



# SERVICE TRACKING DATA ENTRY MANUAL

VAR and SSSP services

## Overview

This manual provides an overview of the data entry process for documenting VAR (Vision Aligned Reporting) and SSSP (Student Success and Support Program) services in SURF.

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Last updated: 7/29/25

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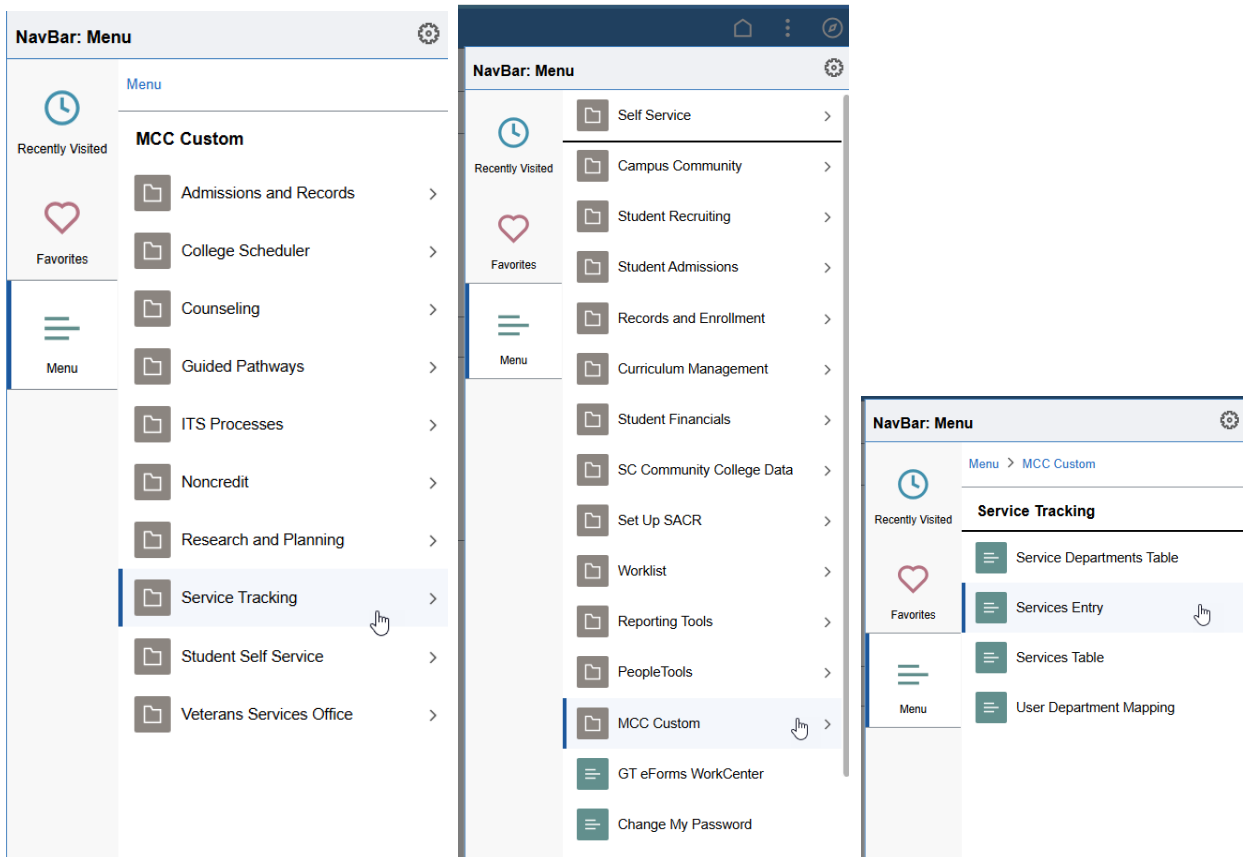
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## DATA ENTRY PAGE

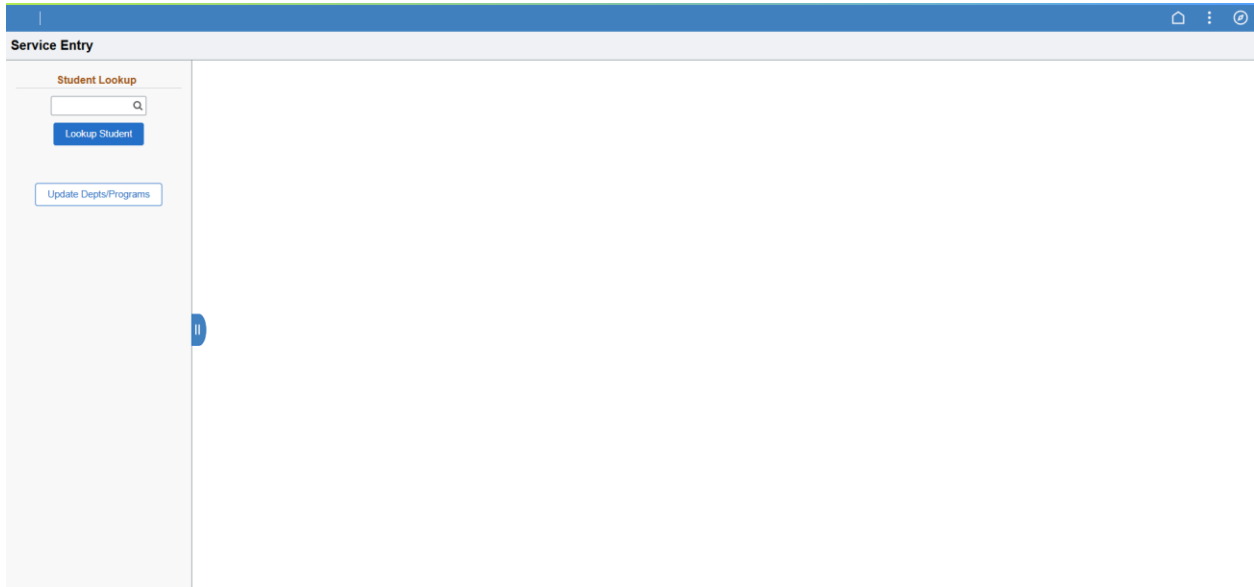
### NAVIGATION IN SURF

To get to the VAR Service Entry page use the following navigation in SURF:

*NavBar → Menu → MCC Custom → Service Tracking → Service Entry*



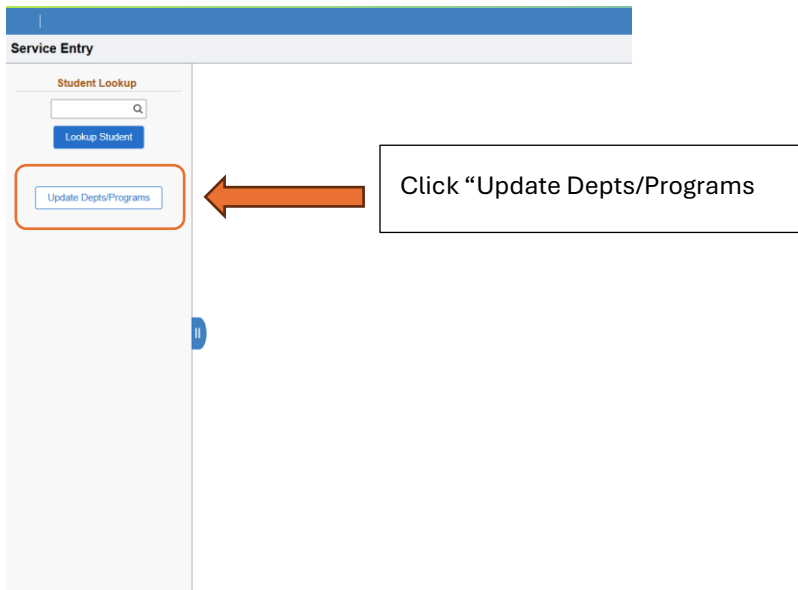
You will now see this page:



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## UPDATE DEPTS/PROGRAMS

Before you can enter data for students for the first time, you will need to tell SURF in which departments and programs you serve students. On the side panel, click the button that says "Update Depts/Programs"



You will see a list of all departments and programs that enter data on this page:

Update Depts/Programs	
Please select the departments/programs where you work. Select a department as your "default department" to have it automatically populate when entering services provided to students.	
Selected	Department/Program
<input type="checkbox"/> No	Academic Success and Equity
<input type="checkbox"/> No	Athletics
<input type="checkbox"/> No	CARE
<input type="checkbox"/> No	CalWORKS
<input type="checkbox"/> No	Career
<input type="checkbox"/> No	Dual Enrollment, CCAP
<input type="checkbox"/> No	EOPS
<input type="checkbox"/> No	General Counseling
<input type="checkbox"/> No	International
<input type="checkbox"/> No	Math, Engineering, Science Ach
<input type="checkbox"/> No	NC CalWORKS
<input type="checkbox"/> No	NC General Counseling
<input type="checkbox"/> No	NC Student Accessibility Svcs
<input type="checkbox"/> No	Next Up
<input type="checkbox"/> No	Orientation & Student Support
<input type="checkbox"/> No	Strong Workforce
<input type="checkbox"/> No	Student Accessibility Services
<input type="checkbox"/> No	Transfer
<input type="checkbox"/> No	Veterans Services

For any department or program you enter services for, switch the "Selected" toggle to "Yes"

## CREDIT AND NONCREDIT

If a program serves both credit and noncredit students, you will see an additional "NC" option for that program.

### Example:

CalWORKS

NC CalWORKS

Use "CalWORKS" when entering credit services. Use "NC CalWORKS" when entering noncredit services.

Once you select your departments and programs, you will see the option to set a default department. This department will auto-populate into the department drop-down menu when entering services on the next page.

If you don't want a default department, click all "Default Department" toggles to "No."

Update Depts/Programs		
Selected	Department/Program	Default Department
<input type="checkbox"/> No	Career	
<input type="checkbox"/> No	Dual Enrollment, CCAP	
<input type="checkbox"/> No	EOPS	
<input checked="" type="checkbox"/> Yes	General Counseling	<input checked="" type="checkbox"/> Yes
<input type="checkbox"/> No	International	
<input type="checkbox"/> No	Math, Engineering, Science Ach	
<input type="checkbox"/> No	NC CalWORKS	
<input type="checkbox"/> No	NC General Counseling	
<input type="checkbox"/> No	NC Student Accessibility Svcs	
<input checked="" type="checkbox"/> Yes	Next Up	<input type="checkbox"/> No
<input type="checkbox"/> No	Non-Credit	
<input type="checkbox"/> No	Orientation & Student Support	
<input type="checkbox"/> No	Strong Workforce	
<input checked="" type="checkbox"/> Yes	Student Accessibility Services	<input type="checkbox"/> No
<input type="checkbox"/> No	Transfer	
<input type="checkbox"/> No	Veterans Services	

When you're done, select "Save Changes." If you ever need to modify your list of departments/programs, just click "Update Depts/Programs" on the main page.

## SERVICE ENTRY

Enter a student ID in the “Student Lookup” box on the main page and click “Lookup Student”

### Service Entry

#### Student Lookup

You will see the following page to enter services:

### Service Entry

#### Student Lookup

**TREX Rex**  
(He/Him/His)  
Student ID: 07291110

760/757-2121  
lry.lizard.arms@gmail.com  
1 Barnard Dr Apt 207  
Oceanside, CA 92056  
Date of Birth: NOV 06, 1969

#### Department/Program

Please select the department/program providing service to this student.  
Not seeing your department/program in the drop-down? Click "Update Depts/Programs" in the bottom-left corner to select the departments/programs where you work.

General Counseling

#### Services

Please select the services provided to this student:

Academic Career <sup>1</sup>	Service <sup>1</sup>	Selected <sup>1</sup>	Service Date <sup>1</sup>	Modality <sup>1</sup>	Monetary Amount <sup>1</sup>	Hours of Service <sup>1</sup>
Credit	Couns-ProgSpec Counseling	<input type="radio"/> No				
Credit	Couns-Transfr	<input type="radio"/> No				
Credit	Separation Support	<input type="radio"/> No				
Credit	Support: Internships	<input type="radio"/> No				
Credit	Support: Orientation/Onboard	<input type="radio"/> No				
Credit	Support: Other	<input type="radio"/> No				
Credit	Support: Program Specific	<input type="radio"/> No				
Credit	Support: Refer to Other Servic	<input type="radio"/> No				
Credit	Support: Unstructured Support	<input type="radio"/> No				
Credit	Support: Work-Based Learning	<input type="radio"/> No				

## DEPARTMENT


Select the department/program for which you're providing services to the student. Notice the department/program drop-down defaults to "General Counseling" (the department I selected as my default).

**Service Entry**

**Student Lookup**

07291110

Lookup Student



**TREX Rex**  
(He/Him/His)  
Student ID: 07291110

760/757-2121  
tiny.lizard.ams@gmail.com  
1 Barnard Dr Apt 207  
Oceanside, CA 92056  
Date of Birth: NOV 06, 1969

Update Depts/Programs

**Department/Program**

Please select the department/program providing service to this student:  
*Not seeing your department/program in the drop-down? Click "Update Depts/Programs" in the bottom-left corner to select the departments/programs where you work.*

General Counseling

**Services**

Please select the services provided to this student:

Academic Career	Service	Selected	Service Date	Modality	Monetary Amount	Hours of Service
Credit	Couns-Transf	<input type="checkbox"/> No				
Credit	Couns-Transf	<input type="checkbox"/> No				
Credit	Separation Support	<input type="checkbox"/> No				
Credit	Support: Internships	<input type="checkbox"/> No				
Credit	Support: Orientation/Onboard	<input type="checkbox"/> No				
Credit	Support: Other	<input type="checkbox"/> No				
Credit	Support: Program Specific	<input type="checkbox"/> No				
Credit	Support: Refer to Other Service	<input type="checkbox"/> No				
Credit	Support: Unstructured Support	<input type="checkbox"/> No				
Credit	Support: Work-Based Learning	<input type="checkbox"/> No				

Submit Services

Use the drop-down menu to change the department/program if necessary.

### Department/Program

Please select the department/program providing service to this student:

*Not seeing your department/program in the drop-down? Click "Update Depts/Programs" in the bottom-left corner to select the departments/programs where you work.*

General Counseling

General Counseling

Next Up

Student Accessibility Services

to this student:

Academic Career ↑↓ Selected ↑↓ Service Date ↑↓

## SERVICES

The “Services” section will display the specific services offered by the selected department or program. Notice how the list changes when General Counseling is selected compared to when NextUp is selected:

General Counseling

### Services

Please select the services provided to this student:

Academic Career ↑↓	Service ↑↓	Selected ↑↓
Credit	Abbreviated Education Plan	<input type="checkbox"/> No
Credit	Academic Progress/Notice	<input type="checkbox"/> No
Credit	Comprehensive Education Plan	<input type="checkbox"/> No
Credit	Couns-Academic	<input type="checkbox"/> No
Credit	Couns-Career	<input type="checkbox"/> No
Credit	Couns-Misc	<input type="checkbox"/> No
Credit	Couns-ProgSpec Counseling	<input type="checkbox"/> No
Credit	Couns-Transfr	<input type="checkbox"/> No
Credit	Separation Support	<input type="checkbox"/> No
Credit	Support: Internships	<input type="checkbox"/> No
Credit	Support: Orientation/Onboard	<input type="checkbox"/> No

Next Up

### Services

Please select the services provided to this student:

Academic Career ↑↓	Service ↑↓
Credit	Academic Progress/Notice
Credit	Aid-Acad Supplies
Credit	Aid-Child Care
Credit	Aid-Emerg Aid
Credit	Aid-Food
Credit	Aid-Housing
Credit	Aid-Misc
Credit	Aid-ProgSpec Grant
Credit	Aid-Technology
Credit	Aid-Textbooks
Credit	Aid-Transportation

Toggle a service to “Yes” if you provided that service during your interaction with a student. You should enter as many services as you provided to the student. If you did a CSEP, Academic Counseling, and Support for Orientation/Onboarding, select all 3 services:

Academic Career ↑↓	Service ↑↓	Selected ↑↓	Service Date ↑↓
Credit	Academic Progress/Notice	<input type="checkbox"/> No	
Credit	Comprehensive Education Plan	<input checked="" type="checkbox"/> Yes	07/29/2025
Credit	Couns-Academic	<input checked="" type="checkbox"/> Yes	07/29/2025
Credit	Couns-Career	<input type="checkbox"/> No	
Credit	Couns-Misc	<input type="checkbox"/> No	
Credit	Couns-ProgSpec Counseling	<input type="checkbox"/> No	
Credit	Couns-Transfr	<input type="checkbox"/> No	
Credit	Separation Support	<input type="checkbox"/> No	
Credit	Support: Internships	<input type="checkbox"/> No	
Credit	Support: Orientation/Onboard	<input checked="" type="checkbox"/> Yes	07/29/2025

General Counseling ▼

**Services**

Please select the services provided to this student:

Academic Career ↑↓	Service ↑↓
Credit	Abbreviated Education Plan
Credit	Academic Progress/Notice
Credit	Comprehensive Education Plan
Credit	Couns-Academic
Credit	Couns-Career
Credit	Couns-Misc
Credit	Couns-ProgSpec Counseling

NC Student Accessibility Svcs ▼

**Services**

Please select the services provided to this student:

Academic Career ↑↓	Service ↑↓
Noncredit	Couns-Academic
Noncredit	Couns-Basic Needs
Noncredit	Couns-Career
Noncredit	Couns-Fin Aid
Noncredit	Couns-Mental Hlth
Noncredit	Follow Up

## ACADEMIC CAREER


Always ensure you are entering services under the correct academic career.

In the top screenshot, “Credit” is populated in the Academic Career field. That’s because the dept/program selected in the drop-down menu is a credit program (in this case, General Counseling).

In the bottom screenshot, “Noncredit” is populated in the Academic Career field. That’s because the dept/program selected in the drop-down menu is a noncredit program (in this case NC SAS).

## Service Date


When you select a service, the Service Date will default to today's date.

Academic Career ↑↓	Service ↑↓	Selected ↑↓	Service Date ↑↓	Modality ↑↓	Monetary Amount ↑↓	Hours of Service ↑↓
Credit	Abbreviated Education Plan	<input type="checkbox"/> No		▼		
Credit	Academic Progress/Notice	<input type="checkbox"/> No		▼		
Credit	Comprehensive Education Plan	<input checked="" type="checkbox"/> Yes	07/29/2025 	▼		
Credit	Couns-Academic	<input type="checkbox"/> No		▼		
Credit	Couns-Career	<input type="checkbox"/> No		▼		

To change the date, click the calendar icon and select a new date:

bottom-left corner to select the depart

**Service Date** ↑↓

07/29/2025 

**Calendar** ×

July ▼ 2025 ▼

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

< Current Date >

### Modality

Select a modality for each service from the drop-down menu.

Modality ↑↓

▼

▼

- Appointment In Person
- Appointment Online
- Classroom Visit
- Email
- Express In Person
- Express Online
- Express Phone
- Mobile
- Online
- Workshop In Person
- Workshop Online

Academic Career ↑↓	Service ↑↓	Selected ↑↓	Service Date ↑↓	Modality ↑↓	Monetary Amount ↑↓	Hours of Service ↑↓
Credit	Comprehensive Education Plan	<input checked="" type="checkbox"/> Yes	07/28/2025	Appointment In Person		

### Monetary Amount

Monetary amount only applies to “Direct Aid” services. Notice this area is greyed out if it is not applicable to the selected service:

Academic Career ↑↓	Service ↑↓	Selected ↑↓	Service Date ↑↓	Modality ↑↓	Monetary Amount ↑↓	Hours of Service ↑↓
Credit	Academic Progress/Notice	<input checked="" type="checkbox"/> Yes	07/29/2025			
Credit	Aid-Acad Supplies	<input type="checkbox"/> No				
Credit	Aid-Child Care	<input type="checkbox"/> No				
Credit	Aid-Emerg Aid	<input type="checkbox"/> No				
Credit	Aid-Food	<input checked="" type="checkbox"/> Yes	07/29/2025			
Credit	Aid-Housing	<input type="checkbox"/> No				
Credit	Aid-Misc	<input type="checkbox"/> No				

Enter the dollar amount for the service provided:

Academic Career ↑↓	Service ↑↓	Selected ↑↓	Service Date ↑↓	Modality ↑↓	Monetary Amount ↑↓	Hours of Service ↑↓
Credit	Aid-Food	<input checked="" type="checkbox"/> Yes	07/29/2025		\$25	

### Hours of Service

Hours of Service is only applicable to some “Direct Aid” services. Just like “Monetary Amount”, this field will be greyed out unless it applies to the selected service. This field accepts decimal places. For example, if you need to enter an hour and 15 minutes of aid, you would enter 1.25 hours.

Academic Career	Service	Selected	Service Date	Modality	Monetary Amount	Hours of Service
Credit	Aid-Work Study	<input checked="" type="checkbox"/> Yes	07/29/2025			1.25

### Submit Services

Once you have entered all the services for your interaction with a student, click “Submit Services”

#### Services

Please select the services provided to this student:

Academic Career	Service	Selected	Service Date	Modality	Monetary Amount	Hours of Service
Credit	Academic Progress/Notice	<input type="checkbox"/> No				
Credit	Comprehensive Education Plan	<input checked="" type="checkbox"/> Yes	07/29/2025	Appointment Online		
Credit	Couns-Academic	<input checked="" type="checkbox"/> Yes	07/29/2025	Appointment Online		
Credit	Couns-Career	<input type="checkbox"/> No				
Credit	Couns-Misc	<input type="checkbox"/> No				
Credit	Couns-ProgSpec Counseling	<input type="checkbox"/> No				
Credit	Couns-Transfr	<input type="checkbox"/> No				
Credit	Separation Support	<input type="checkbox"/> No				
Credit	Support: Internships	<input type="checkbox"/> No				
Credit	Support: Orientation/Onboard	<input checked="" type="checkbox"/> Yes	07/29/2025	Appointment Online		
Credit	Support: Other	<input type="checkbox"/> No				

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*Note: If you change the department drop-down before you click “Submit Services,” the page will reset and you will need to reenter the services.*

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## DUPLICATES

You will only be able to enter the same service for the same student in the same department once per day (i.e., duplicate service entry is blocked on this page to avoid human error in data entry). If you have a legitimate duplicate service to enter, please contact Ailene Crakes.

You will see all services that have been provided to this student in the “Service History” section of this page

### Service History

Empl ID	Academic Institution	Academic Career	Created Datetime	Department Code	Service Code	Description	Service Date	Modality	Monetary Amount	Hours of Service	Created By
07291110	MCCCD	Credit	07/29/25 9:17AM	COUNSELING	COMPSEP	Comprehensive Education Plan	07/29/2025	Appointment Online			LTRESCOTT
07291110	MCCCD	Credit	07/29/25 9:17AM	COUNSELING	C01	Couns-Academic	07/29/2025	Appointment Online			LTRESCOTT
07291110	MCCCD	Credit	07/29/25 9:17AM	COUNSELING	S01	Support: Orientation/Onboard	07/29/2025	Appointment Online			LTRESCOTT
07291110	MCCCD	Credit	07/29/25 9:11AM	COUNSELING	PROBATION	Academic Progress/Notice	07/25/2025	Appointment In Person			LTRESCOTT
07291110	MCCCD	Credit	07/29/25 9:11AM	COUNSELING	C04	Couns-Career	07/25/2025	Appointment In Person			LTRESCOTT
07291110	MCCCD	Credit	07/28/25 4:34PM	NEXTUP	D10	Aid-Acad Supplies	07/28/2025	Express In Person	554		JGILL

## COMMENTS

Below the “Services” section, you will see an option to enter comments. Type your comment in the space provided, select the appropriate date, then click “Add Comment”.

### Comments

#### Add a Comment

I am making a fake comment

#### Service Date

07/29/2025



Add Comment

#### Comment History

You can see all comments entered for a student by expanding the “Comment History Section”

Comment History

9 rows

	Comment	Service Date	Created By	Created Datetime
1	I am making a fake comment	07/29/2025	LTRESCOTT	07/29/25 9:19AM
2	this is a test comment	07/29/2025	LTRESCOTT	07/29/25 9:12AM
3	Test comment	07/21/2025	JGILL	07/28/25 4:34PM
4	rasfdasd	07/07/2025	JGILL	07/25/25 5:10PM
5	Talked about future plans	07/17/2025	JGILL	07/22/25 1:12PM

## SERVICE DEFINITIONS

### SSSP SERVICES

<b>Service</b>	<b>Definition</b>
Abbreviated Education Plan	Education plan one to two terms in length and designed to meet immediate scheduling needs for students
Comprehensive Education Plan	Education plan that covers all terms needed for students to achieve their course of study
Separation Support	Support or intervention provided for student facing dismissal
Orientation (Title V Compliant)	Orientation provided to students as defined by title V
Student Education Plan	Noncredit student education plan
Follow-up Service	Any noncredit SSSP-reportable follow-up service
Placement -ENGL (Alternative)	Noncredit English placement
Placement -MATH (Alternative)	Noncredit Math placement
Academic/Progress Notice	Support or intervention provided for academic or progress probation

### COUNSELING

<b>Service</b>	<b>Definition</b>
Counseling - Academic	Any academic counseling provided to students such as transfer, probation/dismissal, educational planning, etc.
Counseling - Basic Needs	Any counseling provided to students related to housing, food, transportation support, etc. Includes counseling resulting in referral to outside services like CalFresh
Counseling - Mental Health	Any counseling provided to students related to mental health issues, including that resulting in referral to noncampus resources
Counseling - Career	Any counseling provided to students related to choosing a career path and/or finding employment

Counseling - Financial Aid	Any counseling provided to students related to identifying, applying for or receiving scholarships, grants or loans
Counseling - Transfer	Any counseling provided to students related to transfer
Counseling - Program Specific Counseling	Any counseling provided to students related to services provided by a specific program (e.g., CalWORKs, EOPS, etc.) that does not fall into one of the other counseling subcategories; can include referrals to other services

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## DIRECT AID

<b>Service</b>	<b>Definition</b>
Direct Aid - Textbooks	Amount of aid provided for textbooks or financial aid earmarked for textbooks
Direct Aid - Emergency Aid	Amounts of aid provided through an emergency aid program
Direct Aid - Food	Amount of aid earmarked for food support, including food vouchers or food pantry support
Direct Aid - Gift Cards	Amount of aid provided via gift cards to students and not earmarked for a specific expense — if earmarked for a specific expense, the gift card should be identified under one of the more specific subcategories
Direct Aid - Housing	Amount of aid earmarked for housing support provided to students; could include on-campus housing, housing subsidies, etc.
Direct Aid - Child Care	Number of hours of childcare provided to a student
Direct Aid - Testing Fees for Licenses and Certs	Amount of aid provided for taking licensure or certification tests; primarily for Workforce & Economic Development (WEDD) reporting
Direct Aid - External Tutoring Resources	Amount of aid provided for tutoring NOT provided by the campus or program; primarily for WEDD reporting
Direct Aid - Transportation	Amount of aid earmarked for transportation costs, including gas or bus vouchers, parking subsidies, etc.
Direct Aid - Academic Supplies	Amount of aid earmarked for any non-textbook academic supplies
Direct Aid - Mental Health Grant	Amount of grant funds provided for mental health services and/or support
Direct Aid - Program Specific Grant	Amount of grant funds disbursed to students based on program eligibility (e.g., CalWORKS grants)

Direct Aid - Technology	Value of technology either purchased for or loaned to students including laptops, hotspots, software, etc.
Direct Aid - Work Study	Number of hours of work study provided to students (e.g., under CalWORKS)
Direct Aid - Other	Amount of any direct aid to students that does not fit into any of the other Direct Aid to Students subcategories

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#### OUTREACH/INREACH

<b>Service</b>	<b>Definition</b>
Inreach - Marketing	Includes any media (e.g., print, social, tv/radio, tabling event) activity directed toward a college's current students about a program
Inreach - Event	Any real-time event (in-person or virtual) directed toward a college's current students about a program
Inreach - Other	Any activity to provide information to a college's current students about a program that does not fit into one of the previous inreach subcategories

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#### STUDENT SUPPORT SERVICES

<b>Service</b>	<b>Definition</b>
Support - Onboarding, Orientation, or Retention	Any noncounseling activity to provide onboarding, program orientation, or retention support to current students
Support - Enrollment/Reenrollment Activities	Any noncounseling activity to provide enrollment/reenrollment support to students
Support - Transfer Assistance Activities	Any noncounseling activity to provide transfer support to students
Support - Learning Disability Management	Any assessment activity related to a student's learning disability
Support - Material Loans	Any materials, whether related to a specific course or not, that are loaned to a student and returned to the program.
Support - Completion or Student Success Activities	Any noncounseling activity to provide completion support to students
Support - Career Activities	Any noncounseling activity to provide career support to students

Support - Independent Living Workshops/Activities	Any noncounseling activity to provide independent living support to students
Support - Alternative Media/Adaptive Equipment	Activities related to accommodation for students with disabilities by providing alternative media or adaptive equipment
Support - Interpreting/Captioning	Activities related to accommodation for students with disabilities by providing interpreting or captioning
Support - Test Proctoring	Test proctoring services provided to students
Support - Specialized/Supplemental Instruction	Any specialized or supplemental instruction provided to students
Support - Tutoring	Provision of tutoring to students via program tutors, a tutoring center or an extended course
Support - Peer Support	Provision of any peer support to students including mentors, advisors and/or ambassadors
Support - Learning Communities	Learning communities provided to students by a program
Support - Student Center	Students using a specific program's dedicated student center
Support - Referral to Other Services	Students referred to other campus or community services by the program (if provided during a counseling session, both Counseling and Student Support Services: Referral to Other Services should be reported)
Support - Tours/Visits/Xfer Fairs	Provision of university tours to students or transfer fairs to students; also includes visits from four-year institution representatives
Support - Career Tours/Fairs	Provision of career tours, orientations or career fairs for students
Support - Program Specific	Provision of any services specific to the program (e.g., Veterans Centers helping students with GI certification)
Support - Unstructured Student Support	Any activities that provide student support on an ad hoc basis. Could include quick questions via drop-in, phone, etc.
Support - Work-Based Learning	Provision of work-based learning opportunities to students
Support - Internships	Provision of internships to students
Support - Other	Activities related to the main category that do not fit into one of the other Student Support Services subcategories