How-To: Manage Service Indicators

1. Click on the Campus Community link.
2. Click on the Service Indicators (Student) link.
3. Click on the Manage Service Indicators link.
4. On this search page, you can search for a student by their Empl ID, National ID (Social Security Number), Campus ID (which is simply the campus in which they are in attendance, or have attended, in our case, it will be CSI, and our Campus ID is slightly different than Institution ID. Our Campus ID is CSI00, while our Institution ID is CSI01. However, not all Campus ID’s are populated for all students so I would recommend leaving this field blank.), Last Name, and First Name. You can populate the Academic Career field with the student’s career, but this field is not required.
5. On the search page, fill in as much information as you have on the student. If you only have first and last names, a list will come up of all students matching this information and you will need to identify the student based on Date of Birth (minus the year, which is not shown) or last 4 of SSN (if known). If there is only one match to your search criteria, the system will take you directly to the Manage Service Indicators page. ***REMEMBER: If the student is in front of you, or on the phone, never ask students to confirm information by asking if what you are seeing is correct, but ask them to answer generalized questions to which the answers are things you see in front of you. In other words, do not ask them if their last 4 are “XXXX”, rather ask “What is the last 4 of your SSN?” and confirm this with what you are looking at.***
6. On the Manage Service Indicators page, the students name and EMPLID are displayed at the top of the screen.
7. Next you will see Display filters. Filter Service Indicators by:
   a. Effect – You can select All, Positive, or Negative. Positive indicators are used for informational purposes only, and do not prevent or enable any activities in CUNYfirst. Negative indicators are used to inform students and staff of certain actions required by the student, and prevents a range of activities (known as “Impacts”) from Enrollment to Transcript printing.
   b. Institution – This should be set to the College of Staten Island, and we should not be modifying Service Indicators placed by other schools.
   c. If you change the filters, click the Refresh link to refresh the display.
8. Below this you will see the Service Indicator Summary box. In this box you will see all the Service Indicators that have been placed on this student’s account. The columns give you additional details about the Service Indicators and include:
   a. Code – this is the Service Indicator code.
   b. Code Description – This is the long description of the code.
   c. Reason Description – Every Service Indicator has a reason code behind it. These reason codes allow us to differentiate between indicators of the same type. For example, all Academic Advisement Service Indicators are ADV, but the reason codes differ to tell us which department they need to see for advisement and include all the Academic Departments, the Special Programs Departments (for example the Macaulay Honors College), and the Center for Advising and Academic Success (CAAS).
   d. Institution – This shows the institution for which the Service Indicator applies.
   e. Start Term – Used for term based indicators
f. **Start Term Description** – Long Description for the Start Term

g. **End Term** – Used for term based indicators

h. **End Term Description** – Long Description for the End Term

i. **Start Date** – Used for date based indicators

j. **End Date** – Used for date based indicators

**Adding a Service Indicator (Individual Student)**

1. Click on the **Add Service Indicator Link** located either above or below the summary box.

2. On the next page, the first field is **Institution** and should auto-populate to **CSI01** for the College of Staten Island. If it does not auto-populate, click the magnifying glass to the right of the field and select CSI01 from the list.

3. Below this is the **Service Indicator Code** field. If you know the code you can type it in the box, otherwise click the magnifying glass to search for the appropriate code. The long description for the code will appear in the open space to the right of the box. ***NOTE: You will only have access to see Service Indicators for which you have permission to manage.***

4. In the **Service Ind Reason Code** field, type in the reason code you wish to apply. If you do not know the reason code, click the magnifying glass to search for the appropriate code. The long description for the code will appear in the open space to the right of the box. ***NOTE: Again, you will only have access to see Reason Codes for which you have permission to manage.***

5. The **Description** box is not necessary and should be left blank.

6. Below the **Description** box is an **Effect** field. This field cannot be manipulated and will show the effect of the Indicator, whether it be Positive or Negative.

7. In the **Effective Period** box, you will create the effective start and end dates for the “Impacts” for this indicator. The field are:

   a. **Start Term** – used to set a term for the start of the “Impacts” of this Service Indicator for this student. Terms can be typed in using the four digit nomenclature or can be searched and selected by clicking the magnifying glass to the right of the box. A Start Term of **0000** is used to indicate that impacts will be in place for all terms. A Start Term of **9999** is used to indicate that the impacts will never be put in place.

   b. **Start Date** – used to set a specific start date for the Impacts of this Indicator on this student record. This is in the format of MM/DD/YYYY or can be selected of the calendar link to the right of the box.

   c. **End Term** – used to set the term in which the indicator Impacts will end. If no End Term is populated, the impacts will be in place until the indicator is released.

   d. **End Date** – used to set a specific date in which the Impacts will end. If no End Date is populated, the impacts will be in place until the indicator is released.

   ***NOTE: Both Term and Date fields do NOT need to be filled in. You should select the one that is the most appropriate for the situation.***

8. In the **Assignment Details** box, the **Department** field should auto-populate reflecting the Department to which the Indicator applies. The Reference, Amount, and Currency fields are not used in this activity.
9. The **Contact Information** box contains information on who to contact for this indicator, as well as the EMPLID and name of the person who placed this indicator on the student’s record. ***As a matter of Business Practice, we are NOT adding or modifying information in the Contact Information box.***

10. The **Comments** box is used to enter comments to further describe or identify the reason for the service indicator.

11. The **Services Impacted** box shows the Impact, its long description and its impact Basis, whether it is Date or Term. This box cannot be modified.

12. When finished, you can click the **Save** or **Apply** button at the bottom of the page. Apply will apply the indicator to the account without leaving the screen while the Save button will save and apply, but take you back to the **Manage Service Indicators** screen.

**Modifying Existing Indicators**

1. To modify an existing indicator, click on the underlined **Code** in the first column.

2. On the **Edit Service Indicator** screen, you have several options to remove the effects of the indicator.
   a. You can set an **End Term** and the Impacts will be removed at that time, but the indicator will stay on the record.
   b. You can set an **End Date** and the Impacts will be removed at that time, but the indicator will stay on the record.
   c. You can click the yellow **Release** button at the top of the page, which will immediately remove the Impacts of the indicator **AND** remove it from the student’s record.

   ***NOTE: As a matter of Business Practice, it is normally best to release the indicator and have it removed from the student’s record to avoid confusion. They can always be added back at a later date using the steps listed above. If you wish this indicator to remain a part of the student’s account, you can set an END Term or End Date and it will release the Impact but still show up on this screen.***

3. When finished, you can click the **Save** or **Apply** button at the bottom of the page. Apply will apply the indicator to the account without leaving the screen while the Save button will save and apply, but take you back to the **Manage Service Indicators** screen.