Banner Student
Fee Assessment Training Workbook

Release 8.0 - April 2008
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Revision History Log

Publication Date	Summary
April 2008	New version that supports Banner 8 software.

Think before you print.

Table of Contents

Introduction

Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately assess fees for registered students. This workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-Day Operations
- Reference.

Course objectives

In this course you will learn how to

- create the rules and set parameters used to process the data and develop the Fee Assessment control forms
- assessed fees online
- assigned and assessed optional fees to a student for a term
- reviewed the assessment account for a student.

Intended audience

The staff of the Registrar's office and selected personnel from the business office.

Prerequisites

To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- completed the General Person and Registration training workbooks
- administrative rights to create the rules and set the validation codes in Banner.

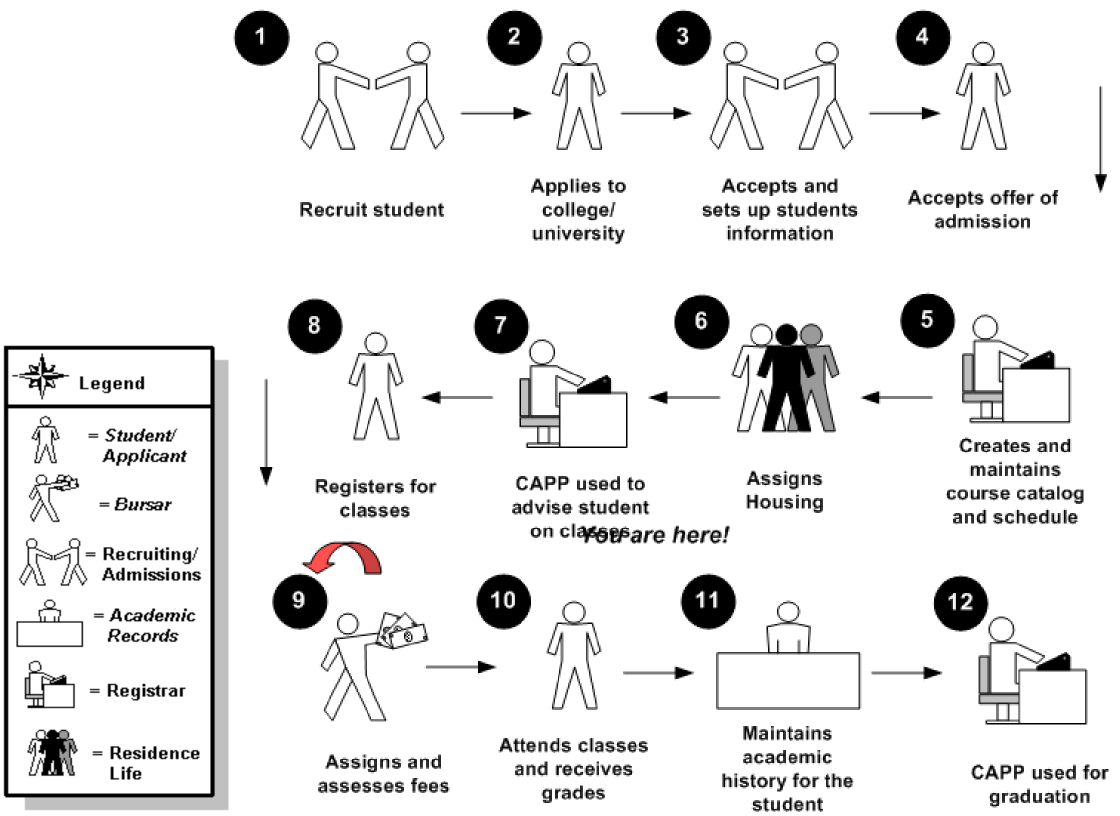
Process Introduction

Introduction

The bursar's office, in conjunction with the registrar's office is responsible for setting up the fee assessment control forms as they pertain to registration and billing.

Flow diagram

This diagram highlights where the Fee Assessment process occurs within the overall Student process.



About the process

- In the Fee Assessment process, bursars and registrars define rules for Fee Assessment and develop refunding tables for a term.
- The student registers for classes and an on-line Fee Assessment will immediately generate charges.
- The bursar then assesses fees in batch and generates a bill.
- Finally, a student receives the bill.

Set Up

Section goal

The goal of this section is to outline the set-up process and detail the procedures to set-up your Banner system.

Before developing Fee Assessment rules and processing data, several forms and rules need to be set or created. These rules and validation forms are used frequently in the Fee Assessment module.

Objectives

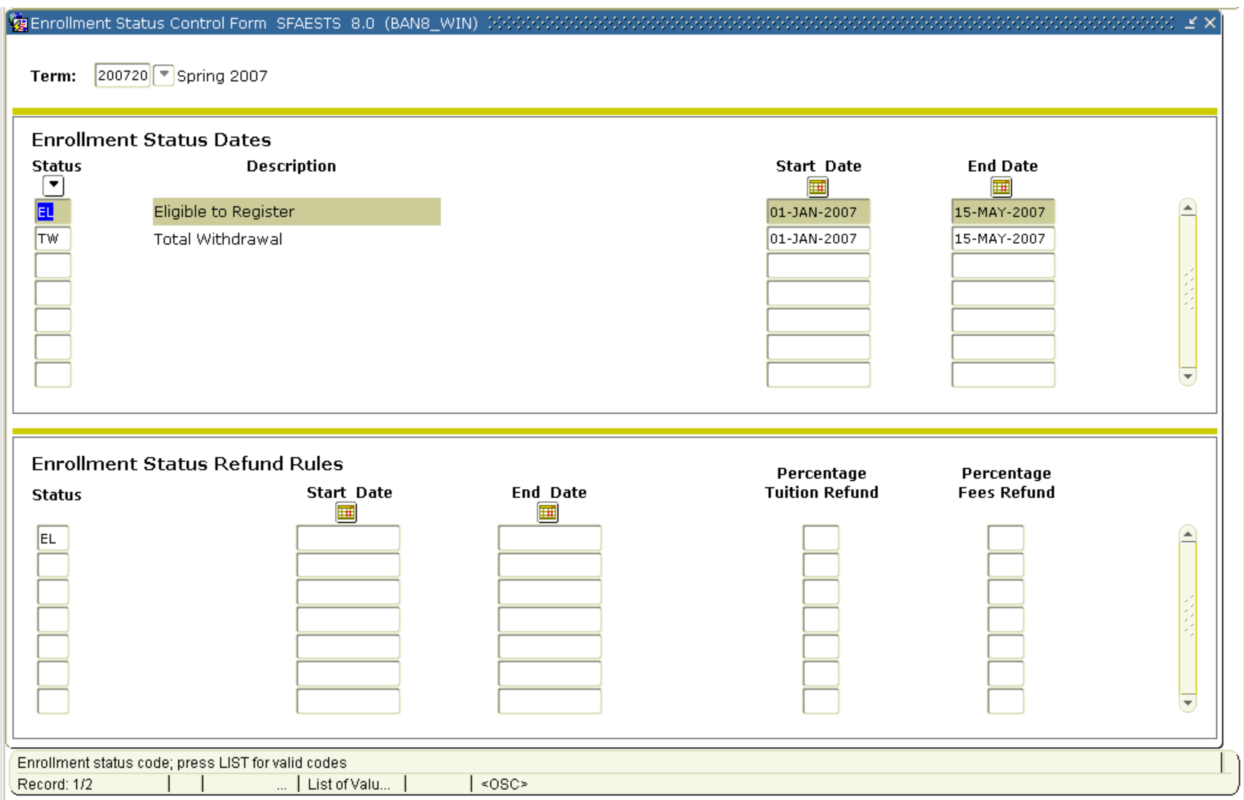
In this section you will learn how to create the rules and set parameters used to process the data and develop the Fee Assessment control forms.

Defining Refund Rules for a Term

Introduction

The Enrollment Status Control Form (SFAESTS) is used to set up enrollment codes, and refund rules for a term.

Banner form



Steps

Follow these steps to create an enrollment code and a refund rule.

1. Access the Enrollment Status Form (SFAESTS).
2. Select a term in the **Term** field.
3. Select an enrollment status code in the **Status** field in the Enrollment Status Dates block.

   Note: The **Description**, **Start Date**, and **End Date** fields are populated by Banner based on the status code selected.
4. Perform a **Next Block** function.
5. Enter the refund start date in the **Start Date** field.
6. Enter the refund end date in the **End Date** field.
7. Enter a percentage in the **Percentage Tuition Refund** field for the date range.
8. Enter a percentage in the **Percentage Fees Refund** field for the date range.
9. Click in the **Status** field to start another date range for the enrollment status code.
10. Repeat steps 3-9 to enter additional date ranges and their associated refund percentages.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Defining Course Registration Status

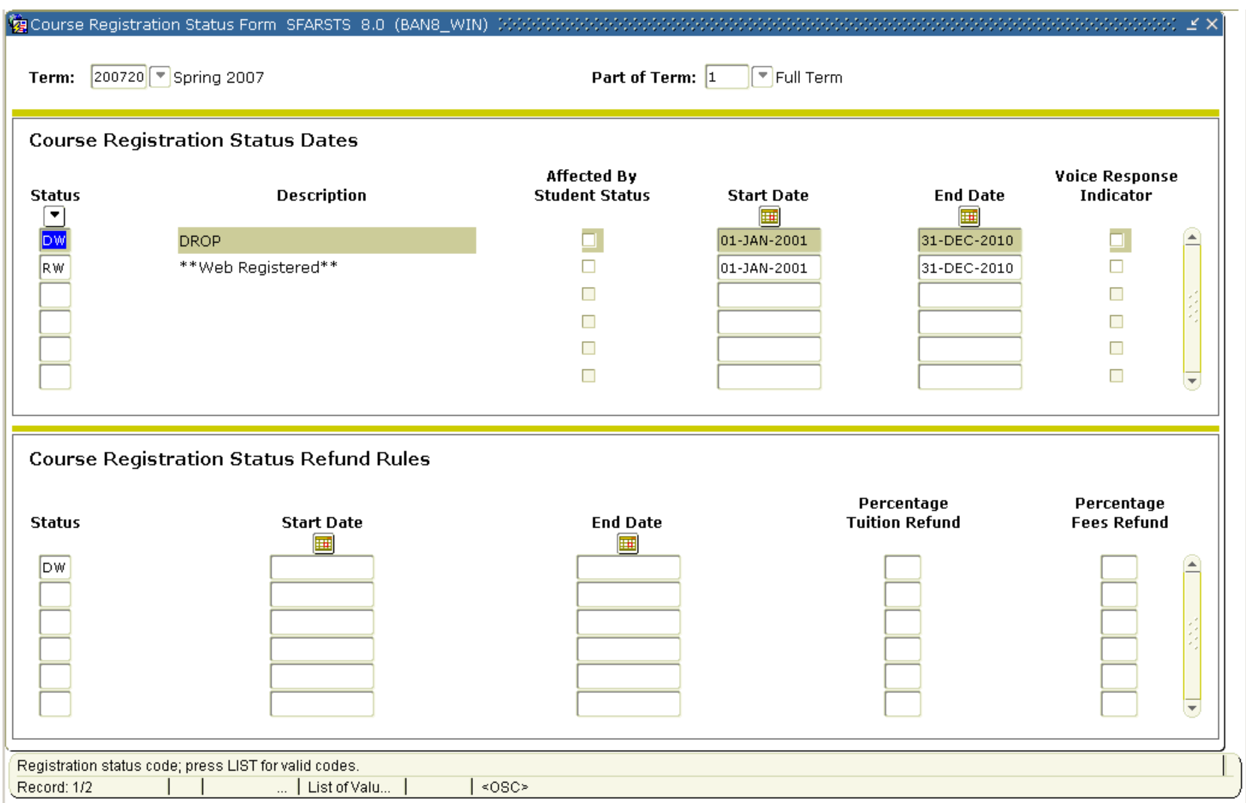
Introduction

The Course Registration Status Form (SFARSTS) is used to define course status codes, and refund rules for courses.

> Note: Status values are user-defined, with the exception of the "RE" (Register Course) status, which must be used as the default for a student's course registration. While the "RE" status is required, its attributes may be defined according to your institution's policy. This is also true for the DD-Drop/Delete Code.

Prior to entering the data on this form, the status codes must have been entered on the Course Registration Status Code Validation Form (STVRSTS). While the validation form spans time, the Course Registration Status Form is specific for a term. This allows you to modify status information from one term to the next.

Banner form



Steps

Follow these steps to define a course status code and a refund rule.

1. Access the Course Registration Status Form (SFARSTS).

2. Enter a term code in the **Term** field.

3. Select an overall term code in the **Part of Term** field.

   Example: Select *Fall II 2006* in the **Term** field and *Fall 2006* in the **Part of Term** field. This is used by institutions that have two seven week courses as well as 14 week courses in the same semester. The Fall I courses would begin in September while the Fall II courses would begin in mid-October. The withdraw dates for the Fall II courses would be different from the dates for the Fall I courses.

4. Select an enrollment status code in the **Status** field in the Enrollment Status Dates block.

   Note: The **Description**, **Start Date**, and **End Date** fields are populated by Banner based on the status code selected.

5. Click the **Affected by Student Status** checkbox if you want this code to be affected by the enrollment status of the student.

6. Click the **Voice Response Indicator** checkbox if your institution uses telephone registration.

7. Perform a **Next Block** function.

8. Enter the refund start date in the **Start Date** field.

9. Enter the refund end date in the **End Date** field.

10. Enter a percentage in the **Percentage Tuition Refund** field for the date range.

11. Enter a percentage in the **Percentage Fees Refund** field for the date range.

12. Click in the **Status** field to start another date range for the enrollment status code.

13. Repeat steps 4-12 to enter additional date ranges and their associated refund percentages.

14. Click the **Save** icon.

15. Click the **Exit** icon.

Defining Fee Assessment Rules

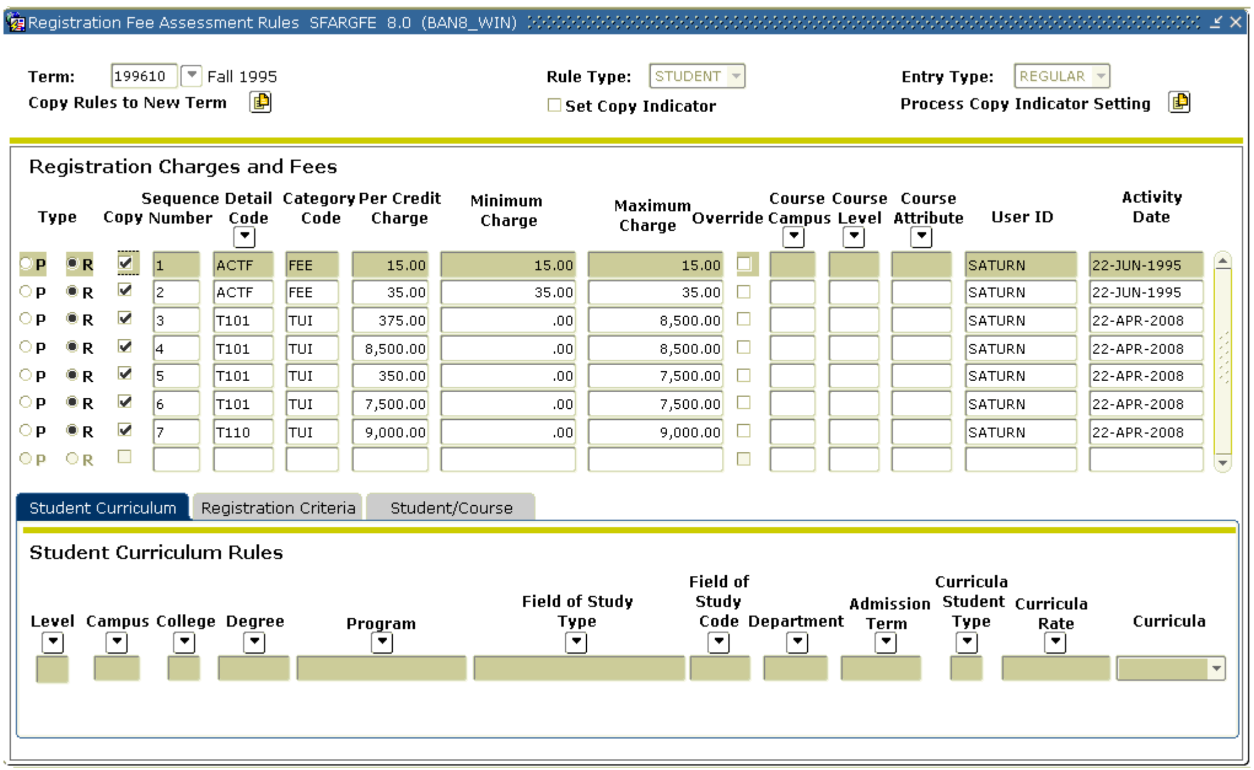
Introduction

Before assessing any fees, the Fee Assessment Control Form must be set up, one time per semester. Rules may be copied from one term to another, future or past.

The Registration Fee Assessment Rules Form (SFARGFE) allows you to define basic tuition and fees for your students. Your instructor will discuss the various options you have based on how you currently assess tuition and fees at your enterprise.

Your instructor will review each window with you. Based on how you assess tuition and fees, you will use one or more of these windows.

Banner form



Steps

Follow these steps to create a registration fee assessment rule.

1. Access the Registration Fee Assessment Rules Form (SFARGFE).

   Note: The following procedures will establish Fee Assessment rules based on *Charges by Student Characteristics Option*.

2. Enter a term in the **Term** field.
3. Select *Student* in the **Rule Type** field.
4. Select *Regular* in the **Entry Type** field**.**
5. Click the **Set Copy Indicator** checkbox if the rule can be copied to another term.
6. Perform a **Next Block** function.

   Note: To create a new Fee Assessment rule you may need to perform an **Insert Record** function, or move your cursor to a blank line.

7. Select a detail code in the **Detail Code** field.
8. Note the **Category Code** field. It is display only, but you can query on it. It is populated when a value is entered in the **Detail Code** field.
9. Enter an amount in the **Per Credit Charge** field.
10. Enter amounts in both of the **Minimum Charge** and **Maximum Charge** fields.

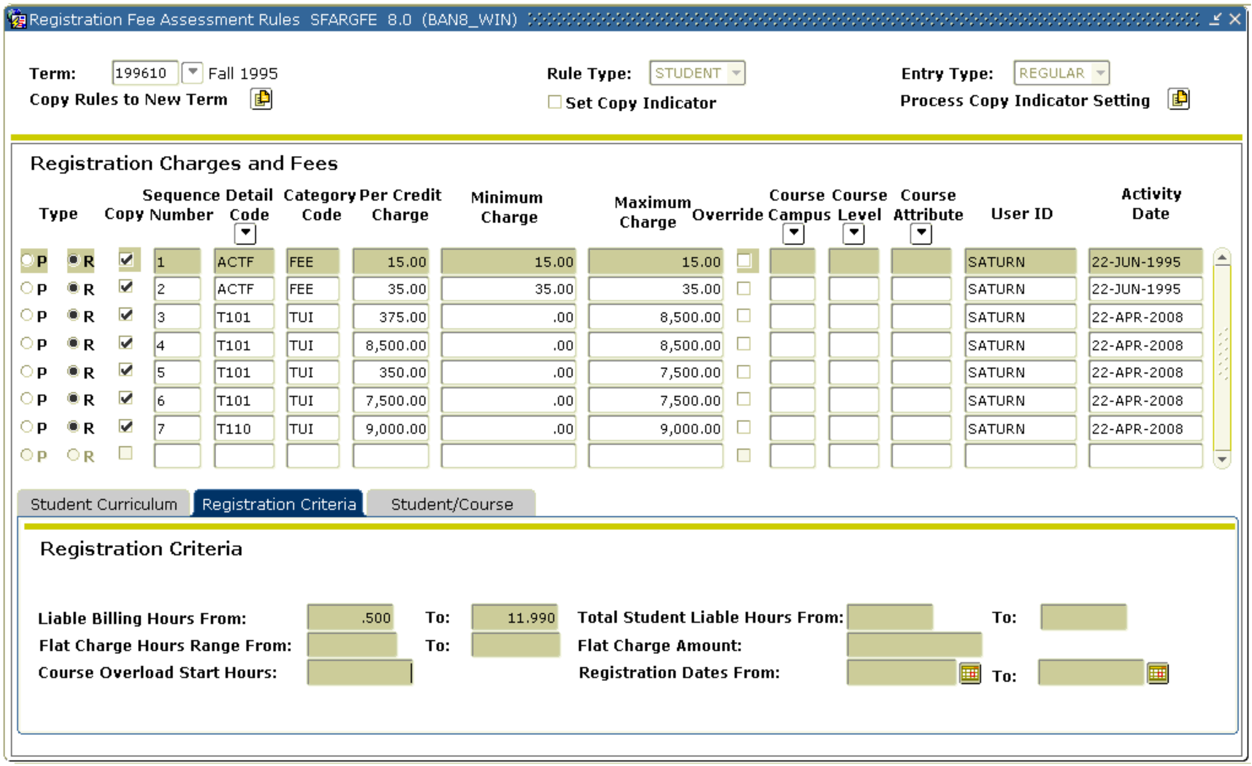
    Note: These fields are the minimum and maximum amount that can be associated with this Detail code.

11. Leave the **Override** checkbox unchecked.
12. Enter *UG* in the **Course Level** field to make this charge applicable to undergraduates only.
13. Perform a **Next Block** function to move to the Student Curriculum Rules Block.

14. Note that this block contains curricular information that is dependent on the rule that is selected in the Registration Charges and Fees block. Enter data as directed by your instructor.

Field	Description	Value
Level	Level code for the fee assessment rule	STVLEVL
Campus	Campus code for the fee assessment rule	STVCAMP
College	College code for the fee assessment rule	STVCOLL
Degree	Degree code for the fee assessment rule	STVDEGC
Program	Program for the fee assessment rule	SMAPRLE
Field of Study Type	Learner field of study type for the fee assessment rule	GTVLFST
Field of Study Code	Field of Study code for the fee assessment rule	STVMAJR
Department	Department code for the fee assessment rule.	
Admission Term	Admission Term code for the fee assessment rule	STVTERM
Curricula Student Type	Student Type code on the curriculum record for the fee assessment rule	STVSTYP
Curricula Rate	Fee assessment rate code on the curriculum record for the fee assessment rule.	STVRATE
Curricula	Curriculum for the fee assessment rule	Valid values are: *Primary, Secondary, Any*

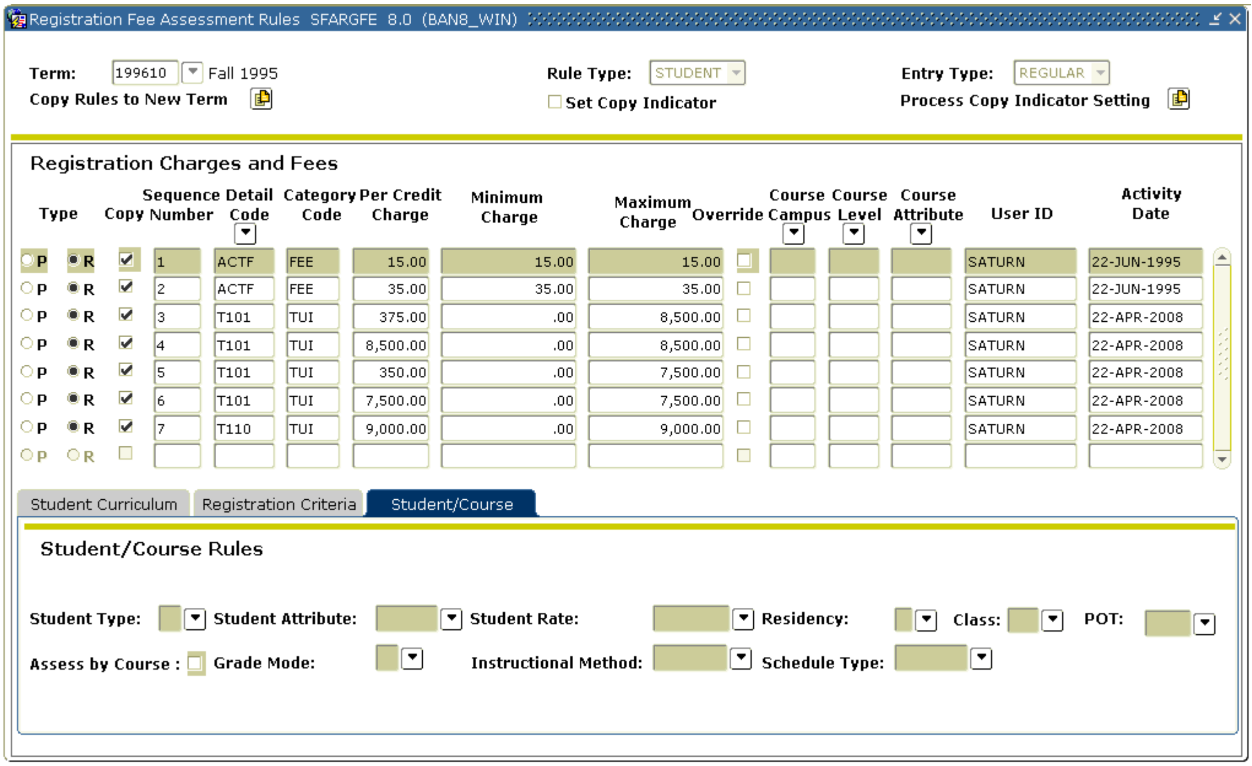
15. You can navigate to the Registration Criteria Block by either clicking on the Registration Criteria tab or by performing a **Next Block**.



16. Enter the lowest number of student hours for this charge to be effective in the **Liable Billing Hours From** field.

17. Enter the highest number of student hours for this charge to be effective in the **Liable Billing Hours To** field.

18. Navigate to the Student/Course Rules block by either performing a **Next Block** or clicking on the Student/Course tab.



19. Click the **Save** icon.

20. Select **Charges by Course Level Rules** from the **Options** menu.

Note: Here fees are related to the level of the course rather than the level of the student.

Note: Observe that the Rule Type in the Key Block changes to LEVEL.

21. Select **Charges by Course Campus Rules** from the **Options** menu.

Note: Here fees are based on the campus that is associated with a particular course.

Note: Observe that the Rule Type in the Key Block changes to CAMPUS.

22. Select **Charges by Course Attribute Rules** from the **Options** menu.

Note: Here fees are based on the course attributes that are associated with a particular course.

Note: Observe that the Rule Type in the Key Block changes to ATTR.

23. Click the **Exit** icon.

Establishing Rules for Online Fee Assessment

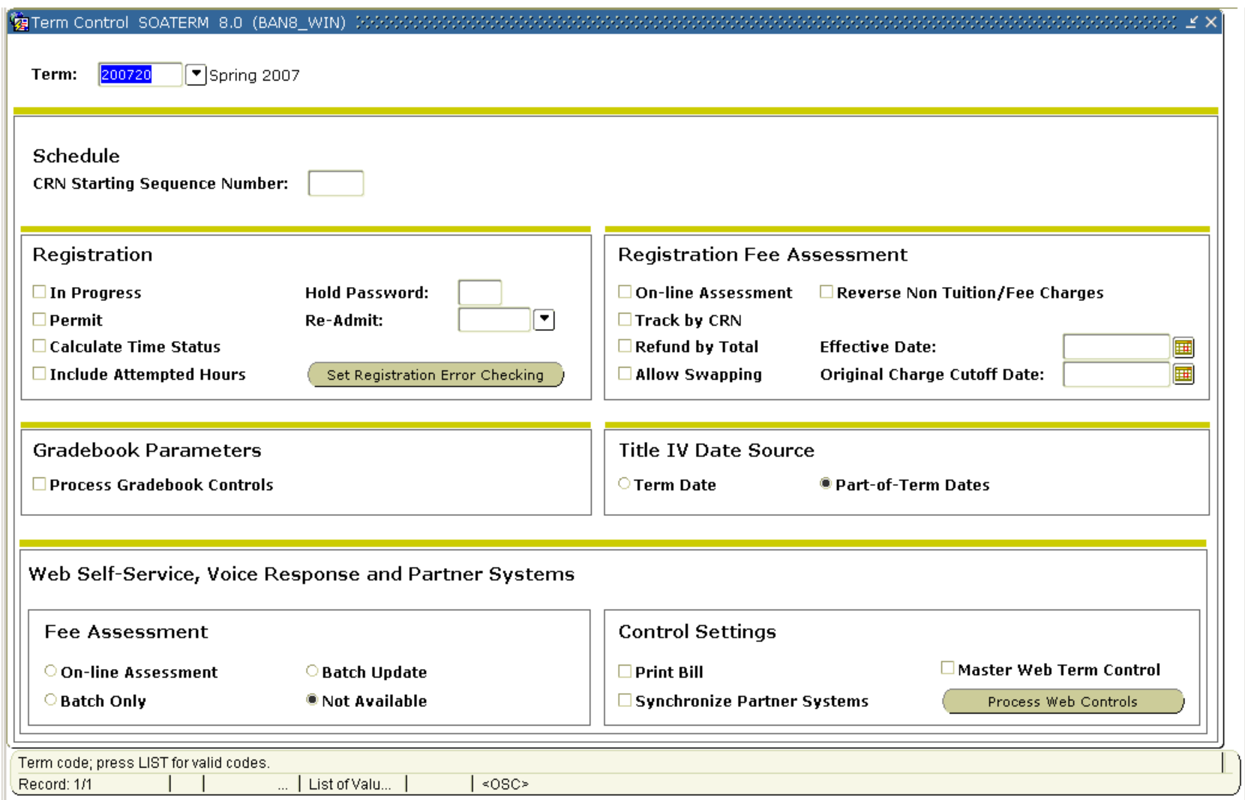
Introduction

Now that the Fee Assessment rules have been defined, you may assess fees in one of two ways: online fee assessment at the time of registration, or batch assessment after registration and after drop/add. The following will establish rules for online Fee Assessment.

Banner form

Use the Term Control Form (SOATERM) to establish controls for a specific term, such as registration fee assessment rules, registration error checking, and part-of-term information.

> Note: Values and options related to fee assessment reside solely on the Term Control Form (SOATERM). In previous Banner releases, some of these values and options resided on the Crosswalk Validation Form (GTVSDAX).



Online vs. batch fee assessment

If you do not want to use online fee assessment, but do all assessment by batch, make sure the **On-line Assessment** checkbox on the Term Control Form (SOATERM) is not checked. This prevents Fee Assessment from taking place online and will not put any collector records in the Registration Batch Fee Assessment Collector table (SFRBTCH) when using the Student Course Registration Form (SFAREGS).

Note: To perform batch assessment, run the Batch Fee Assessment Process (SFRFASC).

Swapping processing

You have the ability to use optional swapping processing with refund by course refund processing. Swapping can be defined as the exchange (dropping and adding) of billing hours within the same day with no additional liability. This functionally is optional; an institution can choose to invoke this functionally or use the current processing with liability for dropped hours.

The **Allow Swapping** checkbox allows you to turn on swapping on a term-by-term basis if desired.

Note: Open learning courses are not considered in the swapping algorithm, as they carry their own refund method. Section fees are not considered as part of swapping processing. If section fees are attached to a course that later is used for swapping, the section fee liability remains.

Reversing non-tuition charges

The **Reverse Non Tuition/Fee Charges** checkbox enables you to allow registration fee assessment to reverse non-tuition or non-fee charges for detail codes with a category code other than *TUI* or *FEE*.

Steps

Follow these steps to establish a rule for online fee assessment.

1. Access the Term Control Form (SOATERM).
2. Enter *the term code (same one that was used in SFARGFE)* in the **Term** field.
3. Perform a **Next Block** function.
4. Click the **On-line Assessment** checkbox in the Registration Fee Assessment block.
5. Click the **Allow Swapping** checkbox, if appropriate.
6. Click the **Reverse Non Tuition/Fee Charges** checkbox, if appropriate.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Assigning Additional Fees

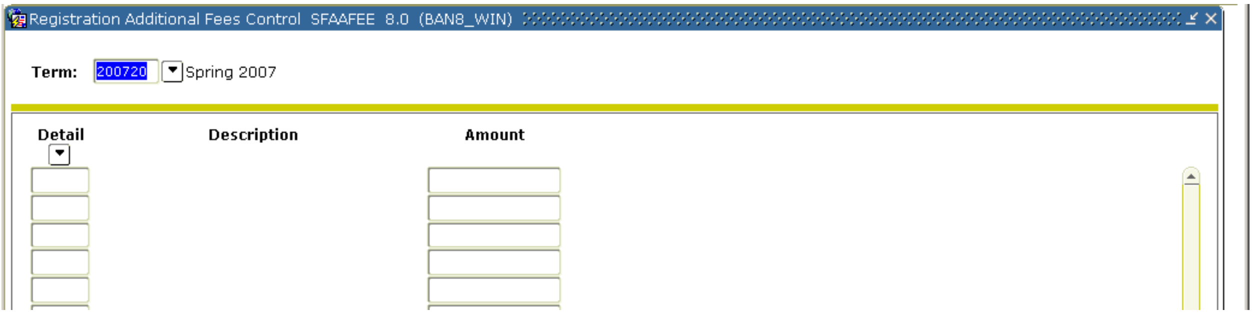
Introduction

Institutions have the option to develop additional, term-based fees. These fees must be set up one time per semester.

The Registration Additional Fees Form (SFAAFEE) is part of the Registration menu and enables you to add specific (optional) fees to the account of a particular student. This should be used only when the fees are not general enough to be assigned to specific course sections using the Schedule Detail form (SSADETL) or from the Registration Fee Assessment Rules Form (SFARGFE).

Banner form

The Registration Additional Fees Form (SFAAFEE)



Steps

Follow these steps to define an additional registration fee.

1. Access the Registration Additional Fees Form (SFAAFEE).

   Note: This is a rules form that is term-specific.

2. Enter a term in the **Term** field.
3. Perform a **Next Block** function or click in the **Detail** field.
4. Select term-specific detail codes in the **Detail** field for additional charges that you may want to add to students' accounts on an ad-hoc basis.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Which form is used to define Fee Assessment rules?

Answer Key for Self Check

Question 1

Which form is used to define Fee Assessment rules?

The Registration Fee Assessment Rules Form (SFARGFE) is used to define Fee Assessment Rules.

Day-to-Day Operations

Section goal

The purpose of this section is to explain the regular process and detail the procedures to handle fee assessment procedures at your institution.

Objectives

In this section you will learn how to

- assess fees on-line
- assign fees to a student for a term.

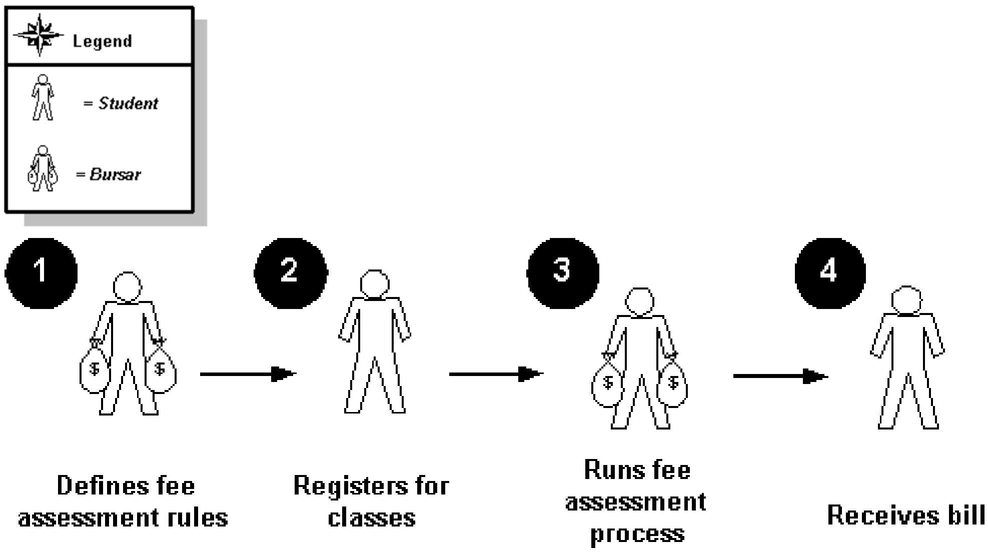
Process Introduction

Introduction

This course is intended to teach you about setting up and running the Fee Assessment process.

Flow diagram

This flow chart highlights specifically what the Fee Assessment process would look like on a day to day basis.



What happens

The stages of the process are described in this table.

Stage	Description
	Bursar and Registrar
1a	Define Fee Assessment rules
1b	Develop refunding tables for a term
	Student
2	Registers for classes
	Bursar
3a	Assess fees in batch
3b	Generates a bill
	Student
4	Receives bill (on-line or paper)

Assessing Fees Online

Introduction

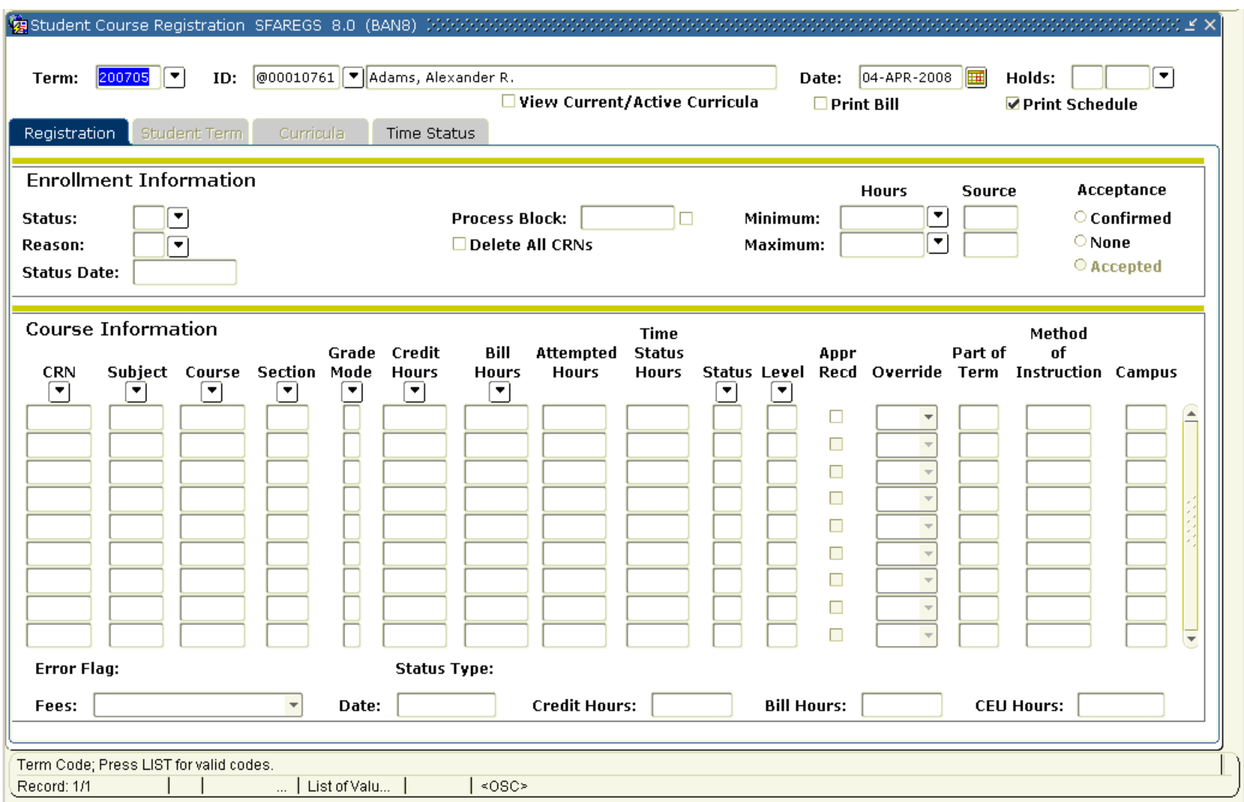
Students must be registered prior to assessing fees.

The first time (each day) that you access the Student Course Registration form (SFAREGS), the system automatically displays the Student System Distribution Initialization Info form (SOADEST). Double-click in the appropriate field in order to select the appropriate printer you will use for each process, or exit if no printer needs to be selected.

Additional fees, as defined on the Registration Additional Fees Form (SFAAFEE), will be applied to students through the Course Registration Form.

Banner form

Student Course Registration Form (SFAREGS)



Steps

Follow these steps to register a student and assess fees.

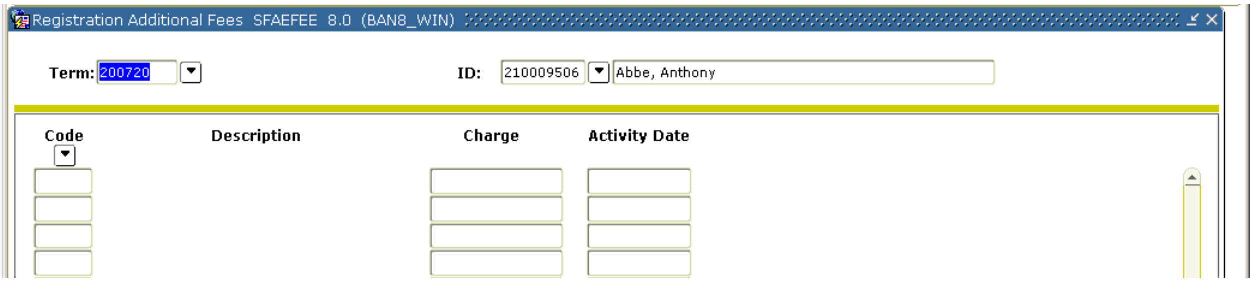
1. Access the Student Course Registration Form (SFAREGS).
2. Enter the term code in the **Term** field.
3. Select the student's ID in the **ID** field.
4. Perform a **Next Block** function.
5. Complete the Registration Information block, if appropriate.

   Note: The values in the **Status**, **Status Date**, **Acceptance**, and **Maximum Hours** fields are entered by Banner.
6. Perform a **Next Block** function.
7. Select a course registration number in the **CRN** field to assign courses to a student.
8. Repeat step 7 as needed to assign additional courses.
9. Click the **Save** icon to save the registration.

   Result: The fees window at the bottom of the screen is now highlighted. *Y - Immediate* is automatically displayed in the **Fee** field.

   Note: For the Batch Fee Assessment process, the indicator should be *N – Create collector record in* the **Fee** field.
10. Click the **Save** icon.
11. Click **OK** to acknowledge the transaction.

12. Select Charge Optional Registration Fees in the **Options** menu.



13. Perform a **Next Block** function.

14. Select a registration fee code in the **Code** field.

    Note: The only fees that may be added on this form are fees that have been defined on SFAAFEE.

15. Click the **Save** icon.

16. Click the **Exit** icon.

    Note: You are returned to the key block of the Student Course Registration Form (SFAREGS).

    The Optional Registration Fees may be assessed immediately:

17. Perform a **Next Block** function.

18. Perform another **Next Block** function.

19. Click the **Save** icon to access the Process Fees option ('Y' should be the default).

20. Click the **Save** icon to process the charges.

21. Click the **OK** button.

Steps

Follow the steps below to review the assessment/account process.

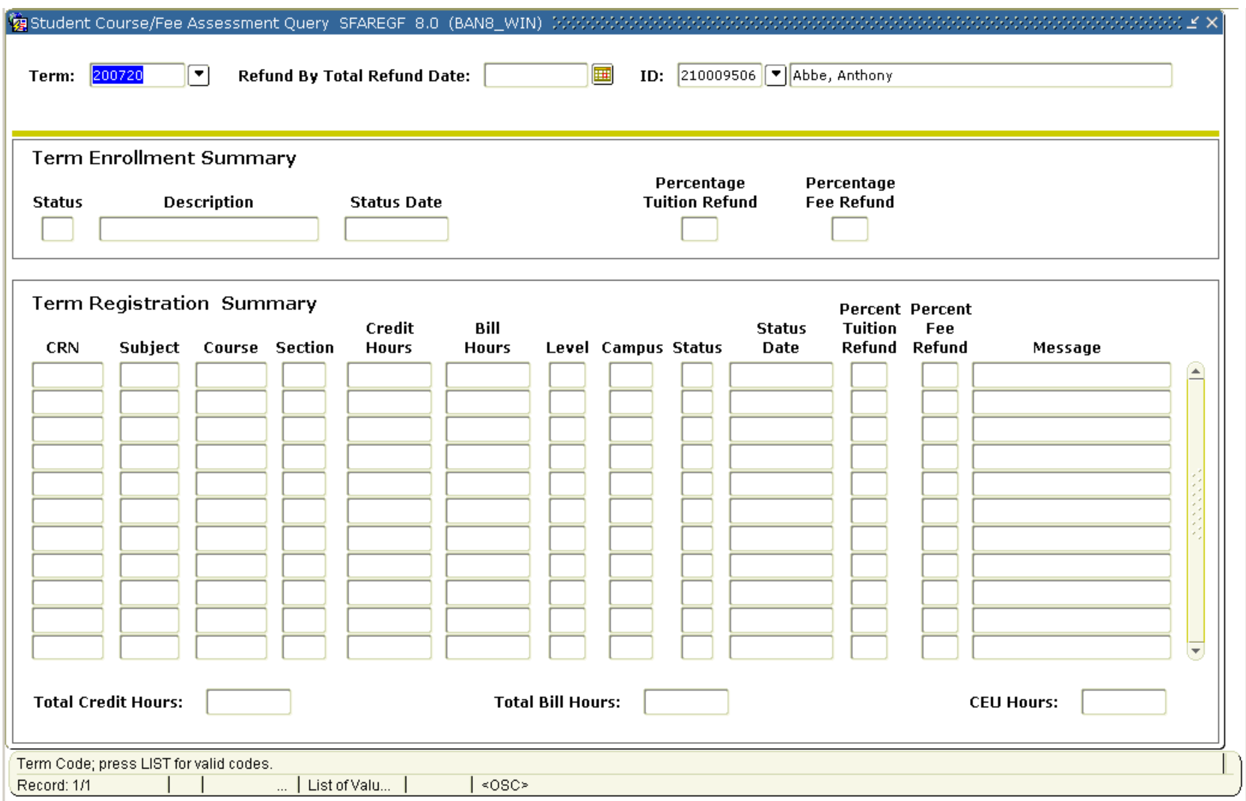
> Notes: Proceed with Reviewing the Assessment as outlined below and the Optional Registration Fees will be displayed.

Using the Batch Fee Assessment Process (SFRFASC) will assess The Optional Registration Fees.

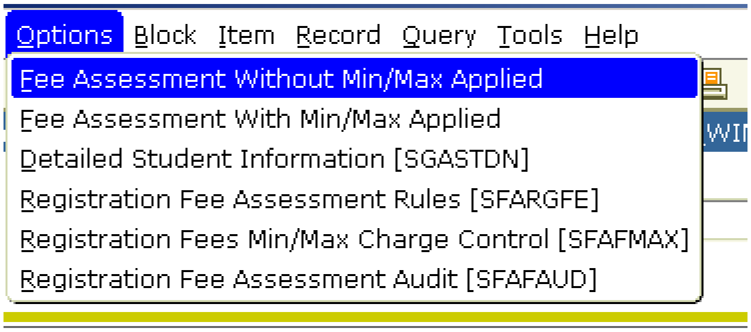
No additional action is required in the Course Registration Form SFAREGS.

1. You should still be in the key block of the Student Course Registration Form (SFAREGS). If not, access the form and verify or enter the appropriate Term code and ID number.

2. Select Review Student's Classes and Charges from the **Options** menu to access the Student Course/Fee Assessment Query Form (SFAREGF).



3. Select either Fee Assessment Without Min/Max Applied or the Fee Assessment With Min/Max Applied from the **Options** menu according to your institutions Fee Assessment policy.

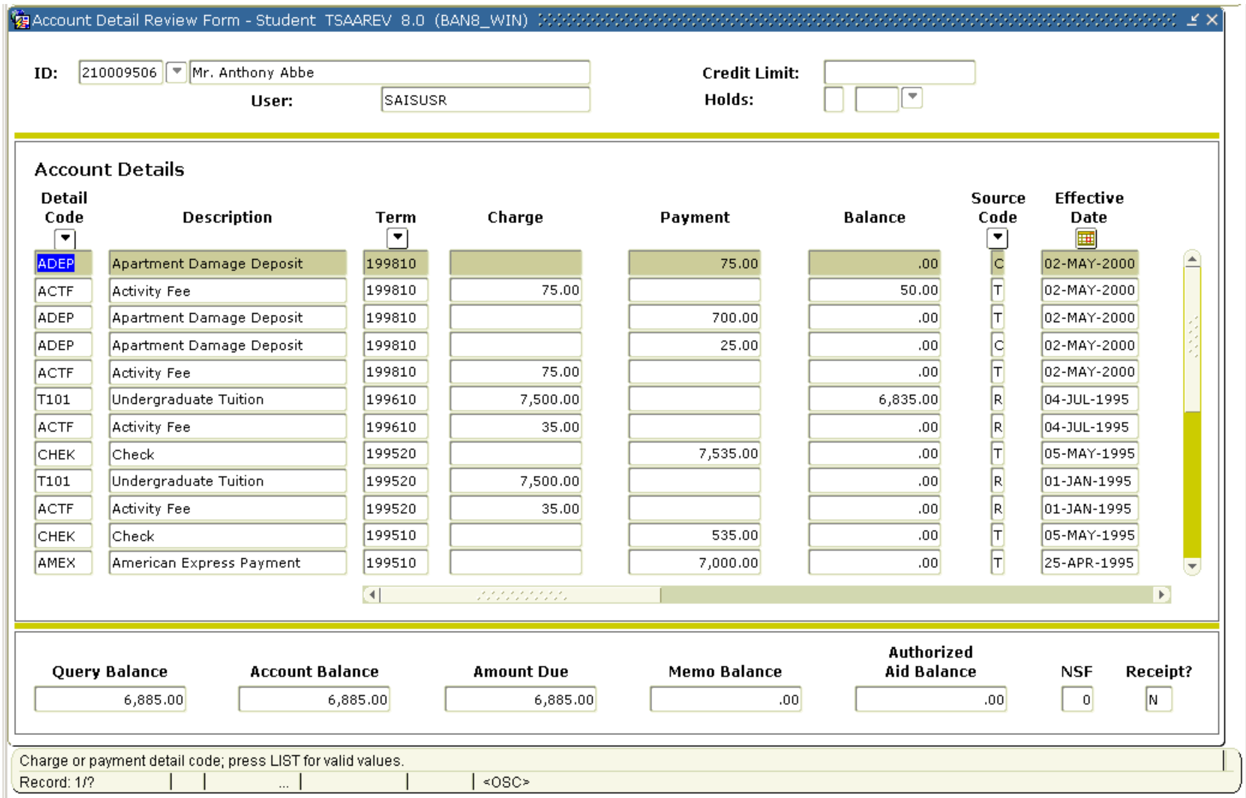


Note: If you attempt to navigate in the Student Course Fee Assessment Query Form the fees will not remain visible. You need to exit the form (SFAREGF), return to the Student Course Registration form (SFAREGS), then select the Review Student's Classes and Charges in the **Options** menu and proceed with the query as outlined above.

4. Click the **Exit** icon to return to the Student Course Registration Form.

5. Select Review Account Detail in the **Options** menu to access the Account Detail Review Form (TSAAREV).

   Result: This will bring up another Printer Destination screen, TOADEST. Exit from this screen to review the account.



Account Detail Review Form - Student TSAAREV 8.0 (BAN8_WIN)

ID: 210009506 Mr. Anthony Abbe   Credit Limit:
User: SAISUSR   Holds:

Account Details

Detail Code	Description	Term	Charge	Payment	Balance	Source Code	Effective Date
ADEP	Apartment Damage Deposit	199810		75.00	.00	C	02-MAY-2000
ACTF	Activity Fee	199810	75.00		50.00	T	02-MAY-2000
ADEP	Apartment Damage Deposit	199810		700.00	.00	T	02-MAY-2000
ADEP	Apartment Damage Deposit	199810		25.00	.00	C	02-MAY-2000
ACTF	Activity Fee	199810	75.00		.00	T	02-MAY-2000
T101	Undergraduate Tuition	199610	7,500.00		6,835.00	R	04-JUL-1995
ACTF	Activity Fee	199610	35.00		.00	R	04-JUL-1995
CHEK	Check	199520		7,535.00	.00	T	05-MAY-1995
T101	Undergraduate Tuition	199520	7,500.00		.00	R	01-JAN-1995
ACTF	Activity Fee	199520	35.00		.00	R	01-JAN-1995
CHEK	Check	199510		535.00	.00	T	05-MAY-1995
AMEX	American Express Payment	199510		7,000.00	.00	T	25-APR-1995

Query Balance	Account Balance	Amount Due	Memo Balance	Authorized Aid Balance	NSF	Receipt?
6,885.00	6,885.00	6,885.00	.00	.00	0	N

Charge or payment detail code; press LIST for valid values.
Record: 1/? ... <OSC>

6. Review the account.

7. Click the **Exit** icon to return to the Student Course Registration Form (SFAREGS).

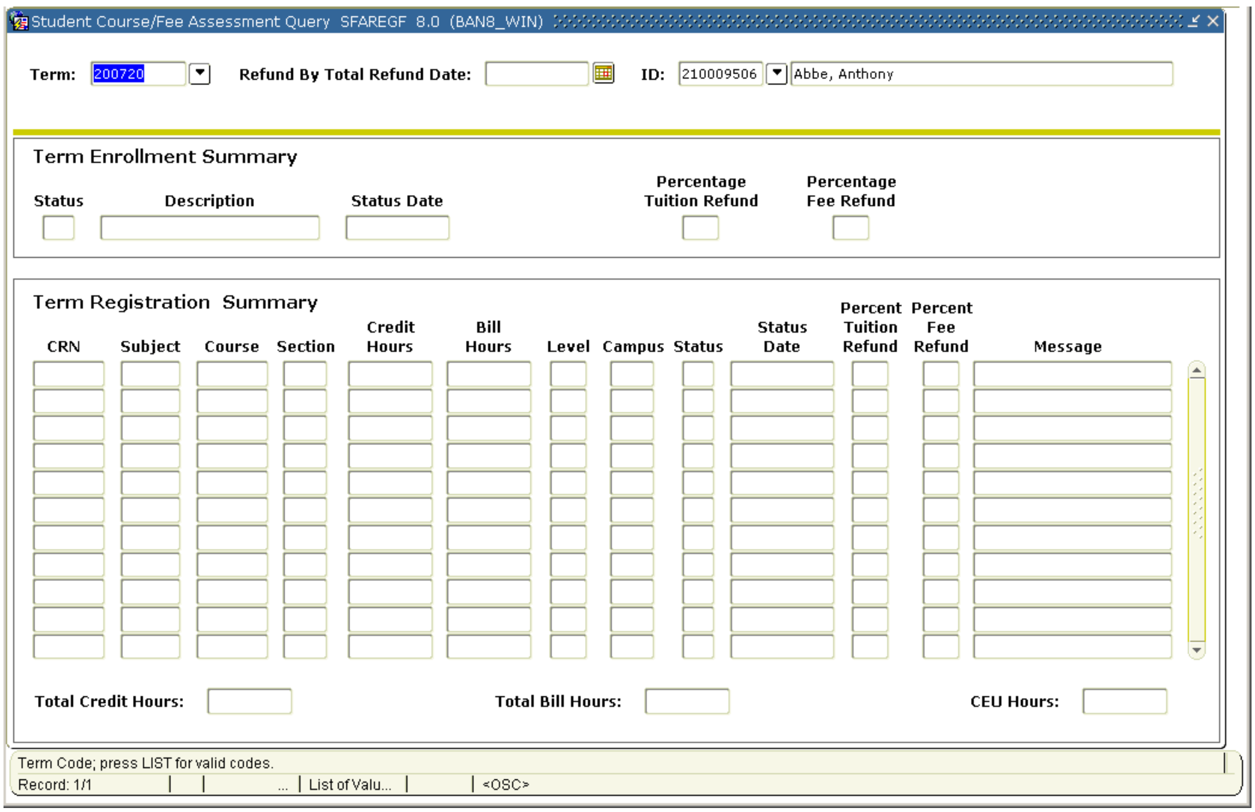
Reviewing the Student Course/Fee Assessment Query

Introduction

The Student Course/Fee Assessment Query Form (SFAREGF) is a query only form, accessed through the Student Course Registration Form (SFAREGS), or through direct access and displays a student's registration and associated fees.

Note: These instructions are provided for those who wish to go back and review a record. The process was covered in the previous procedure.

Banner form



Steps

Follow these steps to review student course/fee assessment.

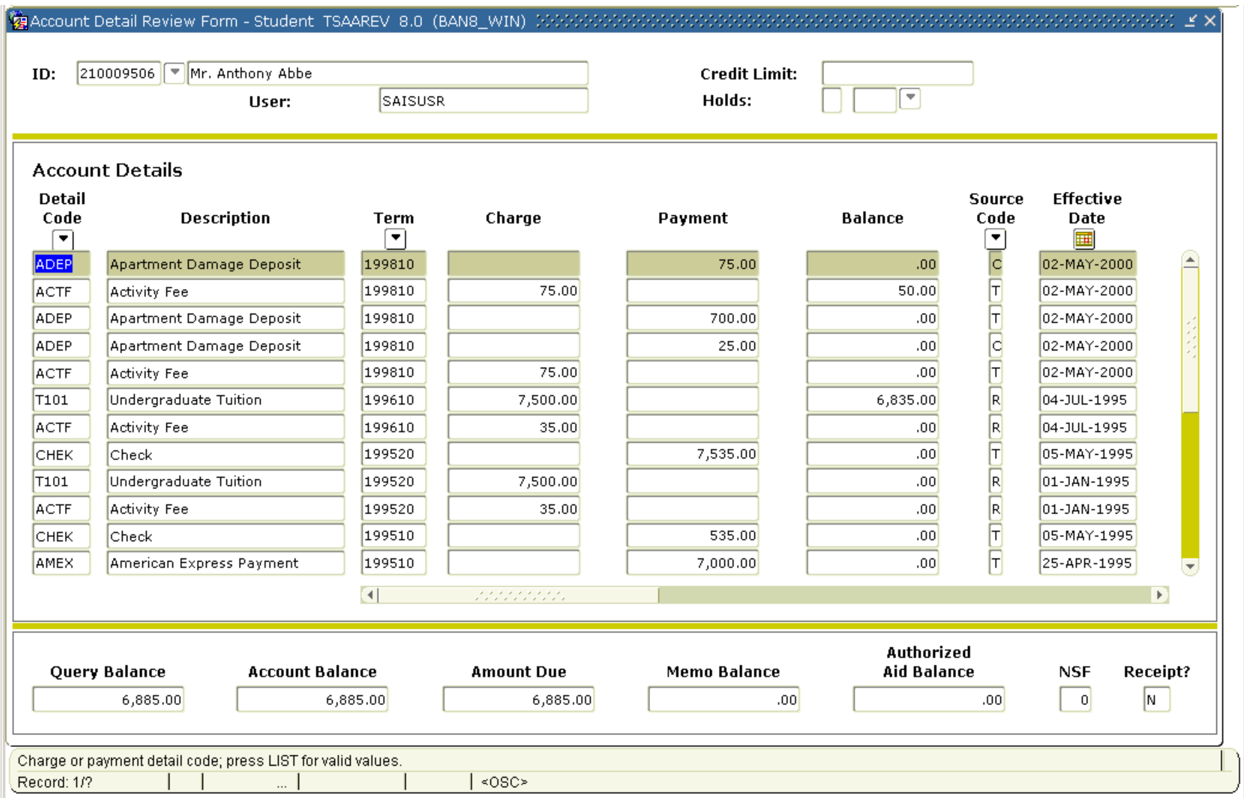
1. Access the Student Course Registration Form (SFAREGS).
2. Enter a term in the **Term** field.
3. Enter a student ID in the **ID** field.
4. Select **Review Student's Classes and Charges** from the **Options** menu to access the Student Course/Fee Assessment Query Form (SFAREGF).
5. Perform a **Next Block** function.
6. Click the **Exit** icon to return to the Student Course Registration Form (SFAREGS).

Reviewing the Account Detail

Introduction

The Account Detail Review Form (TSAAREV) is used for viewing and updating charges to a student's account.

Banner form



Account Detail Review Form - Student TSAAREV 8.0 (BAN8_WIN)

ID: 210009506 Mr. Anthony Abbe

User: SAISUSR

Credit Limit:

Holds:

Account Details

Detail Code	Description	Term	Charge	Payment	Balance	Source Code	Effective Date
ADEP	Apartment Damage Deposit	199810		75.00	.00	C	02-MAY-2000
ACTF	Activity Fee	199810	75.00		50.00	T	02-MAY-2000
ADEP	Apartment Damage Deposit	199810		700.00	.00	T	02-MAY-2000
ADEP	Apartment Damage Deposit	199810		25.00	.00	C	02-MAY-2000
ACTF	Activity Fee	199810	75.00		.00	T	02-MAY-2000
T101	Undergraduate Tuition	199610	7,500.00		6,835.00	R	04-JUL-1995
ACTF	Activity Fee	199610	35.00		.00	R	04-JUL-1995
CHEK	Check	199520		7,535.00	.00	T	05-MAY-1995
T101	Undergraduate Tuition	199520	7,500.00		.00	R	01-JAN-1995
ACTF	Activity Fee	199520	35.00		.00	R	01-JAN-1995
CHEK	Check	199510		535.00	.00	T	05-MAY-1995
AMEX	American Express Payment	199510		7,000.00	.00	T	25-APR-1995

Query Balance	Account Balance	Amount Due	Memo Balance	Authorized Aid Balance	NSF	Receipt?
6,885.00	6,885.00	6,885.00	.00	.00	0	N

Charge or payment detail code; press LIST for valid values.

Record: 1/? ... <OSC>

Steps

Follow these steps to review charges to a student's account.

1. Access the Student Course Registration Form (SFAREGS).
2. Enter a term in the **Term** field.
3. Enter a student ID in the **ID** field.
4. Select **Review Account Detail** in the **Options** menu to access the Account Detail Review Form (TSAAREV).

   Result: This will bring up another Printer Destination screen, TOADEST. Exit from this screen to review the account.
5. Perform a **Next Block** function.
6. Select a registration fee in the **Detail Code** field.
7. Click the **Save** icon.
8. Click the **Exit** icon to return to the Student Course Registration Form (SFAREGS).
9. Click the **Exit** icon.

Using the Fee Assessment Report

Introduction

The Fee Assessment Report (SFRFEES) is used to assist in troubleshooting and debugging fee assessment processing. It is intended to be an efficient way to gather needed information when a question arises on fee assessment.

This report lists various data values stored for a student that have the potential to meet registration assessment rule criteria. The values displayed are for enrollment data, student data, curriculum data, course registration data, optional mock fee assessment data, previous and current fee assessment, and accounts receivable records. The report processes a single ID or a population selection for a term. This report may be used for assessment verification and can be helpful when troubleshooting assessment results.

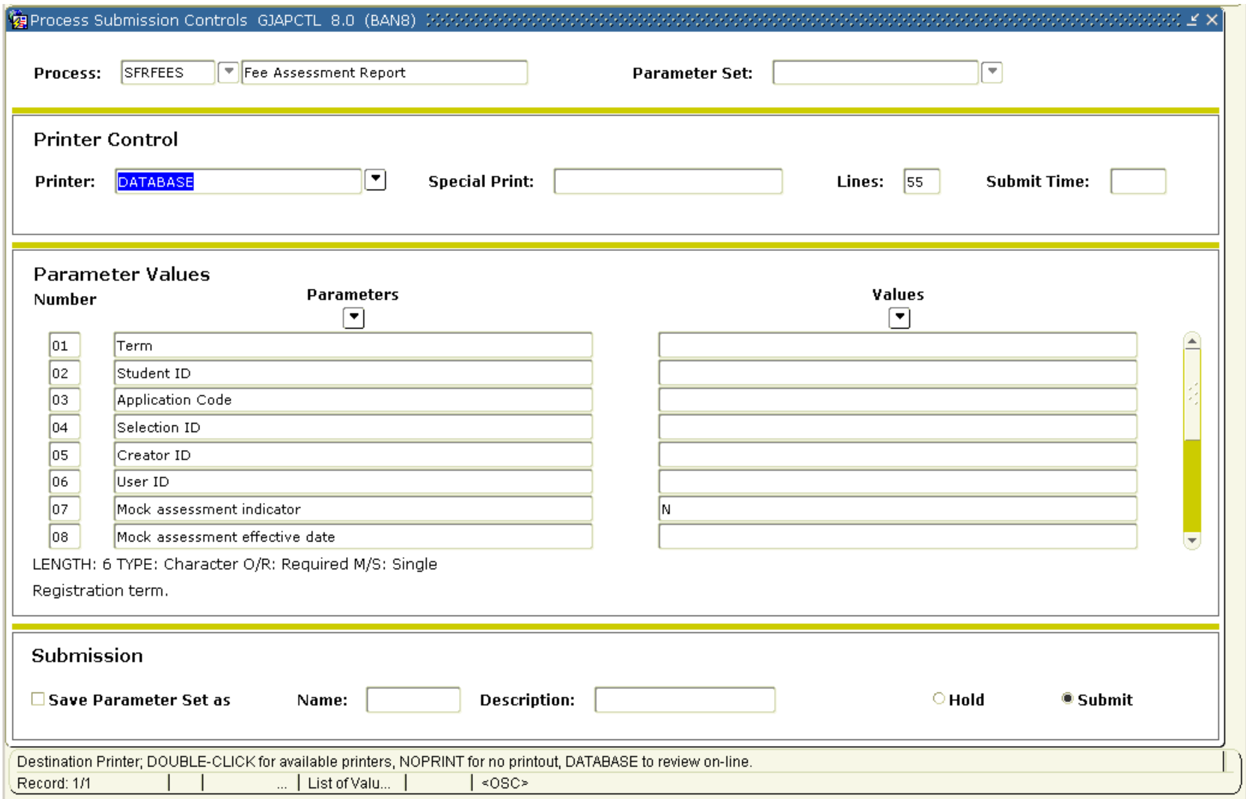
Other uses

This report can also be used as a tool for institutions to evaluate their processing rules or check on a specific group of students.

Example 1: An institution may want to update a rule. They could take a sample population selection, and then compare the current assessment with a mock assessment to determine if this change would be appropriate.

Example 2: A user may want to review assessment results for students who have a specific drop registration status (i.e., *DD*). The user would create a population selection containing these students, and run the report. This allows an easy comparison between the current assessment and the previous one, in order to determine if the refund was performed correctly.

Banner form


Process Submission Controls GJAPCTL 8.0 (BAN8)

Process: SFRFEES Fee Assessment Report Parameter Set:

Printer Control

Printer: DATABASE Special Print: Lines: 55 Submit Time:

Parameter Values

Number	Parameters	Values
01	Term	
02	Student ID	
03	Application Code	
04	Selection ID	
05	Creator ID	
06	User ID	
07	Mock assessment indicator	N
08	Mock assessment effective date	

LENGTH: 6 TYPE: Character O/R: Required M/S: Single

Registration term.

Submission

Save Parameter Set as Name: Description: Hold Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.

Record: 1/1 ... List of Valu... <OSC>

Steps

Follow these steps to use the report.

1. Access the Fee Assessment Report (SFRFEES).
2. Perform a **Next Block** function.
3. Enter the appropriate printer or type *DATABASE* in the **Printer** field.
4. Perform a **Next Block** function.
5. Enter the parameters as appropriate.

Note: Use the table as a guide to the parameters.

Parameter	**Description**	**Req?**
Term	Registration term for which fee assessment is to be reported.	Y
Student ID	ID of the student for which fee assessment is to be reported.	N
Application Code	Code that identifies the general area for which the selection identifier was defined. Note: All or none of the population selection parameters must be entered	N
Selection ID	The code that identifies the population with which you wish to work.	N
Creator ID	Enter the user ID of the person who created the population rules.	N
User ID	Enter the user ID for the population selection. Note: This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID.	N
Mock Assessment Indicator	Enter *Y* to process mock fee assessment or *N* to not process mock fee assessment.	Y

Parameter	Description	Req?
Mock Assessment Effective Date	Enter the date for the mock fee assessment in DD-MON-YYYY format Note: This parameter was created for future use and will be used to expand on the details of accounting transactions.	N
Assessment Detail Indicator	Enter a value to select the level of report detail. Enter *C* for current detail, *P* for previous detail, or *B* for both kinds of information.	Y
Sort Order	Enter a value to select the sort order for the output. Enter *N* for name order or *I* for student ID order.	Y

6. Perform a **Next Block** function.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Summary

Let's review

As a result of completing this workbook, you have

- developed a fee assessment control form
- set up the term control form for online fee assessment
- assessed fees online
- assigned and assessed optional fees to a student for a term
- reviewed the assessment account for a student.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

How do you control that Fee Assessment is done in batch only?

Question 2

How do you perform online Fee Assessment?

Question 3

What form is used to review a student's account?

Question 4

Once enterprise fee rules are defined and assessed, fees can be assigned to each student for the semester.

True or False

Answer Key for Self Check

Question 1

How do you control that Fee Assessment is done in batch only?

The Term Control Form (SOATERM) is used to insure that Fee Assessment is done in batch only.

Question 2

How do you perform online Fee Assessment?

Online Fee Assessment is performed through a process that includes the Term Control Form (SOATERM), the Registration Additional Fees Form (SFAAFEE), the Student Course Registration Form (SFAREGS), the Student Course/Fee Assessment Query Form (SFAREGF) and the Account Detail Review Form (TSAAREV).

Question 3

What form is used to review a student's account?

Account Detail Review Form (TSAAREV)

Question 4

Once enterprise fee rules are defined and assessed, fees can be assigned to each student for the semester. (True or False)

True

Appendix

Forms Job Aid

Form	Full Name	Use this Form to...
SFAESTS	Enrollment Status Control Form	provide the rules associated with a student's status. Status values are user-defined, with the exception of the "EL" status which must be used as the default for registration. While the "EL" status is required, its attributes may be defined according to your institution's policy.
SFARSTS	Course Registration Status Form	provide the rules associated with a student's course status. Status values are user-defined, with the exception of the ***RE*** (Register Course) status, which must be used as the default for a student's course registration. While the ***RE*** status is required, its attributes may be defined according to your institution's policy.

Form	Full Name	Use this Form to...
STVRSTS	Course Registration Status Code Validation Form	create, update, insert, and delete course registration status codes such as Audit, Registered, Web Drop. Other forms use this form to validate course registration statuses. You can set the switches in the checkboxes to determine what the various status codes allow, such as count in enrollment, place on waitlist, whether the course is gradable, and so on. You may also specify an automatic grade which will be placed on the student's registration record when the status is entered.
SFARGFE	Registration Fee Assessment Rules Form	provide the rules used in the Fee Assessment algorithm. These rules provide you with the ability to apply rules by term, residency, college, major, etc. Prior to entering the data on this form the proper validation forms must be created. The data on this form is necessary to process fee assessment. To review the rules as they apply to a student without updating the database, you may use the Student Course/Fee Assessment Query Form (SFAREGF).
SOATERM	Term Control Form	establish controls for a specific term. These controls affect the areas of catalog, schedule, registration, registration fee assessment, and telephone registration processing.
SFRBTCH	Registration Batch Fee Assessment Collector	collect fee assessment records to be applied during a job submission batch process.
SFAREGS	Student Course Registration Form	enroll students in courses, assess fees and query registration records.
SFRFASC	Batch Fee Assessment Process	process that applies Fee Assessments in batch.

Form	Full Name	Use this Form to...
SFAAFEE	Registration Additional Fees Form	provide 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.
SSADETL	Detail Form	enter or display detail schedule information, according to the definitions and restrictions created in the Course Catalog.
SOADEST	Student System Distribution Initialization Information Form	enter the intended destination of hardcopy student schedules, invoices, academic transcripts, enrollment verification reports, and compliance results requested during the terminal session. You can designate the selection criteria used in the sleep/wake routines when processing schedules, invoices, and transcripts. Enrollment verifications are not printed using sleep/wake processing, but the printer to be used may be set up from this field.
SFAAFEE	Registration Additional Fees Form	provide the fee codes and the amounts that can be used in the Registration Additional Fees Form (SFAEFEE), which may be accessed through the Student Course Registration Form (SFAREGS).
SFRFASC	Batch Fee Assessment Process	apply fee assessment in a batch process.

Form	Full Name	Use this Form to...
SFAREGF	Student Course/Fee Assessment Query Form	provide you with the ability to query a student's detail data and registration fee assessment online, without having to update the student's detail file. This allows you to enter the registration fee assessment rules and then test the result on specific students. This form is accessed directly through the menu.
TSAAREV	Account Detail Review Form	enter and review charge and payment information about an account. The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances.
SFRFEES	Fee Assessment Report	troubleshoot fee assessment processing. Can also be used as a tool to evaluate processing rules on check on a specific group of students.

Terminology

Query only

A report mode that lets you look up and view information but not change the data.

Rules form

A type of form in which you define how data is processed in Banner.

Validation form

A type of set up form in which you define choices for other forms. This helps to ensure consistency of data entry.