

## Counselor Forms Summary

### Registration Query Form (SFAREGQ)

The Registration Query Form (SFAREGQ) provides you with an online view of a student's schedule. The form is query-only and will display all registered courses and related information for the term *or* date range and student specified in the Key Information of the form. Use the date range to search on open learning courses.

A person must be a student and have registered for courses using the Student Course Registration Form (SFAREGS) or other remote registration (telephone registration processing, web registration, etc.) for this form to be useful.

You can access SFAREGQ from the SFAREGS form. To do so, select View Student's Schedule of Classes from the Options Menu. You may also access the form directly from the \*REGISTRATION menu.

### Student Course Registration Form (SFAREGS)

The Student Course Registration Form (SFAREGS) provides an automated mechanism for registering students into sections created by the Class Schedule module. This form also assesses the charges related to the registration and passes them to the Accounts Receivable module. This form further allows for student maintenance, performs the functions necessary for add/drop activity, and provides the ability to print a student's schedule/bill.

**Note:** After entering the Registration Information section, *all* changes must be saved and errors corrected, before the user may exit the form.

You may select View Registration Messages from the Options Menu or tab through the fields in the Course Information to the **Override (Indicator)** field, then the **Message** box will display. This box displays registration messages, variable credit hour ranges, and any registration errors detected, such as major restrictions. The box is positionally displayed, depending on the type of message being shown, so that data relevant to the message is still displayed in the main window. Message code and text information comes from SFARMSG.

Prior to registering a student, the registration control information must have been entered via the Registration forms, the course and section information must have been entered via the Catalog and Schedule modules, and student information must have been created via the General Person and Admissions modules.

This form creates a set of SHRMRKS records associated with the student for all courses where gradable components have been defined. This task is accomplished at the time the registration record is created for the student for an individual section. SFAREGS also creates a set of SHRSMRK records for all sub-component definitions associated with the component records for the section.

### Student Course Registration Audit Form (SFASTCA)

The Student Course Registration Audit Form (SFASTCA) shows the results of course requests saved to the database through the Student Course Registration Form (SFAREGS), the Registration Mass Entry Form (SFAMREG), telephone registration processing, and through Web registration. All registration transactions are captured, including fatal errors and overrides.

Enter a term code *or* a date range in the Key Block for your query. The date range is used for open learning courses. Use the View Student's Registration History item in the Options Menu to access SFARHST for an alternative search method for registration information by term or ID to gather additional audit information.

Final grades posted to the SFRSTCR record in the SFRSTCR\_GRDE\_CODE field create registration audit trail records which can be viewed on the Student Course Registration Audit Form (SFASTCA). The audit trail records are written by database triggers on the SFRSTCR table, so any grades posted or changed in SFRSTCR will be reflected in audit trail records. Audit trail records for grades will include the message *Grade update to x*, where "x" is the entered grade value. This message will be issued whether the change is to enter the first final grade, or whether a grade already existing in SFRSTCR is changed to another value.

## Degrees and Other Formal Awards Form (SHADEGR)

The intent of this form is to capture all information pertaining to degrees or other types of awards which the student is seeking, or which have been awarded. Degrees are captured by sequence number (1, 2, 3, etc.) to prevent the occurrence of duplicate degree records for a student. Multiple degrees may be sought by a student. A GPA calculation may be requested for any of the degrees posted to the student's record. Degree GPAs only include those courses which have the **Apply to Learner Outcome (Indicator)** checked in the Institutional Courses window and the Transfer Credits window on this form.

**Note:** A subsequent degree record is created when there is a change in the college, degree, level, or program code. If there is a change on SGASTDN any other curriculum data (i.e., Major 1), the current degree record is updated.

All degree candidates must have been entered via the General Person Identification Form (SPAIDEN) before this form can be used.

## Subject Sequence History Form (SHASUBJ)

The purpose of the Subject Sequence History Form is to provide a tool which can be used by advisors to track the student's progress in specific subject areas. The form provides information pertinent to the student's current status at the institution as well as GPA information on a subject-by-subject basis. This form shows institution entries and all transfer entries which have been flagged to be included in the transfer GPA. Scrolling totals on a subject-by-subject basis are kept for institutional, transfer, and overall GPAs. The form allows the entry of a specific beginning subject area to avoid having to scroll through multiple subject areas if only one is required.

This form is query-only. Valid person and student related information must be present for the ID entered.

## Term Sequence Course History Form (SHATERM)

The purpose of the Term Sequence Course History Form (SHATERM) is to provide a tool to be used by advisors to determine the student's progress on a term-by-term basis. This form is query-only, and displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes. Institutional and transfer work are displayed separately. The form permits the entry of a specific beginning term which is other than the first term the student attended.

Transfer work which has been flagged to be included in the transfer GPA is displayed by term, transfer institution, and transfer attendance period. The primary sort order for coursework is by term. Within term, the sort order is by institutional coursework first then by transfer coursework second. For transfer coursework, the sort order is by transfer institution number and then by attendance period.

The student must have been added to the system via the General Person Identification Form (SPAIDEN). In addition, general student information must be present for the ID entered.

### **Transfer Course Form (SHATRNS)**

The purpose of this form is to capture and maintain information relating to transfer work. Information about each transfer institution and attendance period is captured using a two position short hand notation to identify each entry. The attendance periods entered must pertain to a specific student level (undergraduate, graduate, etc.). If a student had taken both graduate and undergraduate course work at the same institution, and you wished to capture this information, it would be necessary to identify two attendance periods: one for the undergraduate work and one for the graduate work. Optionally, the user may define multiple attendance periods relating to the same level if the need arises. Un-translated entries may be entered from the transcript which have no effect on the transfer GPA. In addition, institutional equivalent entries are captured in a separate window.

These entries have no effect on the student's transfer GPA until the user updates the field telling the system to include the course in the GPA. Optionally, the institutional equivalent information which has been manually entered as a result of the review of the transcript may be associated with the un-translated entries which were posted earlier. Entering a zero in the detail un-translated course sequence number indicates that no un-translated entries have been entered for the associated equivalent courses. The form permits equivalent courses to be associated to un-translated entries on a one-to-one, one-to-many, or a many-to-one basis. Additionally, a course may be applied to a degree for which the student has applied.

The student must have been added to the system via the General Person Identification Form (SPAIDEN).

### **Hold Information Form (SOAHOLD)**

You use the Hold Information Form to assign holds to a person or entity.

The hold information is contained on the Hold Type Code Validation Form (STVHLDD), which specifies how the person or entity is affected by the hold. Holds may prevent registration or graduation, or prevent the production of transcripts, enrollment verification documents, and grade mailers. Holds which affect the Accounts Receivable information may also be specified. Hold information is created by a particular user and may only be deleted or changed by that user (unless the user specifies otherwise). Each office should determine a user to create and delete hold information.

### **High School Information Form (SOAHSCH)**

Use this form to enter high school information such as the school name and address, graduation date, subjects taken, course, overall GPA, and class rank/size.

## Person Search Form (SOAIDEN)

The Person Search Form may be accessed from all forms that require an ID number in the Key Information. This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, change indicator (an indicator to record name and ID changes-blank for the current record), and name type are displayed.

A second function, the Soundex search, is provided on the Soundex Search window. This search allows the user to enter information (or partial information) for a "sounds like" search.

All persons available to all other forms will be displayed on this form. The creation of these persons occurs in the General Person Identification Form (SPAIDEN). You can use the Common Matching Entry Form (GOAMTCH) to create a person after checking to see if they are a match to an existing Banner® ID.

If you wish to enter a case sensitive query for your search, select *Yes* in the **Case Sensitive Query** radio group, and then enter your query.

Use Next Block from the main window to access the Soundex Search window. You may also use the Search Using Sounds Like choice in the Options Menu.

## Soundex Search Window

The Soundex Search window is used to query the database for names that are approximate matches for the name entered in the **Sounds Like...Last Name** field and/or the **First Name** field. To use the soundex search, enter a name in the **Sounds Like...Last Name** field and/or the **First Name** field, and perform an Execute Query function. The query data will be displayed in the main window.

Use Count Query Hits from the **ID** field in the main window to view detail for the ID and access the Person Search Detail Form (SOAIDNS), or use Search and Display More Detail from the Options Menu to access SOAIDNS from the Soundex Search window.

**Note:** Soundex searches are not case sensitive.

## Prior College Form (SOAPCOL)

This form is used to enter information about a person's prior college experience. The degree information including GPA, hours, honors, and attendance dates is also maintained on this form, along with majors, minors, and concentrations associated with the degrees. Multiple degrees may be created for a prior college. A person must be added to the system via the General Person Identification Form (SPAIDEN) prior to entering this form. If a student's degree information is updated, all corresponding majors, minors, and concentrations are updated with the new degree code.

## Test Score Information Form (SOATEST)

Use this form to create and update test score information for an applicant. Test score information can be added or updated automatically via the tape load process or manually. If a test score is a checklist item on a student's admissions application, the checklist will be automatically updated with the most recent test date information (date taken) from SOATEST.

### Prerequisite

The ID must exist before test scores can be entered. You can create an ID on the General Person Identification Form (SPAIDEN). The tape load process will add the person prior to loading the scores, if the person does not exist.

### Person Comment Form (SPACMNT)

You use the Person Comment Form to enter comment information on the person. You may enter short comments or long narrative comments.

### General Person Identification Form (SPAIDEN)

You use the General Person Identification Form to capture biographic/demographic information for all persons/non-persons associated with the institution.

Persons/non-persons may belong to any or all of the installed applications (Student, Finance, etc.). All persons/non-persons are first entered into the database using this form. The information maintained in this form is specific to the person/non-person and does not relate to the person's/non-person's involvement at the institution. All other modules/ applications are dependent on the information captured and maintained in this form. Any changes or additions to a person's/non-person's biographic/demographic information must be made in this form.

You can access the Common Matching Entry Form (GOAMTCH) from SPAIDEN to enter information for a new ID and then execute the matching process before a new PIDM is created in Banner®. To do this, turn on Common Matching for the institution using the **Online Matching Process Enabled (Indicator)** on GUAINST. In addition, the user attempting to access GOAMTCH must not have been excluded from using it on GORCMUS. However, even if a user has been excluded from Common Matching on GORCMUS, they can still access GOAMTCH through the General Person Menu (\*PERSON) or through the Common Matching (GOAMTCH) item in the Options Menu for SPAIDEN.

To open GOAMTCH from SPAIDEN: type *GENERATED* in the **ID** field, select the **Generate ID** button, or enter an ID in the **ID** field that does not exist in Banner. The GOAMTCH form will automatically appear. If a person record is created using only the GOAMTCH form, the **Origin** field (on SPAIDEN and SPRIDEN) will be set to *GOAMTCH*. If the person record is created using SRRSRIN or SRIPREL, then the **Origin** field will be set to *SRKPREL*.

You can search on person last and first names and non-person names by text to see if similar names exist. Use the **Search** feature from the **Last Name** and **First Name** fields to view similar names on the Person Search Form (SOAIDEN). Use the **Search** feature from the Non-Person Name Information **Name** field to view similar names on the Non-Person Search Form (SOACOMP).

You can view the user ID and the form or process which created that name/ID record in the ID and Name Source block.

### Schedule Section Query Form (SSASECQ)

Use the Schedule Section Query Form (SSASECQ) to display all sections currently on the system. The form is run in query-only mode, and no changes can be made to any fields.