


# Mass Assign/Release SF Service Indicators Based on Amount Past Due (B01)

**Purpose:** Use this document as a reference for how to mass assign Student Financials service indicators based on past due amount.


**Audience:** Student Financials Staff.

 You must have at least one of these local college managed security roles:

- ZD CC Service Indicators
- ZZ CC Service Indicators

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

This process utilizes the Mass Assign/Mass Release Service Indicator pages and some flexible queries designed to assign any indicator the user has access to assign, based on the prompted criteria. This is to give the individual colleges a tool for controlling their application of policy in regards to what threshold assigns and releases a service indicator.

 It is recommended that you have separate run controls for your Mass Assign/Mass Release processes, so you can schedule them and they retain your entered values and do not conflict with each other.

## Mass Assign

**Navigation:** Campus Community > Service Indicators > Person > Mass Assign

1. The Mass Assign Run Control search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.

- NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220\_ADM\_FYR\_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Mass Assign page displays.
  4. Within the **Population Selection** section:
    - a. Select **PS Query** from the **Selection Tool** drop-down.
    - b. Enter or search for the **Query Name CTC\_SF\_MA\_SRV\_IND\_AMT**.
    - c. Select the **Edit Prompts** link and the Query Prompts dialogue box displays.
      - i. Search, enter, or select the following fields:
        - a. **Business Unit**.
        - b. **Serv Ind Being Assigned: B01**.
        - c. **Serv Ind Reason Being Assigned: NOPAY**.
        - d. **Amount Past Due More Than:** Dollar amount the account needs to be past due by the number of days to be selected.
        - e. **Days Past Due (at least):** The number of days past due to set a threshold for selection. *Both the Amount Past Due and Days Past due work in conjunction. Both things must be true for selection.*
        - f. **Excl SI with impact NOCAN:** Select the checkbox to exclude accounts with Service Indicators that have a service impact of NOCAN.
        - g. **Excl SI with impact NOAGE:** Select the checkbox to exclude accounts with Service Indicators that have a service impact of NOAGE.
        - h. **Serv Ind End Term Not Less than:** If using the exclusion checkboxes and the selected service indicators have an end term, **they will not be excluded if** the Term prompted for is not less than the end term on the service indicator that the student may have with the impact. In other words, if a student has a service indicator with selected impact and it has an end term that has passed (example: 2235), and then the "current term" is entered (example 2237), that service indicator will not exclude them from being selected, because the end term has expired. Blank end terms will continue being considered for exclusion.
      - ii. Select the **OK** button and the Mass Assign page displays.
  5. Select the **Preview Selection Results** hyperlink to ensure you are picking up students with your prompts.
  6. Within the **Service Indicator Data** section, search, enter, or select the:
    - a. **Institution**.
    - b. **Service Indicator Code: B01**.
    - c. **Reason: NOPAY**.
    - d. **Use System Date:** Selecting the checkbox makes the start date of the Service indicator whatever the system date is at the time of assignment, rather than the Start Date entered in the Effective Period box.
  7. Within the **Effective Period** section, search or enter the:
    - a. **Start Term:** Optional Field - Limits the service indicators system impact in relation to the service impacts on the service indicator, to be effective on the Starting Term.

- b. **End Term:** Optional Field - Limits the service indicators system impact in relation to the service impacts on the service indicator, to be effective on the Ending Term.
  - c. **Start Date:** Enter a date that you would want the Service indicator to start.
  - d. **End Date:** Enter a date that you would want the Service indicator to end.
8. Within the **Assignment Details** section, search or enter the:
  - a. **Department:** Enter desired Department.
  - b. **Reference:** *Optional*.
  - c. **Amount:** This amount is not dynamic. It is suggested to leave at zero as not to cause confusion.
  - d. **Currency Code:** **USD**.
9. *Optional:* Within the **Comments** section, enter your comment.
10. Select the **Run** button and the **Process Scheduler Request** page displays.
11. Select the **SCC\_SI\_ASSN** checkbox.
12. *Optional:* Select the Format type to view the report.
13. Select the **OK** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
14. Process complete.

The screenshot shows the 'Mass Assign' web form. At the top, it displays 'Run Control ID: WAXXX\_MASS\_ASSIGN\_B01' and navigation links for 'Report Manager', 'Process Monitor', and a 'Run' button. The form is divided into several sections:

- Population Selection:** Includes a 'Selection Tool' dropdown set to 'PS Query', a 'Query Name' field with 'CTC\_SF\_MA\_SRV\_IND\_AMT', and links for 'Edit Prompts', 'Launch Query Manager', and 'Preview Selection Results'.
- Service Indicator Data:** Features a '\*Institution' dropdown set to 'Grays Harbor College', a '\*Service Indicator Code' field with 'B01', a '\*Reason' field with 'NOPAY', and a checkbox for 'Use System Date'.
- Effective Period:** Contains fields for 'Start Term', 'End Term', 'Start Date', and 'End Date'.
- Assignment Details:** Includes a '\*Department' field with '98449', a 'Reference' field, an 'Amount' field with '0.000', and a 'Currency Code' dropdown set to 'USD'.
- Contact Information:** Features fields for 'Contact ID', 'Contact Person', 'Placed Person ID', and 'Placed By'.
- Comments:** A large text area for entering comments.

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

# View Tutorial Via Panopto

View the external link to [Mass Assign B01 Indicator](#). This link will open in a new tab/window.

## Mass Release

**Navigation: Campus Community > Service Indicators > Person > Mass Release**

1. The **Mass Release** Run Control search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
  - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220\_ADM\_FYR\_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Mass Release page displays.
4. Within the **Population Selection** section:
  - A. Select **PS Query** from the **Selection Tool** drop-down.
  - B. Enter or search for the **Query Name CTC\_SF\_MR\_SRV\_IND\_AMT**.
  - C. Select the **Edit Prompts** link and the Query Prompts dialogue box displays.
    - I. Search, enter, or select the following fields:
      - a. **Business Unit**.
      - b. **Serv Ind Being Released: B01**.
      - c. **Service Ind Reason Being Released: NOPAY**.
      - d. **Amount Past Due Not More Than**: Dollar amount (past due) the account needs to be at or under by the number of days to be selected.
      - e. **Days Past Due (at least)**: The number of days past due to set a threshold for selection. *Both the Amount Past Due Not More Than and Days Past due work in conjunction. Both things must be true for selection.*
    - II. Select the **OK** button. The Mass Release page displays.
5. Select the **Preview Selection Results** hyperlink to ensure you are picking up students with your prompts.
6. Within the **Service Indicator Data** section, search, enter, or select the:
  - A. **Institution**.
  - B. **Service Indicator Code: B01**.
  - C. **Reason: NOPAY**.

7. Within the **Effective Period** section, search or enter the:
  - A. **Start Term:** Optional Field - Limits the service indicators system impact in relation to the service impacts on the service indicator, to be effective on the Starting Term.
  - B. **End Term:** Optional Field - Limits the service indicators system impact in relation to the service impacts on the service indicator, to be effective on the Ending Term.
  - C. **Start Date:** Enter a date that you would want the Service indicator to start.
  - D. **End Date:** Enter a date that you would want the Service indicator to end.
8. Select the **Run** button and the **Process Scheduler Request** page displays.
9. Select the **SCC\_SI\_RELS** checkbox.
10. *Optional:* Select the Format type to view the report.
11. Select the **OK** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
12. Process complete.

Mass Release

Run Control ID WAXXX\_MASS\_RELEASE\_B01
Report Manager
Process Monitor
Run

**Population Selection**

Selection Tool PS Query
Query Name CTC\_SF\_MR\_SRV\_IND\_AMT
Edit Prompts
Launch Query Manager
Preview Selection Results

**Service Indicator Data**

\*Institution Grays Harbor College
\*Service Indicator Code B01 Past Due Balance
\*Reason NOPAY Debt > \$300

**Effective Period**

Start Term
End Term
Start Date
End Date

Save
Notify
Add
Update/Display

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to [Mass Release B01 Indicator](#). This link will open in a new tab/window.

## Scenarios

### Scenario One - Setting the Amount Past Due and Days to the Same Value for Both the Assign and Release

Mass Assign Query	Mass Release Query
Amount Past Due: \$50.00	Amount Past Due: \$50.00
Days Past Due: 30	Days Past Due: 30


When the balance is \$88 and 54 days past due, the Service Indicator would be assigned. It would be released if they paid \$38 after 10 days later, and now they owe \$50 and are 64 days past due. If they paid 37.99 the service indicator would not be released.

### Scenario Two - Setting the Amount Past Due and Days Higher for Assign and Lower for Release

Mass Assign Query	Mass Release Query
Amount Past Due: \$50.00	Amount Past Due: \$3.00
Days Past Due: 30	Days Past Due: 1

When the balance is \$88 and 54 days past due, the Service Indicator would be assigned. To get the Service Indicator released, the student would need to pay their account down to \$3. If this happened after 5 days it would be \$3 at 59 days past due. If they paid \$85 that would be met, but if that person picked up a small charge (pencil rental .50 cents) and it was due two days ago, then the person would not be released because the .50 cents that is 2 days past due and the \$3 that is 59 days past due would be calculated together, making \$3.50 that is greater than 0 days past due.

This would be a strategy for stricter release and bringing accounts more current before lifting the holds.

 When scheduling the Mass Assign/Mass Release, you can have the processes run daily at slightly different times. The populations should be different, so it would probably be fine to run at the same time. However it would be best to have them run sequentially.