University of Central Florida

Student Financials - Inquiry

Service Indicators

Finance and Accounting
Student Accounts

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Introduction

UPK General Information
This course uses a User Productivity Kit (UPK) format. This format uses a choice of playback modes selected from topics in an outline. These playback modes are different methods that you can use to learn about a topic.

Outline Levels
The structured outline upon which this course is built contains three levels.

• **Module** (represented in the outline by a purple book icon) is the highest level.
• **Lessons** (an icon resembling a stack of papers) comprise the second outline level.
• **Topics** (an icon resembling a single sheet of paper) comprise the third outline level.

Use the plus (+) and minus (-) symbols to expand or collapse the levels.

Playback Modes
To begin the course, expand the outline to the topic level. Then, select a topic, which will activate the three playback modes near the top of the screen.

• **See It!** Learn by watching an animated demonstration of the steps needed to perform a task. All activities, such as moving the mouse, will be completed automatically for you.
• **Try It!** Learn interactively in a simulated environment. The system will prompt you with the actions you should perform to complete a task.
• **Do It!** Learn interactively using live data. Test the knowledge you gained from training by completing the task on your own.

Click the icon for the playback mode you selected to launch the UPK Player in a new window. If you need to pause a screen in the See It! mode, click the Pause link in the lower right corner of the text bubble. To resume playback, click the blinking Resume link in the text bubble.

Links
When the instructions in a topic frame say, "Click here," you must be in either the Try It! mode or the Do It! mode for the link to become active. Links are inactive in the See It! mode.

Jump-in Points
An arrow icon displays to the right of the player modes. Click this icon to open a pop-up window with jump-in points. These points allow you to start a topic at a point other than at the beginning, which is helpful if you need to review a portion of a task.

Concept Pane
The concept pane, which is found at the beginning of the module, lessons, and topics, contains an overview of the particular module, lesson, and topic. Topic concept panes contain additional information about the topic.

Introduction Pane
Each topic's Introduction pane displays a list of the topic's objectives.

Exiting the Player
If you need to return to the outline view before the topic's playback concludes, press the ESC key to terminate the player.

At the conclusion of the topic, the UPK Player window will close automatically and return you to the outline. You can then select another topic from the outline or close the window containing the UPK page.

Topics
This lesson contains the following topics:

• Viewing a Service Indicator

• Adding and Releasing a Service Indicator

Sandbox
The Student Financials training sandbox is available for you to practice what you have learned. To access the sandbox, navigate to https://he90dev.net.ucf.edu/psp/HE90TRN/?cmd=login. When the **Oracle PeopleSoft Enterprise** page opens, you will log in just as you log into the myUCF portal. Enter your PID in the **User ID** field and your PID password in the **Password** field.

Lookup Icon
Whenever you see a lookup icon (represented by a small magnifying glass) next to a field, you can click the icon. You can then select a value from the list of available values that displays.

Menu
You can collapse or expand the menu on the left side of the page while you are using the sandbox.

• To collapse the menu, click the **Minimize Menu** icon (represented by a minus symbol) in the upper right section of the menu bar.

• To expand the menu, click the **Expand Menu** icon in the upper left area of the page.

Service Indicators

Service Indicators indicate that a student's financial record contains information that impacts the student. Two types of service indicators exist, negative and positive.

• **Negative Service Indicator** – signals that a student's financial record contains information that is detrimental to the student. Negative Service Indicators, which are commonly referred to as "holds," prevent services from occurring. For example, a student with a negative Service Indicator for an unpaid library fine may be unable to register for classes or to have his or her grades or transcripts released.

• **Positive Service Indicator** – signals that a student's financial record contains information that is beneficial to the student. For example, a positive Service Indicator may show the user that a late fee has been waived for a student.

Service Indicators can be released from a student's record based on criteria, such as the Service Indicator Code, Reason, Term, and Date value. A record of the Service Indicator's existence will continue in the Audit record.

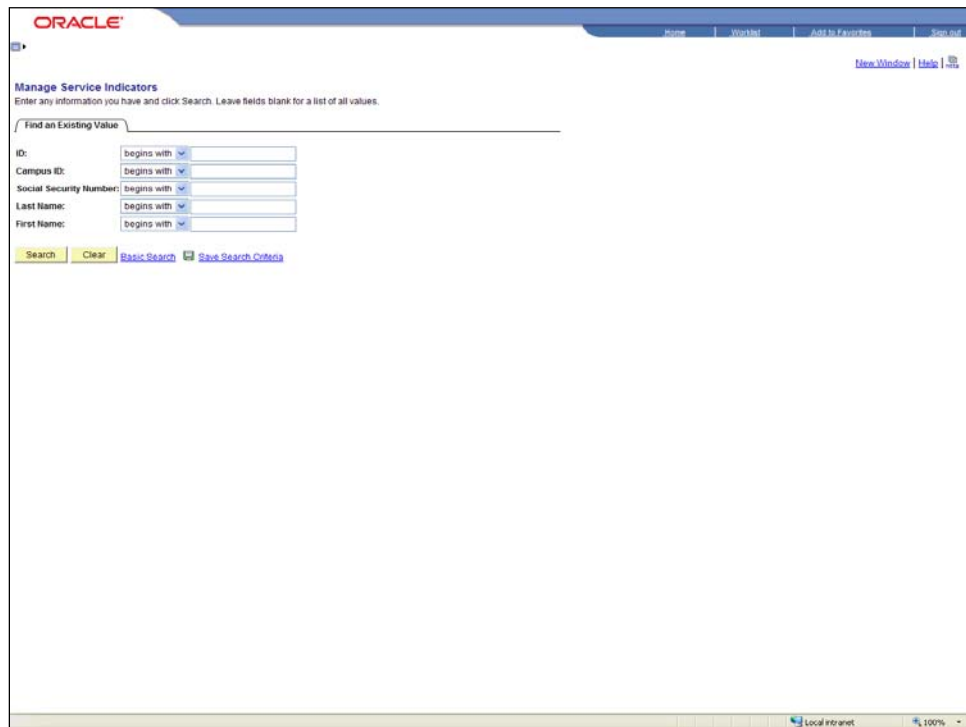ORACLE®
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Viewing a Service Indicator

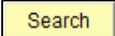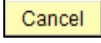In this topic, you will learn how to perform a search and view a service indicator.

Procedure

In this topic you will learn how to:

• Perform a search for a service indicator.

• View a service indicator.

Step	Action
1.	Log into the myUCF portal and navigate to **Staff Applications** > **PeopleSoft SA/HR.**
2.	Next, navigate to **Campus Community** > **Service Indicators** > **Person.** Person
3.	Then, click the **Manage Service Indicators** link. Manage Service Indicators
4.	To provide more room on your screen, click the **Collapse Menu** icon located in the upper left area of your screen. ▬

Step	Action
5.	On the **Manage Service Indicators** page that displays, enter your search criteria in one or more of the search fields. You can enter a portion of the search criteria, click the **Search** button, and then select a student from the list of search results that display. For this example, enter **1234567** in the **ID** field.
6.	Click the **Search** button.
7.	The **Manage Service Indicators** page will redisplay with the name and ID of the student who met your search criteria. Information pertaining to any service indicators posted to a student's account can be viewed in the **Service Indicator Summary**.
8.	To view more detailed information about a service indicator, click its link in the **Code** column.
9.	The **View Service Indicator** page will display. In addition to showing the **Service Indicator Code** and the **Service Indicator Reason Code**, which indicates why the service indicator was placed on the student's record, this page contains a detailed description of the service indicator.

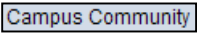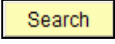| Step	Action
10.	The **Effect** field on the **View Service Indicator** page indicates if the Service Indicator is positive or negative. The page also displays the **Effective Period**, which includes the starting and ending periods for the Service Indicator; **Assignment Details**, such as the department associated with the Service Indicator and the amount; **Contact Information**; and **Comments**, if any.
11.	The **Services Impacted** section at the bottom of the **View Service Indicator** page lists any services affected by the service indicator, such as a block on registration or a hold on releasing the student's grades or transcript. Among the information included in this section is the date and time the service indicator was posted to the student's record as well as the User ID and name of the employee who posted the service indicator.
12.	To view additional information on the service indicator, click one of the links under the Impact column. For this example, click the **AENR** link. AENR
13.	After viewing the information on the **Service Impact Description** page that displays, click the **Return** button. Return
14.	On the **View Service Indicator** page that displays, click the **Cancel** button. Cancel
15.	The **Manage Service Indicators** page will display. Click the **Home** link near the top of the page to return to the main menu. Home
16.	From the home page that displays, either click a menu link or click the **Sign out** link to terminate your current session.
17.	In this topic you learned how to: • Perform a search for a service indicator. • View a service indicator. **End of Procedure.**

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Adding and Releasing a Service Indicator

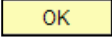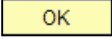In this topic, you will learn how to add and release a service indicator.

Procedure

In this topic, you will learn how to:

• Add a service indicator.

• Release a service indicator.

Step	Action
1.	After logging into the myUCF portal, navigate to **Staff Applications > PeopleSoft SA/HR**, and then click the **Campus Community** link. Campus Community
2.	Next, navigate to **Service Indicators > Person**. Person
3.	Then, click the **Manage Service Indicators** link. Manage Service Indicators
4.	The **Manage Service Indicators** search page will display. Enter a value in one or more of the search fields. For this example, enter **1234567** in the **ID** field.
5.	Click the **Search** button. Search
6.	The **Manage Service Indicators** page will display for the student you selected. To provide more room on your screen, click the **Collapse Menu** icon located in the upper left area of your screen.
7.	To begin the process of adding a service indicator, click the **Add Service Indicator** link. Add Service Indicator
8.	The **Add Service Indicator** page will display. The **Start Date** and **Placed Person ID** fields will automatically populate. Click the **Service Indicator Code** lookup icon.

Step	Action
9.	The **Look Up Service Indicator Code** page will display with a list of service indicators. The list may vary from the one displayed in this example, as the list will contain only the service indicators that you are authorized to add. For this example, select **SFR – Student Accounts Review** from the list. SFR
10.	The **Add Service Indicator** page will redisplay with the value you selected populating the **Service Indicator Code** field. Depending on the service code you select, corresponding values will automatically populate in the following fields: • **Service Ind Reason Code** • **Description** • **Department** • **Services Impacted**
11.	Click the **Start Term** lookup icon. 🔍
12.	Click the **Look Up** button. Look Up
13.	Select a term from the list that displays. For this example, select **1350 – Spring 2009**. 1350 Spring 2009

Step	Action
14.	Enter an optional comment in the **Comment** field. For this example, enter **Charges pending.**
15.	Click the **OK** button. OK
16.	The **Manage Service Indicators** page will redisplay with the service indicator you just added. Next, you will learn how to release a service indicator. To begin the process of releasing a service indicator, click its code link. For this example, click **SFR**. SFR
17.	The **Edit Service Indicator** page will display. Click the **Release** button. Release
18.	Respond to the confirmation message that displays by clicking the **OK** button. OK

Step	Action
19.	The **Manage Service Indicators** page that displays will no longer show the service indicator you just released. Click the **Home** link near the top of the page to return to the main menu. Home
20.	From the home page that displays, either click a menu link or click the **Sign out** link to terminate your current session.
21.	In this topic, you learned how to: • Add a service indicator. • Release a service indicator. **End of Procedure.**