

## Service Indicators (Holds)

### OBJECTIVE:

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

### CONTENTS:

<b>LESSON 1: PLACING A SERVICE INDICATOR (HOLD) .....</b>	<b>2</b>
NEGATIVE SERVICE INDICATORS .....	3
<b>LESSON 2: LIFTING A SERVICE INDICATOR (HOLD) .....</b>	<b>4</b>

### *NEED ADDITIONAL INFORMATION?*

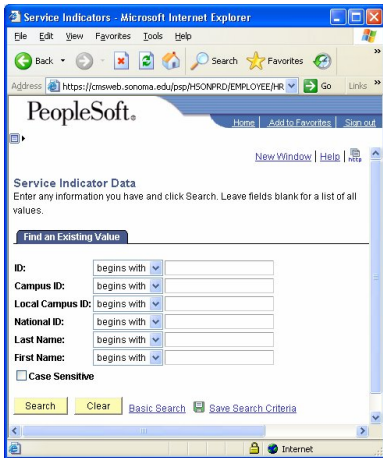
For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **Student Records Functional Lead** under Student Administration.

## STUDENT RECORDS

# Lesson 1: Placing a Service Indicator (Hold)

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

Figure 1 - Search




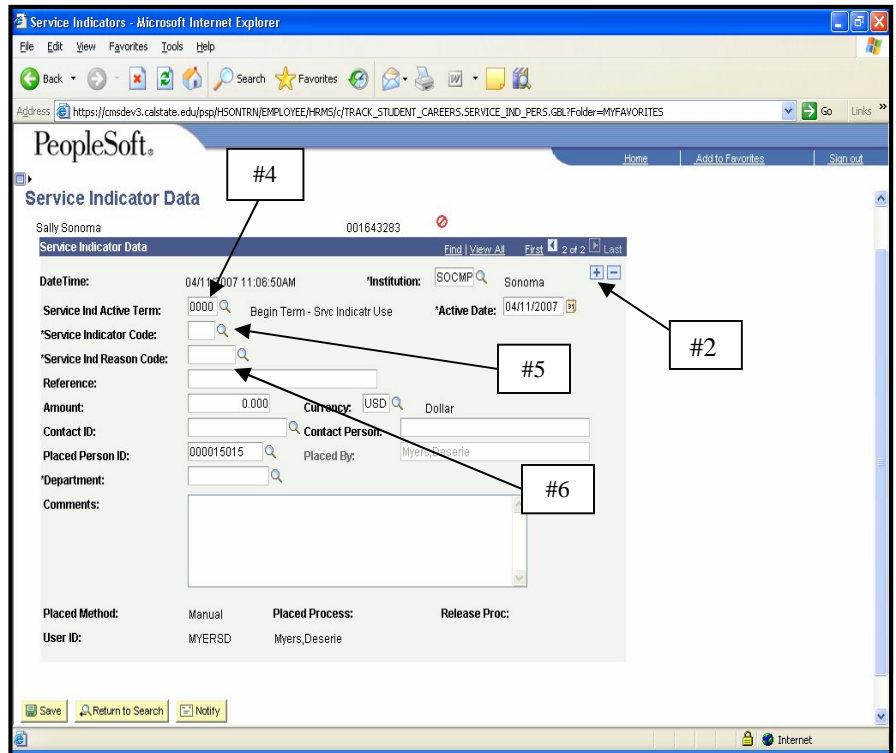
If at anytime you see this magnifying glass icon  click on it to view codes to enter.



Figure 2 – Service Indicator Data



Item	Action
1.	Enter the student's Empl_ID, National ID (Social Security Number), or name. Click "Search" or hit enter. (Fig. 1)
2.	If a Service Indicators already exists, click the blue "plus" button in the upper right corner of the top row. <ul style="list-style-type: none"> <li>➤ It is important that previous student group history be preserved. Always add a row to current history, when adding a student group to existing groups.</li> </ul>
3.	The "Date Time", "Institution", "Active Date", "Place Person ID" and "Placed By" fields will automatically populate.
4.	Enter the code for the current semester under "Service Ind. Active Term". (Fig 2, #4)
5.	Enter the appropriate "Service Indicator Code". (Fig 2, #5)

## STUDENT RECORDS

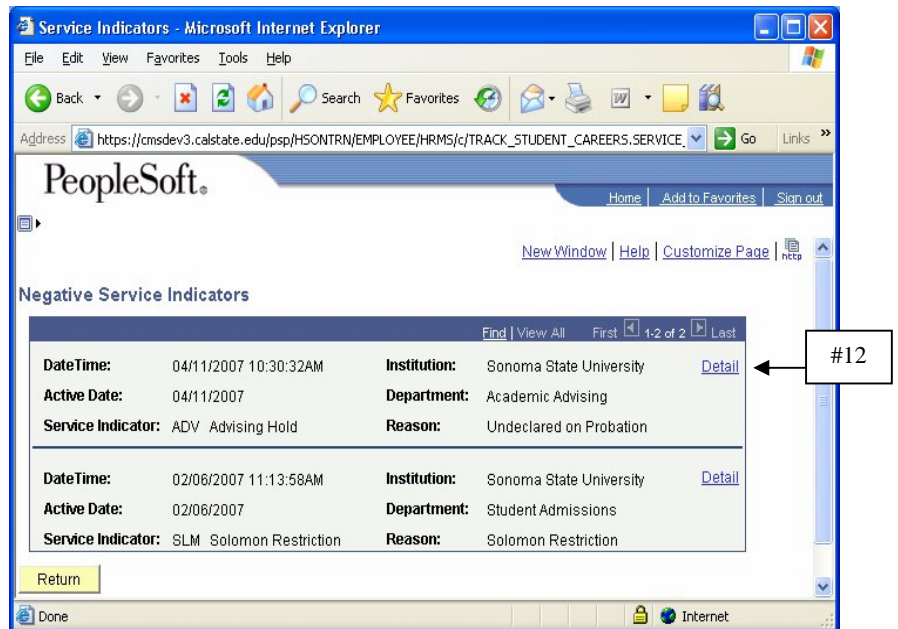
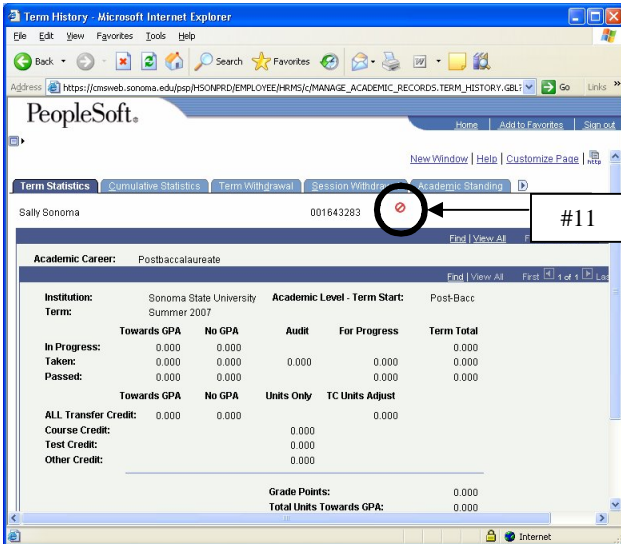
STAFF - [http://www.sonoma.edu/cms/documentation/Service\\_Indicators\\_\(Holds\)](http://www.sonoma.edu/cms/documentation/Service_Indicators_(Holds))

Last Updated: 4.26.07


6.	Enter the appropriate “ <b>Service Ind. Reason Code</b> ”. (Fig. 2, #6)
7.	If there is a contact person, enter his or her Empl_ID. <b>Be aware that student WILL see this person’s name and email address through student self service.</b>
8.	The “ <b>Comments</b> ” section is for internal purposes only. <b>Be aware that student WILL NOT be able to see the information contained in this field.</b>
9.	Click the yellow “ <b>Save</b> ” button in the lower left corner of the screen.
10.	If you have more holds to place, click the “ <b>Return to Search</b> ” button; otherwise, sign out.

Figure 4 – Negative Service Indicators

Figure 3 – Negative Service Indicator Icon



## Negative Service Indicators

11.	On any page for this student, you will find this icon  indicating he or she has a hold. By clicking on the icon you can learn more about the hold. (Fig 3, #11)
12.	Click on the “ <b>Detail</b> ” link for more information (Fig 4, #12)
13.	Click on yellow “ <b>Return</b> ” button at the bottom of the page to leave this page and resume navigating through the student’s record.

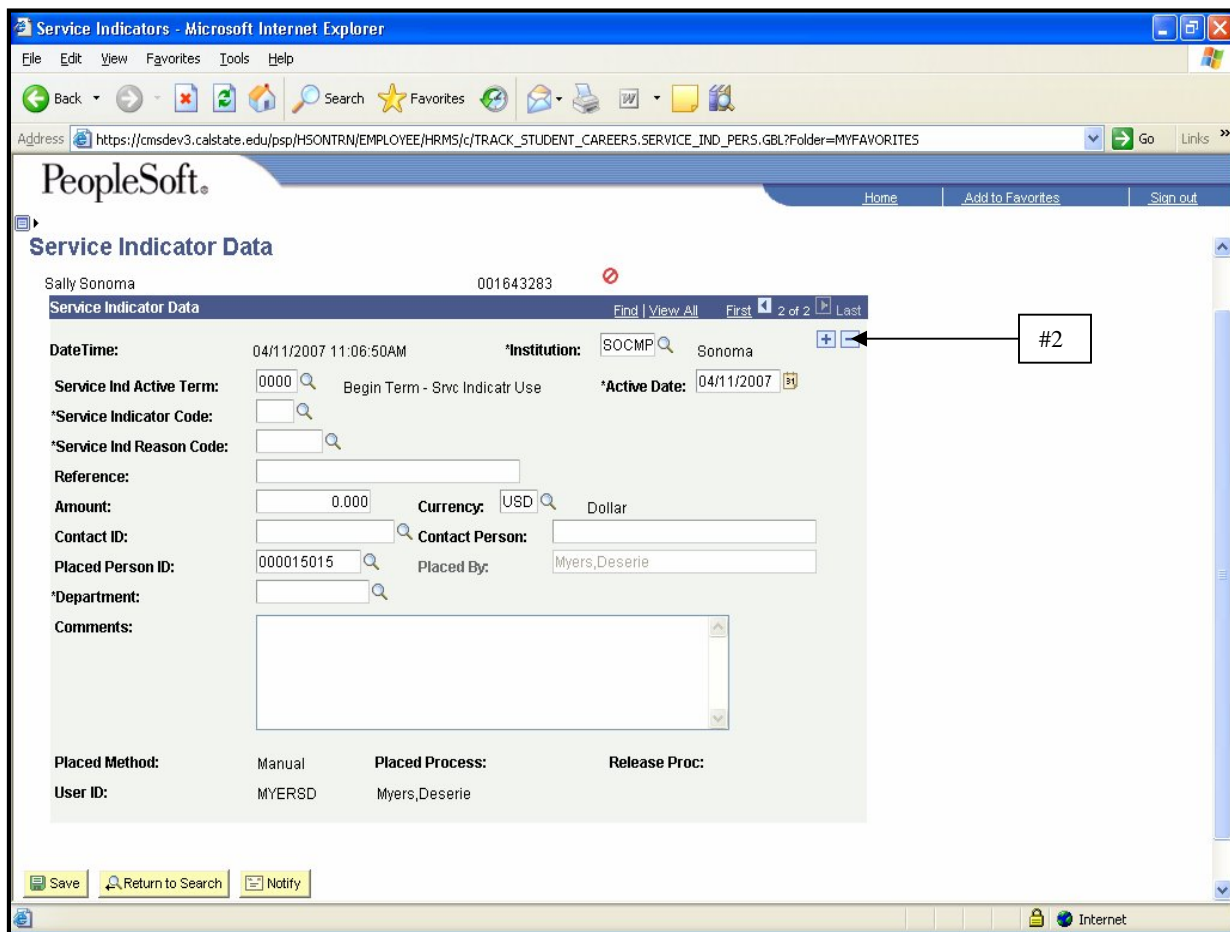
## STUDENT RECORDS

## Lesson 2: Lifting a Service Indicator (Hold)

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

Item	Action
1.	If there is more than one hold, select the appropriate one by clicking "View All" to see the active holds.
2.	Click the blue minus ("-") for the hold to be lifted. It is not necessary to retain a history of service indicators as we have a Service Indicator audit that contains this information. (Fig 5, #2)
3.	Click the yellow "Save" button.

Figure 5 – Service Indicator Data



### STUDENT RECORDS

STAFF - [http://www.sonoma.edu/cms/documentation/Service\\_Indicators\\_\(Holds\)](http://www.sonoma.edu/cms/documentation/Service_Indicators_(Holds))

Last Updated: 4.26.07