

Service Indicators (Holds)

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

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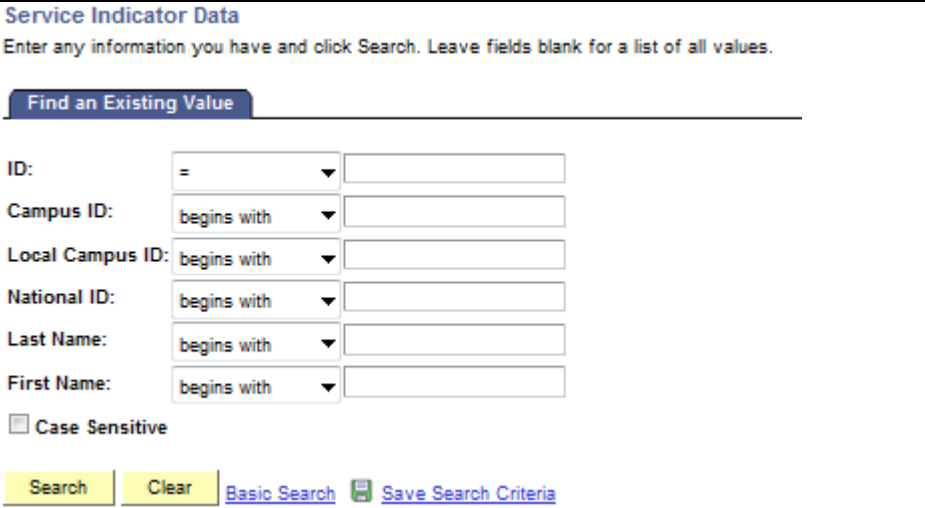
NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **Student Records Functional Lead** under Student Administration.





Lesson 1: Placing a Service Indicator (Hold)

Navigation: Home > Campus Community > Service Indicators > Service Indicator Data

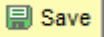
INTRODUCTION: Service Indicators (Holds) can be placed for students who are not yet in compliance with university regulations (i.e., WEPT, department advising, disqualification, etc.). This lesson will take you through the steps needed to put a hold on an individual student.

| Step | Action | Screenshot |
|------|---|---|
| 1 | <p>Access the Service Indicator Data page using the following navigation:</p> <p>Home > Campus Community > Service Indicators > Service Indicator Data</p> |  |

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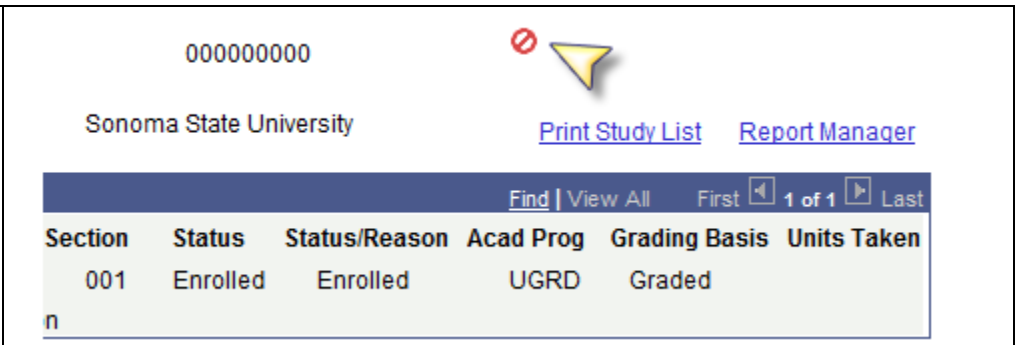
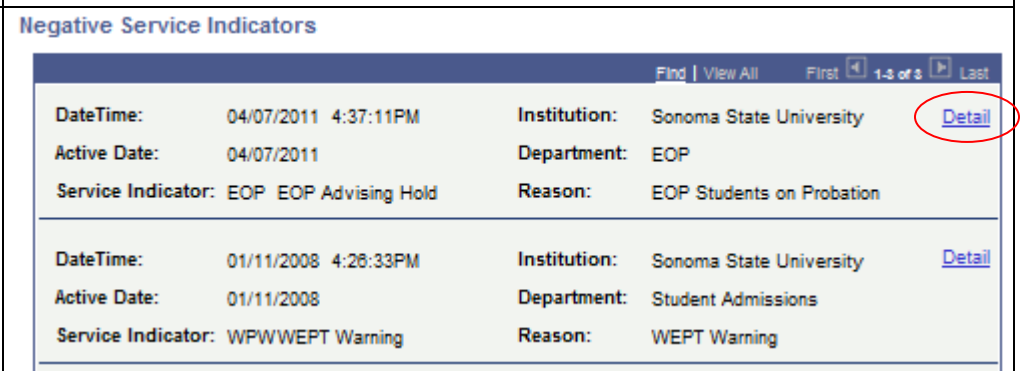
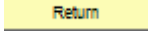
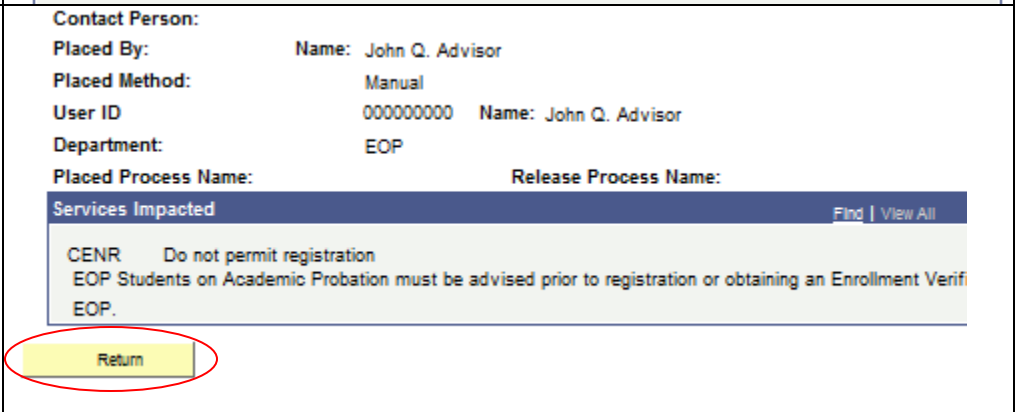
| | | |
|--|--|---|
| <p>2</p> <p>Enter the necessary information to look up the student who needs a service indicator added or changed.</p> <p>NOTE: If at any time you see this magnifying glass icon  click on it to view values to enter.</p>  | | <p>Service Indicator Data Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value</p> <p>ID: = 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> |
| <p>3</p> <p>If a Service Indicator already exists click the blue  button in the upper right corner of the top row.</p> <p>NOTE: It is important that previous service indicator history be preserved. Always add a new row to current history when adding a service indicator.</p> | | <p>Service Indicator Data</p> <p>Sally Sonoma 000000000</p> <p>Service Indicator Data Find View All First: 1 of 2 Last: </p> <p>DateTime: 01/11/2008 4:26:33PM *Institution: SOCMP Sonoma</p> <p>Service Ind Active Term: 0000 Begin Term - Svc Indicatr Use *Active Date: 01/11/2008</p> <p>*Service Indicator Code: WPW WEPT Warning</p> <p>*Service Ind Reason Code: WEPTW WEPT Warning</p> <p>References:</p> <p>Amount: 0.000 Currency: USD Dollar</p> <p>Contact ID: Contact Person:</p> <p>Placed Person ID: 000022035 Placed By: AMillar,Leo A</p> <p>*Department: 1352 Student Admissions</p> <p>Comments:</p> |
| <p>4</p> <p>Enter the code for the current semester under "Service Ind. Active Term".</p> | | <p>Sally Sonoma</p> <p>Service Indicator Data</p> <p>DateTime: 04/07/2011 4:08:57PM</p> <p>Service Ind Active Term: 2113 Spring 2011</p> <p>*Service Indicator Code:</p> |
| <p>5</p> <p>Enter the appropriate "Service Indicator Code".</p> | | <p>Sally Sonoma</p> <p>Service Indicator Data</p> <p>DateTime: 04/07/2011 4:08:57PM</p> <p>Service Ind Active Term: 2113 Spring 2011</p> <p>*Service Indicator Code: EOP EOP Advising Hold</p> <p>*Service Ind Reason Code:</p> |

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| | | |
|---|---|---|
| 6 | Enter the appropriate “Service Ind. Reason Code”. | <p>Service Indicator Data</p> <p>Sally Sonoma 000000000</p> <p>Service Indicator Data</p> <p>DateTime: 04/07/2011 4:08:57PM *Institution:</p> <p>Service Ind Active Term: 2113 Spring 2011</p> <p>*Service Indicator Code: EOP EOP Advising Hold</p> <p>*Service Ind Reason Code: EOPAD EOP Students on Probation</p> <p>Reference:</p> |
| 7 | If there is a contact person, enter his or her Empl_ID. Be aware that students WILL see this person’s name and email address through student self-service. | <p>Service Ind Active Term: 2113 Spring 2011</p> <p>*Service Indicator Code: EOP EOP Advising Hold</p> <p>*Service Ind Reason Code: EOPAD EOP Students on Probation</p> <p>Reference:</p> <p>Amount: 0.000 Currency: USD</p> <p>Contact ID: 000000000 Contact Person:</p> <p>Placed Person ID: 000000000 Placed By: Jo</p> <p>*Department: 1364 EOP</p> <p>Comments:</p> |
| 8 | The “Comments” section is for internal purposes only. Be aware that a student WILL NOT be able to see the information contained in this field. | <p>*Department: 1364 EOP</p> <p>Comments: Sample text.</p> |
| 9 | Click the yellow  button in the lower left corner. | |

Lesson 2: Negative Service Indicators

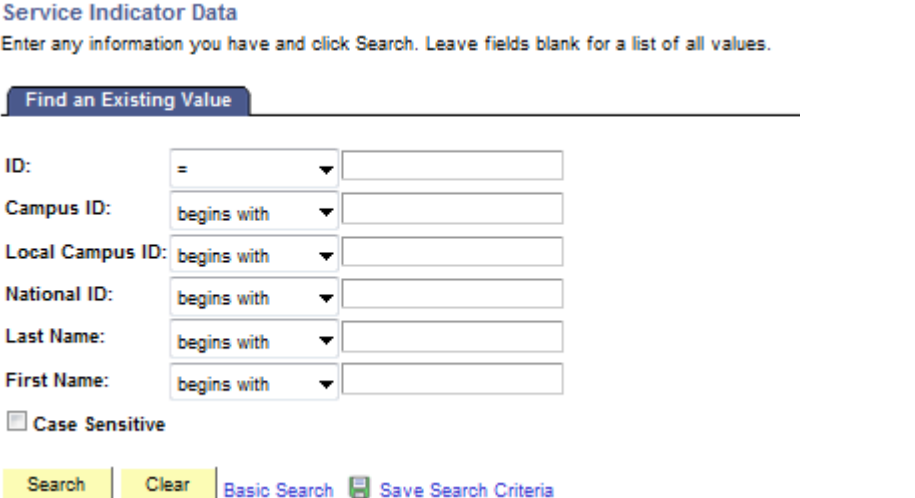
Navigation: Any page for students with a Service Indicator (Hold)

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|----------|--|--|
| <p>1</p> | <p>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.</p> |  |
| <p>2</p> | <p>Click on the “Detail” link for more information.</p> |  |
| <p>3</p> | <p>Click on yellow  button at the bottom of the page to leave this page and resume navigating through the student's record.</p> |  |












Lesson 3: Lifting a Service Indicator (Hold)

Navigation: Home>Campus Community > Service Indicators > Service Indicator Data

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 |
|------|---|---|
| 1 | <p>Access the Service Indicator Data page using the following navigation:</p> <p>Home > Campus Community > Service Indicators > Service Indicator Data</p> |  |

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| | |
|---|--|
| <p>2</p> <p>Enter the necessary information to look up the student who needs a service indicator added or changed.</p> <p>NOTE: If at any time you see this magnifying glass icon  click on it to view values to enter</p>  | <p>Service Indicator Data 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>ID: = 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> |
| <p>3</p> <p>If there is more than one hold, select the appropriate one by clicking "View All" to see the active holds.</p> | <p>00000000 </p> <p>Find View All First 1 of 3 Last</p> <p>*Institution: SOCMP Sonoma  </p> <p>*Active Date: 04/07/2011 </p> |
| <p>4</p> <p>Click the blue minus  for the hold to be lifted.</p> | <p>Find View 1 First 1-3 of 3 Last</p> <p>*Institution: SOCMP Sonoma  </p> <p>*Active Date: 04/07/2011 </p> |
| <p>5</p> <p>Click the yellow  Save button.</p> | |