

# Service Indicators Table of Contents

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# Service Indicators Overview

## Course Materials Overview



This manual covers how to do the following with service indicator information:

- Add
- Change / Edit
- Delete / Release
- View

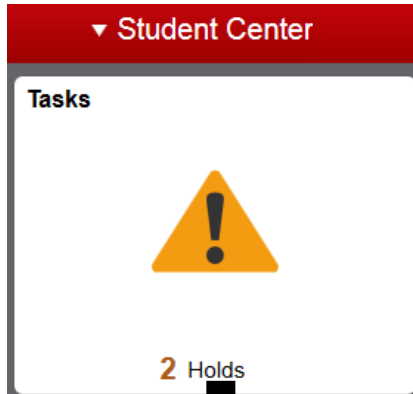
## What is a Service Indicator?

Service Indicators are used in a variety of ways to designate certain services or data for a student. Most generally, service indicators are used to prevent enrollment and access to student records.

**There are two types of Service Indicators:**

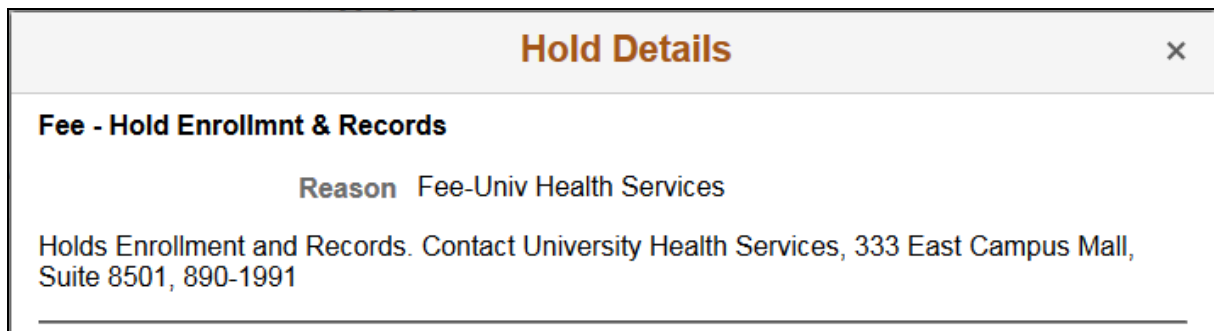
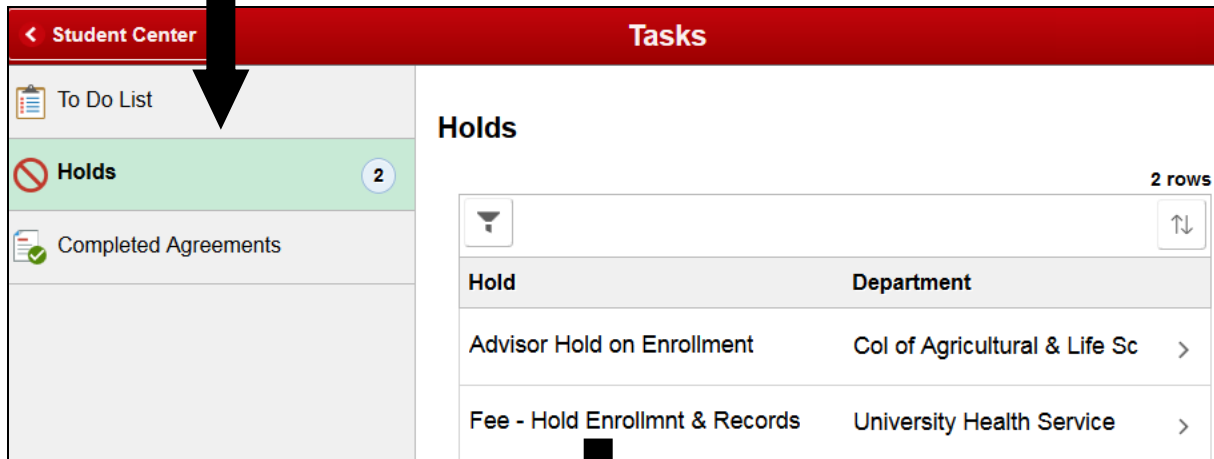
<p><b>Positive Service Indicator</b></p> 	<p>Positive service indicators have no impact on the student. A positive service indicator is mainly used for administrative tracking purposes.</p> <p>Examples of Positive Service Indicators:</p> <ul style="list-style-type: none"> <li>• Eligibility for certain Financial Aid programs</li> <li>• Veterans Benefits</li> <li>• International Student Services</li> <li>• Computerized Records</li> </ul> <p><b>Tip:</b> When you see this icon, ★,select it to view the summary of positive service indicators.</p>
<p><b>Negative Service Indicator</b></p> 	<p>Negative service indicators (also called ‘holds’) have a negative impact on the student. Negative service indicators prevent students from services such as enrolling in classes and receiving student records.</p> <p>Examples of Negative Service Indicators:</p> <ul style="list-style-type: none"> <li>• Student Must Meet with their Advisor</li> <li>• Unpaid Tuition</li> <li>• Fee Holds (e.g. Library, Residence Halls, SHIP)</li> <li>• Default on Student Loan</li> </ul> <p><b>Tip:</b> When you see the negative service indicator icon, ⊘, select it to view the summary of negative service indicators.</p>

## How Do Students View Service Indicators?



Students can view service indicators ('Holds') that prevent enrollment through MyUW in their Student Center under 'Tasks'.

When students receive their enrollment invitation, they are directed to their Student Center to view any holds that may prevent enrollment.



**Note:** Instructions on '[Fines and Holds](#)' and where to clear them can be found in the 'Academic & Student Records' section of this website: <https://registrar.wisc.edu/>

## Service Indicator Pages

The Manage Service Indicator page provides you the opportunity to view a summary of service indicators on a student's record.

From the Manage Service Indicators page you can view more details, add a service indicator, edit a service indicator, and change your display filter effect.

### Manage Service Indicators Page

Navigate to:

**Student Records WorkCenter, Manage Service Indicators**

-or- >Campus Community >Service Indicators >Person >Manage Service Indicators

**Manage Service Indicators**

ID:  Campus ID:

Display  Effect  Institution  Refresh

[+ Add Service Indicator](#)

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date	
ADV	Advisor Hold on Enrollment	Consult L & S Advisor	UWMSN	1202	2019 Fall		06/11/2019		
DDY	Enrolled for eRefund	Enrolled for eRefund	UWMSN	0000	No Term		05/29/2019		
FEB	Fee - Hold Enrollmnt & Records	Fee-Library	UWMSN	1196	2019 Summr		06/11/2019		
FRA	Fin Responsibility Agreement	Financial Responsibility Agrmt	UWMSN	1202	2019 Fall		03/13/2019		
ISS	Intl Student Services	Attended ISS Orientation	UWMSN	1142	2013 Fall				

[+ Add Service Indicator](#)

**Warning:** If *End Term* and/or *End Date* are used, you will continue to see 'expired' Service Indicators that no longer impact the student in SIS and the Student Center.

**Tip:** To change the type of service indicators seen on the Manage Service Indicators page.

1. Select *Display: Effect* of 'All', 'Negative', or 'Positive'.
2. Select Refresh .

**Note:** You can view all service indicators placed on a student's record; however, your security access determines which ones you have the ability to add, edit, and release.

## Service Indicator Page (Add / Edit / View)

The Service Indicator page can be viewed the following ways:

- Select *Code* from the Manage Service Indicators page (edit/view mode).
- Select *Add Service Indicator* button on the Manage Service Indicators page (add mode).

### Add Service Indicator

Rose Badger 00

\*Institution  UW-Madison

\*Service Indicator Code  Advisor Hold on Enrollment

\*Reason  Consult L & S Advisor

Description

Effect Negative Service Indicator

---

#### Effective Period

Start Term  2019 Fall End Term

Start Date  End Date

---

#### Assignment Details

\*Department  College of Letters & Science

Reference

Amount  Currency

---

#### Contact Information

Contact ID  Contact Person

Placed Person ID  Placed By

---

#### Comments

2000 characters remaining

---

#### Services Impacted

Personalize | Find | View All | First 1 of 1 Last

Impact	Description	Basis - Date	Basis - Term	Term Category
1 CENR	No Enrollment Activity Allowed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



Service Indicator Date Time 04/08/2019 2:11:41PM

User ID SRUP Budzik,Elizabeth Noelle

**Note:** The View Service Indicator page displays with grayed out fields indicating service indicator records you cannot modify.


## Service Indicator Page Field Descriptions (Add / Edit / View)

The table below describes the fields and buttons found on the Service Indicator page:

Field or Button	Description
<i>Institution</i>	Name of our institution, UWMSN. <ul style="list-style-type: none"> <li>• Defaults to ‘UWMSN’ for UW–Madison.</li> <li>• <b>If this field is blank, you must enter UWMSN.</b></li> </ul>
<i>Service Indicator Code</i>	Type of service indicator placed on the student (e.g. adv, feb). Type in code or select Look up  button and select service indicator code. Look Up displays codes you have access to use.
<i>Reason</i>	Further explanation of the service indicator. <ul style="list-style-type: none"> <li>• Type in reason code or select Look up  button and select desired service indicator <i>Reason</i> code.</li> <li>• The <i>Service Indicator Code</i> selected above determines the options in the Look Up <i>Reason</i> list.</li> <li>• Fee and Advisor service indicators <i>Reason</i> codes identify the office requesting placement of the service indicator.</li> </ul>
<i>Description</i>	Additional information usually indicating who to contact and impact on student based on service indicator <i>Reason</i> code. You cannot edit this field; use <i>Comments</i> to make notes for yourself. <b>If the <i>Description</i> needs modifying, contact <a href="mailto:leah.meicher@wisc.edu">leah.meicher@wisc.edu</a>.</b>
<i>Effect</i>	Impact service indicator has on student, ‘Negative Service Indicator’ or ‘Positive Service Indicator’.
<i>Start Term</i>	Term in which the service indicator is activated. <ul style="list-style-type: none"> <li>• Defaults to blank for enrollment-based service indicators.</li> <li>• <b>If placing a service indicator to prevent enrollment, enter a <i>Start Term</i> (required).</b></li> <li>• If <i>Start Term</i> is entered and <i>End Term</i> is left blank, and the <i>Services Impacted</i> includes enrollment, the student will <b>not</b> be able to add, drop, or swap from the specified <i>Start Term</i> or any future term until the service indicator is <a href="#">Released</a>.</li> <li>• A four-digit code representing century, year, and semester. Semesters are as follows: Fall=2, Spring=4, Summer=6. e.g. 1202=Fall 2019-2020, 1194=Spring 2018-2019.</li> <li>• To view term and session begin and end dates as well as deadlines, go here: <a href="#">□Student Records WorkCenter,  Dean/Dept Processing , Session Dates and Deadlines</a></li> </ul>

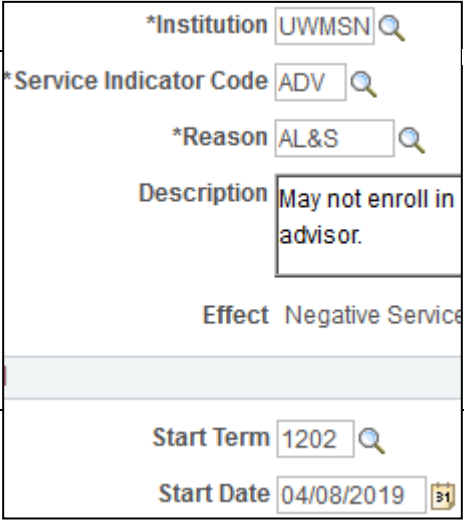
Field or Button	Description
<b><i>End Term</i></b>	<p>If you want to limit the number of terms this service indicator impacts the student, enter an <i>End Term</i>.</p> <ul style="list-style-type: none"> <li>• Defaults to blank.</li> <li>• Leaving <i>End Term</i> blank will impact the student from the <i>Start Term</i> through all future terms.</li> <li>• Entering an <i>End Term</i> will only impact the student from the <i>Start Term</i> through the specified <i>End Term</i>.</li> <li>• If you enter an <i>End Term</i>, you must <a href="#">Release</a> (delete) the service indicator so it is no longer visible in SIS and the Student Center.</li> </ul>
<b><i>Start Date</i></b>	<p>Date the service indicator will take effect.</p> <ul style="list-style-type: none"> <li>• Defaults to current date for enrollment based service indicators. <b>It is recommended that you use the current date.</b></li> <li>• The <i>Start Date</i> determines when the student will begin to view the service indicator in MyUW.</li> </ul> <p><b>If a future date is used:</b></p> <ul style="list-style-type: none"> <li>• The service indicator will not hold enrollment until that date, regardless of what you have specified in <i>Start Term</i>. For example, if you place a service indicator with the <i>Start Term</i> as the current term and a future <i>Start Date</i>, nothing will be held for the current term until that <i>Start Date</i> is reached.</li> </ul>
<b><i>End Date</i></b>	<p>If you want to limit the date range this service indicator impacts the student, enter an <i>End Date</i>. The service indicator will be effective through the end date. After that date, the service indicator expires.</p> <ul style="list-style-type: none"> <li>• Defaults to blank.</li> <li>• If you enter an <i>End Date</i>, you must <a href="#">Release</a> (delete) the service indicator so it is no longer visible in SIS and the Student Center.</li> </ul>
<b><i>Department</i></b>	<p>The <i>Department</i> responsible for the service indicator.</p> <p>Fills in automatically after you enter service indicator <i>Reason</i> code.</p>
<b><i>Reference</i></b>	<p>Optional free-form text field used by a few offices across campus to provide further detail about the service indicator. The student cannot see these comments; only visible to SIS users.</p>
<b><i>Amount</i></b>	<p>Dollar amount of the fine(s).</p> <ul style="list-style-type: none"> <li>• Defaults to 0.00.</li> <li>• The dollar amount of zero does not indicate the fee has been paid.</li> <li>• Service indicators of \$0.00 will hold services.</li> <li>• If a dollar <i>Amount</i> is entered, the student will see the amount.</li> </ul>
<b><i>Currency</i></b>	<p>Currency in which the fee amount should be paid.</p> <p>Defaults to 'USD' for US Dollar.</p>



<b>Field or Button</b>	<b>Description</b>
<b>Contact ID</b> <b>Contact Person</b>	Optional clarification on person (e.g., an advisor) or office the student needs to contact to clear the service indicator. <ul style="list-style-type: none"> <li>• If desired, enter a <i>Contact ID</i> or use the Look up . The name associated with the ID will display in the <i>Contact Person</i> field.</li> <li>• If the contact person does not have an ID, manually enter the person's name or office name in the <i>Contact Person</i> field following the standard name format of 'Last,First' (no space).</li> <li>• If you enter a <i>Contact</i>, the <a href="#">student</a> will see this detail.</li> </ul>
<b>Placed Person ID</b> <b>Placed By</b>	Person who placed the service indicator. <ul style="list-style-type: none"> <li>• Defaults to your ID and Name.</li> <li>• A different <i>Placed Person ID</i> can be entered using the Look up.</li> </ul>
<b>Placed Method</b> <i>(View/Edit page)</i>	How the service indicator was placed on this record: 'Manual' or batch 'Process'.
<b>Placed Process</b> <i>(View/Edit page)</i>	If the <i>Placed Method</i> = 'Process', the name of the process that placed this service indicator displays.
<b>Release Process</b> <i>(View/Edit page)</i>	UW–Madison does not use this field.
<b>Comments</b>	An optional memo field available for further explanation. The student cannot see these comments; only visible to SIS users.
<b>Services Impacted</b>	List of services that this service indicator impacts, including enrollment, transcript, etc.  The checked <i>Basis-Date</i> determines that a <i>Start Date</i> is required and a checked <i>Basis-Term</i> determines that a <i>Start Term</i> is required.
<b>Service Indicator Date Time</b>	Date and time the service indicator was entered.
<b>User ID</b>	The User ID and name of the person who last updated this service indicator.
<b>[Release]</b> <b>(delete)</b> <i>(Edit page)</i>	Select [Release] to delete the service indicator (and [OK]).  Note: The Release button only displays if you have security to remove that service indicator and you are in Edit mode.
<b>[OK]</b> <b>(save &amp; close)</b>	Select [OK] to save this record and close the page.
<b>[Cancel]</b>	Select [Cancel] to cancel any changes you made to this record or close the page without saving.
<b>[Apply]</b> <b>(save &amp; stay)</b>	Select [Apply] to Save changes you made and stay on this record.

## Adding a Service Indicator

To add a service indicator to a student’s record, follow the steps below:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Manage Service Indicators</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Campus Community >Service Indicators >Person >Manage Service Indicators
2.	Use the Find page to locate the student’s record.	A summary of the student’s service indicators displays on the Manage Service Indicators page.
3.	Verify the service indicator is not already in place.	
4.	Select <input type="checkbox"/> <b>Add Service Indicator</b> at either top or bottom of page.	The Add Service Indicator page displays.
5.	Complete all the fields as advised here: <a href="#">Service Indicator Page Field Definitions</a> a) Verify <i>Institution</i> = UWMSN. b) Enter <i>Service Indicator Code</i> . c) Enter <i>Reason</i> . d) Enter <i>Start Term</i> . e) Enter/verify today’s date in <i>Start Date</i> . f) If desired, complete any optional fields.	 <p>The screenshot shows the 'Add Service Indicator' form with the following fields and values:         <ul style="list-style-type: none"> <li>*Institution: UWMSN (annotated with 'a')</li> <li>*Service Indicator Code: ADV (annotated with 'b')</li> <li>*Reason: AL&amp;S (annotated with 'c')</li> <li>Description: May not enroll in advisor.</li> <li>Effect: Negative Service</li> <li>Start Term: 1202 (annotated with 'd')</li> <li>Start Date: 04/08/2019 (annotated with 'e')</li> </ul> </p>
6.	Select <b>[OK]</b> to save.	

### Notes:

- Your security determines which service indicator(s) you can add.
- If *Start Term* is entered and *End Term* is left blank, and the *Services Impacted* include enrollment, the student will **not** be able to add, drop, or swap from the specified *Start Term* or any future term until the service indicator is [released](#).
- A service indicator that prevents enrollment requires a *Start Term*; also enter a current or future *Start Date*. This date determines when a student can view their hold in MyUW.
- If you want the service indicator to only be in affect for one term, enter the same term number in *Start Term* and *End Term*. You can also specify an *End Date*.
- The name of the advisor can be specified in the *Contact ID* field.
- A department should avoid placing multiple FEB service indicators. If a student has more than one fine for the same department, the total can be specified in the *Amount* field and/or details can be typed in the *Comments* field.
- To mass assign service indicators (>50), contact [leah.meicher@wisc.edu](mailto:leah.meicher@wisc.edu).

## Changing a Service Indicator

**You will most likely only change a service indicator if you are fixing a mistake; otherwise, it is recommended that you ‘Release’ a service indicator to delete it, and [Add](#) a service indicator to create a new one.**

To change an existing service indicator on a student’s record, follow the steps below:

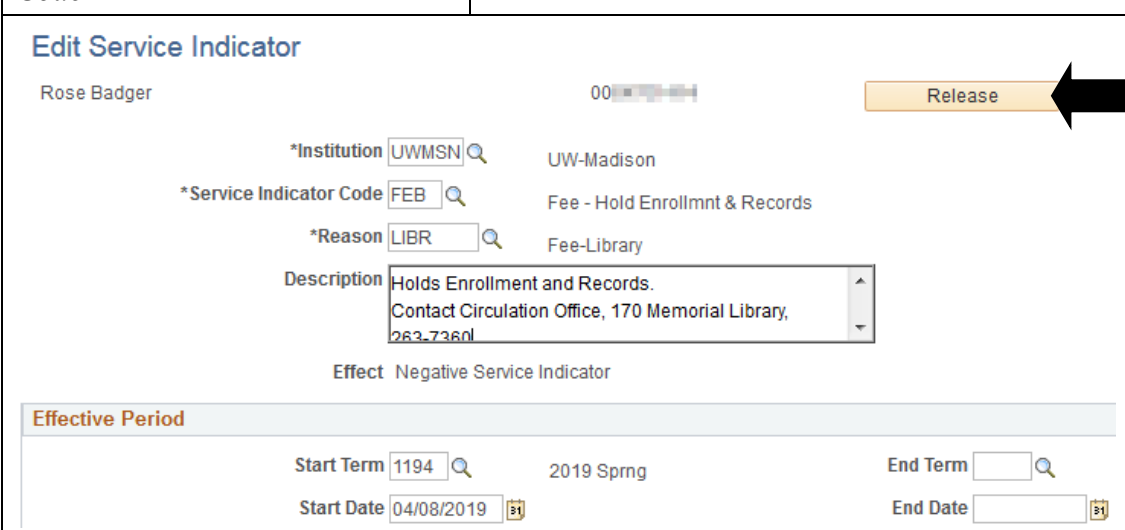
Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Manage Service Indicators</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Campus Community >Service Indicators >Person >Manage Service Indicators
2.	Use the Find page to locate the student’s record.	A summary of the student’s service indicators displays on the Manage Service Indicators page.
3.	Find the specific service indicator you wish to change and select its <i>Code</i> link.	The Edit Service Indicator page displays.
4.	Change <b>Start Date</b> to current date.	<i>Start Date</i> is updated.
5.	<b>Change</b> the appropriate field(s) as advised in the “ <a href="#">Service Indicator Page Field Definitions</a> ” section.	Fields are updated.
6.	Select [OK] to save.	The Manage Service Indicators page displays.

**Notes:** Your security determines which service indicator(s) you can change.

When you change a student’s service indicator information, any evidence of the previous service indicator information is removed from the system; however, behind the scenes, an audit record changes.

## Deleting a Service Indicator

To delete a service indicator from a student’s record, follow the steps below:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Manage Service Indicators</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Campus Community >Service Indicators >Person >Manage Service Indicators
2.	Use the Find page to locate the student’s record.	A summary of the student’s service indicators displays on the Manage Service Indicators page.
3.	Find the specific service indicator you wish to delete and select its <i>Code</i> link.	The Edit Service Indicator page displays.
	 <p><b>Edit Service Indicator</b></p> <p>Rose Badger 00[REDACTED] <b>Release</b></p> <p>*Institution <input type="text" value="UWMSN"/> UW-Madison</p> <p>*Service Indicator Code <input type="text" value="FEB"/> Fee - Hold Enrollmnt &amp; Records</p> <p>*Reason <input type="text" value="LIBR"/> Fee-Library</p> <p>Description <input type="text" value="Holds Enrollment and Records. Contact Circulation Office, 170 Memorial Library, 263-7360"/></p> <p>Effect Negative Service Indicator</p> <p><b>Effective Period</b></p> <p>Start Term <input type="text" value="1194"/> 2019 Sprng End Term <input type="text"/></p> <p>Start Date <input type="text" value="04/08/2019"/> End Date <input type="text"/></p>	
4.	Select [ <b>Release</b> ] button to delete the service indicator.	The message, “Are you sure you want to release this service indicator” displays. <b>Tip:</b> If you have made a mistake and do not want to delete this item, select [Cancel].
5.	Select [ <b>OK</b> ] to the release message if you want to delete the service indicator.	The service indicator is permanently removed and the Manage Service Indicators page displays.

**Notes:** Your security determines which service indicator(s) you can delete.


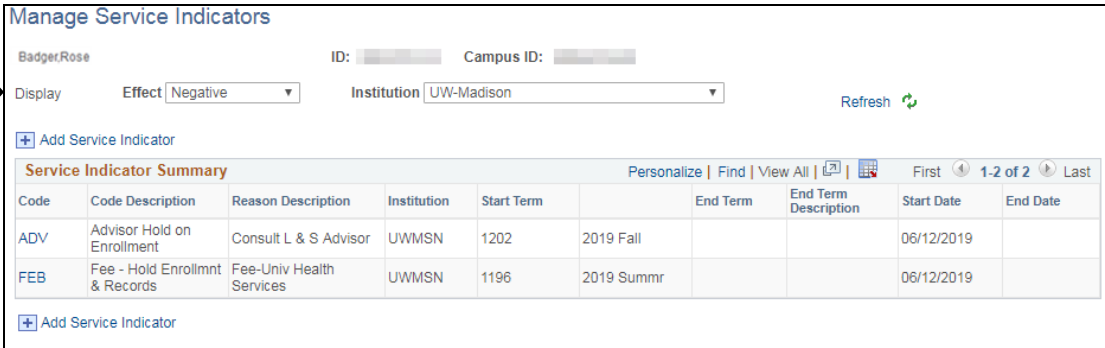
It is important to release a service indicator when the student has cleared it or when the service indicator has expired. Once released, the student will no longer see the service indicator in their Student Center nor will it impact them.

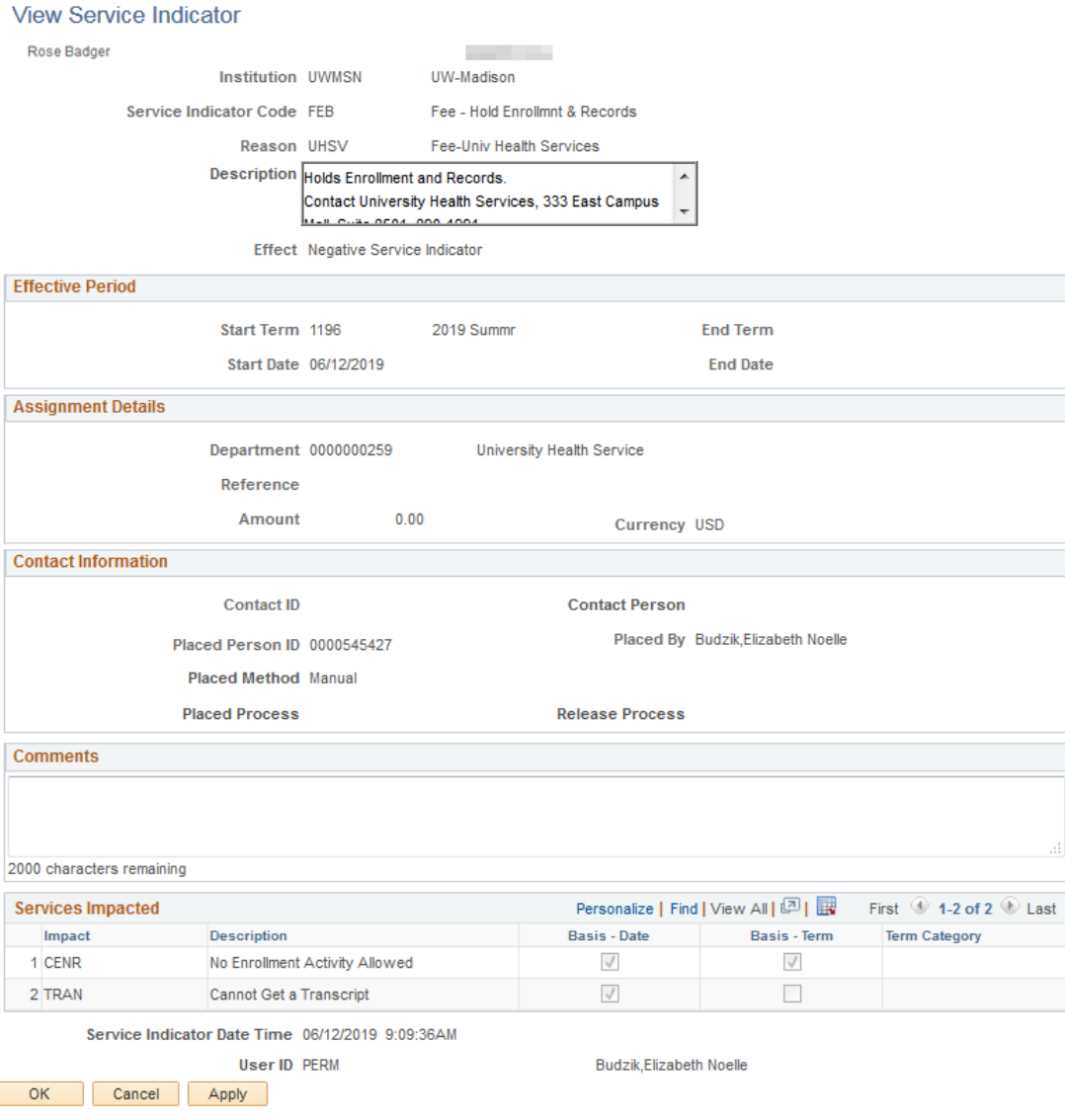
## Viewing Service Indicators

You can view service indicators two ways:

- 1) Navigate to the Manage Service Indicators page
- 2) when visible, select a positive or negative service indicator icon (★, ⊖) on student pages.

To view service indicators, follow the steps below:

Step	Action	Result						
1.	Depending on your location, follow the steps below to view service indicators:							
	<table border="1"> <thead> <tr> <th>If using:</th> <th>Then follow these steps:</th> </tr> </thead> <tbody> <tr> <td><b>Manage Service Indicators page</b></td> <td>           a) From Home, select:  <input type="checkbox"/> Student Records WorkCenter  <b>Manage Service Indicators</b>   <b>Tip:</b> Menu Navigation:            &gt;Campus Community &gt;Service Indicators            &gt;Person &gt;Manage Service Indicators.             b) Use the Find page to locate the student’s record.         </td> </tr> <tr> <td><b>any student record page</b></td> <td>           a) Find a student page that displays a service indicator icon (★, ⊖).  <b>Note:</b> These icons do not display on the Manage Service Indicators page.             b) Select positive ★, or negative ⊖ service indicator icon.         </td> </tr> </tbody> </table>	If using:	Then follow these steps:	<b>Manage Service Indicators page</b>	a) From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Manage Service Indicators</b>  <b>Tip:</b> Menu Navigation: >Campus Community >Service Indicators >Person >Manage Service Indicators.  b) Use the Find page to locate the student’s record.	<b>any student record page</b>	a) Find a student page that displays a service indicator icon (★, ⊖). <b>Note:</b> These icons do not display on the Manage Service Indicators page.  b) Select positive ★, or negative ⊖ service indicator icon.	
If using:	Then follow these steps:							
<b>Manage Service Indicators page</b>	a) From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Manage Service Indicators</b>  <b>Tip:</b> Menu Navigation: >Campus Community >Service Indicators >Person >Manage Service Indicators.  b) Use the Find page to locate the student’s record.							
<b>any student record page</b>	a) Find a student page that displays a service indicator icon (★, ⊖). <b>Note:</b> These icons do not display on the Manage Service Indicators page.  b) Select positive ★, or negative ⊖ service indicator icon.							
	<p><b>Result:</b> If you used ★, ⊖ icons, the Mänge Service Indicators page displays with the <i>Display Effect</i> filtered by ‘Negative’ or ‘Positive’ based on the selected icon. Otherwise, the <i>Display</i> is ‘All’. To change, select <i>Effect &amp;</i> select Refresh</p> 							
								
	<p><b>Note:</b> Some service indicators may be ‘expired’ based on <i>End Term</i> and <i>End Date</i>.</p>							

Step	Action	Result
2.	Select <i>Code</i> link for the service indicator you want to view more detail.	The View or Edit Service Indicator page displays based on your service indicator security.  <b>Note:</b> The Services Impacted area of this page shows services that can be impacted, including enrollment, records, etc.
		
3.	When done, select [Cancel].	The Manage Service Indicators page displays.
4.	If [Cancel] button displays, select.	You will return to the page you were on.

## Reports

1. Use SIS:
  - ☐ Student Records WorkCenter, |Dean/Dept Processing|, **Data Center**
  - or- >Reporting Tools >Data Center |Students|
  - to get a quick ‘common negative service indicator’ report.
2. Find Links to Student reports here: <https://search.data.wisc.edu/radar.php>  
Additional access may need to be requested using RADAR’s ‘Request Access’
3. Tableau/Data Visualization: <https://dataviz.wisc.edu>
4. General Reporting Resources:  
<https://registrar.wisc.edu/datareports/>  
<https://data.wisc.edu/>