <td>SOCMP</td> <td>2073</td> <td>Sprng 2007</td> <td></td> <td></td> <td>02/06/2007</td> <td></td> </tr> </tbody> </table> <p>+ Add Service Indicator</p> <p>Cancel</p>	Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date	DOC	Missing Document	Missing Document	SOCMP	0000	Begin Term			04/13/2012		EOP	EOP Advising Hold	EOP Students on Probation	SOCMP	0000	Begin Term			04/13/2012		SLM	Solomon Restriction	Solomon Restriction	SOCMP	2073	Sprng 2007			02/06/2007	
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3	Click on the yellow OK button at the bottom of the page to return to the Manage Service Indicator page.	 <p>Edit Service Indicator</p> <p>Sally Sonoma 001643283 Release</p> <p>*Institution: <input type="text" value="SOCMP"/> Sonoma State University</p> <p>*Service Indicator Code: <input type="text" value="DOC"/> Missing Document</p> <p>*Service Ind Reason Code: <input type="text" value="DOCMT"/> Missing Document</p> <p>Description: You will not be permitted to register until you have cleared this hold. You will need to submit an official copy of the required transcript or test score report.</p> <p>Effect: Negative</p> <p>Effective Period</p> <p>Start Term: <input type="text" value="0000"/> Begin Term End Term: <input type="text"/> Start Date: <input type="text" value="04/13/2012"/> End Date: <input type="text"/></p> <p>Assignment Details</p> <p>*Department: <input type="text" value="1352"/> Student Admissions</p> <p>Reference: <input type="text"/></p> <p>Amount: <input type="text" value="0.00"/> Currency: <input type="text" value="USD"/></p> <p>Contact Information</p> <p>Contact ID: <input type="text"/> Contact Person: <input type="text"/></p> <p>Placed Person ID: <input type="text" value="000138156"/> Placed By: <input type="text" value="Klafter, Erica E"/></p> <p>Placed Method: Manual</p> <p>Placed Process: <input type="text"/> Release Process: <input type="text"/></p> <p>Comments</p> <p>Santa Rosa Junior College</p> <p>Services Impacted</p> <table border="1"> <thead> <tr> <th>Impact</th> <th>Description</th> <th>Basis - Date</th> <th>Basis - Term</th> <th>Term Category</th> </tr> </thead> <tbody> <tr> <td>1 CENR</td> <td>Do not permit registration</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> </tbody> </table> <p>Service Indicator Date Time: 04/13/2012 11:16:10AM</p> <p>User ID: <input type="text"/></p> <p>OK <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p>	Impact	Description	Basis - Date	Basis - Term	Term Category	1 CENR	Do not permit registration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
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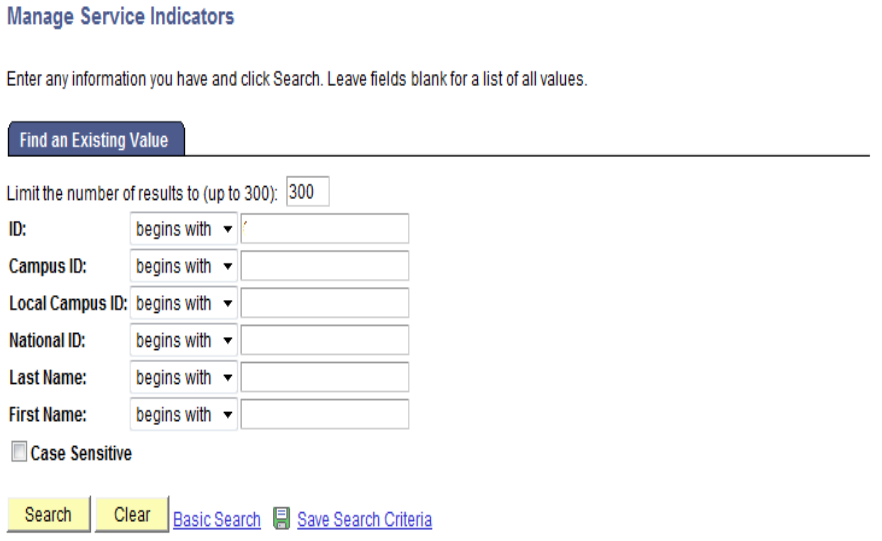
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4	Click on the yellow Cancel button to leave this page and resume navigating through the student's record.	<p>Manage Service Indicators</p> <p>Sally Sonoma 001643283</p> <p>Display: Effect Negative Institution Sonoma State University Refresh </p> <p>+ Add Service Indicator</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="10" style="text-align: right; font-size: small;">Customize Find View All First 1-3 of 3 Last</th> </tr> <tr> <th style="font-size: x-small;">Code</th> <th style="font-size: x-small;">Code Description</th> <th style="font-size: x-small;">Reason Description</th> <th style="font-size: x-small;">Institution</th> <th style="font-size: x-small;">Start Term</th> <th style="font-size: x-small;">Start Term Description</th> <th style="font-size: x-small;">End Term</th> <th style="font-size: x-small;">End Term Description</th> <th style="font-size: x-small;">Start Date</th> <th style="font-size: x-small;">End Date</th> </tr> </thead> <tbody> <tr> <td style="font-size: x-small;">DOC</td> <td style="font-size: x-small;">Missing Document</td> <td style="font-size: x-small;">Missing Document</td> <td style="font-size: x-small;">SOCMP</td> <td style="font-size: x-small;">0000</td> <td style="font-size: x-small;">Begin Term</td> <td></td> <td></td> <td style="font-size: x-small;">04/13/2012</td> <td></td> </tr> <tr> <td style="font-size: x-small;">EOP</td> <td style="font-size: x-small;">EOP Advising Hold</td> <td style="font-size: x-small;">EOP Students on Probation</td> <td style="font-size: x-small;">SOCMP</td> <td style="font-size: x-small;">0000</td> <td style="font-size: x-small;">Begin Term</td> <td></td> <td></td> <td style="font-size: x-small;">04/13/2012</td> <td></td> </tr> <tr> <td style="font-size: x-small;">SLM</td> <td style="font-size: x-small;">Solomon Restriction</td> <td style="font-size: x-small;">Solomon Restriction</td> <td style="font-size: x-small;">SOCMP</td> <td style="font-size: x-small;">2073</td> <td style="font-size: x-small;">Sprng 2007</td> <td></td> <td></td> <td style="font-size: x-small;">02/06/2007</td> <td></td> </tr> </tbody> </table> <p>+ Add Service Indicator</p> <p style="text-align: right;">Cancel</p>	Customize Find View All First 1-3 of 3 Last										Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date	DOC	Missing Document	Missing Document	SOCMP	0000	Begin Term			04/13/2012		EOP	EOP Advising Hold	EOP Students on Probation	SOCMP	0000	Begin Term			04/13/2012		SLM	Solomon Restriction	Solomon Restriction	SOCMP	2073	Sprng 2007			02/06/2007	
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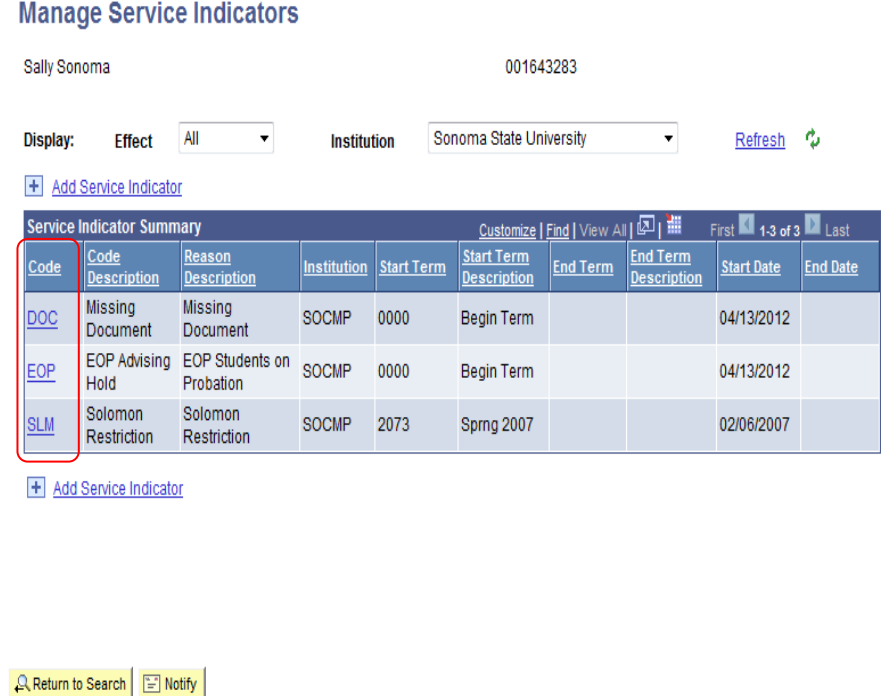
Lesson 3: Lifting a Service Indicator (Hold)

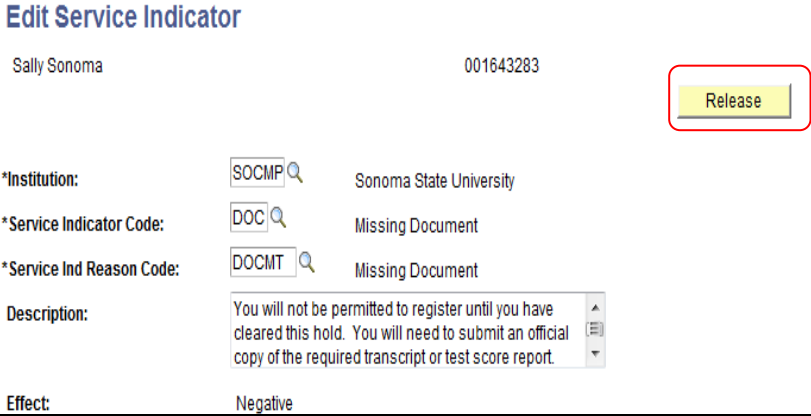
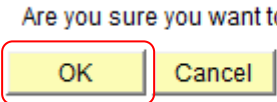
Navigation: Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators

Introduction

Service Indicators (Holds) can be lifted when students are once again in compliance with university regulations (i.e., WEPT, department advising, disqualification, etc.). This lesson will take you through the steps needed to lift a hold on an individual student. It is not necessary to retain a history of service indicators as we have a Service Indicator audit that contains this information.

Step	Action	Screenshot
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2	Enter the necessary information to look up the student who needs a service indicator added or changed.	 <p>Manage Service Indicators</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value</p> <p>Limit the number of results to (up to 300): 300</p> <p>ID: begins with ▼ 000000000</p> <p>Campus ID: begins with ▼</p> <p>Local Campus ID: begins with ▼</p> <p>National ID: begins with ▼</p> <p>Last Name: begins with ▼</p> <p>First Name: begins with ▼</p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p>																																																		
3	Click on the blue Code link that you wish to remove.	 <p>Manage Service Indicators</p> <p>Sally Sonoma 001643283</p> <p>Display: Effect All ▼ Institution Sonoma State University ▼ Refresh</p> <p>+ Add Service Indicator</p> <table border="1"> <thead> <tr> <th colspan="10">Service Indicator Summary</th> </tr> <tr> <th>Code</th> <th>Code Description</th> <th>Reason Description</th> <th>Institution</th> <th>Start Term</th> <th>Start Term Description</th> <th>End Term</th> <th>End Term Description</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>DOC</td> <td>Missing Document</td> <td>Missing Document</td> <td>SOCMP</td> <td>0000</td> <td>Begin Term</td> <td></td> <td></td> <td>04/13/2012</td> <td></td> </tr> <tr> <td>EOP</td> <td>EOP Advising Hold</td> <td>EOP Students on Probation</td> <td>SOCMP</td> <td>0000</td> <td>Begin Term</td> <td></td> <td></td> <td>04/13/2012</td> <td></td> </tr> <tr> <td>SLM</td> <td>Solomon Restriction</td> <td>Solomon Restriction</td> <td>SOCMP</td> <td>2073</td> <td>Spring 2007</td> <td></td> <td></td> <td>02/06/2007</td> <td></td> </tr> </tbody> </table> <p>+ Add Service Indicator</p> <p>Return to Search Notify</p>	Service Indicator Summary										Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date	DOC	Missing Document	Missing Document	SOCMP	0000	Begin Term			04/13/2012		EOP	EOP Advising Hold	EOP Students on Probation	SOCMP	0000	Begin Term			04/13/2012		SLM	Solomon Restriction	Solomon Restriction	SOCMP	2073	Spring 2007			02/06/2007	
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Step	Action	Screenshot
4	You will now be on the Edit Service Indicator page, click the Release button to remove the service indicator.	
5	Click the OK button if you are sure you want to remove the service indicator from the student's record.	
6	The removal process is now complete.	