

Banner Student General Student Training Workbook

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Revision History Log

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October 2008	New version that supports 8.1 software.

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Think before you print.

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Introduction



Course goal

The goal of this workbook is to provide you with the knowledge and practice to create and modify student records. This workbook is divided into these sections:

- Introduction
- Set Up
- Day-to-day Operations

Course objectives

In this course you will learn how to

- create and modify current information for students
- change a student's major
- change a student's residency
- change a student type
- enter information on career choice
- add advisors
- add activities
- add veteran information
- enter student classifications
- enter cooperative information
- enter Student Right to Know information.

Intended audience

Personnel responsible for creating and modifying current student information

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 Curriculum, Advising, and Program Plan training workbook
- completed the General Person training workbook
- administrative rights to create the rules and set the validation codes in Banner.

To complete the exercises in the Day to Day Section of this workbook, you will also need to ensure that the rules and validation codes in Banner needed for the General Student module and the Curriculum, Advising, and Program Plan (CAPP) module have been set up for you.

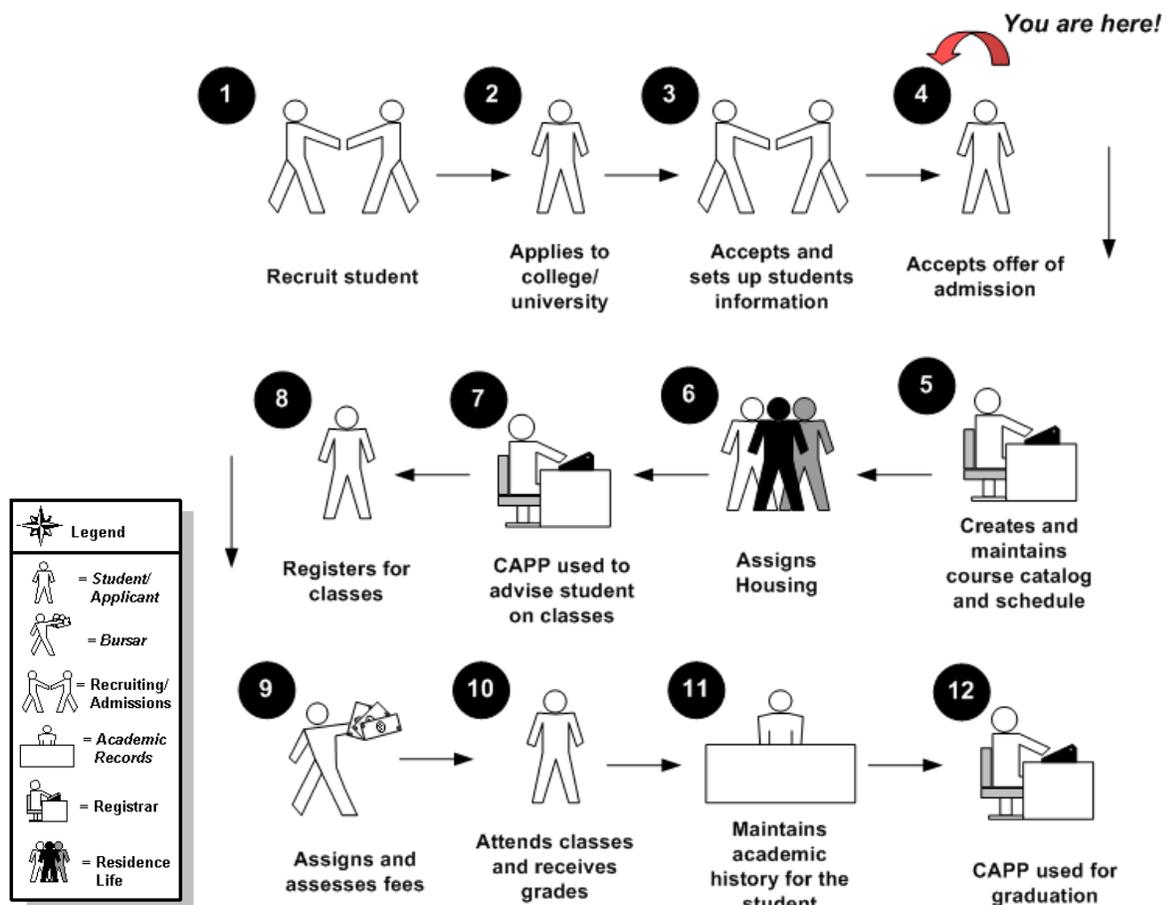
Process Introduction

About the process

An active General Student record is required before a student is able to register for classes and be assessed tuition and fees. Banner will review the student characteristics during registration to ensure that the student is eligible to register and to ensure that the student register's into the correct courses.

Flow diagram

This diagram highlights where the General Student Module process occurs within the overall Student process.



About the process

- Validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- Rule forms are set up for specific terms and can be either copied as is to a new term or changed for subsequent terms.
- The person/employee may view, save, and print online output.
- Parameters validation criteria are defined for generating the General Student Job Submission processes and reports.

Set Up



Section goal

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

Objectives

In this section you will learn how to create the rules and set parameters used to process student data.

Validation Forms Used in the General Student Module

List of validation forms

Before performing day-to-day activities related to General Student, a number of forms require your organization's data to be entered first. The following validation forms are used in the General Student module. Review these forms and practice entering information in each.

Note: Some of these validation forms are shared by various Banner systems. You should coordinate with other Banner system users at your institution when deciding what codes are used.

The forms are listed below in alphabetical order by Banner Name for reference purposes; it is likely you may set them up in a different order from how they are listed here. They are covered in detail on the pages that follow.

Form Description	Banner Name
Student Activity Code Validation	STVACTC
Advisor Type Code Validation	STVADVR
Student CARE AFDC Duration Validation	STVAFDC
Academic Standing Code Validation	STVASTD
Attribute Validation	STVATTR
Student Attribute Code Validation	STVATTS
Block Code Validation	STVBLCK
Campus Code Validation	STVCAMP
Combined Academic Standing Code Validation	STVCAST
Cohort Code Validation	STVCHRT
Class Code Validation	STVCLAS
Comment Type Code Validation	STVCMTT

Form Description	Banner Name
Communication Plan Code Validation	STVCPLN
Cohort Reason Code Validation	STVCREA
Contact Type Code Validation	STVCTYP
Student CARE Number of Dependents Validation	STVDEPS
Disability Type Code Validation	STVDISA
Degree Level Code Validation	STVDLEV
Employer Code Validation	STVEMPL
Eligibility Validation	STVELIG
Education Opportunity Prog/Serv Status Validation	STVEOPS
Eligibility Factor Validation	STVESEL
Level Code Validation	STVLEVL
Student CARE Marital Status Validation	STVMARS
Medical Code Validation	STVMEDI
Progress Evaluation Code Validation	STVPREV
Appointment Result Code Validation	STVRSLT
Services Provided Validation	STVSEPR
State F/A Eligibility Validation	STVSFAE
Service Provider Validation	STVSPRV
Disability Service Code Validation	STVSPSR
Sport Status Code Validation	STVSPST
Service Code Validation	STVSSER
Service Result Validation	STVSSRS
Services Status Validation	STVSSST
Student Status Code Validation	STVSTST

Form Description	Banner Name
Student Type Code Validation	STVSTYP
Student Element One (through Ten) Validation	STVSUDA, STVSUDB, STVSUDC,....,STVSUDJ
Acceptance Reason Validation	STVTRAC
Veteran Type Code Validation	STVVETC
Student EOPS/CARE Withdrawal Reason Validation	STVWTHD

Student Activity Code Validation

Purpose

Use the Student Activity Code Validation Form (STVACTC) to create, update, insert, and delete activity codes. This form is used by other forms to validate activity codes (Debate Club, Swim Team, ROTC, etc.). You may only create or update activity codes from this form.

The **Code** field is validated against the Activity Category Validation Form (STVACCG), and the **Type** field is validated against the Activity Type Validation Form (STVACTP).

Notes: All activity codes which are for sports and should be able to be added on the Student Sport Form (SGASPRT) *must* have a type code of SPRTS. This type code is a system-required code on the Activity Type Validation Form (STVACTP).

Use a code of UNASSIGN for collector table processing with the Print Detail Report Indicator parameter of the Student Right to Know Report (SGRKNOW).

Warning: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Student Activity Code Validation STVACTC 8.0 (BAN8)

Code	Description	Type	Category	Activity Date
010	Field Hockey			25-JUN-2004
020	Music Festival Volunteers	MUSIC	CIVIC	24-JAN-1992
030	Alumni Board Member			03-JUN-1990
040	Past Presidents' Council		CORP	24-JAN-1992
050	Memorial Scholarship Committee			03-JUN-1990
060	Friends of the Library	CULTR		22-JAN-1992
070	Friends of the Museum	CULTR		22-JAN-1992
080	Gallery Patrons Committee			03-JUN-1990
090	Board of Visitors	ACADM		10-JAN-2002
100	Alumni Admissions Rep	ATHLE		07-APR-2004
101	Debate Club			17-AUG-1987
110	Fraternity	FRTTY	UNGRD	24-JAN-1992
120	Sorority	FRTTY	UNGRD	24-JAN-1992
130	Football Team	SPRTS	UNGRD	24-JAN-1992
140	Basketball Team	SPRTS	UNGRD	24-JAN-1992
150	Baseball Team	SPRTS	UNGRD	24-JAN-1992
160	Swim Team	SPRTS	UNGRD	24-JAN-1992
170	Tennis Team	SPRTS	UNGRD	24-JAN-1992
180	Golf Team	SPRTS	UNGRD	24-JAN-1992
190	ROTC			17-AUG-1987
200	Gymnastics Team	SPRTS	UNGRD	24-JAN-1992
210	Student Newspaper		UNGRD	24-JAN-1992

Steps

Follow these steps to create a student activity code.

1. Access the Student Activity Code Validation Form (STVACTC).
2. Perform an **Insert Record** function.
3. Enter a three- or four-character activity code in the **Code** field.
4. Enter a description of the code in the **Description** field.
5. Select an activity type in the **Type** field.
6. Select an activity category in the **Category** field.
7. Repeat steps 2 – 6 to enter all student activity codes.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Advisor Type Validation

Purpose

Use the Advisor Type Code Validation Form (STVADVR) to create, update, insert, and delete advisor type codes for students. Students may have multiple advisors, such as an academic advisor or an athletic advisor. You may only create or update advisor type codes from this form.

Banner form

Code	Description	Activity Date
ADMN	Administrative Advisor	09-AUG-2004
MAJR	Major Advisor	21-MAR-2002
PEER	Student Peer Advisor	22-JUL-1999
PRIM	Primary Advisor	22-AUG-2001

Steps

Follow these steps to create an advisor type code.

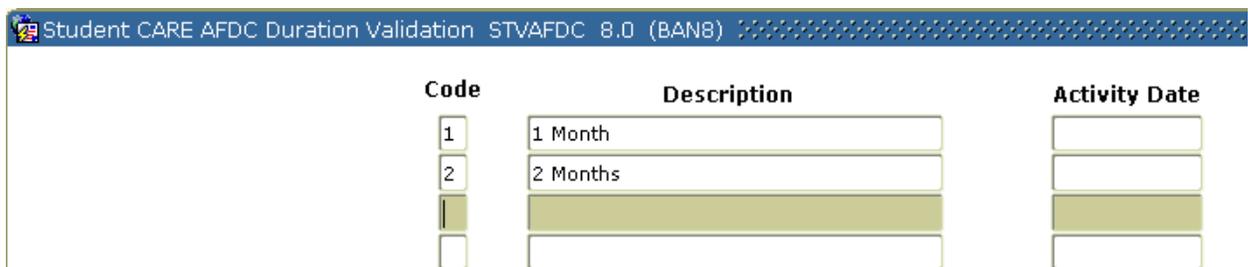
1. Access the Advisor Type Code Validation Form (STVADVR).
2. Enter an advisor type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student CARE AFDC Duration Validation

Purpose

Use the Student CARE AFDC Duration Validation Form (STVAFDC) to create, update, insert, and delete CARE AFDC codes. These codes indicate the length of time a CARE student has been on Aid to Families with Dependent Children (AFDC), at the time of enrollment for the current term. You can create or update these codes only from this form.

Banner form



The screenshot shows a web browser window titled "Student CARE AFDC Duration Validation STVAFDC 8.0 (BAN8)". The form contains a table with three columns: "Code", "Description", and "Activity Date".

Code	Description	Activity Date
1	1 Month	
2	2 Months	

Steps

Follow these steps to create a student CARE AFDC duration code.

1. Access the Student CARE AFDC Duration Validation Form (STVAFDC).
2. Enter the code of the CARE AFCD duration in the **Code** field.
3. Enter a description of the CARE AFDC duration in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Academic Standing Code Validation

Purpose

Use the Academic Standing Code Validation Form (STVASTD) to create, update, insert, and delete academic standing codes, such as Good Standing, Dean's List, or Suspension. Other forms use this form to validate these codes, which you can only create or update from this form.

Note: Calculated code displays in the General Student record.

Banner form

Standing Code	Description	Dean List	Prob Ind	Proh Reg	Minimum Hours	Maximum Hours	EDI Eqv	Voice Msg	Sys Req	Activity Date
00	Good Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			B27		<input checked="" type="checkbox"/>	21-MAR-2007
10	Deans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	17-NOV-2004
12	Honors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	10-FEB-2005
13	Presidents List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	17-NOV-2004
AC	This is Academic Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					<input type="checkbox"/>	13-JUL-2004
AD	Academic Dismissal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			B28		<input type="checkbox"/>	20-AUG-2004
AW	Academic Warning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		16.000			<input type="checkbox"/>	26-APR-1999

Steps

Follow these steps to create an academic standing code.

1. Access the Academic Standing Code Validation Form (STVASTD).
2. Enter a two-character code in the **Standing Code** field.
3. Enter a description of the standing code in the **Description** field.
4. Click the **Dean's List** checkbox if this code indicates the student is on the Dean's List.
5. Click the **Prob Ind** checkbox if this code indicates the student is on academic probation.
6. Click the **Proh Reg** checkbox if this code means that the student is prohibited from registering for additional courses.
7. Enter a number in the **Max Hours** field for which a student may enroll when under this academic standing code.
8. Enter a code in the **EDI Eqv** (Equivalent) field.

Note: The **EDI Eqv** (Equivalent) field is used to assign the EDI SPEEDE/ExPRESS academic standing code values to the institution's academic standing codes. The EDI equivalent value will be used in the transmission of transcript information electronically via EDI. These values are defined in the EDI SPEEDE/ExPRESS Implementation Guide under data element #641.

9. Enter a number in the **Voice Msg** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
10. Click the **System Required** checkbox if this validation table record is required.

Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.

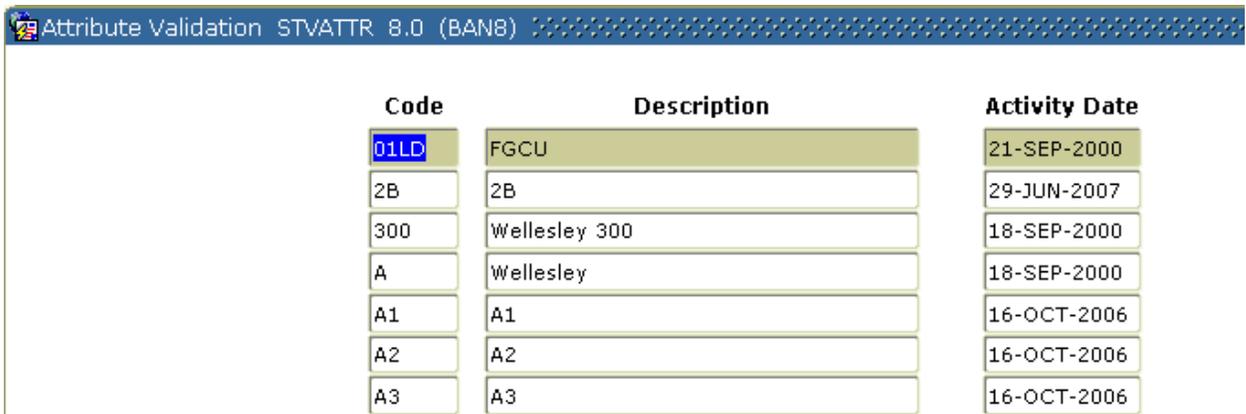
11. Click the **Save** icon.
12. Click the **Exit** icon.

Attribute Validation

Purpose

Use the Attribute Validation Form (STVATTR) to create, update, insert, and delete degree program codes, such as Affiliated Teaching Requirement, Language Requirement, or Writing Intensive Requirement. Other forms use this form to validate these codes, which you can create or update only from this form. You need to create an attribute code for Remedial Course Attribute, for use in IPEDS reporting.

Banner form



The screenshot shows a web browser window titled "Attribute Validation STVATTR 8.0 (BAN8)". The main content is a table with three columns: "Code", "Description", and "Activity Date". The first row is highlighted in green and contains the values "01LD", "FGCU", and "21-SEP-2000". The following rows are white with black text and contain the following data:

Code	Description	Activity Date
01LD	FGCU	21-SEP-2000
2B	2B	29-JUN-2007
300	Wellesley 300	18-SEP-2000
A	Wellesley	18-SEP-2000
A1	A1	16-OCT-2006
A2	A2	16-OCT-2006
A3	A3	16-OCT-2006

Steps

Follow these steps to create an attribute validation code.

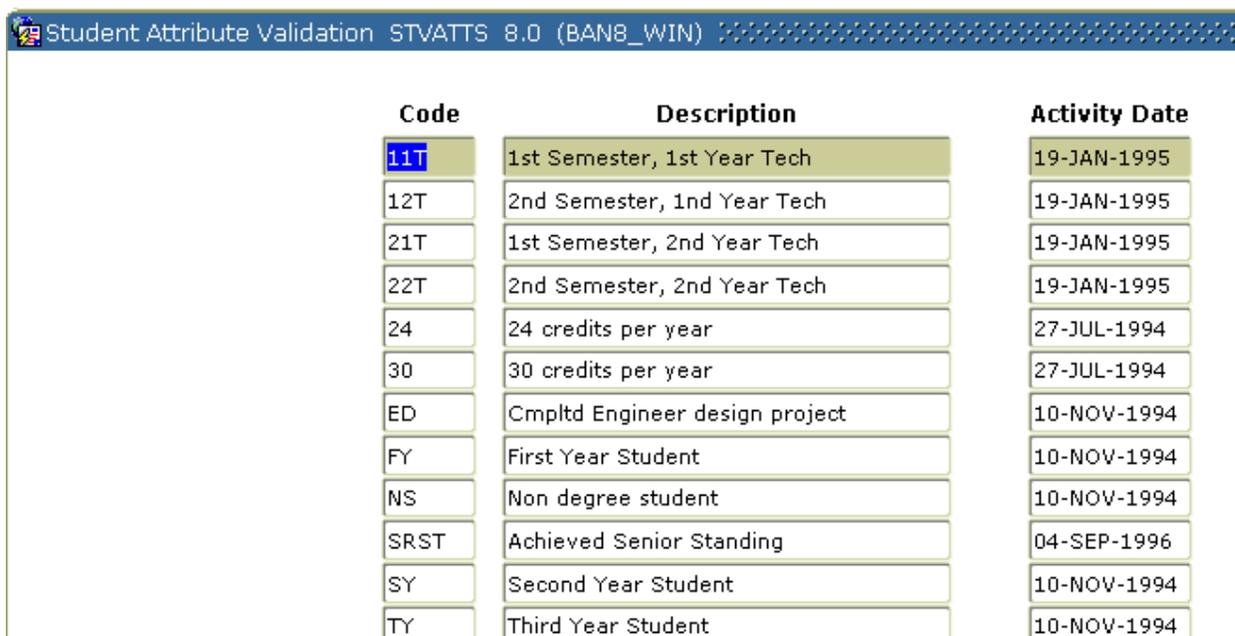
1. Access the Attribute Validation Form (STVATTR).
2. Enter the code of the degree attribute in the **Code** field.
3. Enter a description of the degree attribute in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student Attribute Validation

Purpose

You can use the Student Attribute Code Validation Form (STVATTS) to create, update, insert, and delete student attribute codes such as First Year Student, Achieved Senior Standing, or Non-degree Student. You can only create or update these codes from this form

Banner form



The screenshot shows a window titled "Student Attribute Validation STVATTS 8.0 (BAN8_WIN)". Inside the window is a table with three columns: Code, Description, and Activity Date. The table contains the following data:

Code	Description	Activity Date
11T	1st Semester, 1st Year Tech	19-JAN-1995
12T	2nd Semester, 1nd Year Tech	19-JAN-1995
21T	1st Semester, 2nd Year Tech	19-JAN-1995
22T	2nd Semester, 2nd Year Tech	19-JAN-1995
24	24 credits per year	27-JUL-1994
30	30 credits per year	27-JUL-1994
ED	Cmpltd Engineer design project	10-NOV-1994
FY	First Year Student	10-NOV-1994
NS	Non degree student	10-NOV-1994
SRST	Achieved Senior Standing	04-SEP-1996
SY	Second Year Student	10-NOV-1994
TY	Third Year Student	10-NOV-1994

Steps

Follow these steps to create a student attribute validation code.

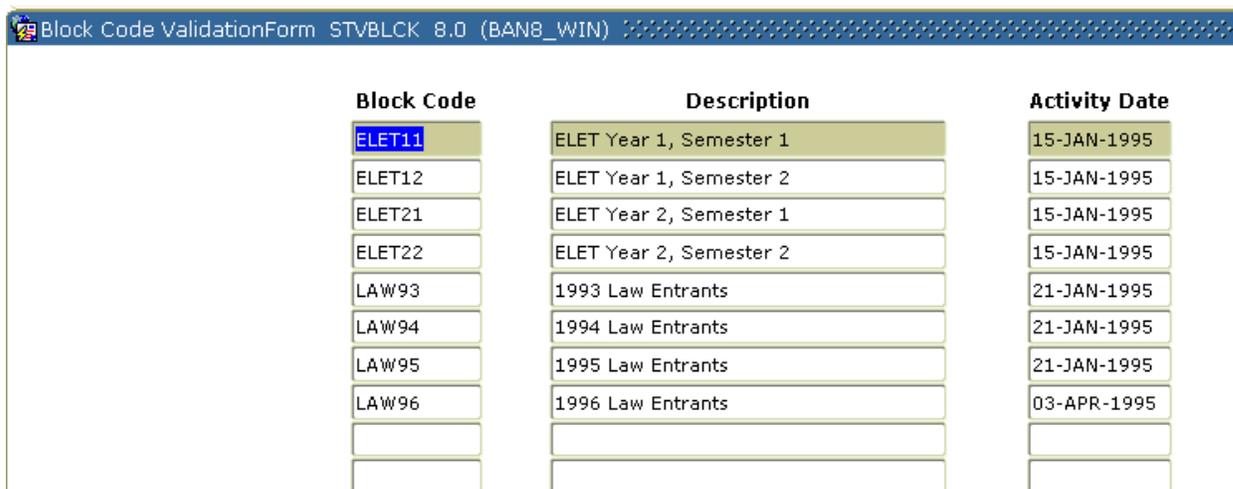
1. Access the Student Attribute Code Validation Form (STVATTS).
2. Enter up to a four-character student attribute code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Block Code Validation

Purpose

Use the Block Code Validation Form (STVBLOCK) to create, update, insert, and delete block codes which are used in Block Scheduling processing. The block codes represent sets or groupings of sections to which students are assigned in order to be registered more efficiently. You can only create or update these codes from this form.

Banner form



The screenshot shows a web browser window titled "Block Code ValidationForm STVBLOCK 8.0 (BAN8_WIN)". The main content is a table with three columns: "Block Code", "Description", and "Activity Date". The table contains the following data:

Block Code	Description	Activity Date
ELET11	ELET Year 1, Semester 1	15-JAN-1995
ELET12	ELET Year 1, Semester 2	15-JAN-1995
ELET21	ELET Year 2, Semester 1	15-JAN-1995
ELET22	ELET Year 2, Semester 2	15-JAN-1995
LAW93	1993 Law Entrants	21-JAN-1995
LAW94	1994 Law Entrants	21-JAN-1995
LAW95	1995 Law Entrants	21-JAN-1995
LAW96	1996 Law Entrants	03-APR-1995

Steps

Follow these steps to create a block code.

1. Access the Block Code Validation Form (STVBLOCK).
2. Enter a block code in the Block Code field.
3. Enter a description of the block code in the **Description** field.
4. Repeat steps 2 and 3 until all block codes have been established.
5. Click the **Save** icon.
6. Click the **Exit** icon.

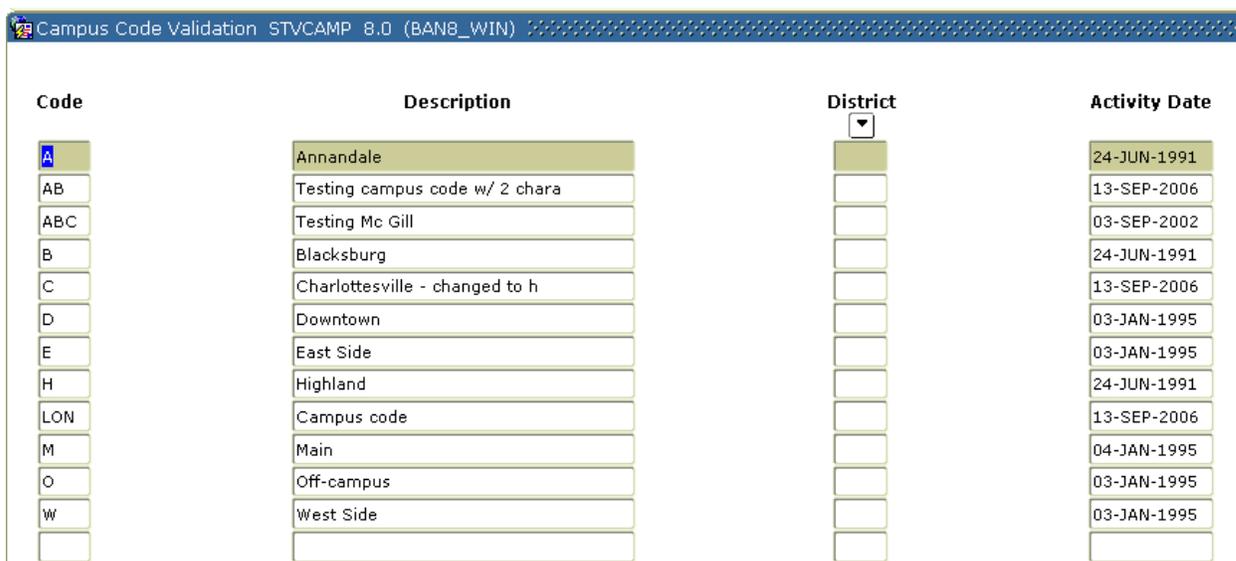
Campus Code Validation

Purpose

Use the Campus Code Validation Form (STVCAMP) to create, update, insert, and delete campus codes, such as Main Campus, Downtown Campus, or Foreign Campus. This form is used by other forms to validate the campus codes. You can create or update these codes only from this form. The **District** field is validated against the District/Division Code Validation Form (GTVDICD).

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Code	Description	District	Activity Date
A	Annandale		24-JUN-1991
AB	Testing campus code w/ 2 chara		13-SEP-2006
ABC	Testing Mc Gill		03-SEP-2002
B	Blacksburg		24-JUN-1991
C	Charlottesville - changed to h		13-SEP-2006
D	Downtown		03-JAN-1995
E	East Side		03-JAN-1995
H	Highland		24-JUN-1991
LON	Campus code		13-SEP-2006
M	Main		04-JAN-1995
O	Off-campus		03-JAN-1995
W	West Side		03-JAN-1995

Steps

Follow these steps to create a campus code.

1. Access the Campus Code Validation Form (STVCAMP).
2. Enter campus code in the **Code** field.

Note: Once a campus code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the campus code record cannot be deleted

3. Enter a description of the campus in the **Description** field.
4. Enter the code of the district or division with which the campus is associated in the **District** field.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Combined Academic Standing Code Validation

Purpose

The Combined Academic Standing Code Validation Form (STVCAST) is used to create and define valid combined academic standing codes. The combined academic standing code is defined by a combination of an academic standing code and a progress evaluation code.

Note: Calculated code displays in the General Student record.

Banner form

Code	Description	Prohibit Registration	Minimum Hours	Maximum Hours	Voice Message	System Required	User ID	Activity Date
00	Good Standing	<input type="checkbox"/>				<input checked="" type="checkbox"/>	SATURN	27-SEP-2001
		<input type="checkbox"/>				<input type="checkbox"/>		
		<input type="checkbox"/>				<input type="checkbox"/>		
		<input type="checkbox"/>				<input type="checkbox"/>		
		<input type="checkbox"/>				<input type="checkbox"/>		

Steps

Follow these steps to create a combined academic standing code.

1. Access the Combined Academic Standing Code Validation Form (STVCAST).
2. Enter a two-digit combined academic standing code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Prohibit Registration** checkbox if this code means that the student is prohibited from registering for additional courses.
5. Enter a number in the **Maximum Hours** field for which a student may enroll when under this academic standing code.
6. Enter a number in the **Voice Message** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
7. Click the **System Required** checkbox if this validation table record is required.

Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.

8. Click the **Save** icon.

Result: Banner will fill in the **User ID** and **Activity Date** fields.

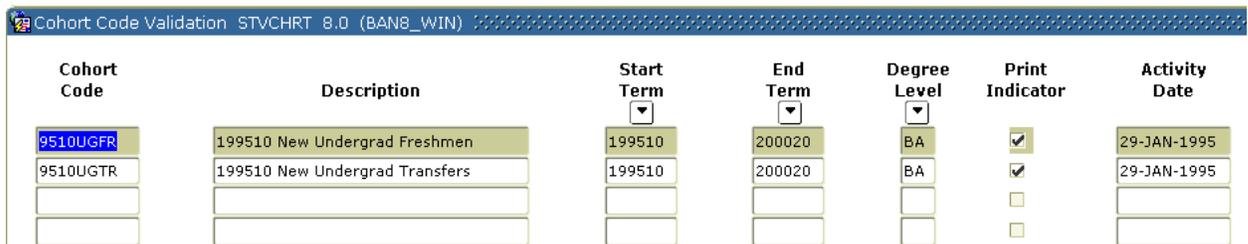
9. Click the **Exit** icon.

Cohort Code Validation

Purpose

You can use the Cohort Code Validation Form (STVCHRT) to create, update, insert, and delete cohort codes used in the Recruiting, Admissions, General Student, and Academic History modules. These codes represent a cohort grouping assigned to students based on user-defined criteria. These codes provide a tracking mechanism for Student Right to Know reporting. You may only create or update cohort codes from this form.

Banner form



Cohort Code	Description	Start Term	End Term	Degree Level	Print Indicator	Activity Date
9510UGFR	199510 New Undergrad Freshmen	199510	200020	BA	<input checked="" type="checkbox"/>	29-JAN-1995
9510UGTR	199510 New Undergrad Transfers	199510	200020	BA	<input checked="" type="checkbox"/>	29-JAN-1995
					<input type="checkbox"/>	
					<input type="checkbox"/>	

Steps

Follow these steps to create a cohort code.

1. Access the Cohort Code Validation Form (STVCHRT).
2. Enter a code in the **Cohort Code** field.
3. Enter a description of the code in the **Description** field.
4. Select a term in the **Start Term** field.
5. Select an expected graduation term for this cohort in the **End Term** field.
6. Select the expected degree level for this cohort in the **Degree Level** field.
7. Click the **Print Indicator** checkbox to have data about this cohort included in printed reports.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Class Code Validation

Purpose

Use the Class Code Validation Form (STVCLAS) to create, update, insert, and delete class codes.

Examples: Freshmen, Sophomore, First Year Law, Professional, etc.

Banner form

Class Code Validation STVCLAS 8.0 (BAN8_WIN)

Class Code	Description	EDI Eqv	LMS Eqv	Activity Date
01	First Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
02	Second Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
03	Third Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
04	Fourth Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
11	Year 1, Semester 1	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
12	Year 1, Semester 2	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
21	Year 2, Semester 1	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
22	Year 2, Semester 2	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995

Steps

Follow these steps to create a class code.

1. Access the Class Code Validation Form (STVCLAS).
2. Enter a two-character code in the **Class Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter an EDI equivalent value in the **EDI Eqv** field.

Note: The **EDI Eqv** (Equivalent) field is used to assign the EDI SPEEDE/ExPRESS class code values to the institution's class codes. The EDI equivalent value will be used in the transmission of transcript information electronically via EDI. These values are defined in the EDI SPEEDE/ExPRESS Implementation Guide under data element #1131

5. Enter an LMS equivalent value in the **LMS Eqv** field.

Note: The **LMS Eqv** (Equivalent Class Code) field is used to display the IA-PLUS Loan Management System (LMS) class code values that are equivalent to the Banner class codes. These codes are not validated. The translation to these LMS codes occurs during the LMS transaction feed interface from Banner Financial Aid. For more information, please refer to the Financial Aid User Guide or the IA-PLUS Loan Management System User Manual.

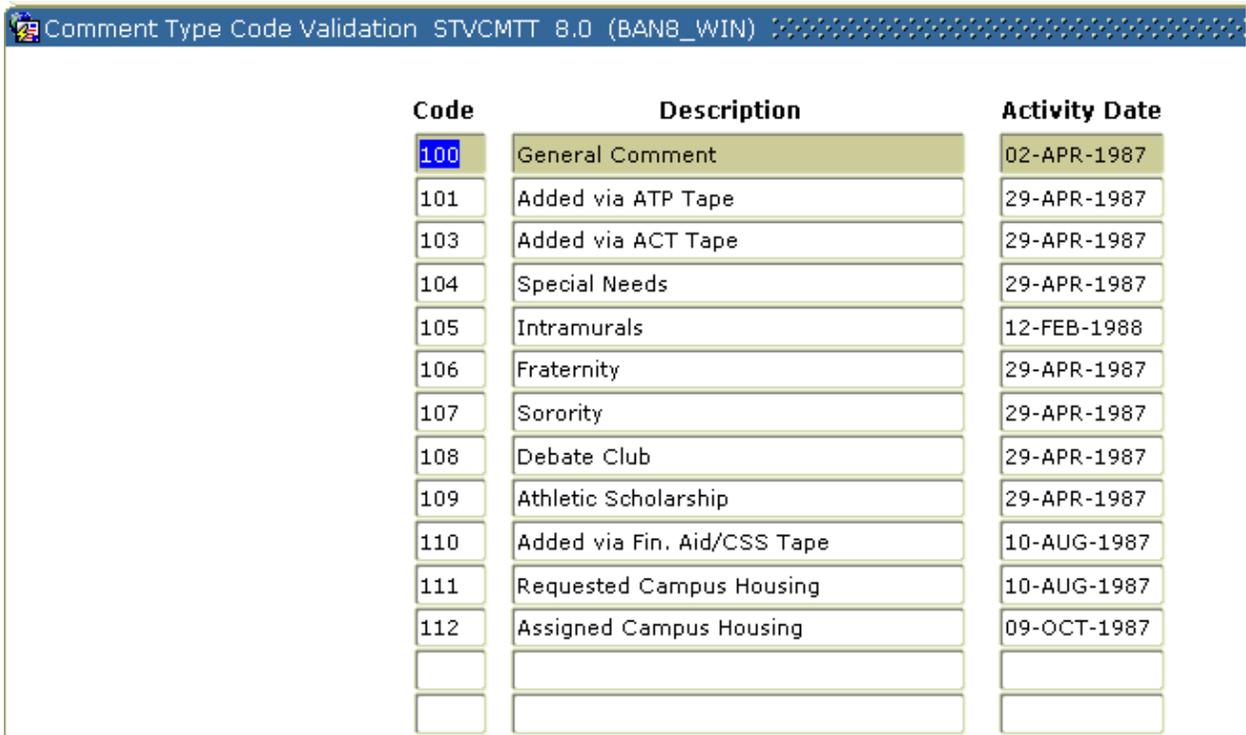
6. Click the **Save** icon.
7. Click the **Exit** icon.

Comment Type Code Validation

Purpose

You can use the Comment Type Code Validation Form (STVCMTT) to create, update, insert, and delete comment types and their respective codes (i.e., General Comment, Special Needs, or Added via ACT Tape). This form is used by other forms to validate the comment types. You can only create or update the comment types from this form.

Banner form



Code	Description	Activity Date
100	General Comment	02-APR-1987
101	Added via ATP Tape	29-APR-1987
103	Added via ACT Tape	29-APR-1987
104	Special Needs	29-APR-1987
105	Intramurals	12-FEB-1988
106	Fraternity	29-APR-1987
107	Sorority	29-APR-1987
108	Debate Club	29-APR-1987
109	Athletic Scholarship	29-APR-1987
110	Added via Fin. Aid/CSS Tape	10-AUG-1987
111	Requested Campus Housing	10-AUG-1987
112	Assigned Campus Housing	09-OCT-1987

Steps

Follow these steps to create a comment type code.

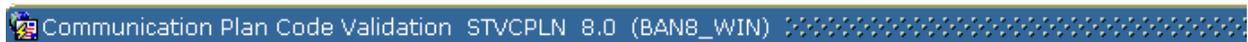
1. Access the Comment Type Code Validation Form (STVCMTT).
2. Enter a three-digit comment type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Communication Plan Code Validation

Purpose

You can use the Communication Plan Code Validation Form (STVCPLN) to create, update, insert, and delete communication plan codes used in the Recruiting, Admissions, and General Student modules. You may only create or update communication plan codes from this form.

Banner form



Code	Description	Activity Date
ADAP	Admissions Application Plan	23-MAY-1995
LORI	Lori's Test Plan	20-NOV-2002
RCNV	Converted Recruiting Comm Plan	31-MAY-1994
REIN	Recruiting Inquiry Plan	23-MAY-1995
STDN	Student Plan	26-JUL-1994

Steps

Follow these steps to create a communication plan code.

1. Access the Communication Plan Code Validation Form (STVCPLN).
2. Enter a four-character communication plan code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Cohort Reason Code Validation

Purpose

Use the Cohort Reason Code Validation Form (STVCREA) to create, update, insert, and delete cohort reason codes such as Peace Corps, Church Mission, Military Assignment. These codes are used in conjunction with an inactivation of a cohort for a student to identify the reason for the inactivation. You may only create or update cohort reason codes from this form.

Banner form



The screenshot shows a window titled "Cohort Reason Code Validation STVCREA 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The first row contains the values "TM", "whatever", and "10-APR-2007". Below this row are three empty rows for data entry.

Code	Description	Activity Date
TM	whatever	10-APR-2007

Steps

Follow these steps to create a cohort reason code.

1. Access the Cohort Reason Code Validation Form (STVCREA).
2. Enter a four-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Repeat steps 2 and 3 until all cohort reasons are entered.
5. Click the **Save** icon.
6. Click the **Exit** icon.

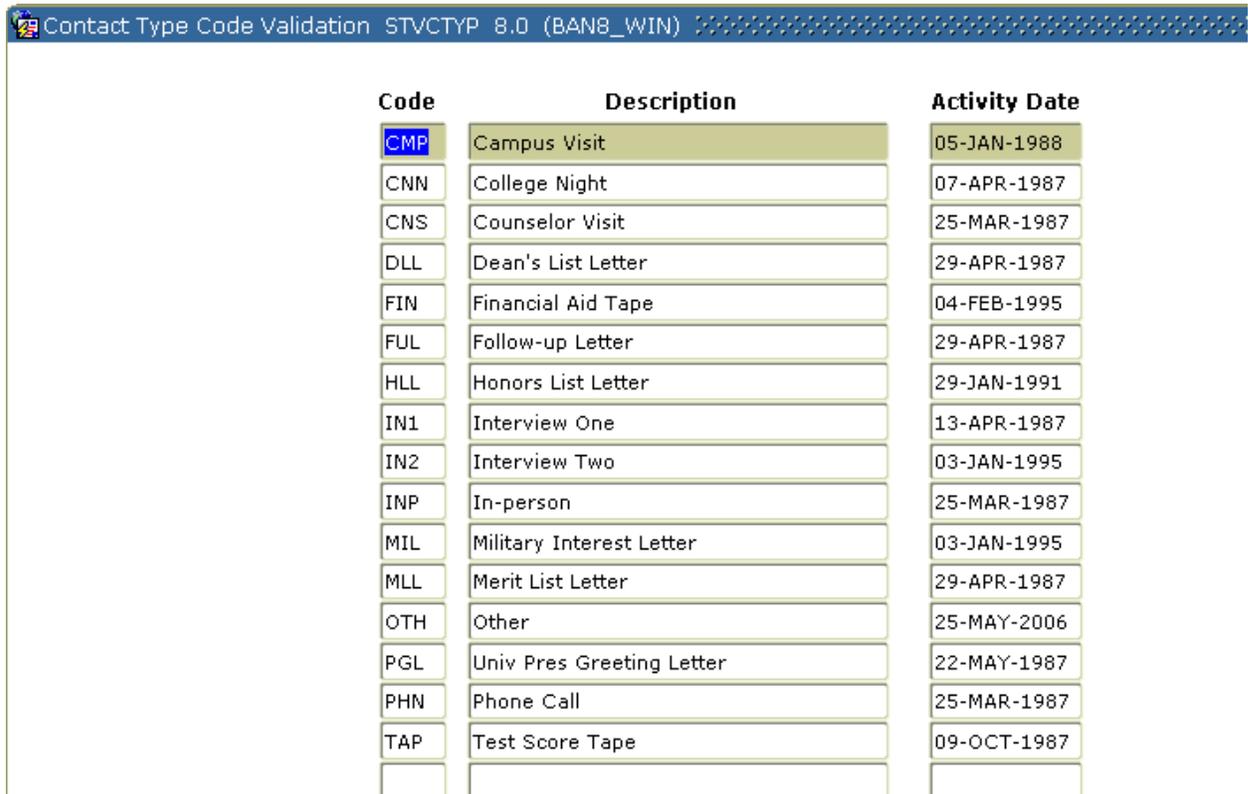
Contact Type Code Validation

Purpose

Use the Contact Type Code Validation Form (STVCTYP) to create, update, insert, and delete recruiting contact type codes (i.e., Campus Visit, College Night, or Merit List Letter, etc.).

Note: Several forms in the Recruiting module and the Interface Validation Form (STVINFC) use this form to validate recruiting contact type codes. You may only create or update these codes from this form.

Banner form



The screenshot shows a window titled "Contact Type Code Validation STVCTYP 8.0 (BAN8_WIN)". Inside the window is a table with three columns: Code, Description, and Activity Date. The table contains 17 rows of data, with the first row highlighted in blue. The codes listed are CMP, CNN, CNS, DLL, FIN, FUL, HLL, IN1, IN2, INP, MIL, MLL, OTH, PGL, PHN, and TAP. The descriptions range from "Campus Visit" to "Test Score Tape". The activity dates range from "05-JAN-1988" to "25-MAY-2006".

Code	Description	Activity Date
CMP	Campus Visit	05-JAN-1988
CNN	College Night	07-APR-1987
CNS	Counselor Visit	25-MAR-1987
DLL	Dean's List Letter	29-APR-1987
FIN	Financial Aid Tape	04-FEB-1995
FUL	Follow-up Letter	29-APR-1987
HLL	Honors List Letter	29-JAN-1991
IN1	Interview One	13-APR-1987
IN2	Interview Two	03-JAN-1995
INP	In-person	25-MAR-1987
MIL	Military Interest Letter	03-JAN-1995
MLL	Merit List Letter	29-APR-1987
OTH	Other	25-MAY-2006
PGL	Univ Pres Greeting Letter	22-MAY-1987
PHN	Phone Call	25-MAR-1987
TAP	Test Score Tape	09-OCT-1987

Steps

Follow these steps to create a contact type code.

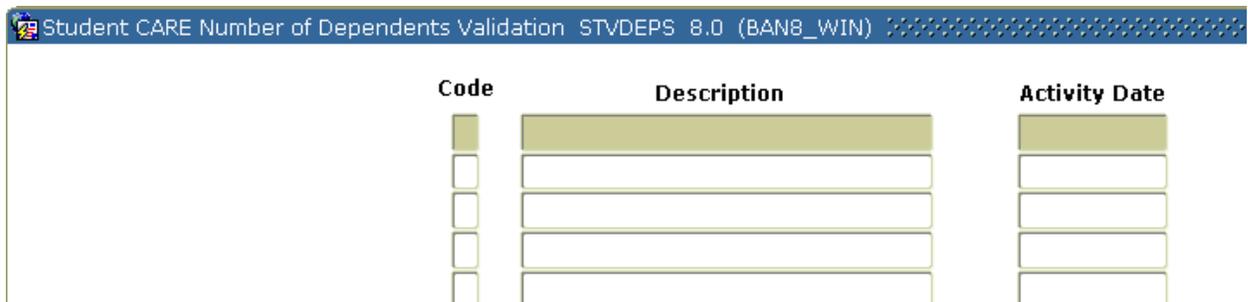
1. Access the Contact Type Code Validation Form (STVCTYP).
2. Enter a three-character contact type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student CARE Number of Dependents Validation

Purpose

Use the Student CARE Number of Dependents Validation Form (STVDEPS) to create, update, insert, and delete codes which indicate a CARE student's number of dependent children. You can create or update these codes only from this form.

Banner form



The screenshot shows a window titled "Student CARE Number of Dependents Validation STVDEPS 8.0 (BAN8_WIN)". The window contains a table with three columns: "Code", "Description", and "Activity Date". The table has five rows, with the first row highlighted in a light green color. The "Code" column has a small square icon next to each row. The "Description" column has a larger rectangular area for text entry. The "Activity Date" column has a smaller rectangular area for text entry.

Steps

Follow these steps to create a Student CARE Number of Dependents code.

1. Access the Student CARE Number of Dependents Validation Form (STVDEPS).
2. Enter code of the dependent-children number in the **Code** field.

Note: Once a dependent-children number code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the dependent-children number code record cannot be deleted.

3. Enter a description of the dependent-children number in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Disability Type Code Validation

Purpose

Use the Disability Type Code Validation Form (STVDISA) to create, update, insert, and delete disability codes, such as Blind, Multiple Sclerosis, Hearing Impaired, and so forth. You can create or update these codes only from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



The screenshot shows a window titled "Disability Type Code Validation STVDISA 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains the following data:

Code	Description	Activity Date
HI	Hearing Impaired	03-JAN-1995
MI	Mobility Impaired	18-MAY-1993
VI	Visually Impaired	26-JUL-1994

Steps

Follow these steps to create a disability code.

1. Access the Disability Code Validation Form (STVDISA).
2. Enter a two-character code in the **Code** field.

Note: Once a disability type code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the disability type code record cannot be deleted.

3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

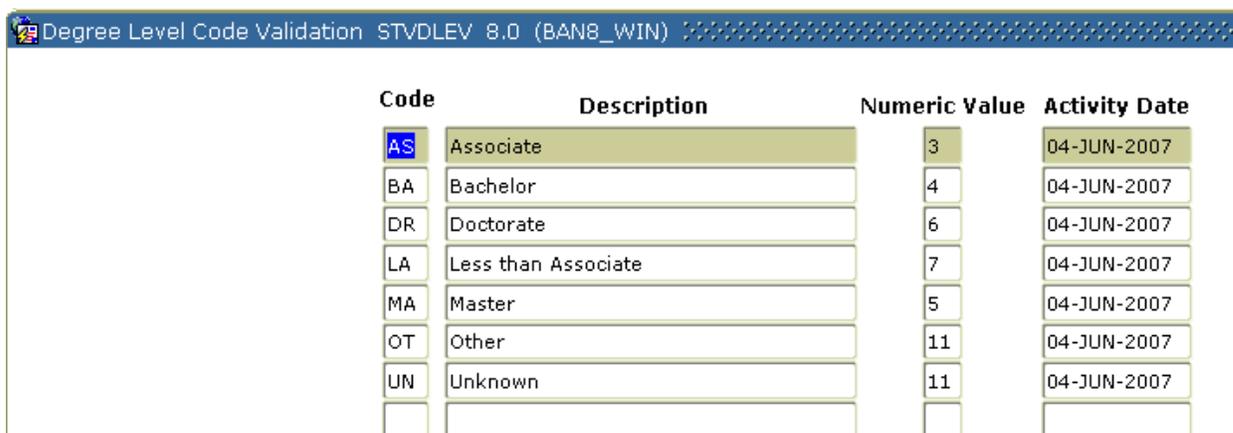
Degree Level Code Validation

Purpose

Use the Degree Level Code Validation Form (STVDLEV) to create, update, insert, and delete degree level codes (Associate, Bachelor, Master, etc.). Other forms use this form to validate the degree level codes. You may only create or update degree level codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Code	Description	Numeric Value	Activity Date
AS	Associate	3	04-JUN-2007
BA	Bachelor	4	04-JUN-2007
DR	Doctorate	6	04-JUN-2007
LA	Less than Associate	7	04-JUN-2007
MA	Master	5	04-JUN-2007
OT	Other	11	04-JUN-2007
UN	Unknown	11	04-JUN-2007

Steps

Follow these steps to create a degree level code.

1. Access the Degree Level Code Validation Form (STVDLEV).
2. Enter a two-character degree level code in the **Code** field.
3. Enter a description in the **Description** field.
4. Enter a number in the **Numeric Value** field.

Note: The **Numeric Value** field is used to determine a ranking value for the degree level, which is used in the Cohorts and Student Right to Know tracking processes. The numeric value should be established with the lowest degree level having the lowest value and the highest degree level having the highest value.

5. Repeat steps 2-4 to add more degree codes.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Employer Code Validation

Purpose

Use the Employer Code Validation Form (STVEMPL) to maintain employer codes which represent the employer's name, address, and phone number. Other forms use this form to validate this employer information. You may only create or update these codes from this form.

Note: When a valid ZIP or postal code is selected from the ZIP/Postal Code Validation Form (GTVZIPC) and entered in the ZIP/PC field, the combination of City, State/Province, and Nation information which exists in GTVZIPC will default into the appropriate fields. The related information does not default in when the ZIP/Postal Code is entered manually.

Banner form

The screenshot shows a web browser window titled "Employer Code Validation STVEMPL 8.0 (BAN8_WIN)". The form contains three entries for employer codes, each with fields for Code, Street Line 1-3, City, State or Province, Nation, Activity Date, ZIP or Postal Code, and Phone.

Code	Street Line 1	Street Line 2	Street Line 3	City	State or Province	Nation	Activity Date	ZIP or Postal Code	Phone
0001	Xerox Corporation	Downtown	1500 Market Street	Philadelphia	PA	United States of America	29-AUG-1987	18876	215 6408888 345
0002	IBM	124 Main Street		Philadelphia	PA		07-APR-1988	18876	215 5551212 216
SCT	Systems & Computer Technology	Four Country View Road		Malvern	PA		06-JAN-1995	19355	610 6475930

Steps

Follow these steps to create an employer code.

1. Access the Employer Code Validation Form (STVEMPL).
2. Perform an **Insert Record** function.
3. Enter up to a four-character employer code in the **Code** field.
4. Enter the employer name in the un-named field.
5. Enter the street address in the **Street Line 1** field.
6. Enter the city in the **City** field.
7. Select the state or province code in the **State or Province** field.
8. Enter *157* in the **Nation** field for the United States of America.
9. Select a zip or postal code in the **Zip or Postal Code** field.
10. Enter a phone number in the **Phone** field.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Eligibility Validation

Purpose

You can use the Eligibility Code Validation Form (STVELIG) to create, update, insert, and delete eligibility codes. These codes are used in Student Right to Know tracking by the Student Sport Form (SGASPRT) in the General Student module. You may only create or update these codes from this form.

Banner form



The screenshot shows a window titled "Eligibility Code Validation STVELIG 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains the following data:

Code	Description	Activity Date
RE	Recruit	03-APR-1995
RS	Red Shirt	03-APR-1995
WO	Walk-On	03-APR-1995

Steps

Follow these steps to create an eligibility code.

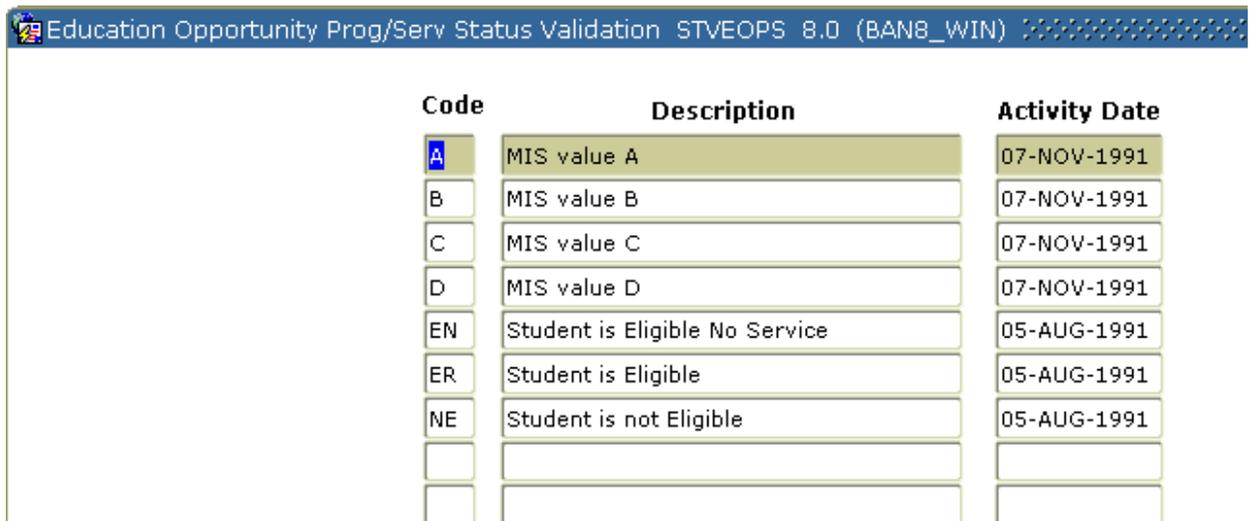
1. Access the Eligibility Validation Form (STVELIG).
2. Enter a two-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Education Opportunity Prog/Serv Status Validation

Purpose

Use the Education Opportunity Prog/Serv Status Validation Form (STVEOPS) to create, update, insert, and delete EOPS (Educational Opportunity Programs and Services) status codes, such as No Service, Student is Eligible, or Student is Not Eligible. This form is used by the Educational Opportunity Programs and Services Form (SGAEOPS) to validate the EOPS status codes. You can create or update these type codes only from this form.

Banner form



The screenshot shows a window titled "Education Opportunity Prog/Serv Status Validation STVEOPS 8.0 (BAN8_WIN)". Inside the window is a table with three columns: Code, Description, and Activity Date. The table contains several rows of data, with the first row highlighted in yellow.

Code	Description	Activity Date
A	MIS value A	07-NOV-1991
B	MIS value B	07-NOV-1991
C	MIS value C	07-NOV-1991
D	MIS value D	07-NOV-1991
EN	Student is Eligible No Service	05-AUG-1991
ER	Student is Eligible	05-AUG-1991
NE	Student is not Eligible	05-AUG-1991

Steps

Follow these steps to create an EOPS (Educational Opportunity Programs and Services) status code.

1. Access the Education Opportunity Prog/Serv Status Validation Form (STVEOPS).

2. Enter the code of the EOPS status in the **Code** field.

Note: Once an EOPS status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS status code record cannot be deleted.

3. Enter a description of the EOPS status in the **Description** field.

4. Click the **Save** icon.

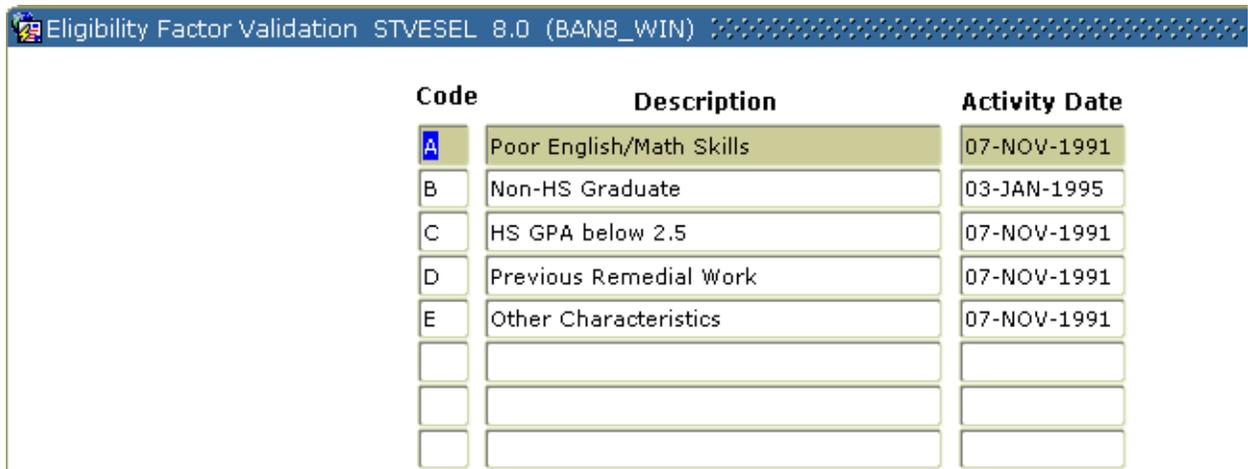
5. Click the **Exit** icon.

Eligibility Factor Validation

Purpose

Use the Eligibility Factor Validation Form (STVESEL) to create, update, insert, and delete eligibility factor codes, such as: Did not graduate HS NO GED; Financial Consideration; H.S. GPA below 2.5; and so on. The Education Opportunity Programs and Services Form (SGAEOPS) uses this form to validate eligibility factors. You can create or update these codes only from this form.

Banner form



Code	Description	Activity Date
A	Poor English/Math Skills	07-NOV-1991
B	Non-HS Graduate	03-JAN-1995
C	HS GPA below 2.5	07-NOV-1991
D	Previous Remedial Work	07-NOV-1991
E	Other Characteristics	07-NOV-1991

Steps

Follow these steps to create an eligibility factor code.

1. Access the Eligibility Factor Validation Form (STVESEL).
2. Enter the code of the eligibility factor in the **Code** field.

Note: Once an eligibility factor code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the eligibility factor code record cannot be deleted.

3. Enter a description of the eligibility factor in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Level Code Validation

Purpose

Use the Level Code Validation Form (STVLEVL) to create, update, insert, and delete level codes, such as No Level Declared, Undergraduate, Non-Matriculated Graduate, and so on. Several forms in various modules use this form to validate the level codes. You can create and update these codes only from this form.

Banner form

Level Code	Description	CEU Indicator	Voice Message	EDI Equivalent	System Required	Activity Date
00	Undeclared	<input type="checkbox"/>			<input checked="" type="checkbox"/>	24-JUN-1991
CE	Continuing Education	<input checked="" type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
CR	Credit	<input type="checkbox"/>			<input type="checkbox"/>	26-JUL-1994
GR	Graduate	<input type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
LW	Law	<input type="checkbox"/>			<input type="checkbox"/>	04-JAN-1995
MV	Marian's level	<input type="checkbox"/>			<input type="checkbox"/>	06-OCT-2005
NC	Non Credit	<input type="checkbox"/>			<input type="checkbox"/>	04-JAN-1995
PR	Professional	<input type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
UG	Undergraduate	<input type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
		<input type="checkbox"/>			<input type="checkbox"/>	
		<input type="checkbox"/>			<input type="checkbox"/>	

Steps

Follow these steps to create a level code.

1. Access the Level Code Validation Form (STVLEVEL).

2. Enter the code of the level in the **Code** field.

Note: Once a level code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the level code record cannot be deleted.

3. Enter a description of the level in the **Description** field.

4. Click the **CEU Ind** (Continuing Education Indicator) checkbox if the level is a CEU level.

5. Enter a voice response message number, if appropriate, in the **Voice Msg** field.

6. Enter an EDI equivalent in the **EDI Equiv** field, if appropriate.

Note: This field is used to assign the EDI SPEEDE/ExPRESS level code values to an institution's level codes for the level of coursework which is reflected in the GPA and hours. When an institutional code is not equated with an EDI code, this field should be blank. The EDI equivalent value is used in the transmission of transcript information electronically via EDI.

7. Click the **Save** icon.

8. Click the **Exit** icon.

Student CARE Marital Status Validation

Purpose

Use the Student CARE Marital Status Validation Form (STVMARS) to create, update, insert, and delete codes which indicate the marital status of a CARE student. You can create and update these codes only from this form.

Banner form

Code	Description	Activity Date

Steps

Follow these steps to create a student CARE marital status code.

1. Access the Student CARE Marital Status Validation Form (STVMARS).

2. Enter the code of the marital status in the **Code** field.

Note: Once a marital status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the marital status code record cannot be deleted.

3. Enter a description of the marital status in the **Description** field.

4. Click the **Save** icon.

5. Click the **Exit** icon.

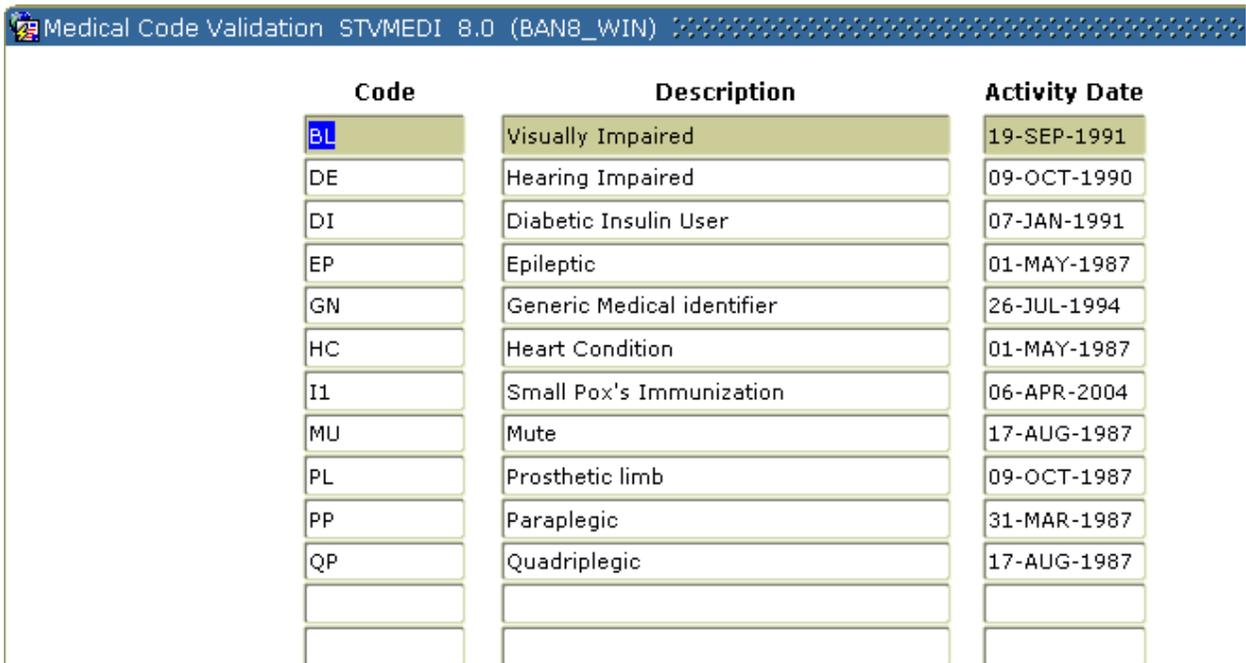
Medical Code Validation

Purpose

Use the Medical Code Validation Form (STVMEDI) to create, update, insert, and delete medical codes, such as Blind, Deaf, Prosthetic Limb, and so on. The Medical Information Form (GOAMEDI) uses this form to validate the medical codes. You can create and update these codes only from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



The screenshot shows a window titled "Medical Code Validation STVMEDI 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains the following data:

Code	Description	Activity Date
BL	Visually Impaired	19-SEP-1991
DE	Hearing Impaired	09-OCT-1990
DI	Diabetic Insulin User	07-JAN-1991
EP	Epileptic	01-MAY-1987
GN	Generic Medical identifier	26-JUL-1994
HC	Heart Condition	01-MAY-1987
I1	Small Pox's Immunization	06-APR-2004
MU	Mute	17-AUG-1987
PL	Prosthetic limb	09-OCT-1987
PP	Paraplegic	31-MAR-1987
QP	Quadriplegic	17-AUG-1987

Steps

Follow these steps to create a medical code.

1. Access the Medical Code Validation Form (STVMEDI).
2. Enter the code of the type of disability in the **Code** field.

Note: Once a medical code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the medical code record cannot be deleted.

3. Enter a description of the type of disability in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Originator Code Validation

Purpose

Use the Originator Code Validation Form (STVORIG) to create, update, insert, and delete originator codes, such as Student Accounts Office, Bursar's Office, Dean of Students, and so on. Forms in several modules use this form to validate the originator codes. You can create and update these codes only from this form.

Note: The value *AUTO*, for *Generated Automatically*, is a required value on this form when CAPP processing is in use.

Banner form



Code	Description	Activity Date
ACCT	Student Accounts Office	26-MAR-1987
ADMS	Admissions Office	26-MAR-1987
ALDR	Director of Alumni Relations	05-JUN-1990
ANFD	Annual Fund Office	03-JUN-1990
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
CCON	Capital Consultant	03-JUN-1990
CORG	Corporate Giving Office	03-JUN-1990
COUN	Counseling Center	01-MAY-1987
DEVD	Director of Development	05-JUN-1990
DOFI	Dean of Instruction	01-MAY-1987
DOFS	Dean of Students	01-MAY-1987
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

Steps

Follow these steps to create an originator code.

1. Access the Originator Code Validation Form (STVORIG).
2. Enter the code of the originator in the **Code** field.

Note: Once an originator code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the originator code record cannot be deleted.

3. Enter a description of the originator in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Progress Evaluation Code Validation

Purpose

Use the Progress Evaluation Code Validation Form (STVPREV) to create and define valid progress evaluation codes.

Note: Calculated code displays in the General Student record.

Banner form

Code	Description	System Req	Voice Message	User ID	Activity Date
00	Good Standing	<input checked="" type="checkbox"/>		SATURN	27-SEP-2001
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

Steps

Follow these steps to create a progress evaluation code.

1. Access the Progress Evaluation Code Validation Form (STVPREV).
2. Enter a two-digit progress evaluation code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter a number in the **Voice Message** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
5. Click the **Save** icon.

Result: Banner will fill in the **User ID** and **Activity Date** fields.

6. Click the **Exit** icon.

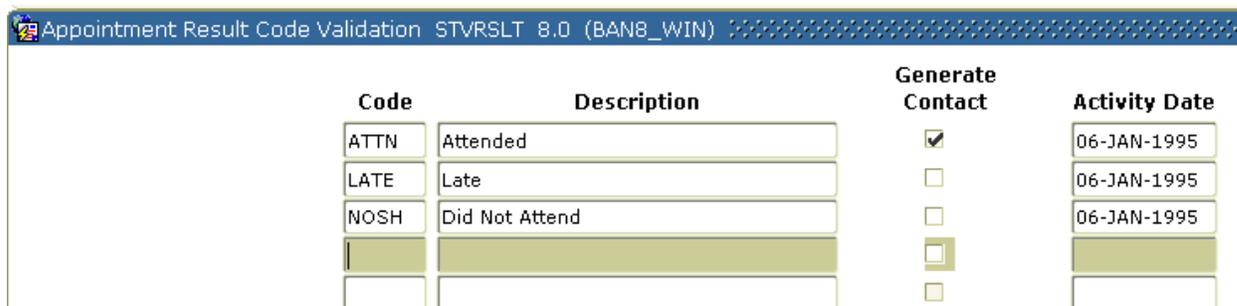
Appointment Result Code Validation

Purpose

Use the Appointment Result Code Validation Form (STVRSLT) to create, update, insert, and delete appointment result codes such as Attended Interview, Did Not Attend Interview, Late to Interview.

Note: The Prospect Information Form (SRARECR) and the Person Appointments/Contacts Form (SOAAPPT) use this form to validate the recruiting appointment result codes. You can only create and update these codes from this form.

Banner form



Code	Description	Generate Contact	Activity Date
ATTN	Attended	<input checked="" type="checkbox"/>	06-JAN-1995
LATE	Late	<input type="checkbox"/>	06-JAN-1995
NOSH	Did Not Attend	<input type="checkbox"/>	06-JAN-1995
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Steps

Follow these steps to create an appointment result code.

1. Access the Appointment Result Code Validation Form (STVRSLT).
2. Enter a four-character appointment result code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Generate Contact** checkbox to generate follow-up contact material.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Services Provided Validation

Purpose

Use the Services Provided Validation Form (STVSEPR) to create, update, insert, and delete support services provided codes, such as *Services Accepted*, *Services Provided*, or *Services Rejected*. The Support Services module uses this form to validate the support services provided codes. You can create and update these codes only from this form.

Banner form



The screenshot shows a window titled "Services Provided Validation STVSEPR 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains the following data:

Code	Description	Activity Date
AC	Services Accepted	26-NOV-1991
PR	Services Provided	26-NOV-1991
RJ	Services Rejected	04-SEP-1991

Steps

Follow these steps to create a services provided code.

1. Access the Services Provided Validation Form (STVSEPR).
2. Enter a code of the support service in the **Code** field.

Note: Once a support service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the support service code record cannot be deleted.

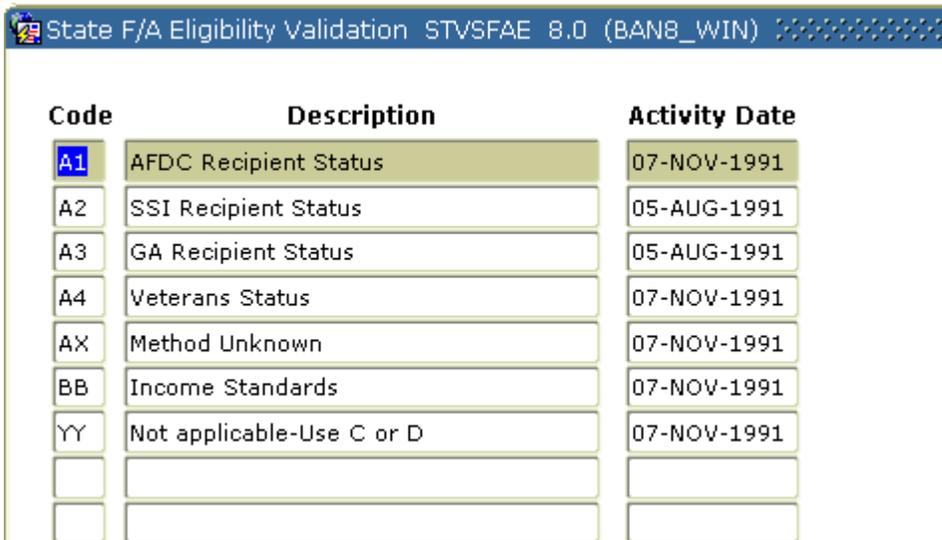
3. Enter a description of the support service in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

State F/A Eligibility Validation

Purpose

Use the State F/A Eligibility Validation Form (STVSFAE) to create, update, insert, and delete State F/A Eligibility codes. These codes, which describe the manner in which a student was accepted into the EOPS (Educational Opportunity Programs and Services) program, are used by the Educational Opportunity Programs and Services Form (SGAEOPS) for validation. You can create or update these codes only from this form.

Banner form



The screenshot shows a window titled "State F/A Eligibility Validation STVSFAE 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains several rows of data, with the first row highlighted in green. The "Code" column contains codes like A1, A2, A3, A4, AX, BB, YY, and two empty rows. The "Description" column contains descriptions like "AFDC Recipient Status", "SSI Recipient Status", "GA Recipient Status", "Veterans Status", "Method Unknown", "Income Standards", and "Not applicable-Use C or D". The "Activity Date" column contains dates like "07-NOV-1991", "05-AUG-1991", and "07-NOV-1991".

Code	Description	Activity Date
A1	AFDC Recipient Status	07-NOV-1991
A2	SSI Recipient Status	05-AUG-1991
A3	GA Recipient Status	05-AUG-1991
A4	Veterans Status	07-NOV-1991
AX	Method Unknown	07-NOV-1991
BB	Income Standards	07-NOV-1991
YY	Not applicable-Use C or D	07-NOV-1991

Steps

Follow these steps to create a State F/A Eligibility code.

1. Access the State F/A Eligibility Validation Form (STVSFAE).
2. Enter a State F/A Eligibility Code in the **Code** field.

Note: Once a State F/A Eligibility code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the State F/A Eligibility code record cannot be deleted.

3. Enter a description of the State F/A Eligibility in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Service Provider Validation

Purpose

Use the Service Provider Validation Form (STVSPRV) to create, update, and delete the service provider codes, such as Training Center, Counseling Center, Learning Center). The Support Services module uses this form to validate the support services provider codes. You can create and update these codes only from this form.

Banner form



Code	Description	Activity Date
AA	Alcoholics Anonymous	21-JUL-1994
CFF	Center for the Family	21-JUL-1994
CH	Community Hosptial Ed Center	21-JUL-1994
MD	Munchkin Daycare	21-JUL-1994
MHS	Math Honor Society	21-JUL-1994
NA	Narcotics Anonymous	21-JUL-1994
TLC	The Learning Center	21-JUL-1994
UCC	University Counseling Center	21-JUL-1994
UTS	University Transportation Svc	21-JUL-1994

Steps

Follow these steps to create a service provider code.

1. Access the Service Provider Validation Form (STVSPRV).
2. Enter the service provider code in the **Code** field.

Note: Once a service provider code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service provider code record cannot be deleted.

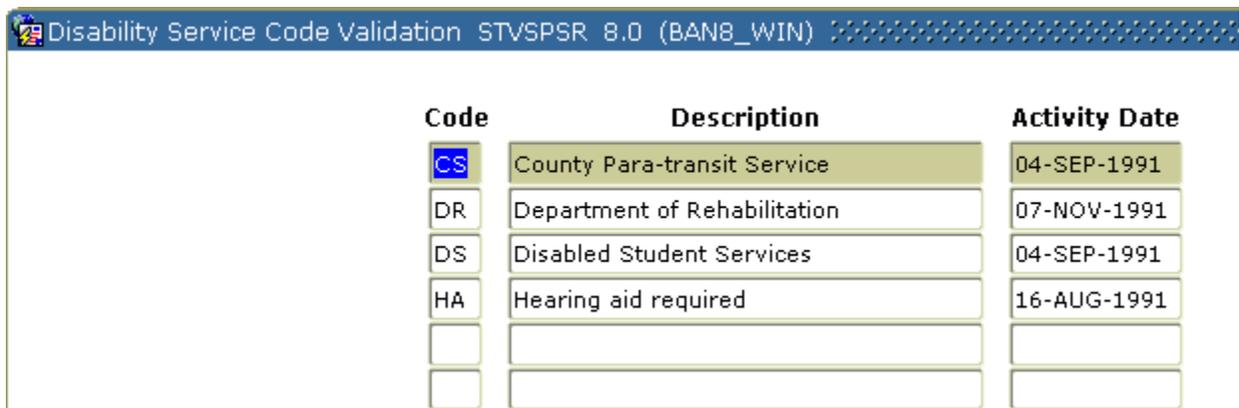
3. Enter a description of the service provider in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Disability Service Code Validation

Purpose

Use the Disability Service Code Validation Form (STVSPSR) to create, update, insert, and delete disability service codes, such as County Paratransit Service, Hearing Aid Required, Disabled Student Services, and so on. The Medical Information Form (GOAMEDI) uses this form to validate the disability service codes. You can create and update these codes only from this form.

Banner form



Code	Description	Activity Date
CS	County Para-transit Service	04-SEP-1991
DR	Department of Rehabilitation	07-NOV-1991
DS	Disabled Student Services	04-SEP-1991
HA	Hearing aid required	16-AUG-1991

Steps

Follow these steps to create a disability service code.

1. Access the Disability Service Code Validation Form (STVSPSR).
2. Enter the code of the disability service in the **Code** field.

Note: Once a disability service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the disability service code record cannot be deleted.

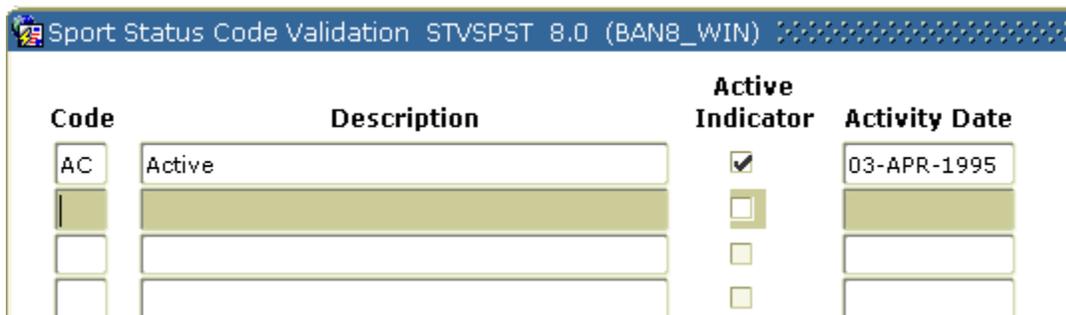
3. Enter a description of the disability service in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Sport Status Validation

Purpose

Use the Sport Status Code Validation Form (STVSPST) to create, update, insert, and delete sport status codes used in the General Student module. The Student Sport Form (SGASPRT) uses this form to validate the sport status codes. You may only create or update these codes from this form.

Banner form



The screenshot shows a window titled "Sport Status Code Validation STVSPST 8.0 (BAN8_WIN)". The window contains a table with the following columns: Code, Description, Active Indicator, and Activity Date. The first row is populated with the code "AC", the description "Active", the active indicator checked, and the activity date "03-APR-1995". The subsequent three rows are empty, with the active indicator checkboxes unchecked.

Code	Description	Active Indicator	Activity Date
AC	Active	<input checked="" type="checkbox"/>	03-APR-1995
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Steps

Follow these steps to create a sport status code.

1. Access the Sport Status Code Validation Form (STVSPST).
2. Enter a two-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Service Code Validation

Purpose

Use the Service Code Validation Form (STVSSER) to create, update, insert, and delete service codes such as Day Care, Career Planning, Transportation. The Support Services module uses this form to validate service codes. You can create or update services only from this form.

Banner form

Code	Description	Service Type	Activity Date
ACAD	Academic Advising Follow-up		07-NOV-1991
ADLT	Adult Literacy		06-NOV-1991
APTA	Aptitude Assessment		18-NOV-1991
ASMT	Assessment Service		07-NOV-1991
BABY	Babysitting hourly		07-NOV-1991
BAEM	Basic Employment	5	06-NOV-1991
BMI	Black Male Initiative		21-JUL-1994
BSSK	Basic Skills	6	06-NOV-1991
CHCR	Child Care	2	06-NOV-1991
CNAD	Counseling/Advising Service		07-NOV-1991
CRPL	Career Planning/Interest		07-NOV-1991
DISA	Disabled Student Services	3	06-NOV-1991
DRUG	Drug Counseling		21-JUL-1994
EOPS	EOPS	9	06-NOV-1991
ESL	ESL	8	06-NOV-1991
FINA	Financial Aid	1	06-NOV-1991
JOBP	Job Placement		21-JUL-1994
JUDI	Judicial Affairs		21-JUL-1994
LSTY	Learning/Study Skills Service		07-NOV-1991
MINO	Minority Student Services		21-JUL-1994
OREN	Orientation Service		07-NOV-1991
SPEC	Specialized Service		18-NOV-1991
SSKE	Study Skills Evaluation		22-NOV-1991

Steps

Follow these steps to create a service code.

1. Access the Service Code Validation Form (STVSSER).

2. Enter a service code in the **Code** field.

Note: Once a service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service code record cannot be deleted.

3. Enter a description of the service in the **Description** field.

4. Click the **Save** icon.

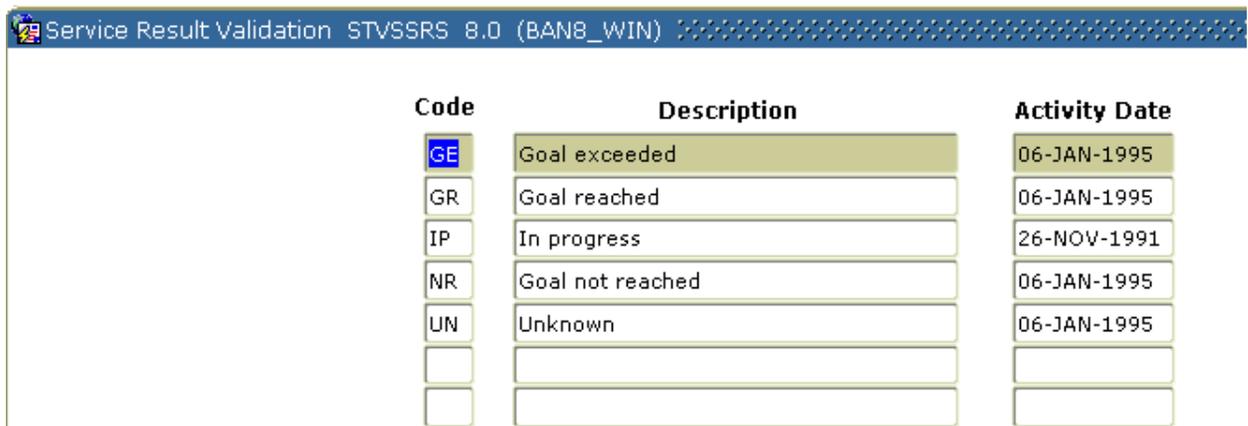
5. Click the **Exit** icon.

Service Result Validation

Purpose

Use the Service Result Validation Form (STVSSRS) to create, update, insert, and delete student service result codes, such as Promotion Obtained, Job Obtained, Goal Not Met, and so on. The Support Services module uses this form to validate service result codes. You can create or update service result codes only from this form.

Banner form



The screenshot shows a window titled "Service Result Validation STVSSRS 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains the following data:

Code	Description	Activity Date
GE	Goal exceeded	06-JAN-1995
GR	Goal reached	06-JAN-1995
IP	In progress	26-NOV-1991
NR	Goal not reached	06-JAN-1995
UN	Unknown	06-JAN-1995

Steps

Follow these steps to create a student service result code.

1. Access the Service Result Validation Form (STVSSRS).
2. Enter a service result code in the **Code** field.

Note: Once a service result code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service result code record cannot be deleted.

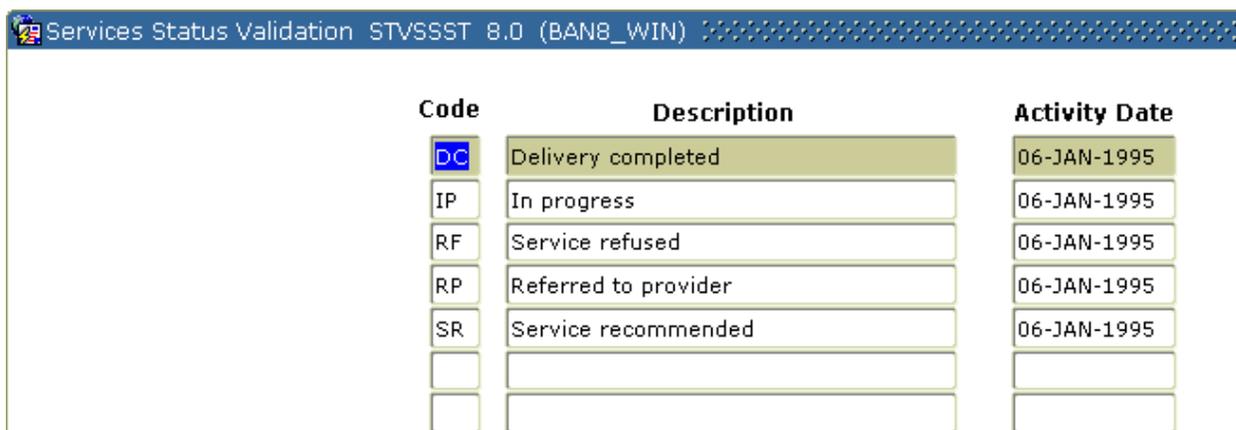
3. Enter a description of the service result in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Services Status Validation

Purpose

Use the Services Status Validation Form (STVSSST) to create, update, insert, and delete services status codes, such as In Progress, Service Refused, Referred to Provider). The Support Services module uses this form to validate service status codes. You can create or update these codes only from this form.

Banner form



The screenshot shows a window titled "Services Status Validation STVSSST 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table contains several rows of data, with the first row highlighted in green. The first row has the code "DC", the description "Delivery completed", and the activity date "06-JAN-1995". The other rows have codes "IP", "RF", "RP", and "SR" with their respective descriptions and the same activity date. There are also two empty rows at the bottom of the table.

Code	Description	Activity Date
DC	Delivery completed	06-JAN-1995
IP	In progress	06-JAN-1995
RF	Service refused	06-JAN-1995
RP	Referred to provider	06-JAN-1995
SR	Service recommended	06-JAN-1995

Steps

Follow these steps to create a services status code.

1. Access the Services Status Validation Form (STVSSST).
2. Enter a services status code in the **Code** field.

Note: Once a services status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the services status code record cannot be deleted.

3. Enter a description of the services status in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student Status Code Validation

Purpose

Use the Student Status Code Validation Form (STVSTST) to create, update, insert, and delete student status codes (i.e., Active, Withdrawn, Inactive Due to Graduation, etc.). Forms in several modules use this form to validate the student status codes. You can only create and update these codes from this form.

Banner form

Student Status Code Validation STVSTST 8.0 (BAN8_WIN)

Status Code	Description	Allow Registration	System Required	Curriculum Status	Activity Date
AS	Activexxxxxxxxxx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	APPACCEPT Applicant acceptance	10-APR-2007
GR	Graduated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GRADUATED Learner has Graduated	05-JUN-2006
IG	Inactive due to Graduation	<input type="checkbox"/>	<input type="checkbox"/>		21-JAN-1995
IS	Inactive	<input type="checkbox"/>	<input checked="" type="checkbox"/>	INACTIVE Inactivate Applicant from Adms	05-JUN-2006
LV	Student on Leaved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LEAVE Learner is on Leave	09-APR-2007
		<input type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>		

Steps

Follow these steps to create a student status code.

1. Access the Student Status Code Validation Form (STVSTST).
2. Enter a two-character code in the **Status Code** field.
3. Enter a description of the status code in the **Description** field.
4. Click the **Allow Registration** checkbox if registration is allowed with the associated student status.
5. Click the **System Required** checkbox if this value is system required.

Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.

6. Select a status in the **Curriculum Status** field. (This is only necessary if your institution does not intend to use delivered processes associated with Curriculum status.)
7. Click the **Save** icon.
8. Click the **Exit** icon.

Student Type Code Validation

Purpose

Use the Student Type Code Validation Form (STVSTYP) to create, update, insert, and delete student type codes (i.e., Returning Freshman, Continuing, Transfer, etc.). Several forms in various modules use this form to validate the student type codes. You can only create and update these codes from this form.

The following student type codes should be created for IPEDS reporting:

- Freshman
- First Time Freshman
- Unclassified
- Continuing
- First Time Graduate
- First Time Professional

Banner form

Code	Description	Next Student Type	System Required	Activity Date
0	Undeclared	0	<input checked="" type="checkbox"/>	31-MAY-1994
7	Marian's numeric styp	C	<input type="checkbox"/>	06-OCT-2005
C	Continuing	C	<input type="checkbox"/>	06-MAY-1987
E	Adult/Continuing Education	E	<input type="checkbox"/>	04-JAN-1995
M	Marian's stu type	7	<input type="checkbox"/>	06-OCT-2005
N	New First Time	C	<input type="checkbox"/>	04-JAN-1995
R	Returning	C	<input type="checkbox"/>	04-JAN-1995
S	Special	S	<input type="checkbox"/>	06-MAY-1987
T	Transfer	C	<input type="checkbox"/>	04-JAN-1995
X	Transient	X	<input type="checkbox"/>	04-JAN-1995
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Steps

Follow these steps to create a student type code.

1. Access the Student Type Code Validation Form (STVSTYP).
2. Enter a one-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter a code in the **Next Student Type** field to identify the student type to be assigned when the Student Type Update Report (SHRTYPE) is run. This value is generally updated from term to term rather than from year to year on the General Learner Record.

Example: The Next Student Type for *A - First Time Freshman* would be *C - Continuing*. The Next Student Type for an *E - Adult Continuing Education* Code would be *E - Adult Continuing Education* since the status for this type of student would not change from year to year.

5. Click the **System Required** checkbox if this validation table record is required.

Example: First Time Freshman, Continuing.

Note: The **System Required** checkbox is used to set up a default when residency is not entered in the Recruiting module, and the prospect record is pulled to the Admissions module to build the application. If the **System Required** checkbox is checked, the validation table record cannot be deleted.

6. Repeat steps 2-5 until all codes are set up.
7. Click the **Save** icon.
8. Click the **Exit** icon.

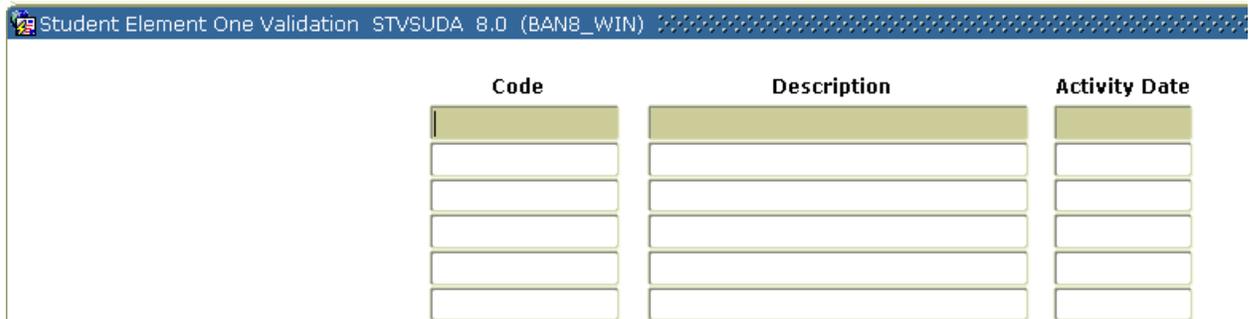
Student Element One Validation

Purpose

Use the Student Element One Validation Form (STVSUDA) to create, update, insert, and delete institutional reporting data elements specific to an institution's needs for state or local reporting for a student. This form is one of ten (STVUDA, STVUDB, STVUDC,...,STVUDJ) used in the General Student module for this purpose. You can create or update values for **Element 1** on the Student Institutional Reporting Requirements Form (SGAUSDF) from the Student Element One Validation Form (STVSUDA). Elements 2 through 10 are created on the subsequent respective STVSUDx form.

These validation forms correspond to Elements 1 through 10 on the Student Institutional Reporting Requirements Form (SGAUSDF). They are all completed in the same manner.

Banner form



The screenshot shows a window titled "Student Element One Validation STVSUDA 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Code", "Description", and "Activity Date". The table has a header row with a light green background and six data rows with white backgrounds. The "Code" column is the narrowest, the "Description" column is the widest, and the "Activity Date" column is the narrowest.

Code	Description	Activity Date

Steps

Follow these steps to create an institutional reporting data element.

1. Access the Student Element One Validation Form (STVSUDA).
2. Enter the code of the student institutional reporting element 1 in the **Code** field.

Note: Once a student institutional reporting element code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the student institutional reporting element code record cannot be deleted.

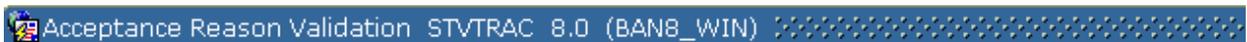
3. Enter a description of the student institutional reporting element in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Acceptance Reason Validation

Purpose

Use the Acceptance Reason Validation Form (STVTRAC) to create, update, insert, an EOPS (Educational Opportunity Programs and Services) reason of acceptance codes for use in the General Student module. You can create or update these codes only from this form.

Banner form



Code	Description	Activity Date
AE	Accept basis: Essay	08-APR-2008
AN	Accept basis: Financial Need	08-APR-2008
ED	Eligibility demonstrated	08-APR-2008

Steps

Follow these steps to create an EOPS (Educational Opportunity Programs and Services) reason of acceptance code.

1. Access the Acceptance Reason Validation Form (STVTRAC).
2. Enter an EOPS acceptance reason code in the **Code** field.

Note: Once an EOPS acceptance reason code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS acceptance reason code record cannot be deleted.

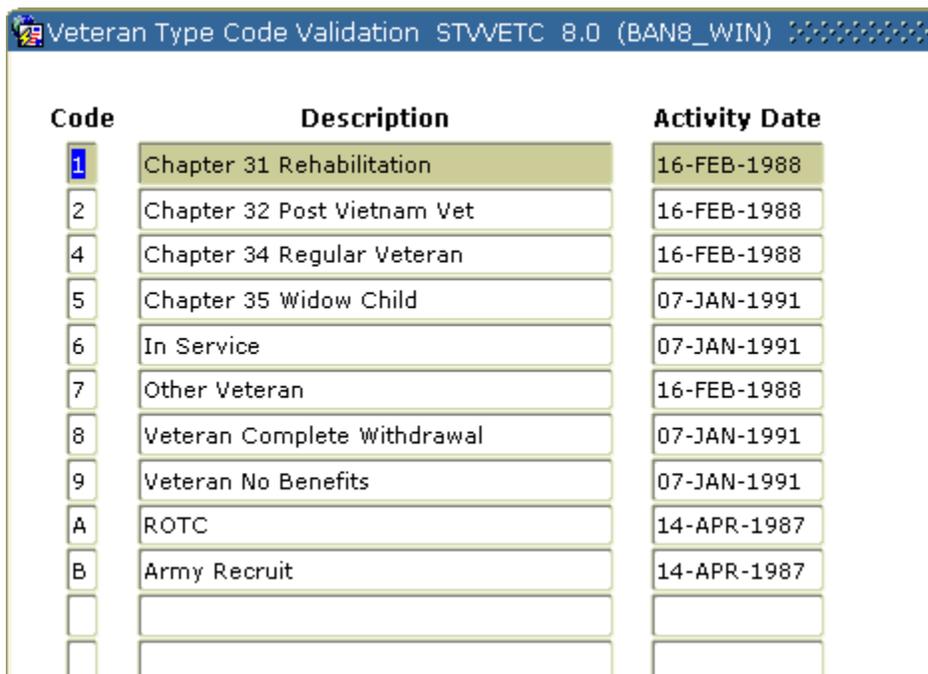
3. Enter a description of the EOPS acceptance reason in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Veteran Type Code Validation

Purpose

Use the Veteran Type Code Validation Form (STVVETC) to create, update, insert, and delete veteran type codes (e.g., Chapter 32 Post Vietnam Vet, Other Veteran, ROTC, etc.). The General Student Form (SGASTDN) uses this form to validate the veteran type codes. You can only create and update these codes from this form.

Banner form



Code	Description	Activity Date
1	Chapter 31 Rehabilitation	16-FEB-1988
2	Chapter 32 Post Vietnam Vet	16-FEB-1988
4	Chapter 34 Regular Veteran	16-FEB-1988
5	Chapter 35 Widow Child	07-JAN-1991
6	In Service	07-JAN-1991
7	Other Veteran	16-FEB-1988
8	Veteran Complete Withdrawal	07-JAN-1991
9	Veteran No Benefits	07-JAN-1991
A	ROTC	14-APR-1987
B	Army Recruit	14-APR-1987

Steps

Follow these steps to create a veteran type code.

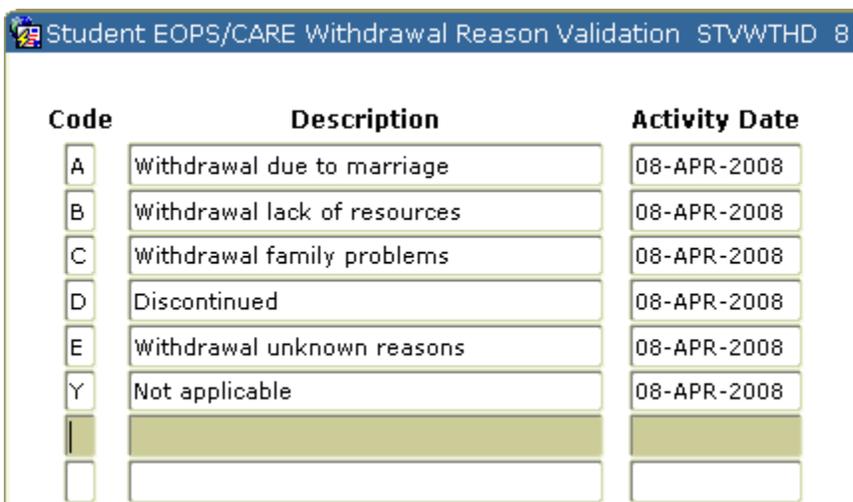
1. Access the Veteran Type Code Validation Form (STVVETC).
2. Enter a one character veteran code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student EOPS/CARE Withdrawal Reason Validation

Purpose

Use the Student EOPS/CARE Withdrawal Reason Validation Form (STVWTHD) to create, update, insert, and delete codes which indicate a student's reason for withdrawing from the EOPS (Educational Opportunity Programs and Services) and/or CARE programs for the following term, as of the end of the reporting term. Examples are Lack of Resources, Student or Family Problems, Discontinued (Academic Reasons). You can create or update these codes only from this form.

Banner form



Code	Description	Activity Date
A	Withdrawal due to marriage	08-APR-2008
B	Withdrawal lack of resources	08-APR-2008
C	Withdrawal family problems	08-APR-2008
D	Discontinued	08-APR-2008
E	Withdrawal unknown reasons	08-APR-2008
Y	Not applicable	08-APR-2008

Steps

Follow these steps to create a code which indicate a student's reason for withdrawing from the EOPS (Educational Opportunity Programs and Services) and/or CARE programs.

1. Access the Student EOPS/CARE Withdrawal Reason Validation Form (STVWTHD).
2. Enter an EOPS/CARE withdrawal reason code in the **Code** field.

Note: Once an EOPS withdrawal reason code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS withdrawal reason code record cannot be deleted.

3. Enter a description of the EOPS withdrawal reason in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student Classification Rules

Purpose

Use the Student Classification Rules Form (SGACLSR) to establish the academic classification rules based on the range of hours entered and user-defined student attributes. The **To Hours** must be greater than the **From Hours** when creating a rule.

The Class Code Validation Form (STVCLAS), the Level Code Validation Form (STVLEVL), and the Attribute Validation Form (STVATTR) must be established prior to entering this form. When attributes are maintained for a rule, then the student must fall within the credit hour requirement and have the attribute code for the effective term on the Additional Student Information Form (SGASADD).

Note: Student classification rules must exist for students of all levels. If classification rules do not exist for a certain level of students, they will *not* be reported in the Unduplicated Headcount Report (SFRHCNT).

Banner form

Level Code	From Hours	To Hours	Class Code	Description	Activity Date
<input checked="" type="checkbox"/> CR	.000	99.000	11	Year 1, Semester 1	19-JAN-1995
<input type="checkbox"/> CR	.000	99.000	12	Year 1, Semester 2	19-JAN-1995
<input type="checkbox"/> CR	.000	99.000	21	Year 2, Semester 1	19-JAN-1995
<input type="checkbox"/> CR	.000	99.000	22	Year 2, Semester 2	19-JAN-1995
<input type="checkbox"/> LW	.000	99.000	L1	First Year Law	19-JAN-1995
<input type="checkbox"/> LW	.000	999.000	L2	Second Year Law	19-JAN-1995
<input type="checkbox"/> LW	.000	999.000	L3	Third Year Law	19-JAN-1995
<input type="checkbox"/> UG	.000	27.990	FR	Freshman	18-JAN-1995
<input type="checkbox"/> UG	28.000	58.990	SO	Sophomore	19-JAN-1995
<input type="checkbox"/> UG	59.000	88.990	JR	Junior	19-JAN-1995

Class Standing Attribute	
Attribute	Description
11T	1st Semester, 1st Year Tech
<input type="text"/>	

Steps

Follow these steps to create a student classification rule.

1. Access the Student Classification Rules Form (SGACLSR).
2. Perform an **Insert Record** function.
3. Enter a two-character code in the **Level Code** field.
4. Enter an amount in the **From Hours** field.
5. Enter an amount in the **To Hours** field.
6. Select a class code in the **Class Code** field.
7. Double-click in the **Attribute** field and select a class standing student attribute code. This field is optional.
8. Repeat steps 2-7 as needed.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Self Check

Directions

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

Question 1

What is a communication plan?

Question 2

What is a Student's Right to Know?

Question 3

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

Answer Key for Self Check

Question 1

What is a communication plan?

A set of rules designed to implement institution preferences regarding who should receive which materials and when those materials should be sent. Materials can be generated (letter or label) or published (department brochures).

Example: All accepted high school students who apply for admissions into the Education program receive a letter acknowledging acceptance into both the university and the Education program. However, all accepted high school students who apply for admissions into the Nursing program receive a letter acknowledging acceptance into just the university and instructions for next steps on how to apply at a later time to the Nursing program. Prospective nursing students also receive a Nursing program brochure along with their acceptance letter into the university.

Question 2

What is a Student's Right to Know?

This legislation requires that an institution of higher education annually disclose information about its student body's completion and graduation rates.

For more information, refer to *Maintaining and Monitoring Student Right to Know Reporting* in *Section C: Day-to-Day Operations* of this training workbook.

Question 3

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

The following student type codes should be created for IPEDS reporting:

- **Freshman**
- **First Time Freshman**
- **Unclassified**
- **Continuing**
- **First Time Graduate**
- **First Time Professional**

Day-to-Day Operations



Section goal

The purpose of this section is to explain the process and detail the procedures to use the General Student Module.

Objectives

In this lesson you will learn how to

- create a general student record
- use Mass Entry forms to update multiple student records
- change a major and add a minor
- process a leave of absence request
- enter veteran information
- add or change advisor information
- enter additional student information
- enter cooperative education information
- view a student's information
- enter guardian information
- maintain sports records
- maintain and monitor Student Right to Know reporting
- enter disability information
- enter EOPS information
- maintain required information

- perform purge processes.

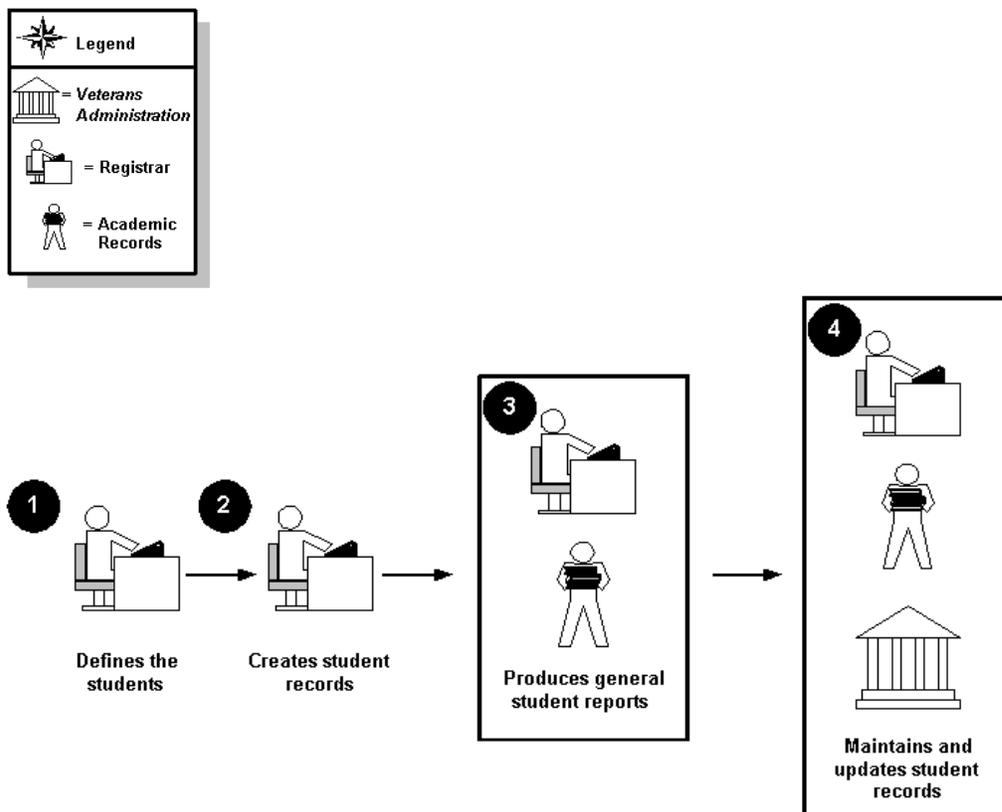
Process Introduction

Introduction

The Banner System requires that there be an Active General Student Record for the term before a student can register or be registered for courses and have tuition and fees assessed. The validation tables and rules for the General Student Module are used by the system to ensure that the student is registered into the correct courses and is assessed the correct tuition and fees.

Flow diagram

This flow chart highlights specifically what the General Student Module process would look like on a day to day basis.



What happens

The stages of the process are described in this table.

Stage	Description
Registrar	
1	Defines general student validation tables and rules
2	Creates Student records by offering a seat to the student and the student, then accepting the seat
Registrar/Academic Records/Veteran Admin Office	
3	Maintain and Update Student Records
4	Produce General Student reports and run General Student related processes (e.g., The Student Right to Know Report-SGRKNOW, Student Report-SGRSTDN and the Veteran report-SGRVETN Processes: Hold Purge-SGPHOLD, General Student Purge-SGPSTDN, Cooperative Education Purge-SGPCOOP, Student Block Load Process-SGPBLCK and Cohort Load Process-SGRCHRT)

Creating a General Student Record

Purpose

Information about a student is initially created when a decision is entered on the Admissions Decision Form (SAADCRV), which indicates that the applicant accepts the institution's offer of admission, or when an applicant is admitted via the Quick Entry Form (SAAQUIK). An applicant must accept the institution's offer of admissions to generate an initial general student record or the Quick Entry Form must have been processed for the student. This record may not be deleted if registration or academic history records exist for a term or if associated sports records exist.

The Admissions Decision Form (SAADCRV) is used to enter decisions for an admissions application. Once a decision is entered or calculated to indicate that the student has accepted and plans to attend, a general student record is automatically created using the information entered on the application. This record allows the student to be eligible to register.

Banner form

The screenshot shows the SAADCRV 8.1 application form. At the top, there are fields for ID (211009508) and Name (Abbe, Anthony). Below this are tabs for Decision Processing, High School Review, Prior College and Degree Review, and Test Score Review. The Application Summary section includes fields for Entry Term (200810), Decision, Status (C), Application Date (27-APR-2008), Application Number (1), Admission Type (ST), Session, Outstanding Requirements, Application Preference, Student Type (N), Residence (R), and Full or Part Time (Full Time). Below this is a section for Priority (1), Program (102002), Level (UG), College (DE), Degree (DEFACT), Catalog Term (200810), and Field of Study (MAJOR, DFCT, Department). At the bottom, there are tabs for Application Decision, Application Decision Letter, Decision Calculator, and Rating Review. The Decision Data section contains a table with the following columns: Decision Code, Description, Significant Decision, Institution Acceptance, Applicant Acceptance, Institution Rejection, Inactive Application, Maintained by, Decision Date, and User ID. The first row in the table is highlighted in green.

Decision Code	Description	Significant Decision	Institution Acceptance	Applicant Acceptance	Institution Rejection	Inactive Application	Maintained by	Decision Date	User ID
		<input type="checkbox"/>							
		<input type="checkbox"/>							
		<input type="checkbox"/>							
		<input type="checkbox"/>							

Steps

Follow these steps to create a General Student record.

Note: A student's application information must exist or be entered on the Admissions Application Form (SAAADMS) to use this form.

1. Access the Admissions Decision Form (SAADCRV).
2. Click the down arrow next to the **ID** field.
3. Enter a few characters of a last name with the wildcard (%) at the end in the **Last Name** field to perform a query.
4. Perform an **Execute Query** function.
5. Scroll through the list of names to find your student created and used during the Admissions Training.
6. Double-click in the **ID** field to return that student to SAADCRV.

Note: Make a note of the student's name and ID because they will be used in future lessons. Each participant must pick a unique student.

7. Select a term in the **Term** field.
8. Perform a **Next Block** function.
9. Select a decision code in the **Decision Code** field. The decision entered should have the Applicant Acceptance checkbox checked in order for the General Student (Learner) record to be created.
10. Click the **Save** icon.

Note: You will see the message, "Note: Student record created for admissions entry term."

11. Click the **OK** button.

Note: You will see the message, "Transaction complete. 1 record applied and saved."

12. Click the **OK** button.
13. Click the **Exit** icon.

Using the Quick Entry Form

Purpose

The Quick Entry Form (SAAQUIK) is used to provide a way to enter and register persons on the system with minimal effort. This form is combined with the General Person Identification Form (SPAIDEN), which allows a person to be added to the system along with addresses (optional). It can also create recruiting and admissions records at the user's option, and will automatically create a student record that is required for registration.

Default rules for a specific level of applicant can be defined on the Quick Entry Rules Form (SAAQKER) so that when the ID, Term and Level are entered into the key block, the majority of data will be defaulted in from SAAQKER.

Banner form

The screenshot shows the SAAQUIK 8.0 (BAN8) Quick Entry Form. At the top, there are fields for ID (601000110), Name (McVey, Elmo K.), Term (199901), Level (UG), and a Generate ID button. Below this are tabs for Quick Admit, Addresses, and Biographical. The main form is divided into several sections:

- Enter Address / Enter Biographical:** The "Enter Biographical" checkbox is checked. Fields include Student Type (B - New Freshman), Student Status (AS - Active), Residence (R - In state Resident), Full or Part Time (radio buttons for Full Time, Part Time, and selected None), Rate, Education Goal (BD - Obtain Bachelor's Degree), and Education Level.
- Application and Recruit Information:** Includes checkboxes for "Create Application Record" and "Create Recruit Record", along with fields for Application Number, Admission Type, Application Status, Admission Decision, and Primary Source.
- Curriculum:** Features a record navigation bar (Record 1 of 1) and fields for Term (199901), Catalog Term (199901), Priority (1), Program, Level (UG - Undergraduate), Campus, College (01 - College of Arts & Sciences), and Degree (BA - Bachelor of Arts).
- Field of Study:** Includes fields for Type (MAJOR), Priority (1), Field of Study (ACCT - Accounting), Status (INPROGRESS), Department, and Attached to Major.

Steps

Follow these steps to create a General Student record using the Quick Entry Form.

1. Access the Quick Entry Form (SAAQUIK).
2. Select **Generate ID** in the **Options** menu, or enter *GENERATED* in the **ID** field and press Enter to open the Current Identification window.

Result: The Common Matching Entry window opens.

Common Matching Entry GOAMTCH 8.0 (BAN8)

ID: GENERATED Matching Source: ACT_LORI ACT_LORI View Comments

Data Entry

Last Name: Non-Person Name:

First Name: SSN/SIN/TIN:

Middle Name: Birth Date: Day: Month: Year:

Address Type: Gender:

Street Line 1: Telephone Type:

Street Line 2: Telephone:

Street Line 3: E-mail Type:

City: E-mail:

State or Province:

ZIP or Postal Code:

County:

Nation:

Duplicate Check Select ID Details Update ID View Comments Create New

Match Potential Matches

ID	Name	Matched Address	Telephone	E-mail

Clear and Return to Data Entry

Matching Rule Sets: All Addresses: All Telephones: All E-mails:

No Matches

3. Enter values in the **Last Name**, **First Name**, and **Middle Name** fields.

Note: Each participant must create a unique student. Make a note of the student's name and ID because they will be used in future lessons.

4. Click the **Save** icon.
5. Double-click in the **Term** field to select a term.
6. Double-click in the **Level** field and select *Undergraduate*.
7. Perform a **Next Block** function.

Result: You may receive the message "Defaulting values from Quick Entry Rules Form." Note that many of the field values will default in based on the rules that have been created.

8. Click either the **Enter Address** checkbox or the **Enter Biographical** checkbox if you want to go directly to those tabs to enter that information.

Result: The appropriate tab opens.

9. Complete steps 10 through 18 to enter address information.
10. Click the **Enter Address** checkbox and enter a date in the **From Date** field, if desired.
11. Select an address type in the **Address Type** field.
12. Enter a street address in the **Street Line 1** field.
13. Enter a city in the **City** field.
14. Enter a state or province code in the **State or Province** field.
15. Enter a zip or postal code in the **Zip or Postal Code** field.
16. Select a telephone type in the **Telephone Type** field.
17. Enter a telephone number in the **Telephone** field.
18. Click the **Save** icon.

Complete steps 20 through 30 to enter biographical information.

20. Click the **Enter Biographical** checkbox and select either the **Male** or **Female Gender** radio button as appropriate.
21. Enter a date in DD-MM-YYYY format in the **Birth Date** field.
22. Enter the appropriate number in the **SSN/SIN/TIN** field.
23. Select a citizenship code in the **Citizenship** field.

Note: Your institution may not request this information. If it does not, the field can be left blank.

24. Enter the marital status in the **Marital Status** field.
25. Enter the religion in the **Religion** field, if known.
26. Enter the legacy information in the **Legacy** field, if known.
27. Select an ethnicity code in the **New Ethnicity** field.

Note: Your institution may not request this information. If it does not, the field can be left blank.

If you have confirmed this information, click the **Ethnicity and Race Confirmed** checkbox and enter a confirmed date in the **Confirmed Date** field.

28. Enter the appropriate veteran information in the **Veteran File Number**, **Veteran Category**, and **Active Duty Separation Date** fields, if this information applies. Otherwise, you may leave these fields blank.

29. Perform a **Next Block** function to access the Race block.

Result: Information in the fields may default based on what you have selected in the Ethnicity field.

30. Enter additional race records in the **Race** field, if appropriate.

Note: You cannot change an existing race.

31. Access the **Quick Admit** tab.

Note: Some of these fields may have defaulted in, depending on the rules that have been created. If that is the case, you will not need to complete all fields.

32. Enter a student type code in the **Student Type** field.

Example: *A* (1st Time Freshman)

33. Enter a student status code in the **Student Status** field.

Example: *AS* (Active)

34. Enter a residence code in the **Residence** field.

35. Enter *F* if the student is full time or *P* if the student is part time in the **Full or Part Time** field.

36. Select a rate code in the **Rate** field.

37. Select an education goal in the **Education Goal** field.

38. Select an education level in the **Education Level** field.

39. Click the **Create Application Record** checkbox.

40. Select the type of admissions in the **Admission Type** field.

41. Select an application status code in the **Application Status** field.

42. Select an admissions decision in the **Admission Decision** field.

43. Perform a **Next Block** function to access the Curriculum block.

44. Select a catalog term in the **Catalog Term** field.

45. Enter a priority number that identifies curriculum rank in the **Priority** field.

46. Select a program from the All Program Codes option in the **Program** field.

Note: The **College**, **Level**, and **Degree** fields may be filled in for you based on the program selected. If not, select values for these fields.

47. Select a campus code in the **Campus** field.

48. Enter a field of study priority number in the **Priority** field.

49. Access the Field of Study block.

50. Select *Major* in the **Type** field.

51. Select a status in the **Status** field.

52. Select a major, minor, or concentration code in the **Field of Study** field.

53. Click the **Save** icon.

54. Click the **OK** button to acknowledge that the records have been saved.

Result: The Communication Plan window opens.

55. Click the **Save** icon to save the communication plan.

56. Click the **Return** button.

57. Click the **Exit** icon.

Changing a Major and Adding a Minor

Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The General Student Form also contains comments, activities, and veteran information. This record may not be deleted if registration or academic history exists for the term or if associated sports records exist.

Use the Curriculum window on the General Student Form (SGASTDN) to enter curriculum information for the student. You may view lists of attached majors, departments, minors, and concentrations by accessing the Help drop down menu and choosing the Help function from the corresponding **Major**, **Department**, **Minor**, and **Concentration** fields in this window. You may also double-click in the field and select the appropriate choice from the Option List.

Banner form

The screenshot shows the Banner General Student Form (SGASTDN) for student Hannah Flath. The form is divided into several sections:

- General Learner:** Includes fields for New Term (200610), Student Status (AS - Active), Student Type (N - New First Time), Residence (R - In state Resident), Fee Assessment Rate, Class (FR - Freshman), and Full or Part Time (radio buttons for Full Time, Part Time, and None).
- Additional Information:** Includes Site (002 - Unit test gen 002), Session (C - Conference & Seminar), Block (ELET21 - ELET Year 2, Semester 1), and Citizenship (Y - Citizen).
- Curricula Summary - Primary:** A table showing the primary curriculum with columns for Priority Term, Program, Catalog, Student Type, Level, Campus, Rate, College, and Degree. The entry shows a Bachelor of Arts - DI program at the Undergraduate (UG) level, College of Arts & Sciences, with a Bachelor of Arts degree.
- Field of Study Summary:** A table showing attached majors, minors, and concentrations with columns for Priority Term, Type, Field of Study, Department, and Attached to Major. The entries include a Major in Art Mixed Medium, a Minor in Architecture, and a Concentration in Art Mixed Medium.

Steps

Follow these steps to complete the process of changing a major and adding a minor for the student created in the previous exercises.

Note: It is important to ensure that the major a student is being changed to is valid for the Program that the student is in. Appropriate combinations of major to program are established on the Curriculum Rules form (SOACURR).

1. Access the General Student Form (SGASTDN).
2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select the term where the change will take place in the **Term** field.
4. Perform a **Next Block** function.
5. Perform a **Duplicate Record** function.
6. Click the down arrow in the **New Term** field.
7. Select **Create New Effective Term** from the **Options** list.
8. Click the down arrow in the **New Term** field again.
9. Select **List of Terms** from the **Options** list.
10. Double-click on a term to return a term to the **New Term** field.
11. Select the **Curricula** tab.

Result: You are taken to the **Curricula** tab, which contains two additional tabs: **Curriculum** and **Field of Study**.

General Student SGASTDN 8.1 (s10b80)

Confidential
 ID: 817111111 Flath, Hannah Student Summary Term: 200610 View Current/Active Curricula

Learner Curricula Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

Curriculum Field of Study

Curriculum Record 1 of 5

Replace:  Update:  Duplicate:  Roll Learner: Yes No Default Roll to Outcome: 
 Activity: ACTIVE Apply to Graduate:  Graduation Sequence: Rolloled to Outcome: 2
 Key Sequence: 99 User ID: STUDENT_TRACI
 Term: 200610 Fall 2005-2006 (200610) Activity Date: 01-NOV-2005
 End Term: Start Date:
 Catalog Term: 200610 Fall 2005-2006 (200610) End Date:
 Priority: 1
 Program: BA_DMF Bachelor of Arts - DMF
 Level: UG Undergraduate (UG) Student Type:
 Campus: Site:
 College: AS College of Arts & Sciences Rate:
 Degree: BA Bachelor of Arts Leave of Absence:
 Admission Type: From Date:
 Admission Term: 200610 Fall 2005-2006 (200610) To Date:
 Application: Expected Graduation Date:
 Matriculated Term: 200610 Fall 2005-2006 (200610) Graduation Term:
 Graduation Year:

- Click the **Replace** icon while on the curriculum row to be inactivated (it must currently be active and the most recent record for the priority).

Result: The icon inactivates the curriculum row and inserts a new curriculum row for the new curriculum record.

- Complete these fields: **Priority, Program, Level, Campus** (optional), **Degree and College**.

- Perform a **Next Block** function.

Result: You are taken to the **Field of Study** tab, within the **Curricula** tab.

- Verify that the correct type is selected in the **Type** field.

- Complete additional fields that have not already been completed, if necessary. For example, you may want to enter information in the **Attached to Major** and **Full or Part Time** fields, if appropriate.

Note: At least one active row with Type = Major must exist. Without a major, you will not be able to save the record.

- Click the **Save** icon.

- Click the **Exit** icon.

Processing a Leave of Absence Request

Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The Miscellaneous Student Information window on the General Student Form (SGASTDN) is used to enter miscellaneous information for the student, such as practical training and leave information.

Banner form

The screenshot shows the Banner General Student Form (SGASTDN) Miscellaneous Information window. The window title is "General Student SGASTDN 8.1 (s10b80)". The student ID is 817111111 and the name is Flath, Hannah. The term is 200610. The window is divided into several tabs: Learner, Curricula, Activities, Veteran, Comments, Academic and Graduation Status, Dual Degree, and Miscellaneous. The Miscellaneous Information section contains the following fields:

Orientation Session:	<input type="checkbox"/> Summer Sessions	Employee and Training Code:	<input type="checkbox"/> Job Training Pgm Participant
Career Plan:	<input type="checkbox"/> Computer Programmer	Vocational Education:	<input type="checkbox"/> Vocational Education Program
Practical Training:	<input type="checkbox"/> Cooperative Education Progra	Transfer Center:	<input type="checkbox"/> No formal transfer center use
Education Level:	<input type="checkbox"/> Completed Master's Degree	Educational Goal:	<input type="checkbox"/> Obtain Bachelor's Degree
Income Range:	<input type="checkbox"/>	Basic Skills:	<input type="checkbox"/> Developmental Language/Mat
Employment Expectation:	<input type="checkbox"/> Working 10 hours a week	<input checked="" type="checkbox"/> Graduate Credit Approved	
Apprenticeship Code:	<input type="checkbox"/> Registered with Dept of Inds	From Date:	<input type="text" value="21-APR-2004"/>
Leave of Absence:	<input type="checkbox"/> Maternity	To Date:	<input type="text" value="29-APR-2004"/>

Steps

Follow these steps to process a leave of absence request.

1. Access the General Student Form (SGASTDN).
2. Enter the ID of your student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow find your student.

3. Select a term in the **Term** field.
4. Perform a **Next Block** function.
5. Select the **Miscellaneous** tab.
6. Select a code in the **Leave of Absence** field.
7. Enter a start date in the **From Date** field.
8. Enter an end date in the **To Date** field.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Entering Veteran Information

Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The Veteran Information window is used to maintain veteran information.

Banner form

The screenshot shows the Banner General Student SGASTDN 8.1 (s10b80) window. At the top, it displays 'Confidential' and the student ID '817111111' for 'Flath, Hannah'. The 'Student Summary' dropdown is selected, and the 'Term' is set to '200610'. A checkbox for 'View Current/Active Curricula' is present. Below this are tabs for 'Learner', 'Curricula', 'Activities', 'Veteran', 'Comments', 'Academic and Graduation Status, Dual Degree', and 'Miscellaneous'. The 'Veteran' tab is active, showing the 'Veteran Certification Information' section. This section contains a table with the following columns: 'Veteran Type', 'Description', 'Term', 'Certification Credit Hours', and 'Certification Date'. The first row is highlighted and contains the following data: '8' in the 'Veteran Type' column, 'Veteran Complete Withdrawal' in the 'Description' column, '200310' in the 'Term' column, '25.360' in the 'Certification Credit Hours' column, and '01-JUN-2003' in the 'Certification Date' column. Below this row are several empty rows for data entry.

Veteran Type	Description	Term	Certification Credit Hours	Certification Date
8	Veteran Complete Withdrawal	200310	25.360	01-JUN-2003

Steps

Follow these steps to enter veteran information.

1. Access the General Student Form (SGASTDN).

2. Enter the ID of your student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.

4. Perform a **Next Block** function.

5. Select the **Veteran** tab.

6. Select a code in the **Veteran Type** field.

7. Select a term in the **Term** field.

8. Enter a number in the **Certification Credit Hours** field.

9. Enter a date in DD-MM-YYYY format in the **Certification Date** field.

10. Click the **Save** icon.

11. Click the **Exit** icon.

Adding or Changing Advisor Information

Purpose

The Multiple Advisors Form (SGAADVR) allows a student to be associated with an unlimited number of advisors for an effective term range. It also allows the user to view a student's existing advisors for an effective term range. Multiple advisors may be designated for any type of student, not just graduate students. A General Student record must exist to associate an advisor with a student. The user must designate a primary advisor if multiple advisors exist. If the primary advisor is deleted, the secondary advisor defaults into the primary place.

Banner form

Multiple Advisors SGAADVR 8.0 (BAN8)

ID: 601000070 Davis, Mac S. Term: 199901

Advisor Information

From Term: 199901 Maintenance To Term: 999999

ID	Advisor Type	Primary Indicator
222000001 Adams, Jack	MAJR Major Advisor	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Steps

Follow these steps to complete the process of adding an advisor to your student's record.

1. Access the Multiple Advisors Form (SGAADVR).

2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.

4. Perform a **Next Block** function.

5. Select the down arrow in the **ID** field in the Advisor Information block.

Result: The **Faculty/Advisor Query Form** (SIAIQRY) opens.

6. Enter part of the advisor's last name in the **Last Name** field.

7. Perform an **Execute Query** function.

8. Double-click in the **ID** field to return the information to SGAADV.

9. Select a code in the **Advisor Type** field.

10. Click the **Primary Indicator** checkbox to indicate that this is the student's primary advisor.

11. Click the **Save** icon.

12. Click the **Exit** icon.

Entering Additional Student Information

Purpose

The Additional Student Information Form (SGASADD) maintains cohort codes, as well as attributes, which are assigned to the student by effective term. The cohort information records and attributes can be created manually on this form or may be rolled from the Admissions module upon creating the student record. The person must be defined as a student for a term that is encompassed by the effective term range for that student on the General Student Form (SGASTDN).

Banner form

The screenshot shows the Banner SGASADD 8.0 (BAN8) form. At the top, the ID is 601000070 and the name is Davis, Mac S. The term is set to 199901. The form is divided into two main sections: Student Cohort and Student Attribute.

Student Cohort Section:

- From Term:** 199901
- Maintenance:** [Maintenance icon]
- To Term:** 999999
- Table:**

Cohort Code	Description	Inactive	Reason
2006COHRT	2006 Cohort	<input type="checkbox"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="text"/>

Student Attribute Section:

- From Term:** 199901
- Maintenance:** [Maintenance icon]
- To Term:** 999999
- Table:**

Attribute Code	Description

Steps

Follow these steps to add cohorts and attributes for your student.

1. Access the Additional Student Information Form (SGASADD).

2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.

4. Select a code in the **Cohort Code** field.

Result: The **From Term** and **To Term** fields default.

5. Select a student attribute code in the **Attribute** field.

6. Click the **Save** icon.

7. Click the **OK** button.

8. Click the **Exit** icon.

Entering Cooperative Education Information

Purpose

The Cooperative Education Form (SGACOOOP) is used to maintain data pertaining to the student's cooperative education positions. The form contains employer information as well as comments on the duties involved in each position.

A person must be an active student for the term and level for which the cooperative education job is being entered. Multiple records for the term/level may be entered. The student's record cannot be deleted if cooperative education information exists; the cooperative education record must be deleted first.

Note: Employers entered must exist on the Employer Code Validation Form (STVEMPL).

Banner form

The screenshot shows a web browser window titled "Cooperative Education SGACOOOP 8.0 (BAN8)". The form contains the following fields and sections:

- ID:** 601000070 (dropdown), Davis, Mac S. (text), **Term:** 199901 (dropdown)
- Cooperative Education Details**
 - Level:** 00 (dropdown), Undeclared
 - Cooperative Code:** CS (dropdown), Computer Science
 - CRN:** (dropdown)
 - Begin Date:** (calendar icon), **End Date:** (calendar icon), **Override**
 - Evaluation Prepared:** (calendar icon), **Evaluation Received:** (calendar icon)
- Employer and Contact Details**
 - Employer Code:** (dropdown)
 - Contact Name:** (text)
 - Title:** (text)
 - Contact Phone:** (text) - (text) (text)
 - Employer Phone:** (text) - (text) (text)
 - Review Address**

Steps

Follow these steps to add cooperative education information to your student's record.

1. Access the Cooperative Education Form (SGACOOB).

2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.

4. Perform a **Next Block** function.

5. Select a level code in the **Level** field.

6. Select a code in the **Cooperative Code** field.

7. Select a course registration number for the internship in the **CRN** field.

8. Enter a start date in the **Begin Date** field.

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

10. Select an employer code in the **Employer Code** field.

11. Enter a name in the **Contact Name** field.

12. Enter the person's title in the **Title** field.

13. Enter the person's phone number in the **Contact Phone** field.

14. Click the **Save** icon.

15. Click the **Yes** button.

16. Click the **Exit** icon.

Creating Communication Plan Information

Purpose

Communication Plans are designed to implement an institution's rules regarding who should receive which materials and when those materials should be sent. A material can be generated (letter or label) or published (department brochures).

The Communication Rules Form (SOACOMM) is used to define the different types of Communication Plans as applied to campus, level, college, and degree, and to define the rules for the automatic assignment of communication plans to people and the processing of the communication plan.

If the campus is X, and the degree level is X, and the college is X, and the degree is X, then under these conditions a specific code is assigned. All students with these characteristics will receive the Communication Plan automatically. If you leave the campus blank, then it is used as a wild card and is applicable on all campuses.

Note: Details about setting up Communications Plans are found in another workbook.

Banner form

Communication Rules SOACOMM 8.0 (BAN8)

Communication Plans

Level	Campus	College	Degree	Program	Field of Study Type	Field of Study Code	Department	Curricula	Recruit	Admissions	Student
01	1	01	BS	PAW	MAJOR	PAW	PAW	Primary	PAWA		
01	1	01	BS	3122864		ACCT		Primary		LORI	
01	1	01	BS	JP	MAJOR	JP	JP	Primary	JPR	JPA	
01	1	01	BS	JFI	MAJOR	JFI	JFI	Primary	JFIR		
01	1	01	BS	PAW	MAJOR	PAW	PAW	Primary	PAWR		
01	1	01	BS	JFI	MAJOR	JFI	JFI	Primary	JFIA		
01	1	01	BS	ST	MAJOR	ST	SL	Primary	STR		
01	1	01	BS	ELH	MAJOR	ELH	ELH	Primary	ELHR		
01	1	01	BS	LGM	MAJOR	LGM	LGM	Primary	LGMR	LGMA	
UG	1	01	BS	ST	MAJOR	ST	SL	Primary		STA	
	1	AS						Primary		WM	
	1		BA			ACCT		Primary	LORI	LORI	
UG	123	01	BA	SOU000013	MAJOR	ANTH	SL	Primary	STR	STA	
UG	123	01	BA	TR000013	MAJOR	TMJ	TRD	Primary	TRR		
UG	123	01	BA	S000013	MAJOR	TRM	SL	Primary	STR		
UG	123	01	BA	000011	MAJOR	AMC	SL	Primary	ATR		
UG	123	01	BA	TR000013	MAJOR	TMJ	TRD	Primary		TRA	
UG	123	01	BA	000012	MAJOR	AMC	SL	Primary	ATR		
UG	123	19	DMD					Primary	BWV4	BWV4	
01	2	01						Primary	AJ2	AJ3	

Steps

Follow these steps to define communication plans.

1. Access the Communication Rules Form (SOACOMM).
2. Perform an **Insert Record** function.
3. Select a level code in the **Level** field.
4. Select a campus code in the **Campus** field.
5. Select a college code in the **College** field.
6. Select a degree code in the **Degree** field.
7. Select a program code in the **Program** field.
8. Select a field of study type and code in the **Type** and **Code** fields.

Example: You might select a type of *MAJOR* and a Code of *ACCT* for a major in Accounting.

9. Select a department code in the **Department** field.
10. Use the drop-down arrow above the **Curricula** field to specify if the curricular elements defined on the rule must come from the primary curriculum record, secondary curriculum record, or any curricula.
11. Select a communication plan code in the **Recruit** field to select a communication plan.
12. Select a communication plan code in the **Admissions** field to select a communication plan.
13. Select a communication plan code in the **Student** field to select a communication plan. For the purposes of the General Student manual, only those communication plans that are defined for Student will be triggered when the SGASTDN record reflects the criteria from all of the other fields.
14. Click the **Save** icon.
15. Click the **Exit** icon.

Viewing a Student's Information

Purpose

The General Student Summary Form (SGASTDQ) is a stand-alone query form that displays all general student records on file for a student from the term represented in the Key Information. The person must be a student to be queried on this form. If a term is entered in the Key Information, those general student records with a term that is earlier in time or is equal to the term in the Key Information will be displayed. If no term is entered in the Key Information, all of the student's General Student records will be represented on the form back to the earliest record on file.

When working in the Student Information section of SGASTDQ, the user may perform a Count Query Hits function from any existing record to transfer to the General Student Form (SGASTDN). The user will view the record on SGASTDN that matches the record on which the cursor was placed in SGASTDQ when the function was performed.

When the General Student Summary Form is accessed from the Committee/Service Form (SHACOMI), the user may perform a Select function to drag back information for college and department to SHACOMI.

Banner form

The screenshot shows the 'General Student Summary' form for student Hannah Flath (ID: 817111111) in term 200610. The form is divided into several sections:

- Header:** Confidential, ID: 817111111, Name: Flath, Hannah, Level, Campus, College, Degree, Term: 200610, Program, Field of Study Type, Field of Study Code.
- Student Summary Table:** A table with columns for From Term, To Term, Student Status, Student Type, Residence, Code, Term, and Override. The first row shows a record for term 200610 with status AS, type N, residence R, and code GS 200410.
- Curricula Summary - Primary:** Shows program details: Priority Term 1, Program Bachelor of Arts - DI, Catalog 200610, Student Type Undergraduate (UG), Campus, Rate College, Degree Bachelor of Arts, Admission 200610, Matriculation 200610.
- Field of Study Summary Table:** A table with columns for Priority Term, Type, Field of Study, Department, and Attached to Major. It lists three entries: Major (Art Mixed Medium), Minor (Architecture), and Concentration (Attached to Major Conc 02).

Steps

Follow these steps to view your student's information.

1. Access the General Student Summary Form (SGASTDQ).
2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Enter a term in the **Term** field.

Note: The query will return information for the term you entered plus any previous terms that contain information for this student. You can enter information in the other fields in the key block to narrow your search results.

4. Perform a **Next Block** function.
5. Use the scroll bar, if necessary, to review the student's record.
6. Select **Detailed Student Information** from the **Options** menu to access the General Student Form (SGASTDN).
7. Click the **Exit** icon to return to the General Student Summary Form (SGASTDQ).
8. Click the **Exit** icon.

Entering Guardian Information

Introduction

To enter guardian information, you must first enter the guardian on the General Person Identification Form (SPAIDEN), and then assign the guardian to a student using the Guardian Information Form (SOAFOLK).

Banner form

The screenshot shows a web browser window titled "General Person Identification SPAIDEN 8.0 (BAN8)". The form has a top navigation bar with tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The "Current Identification" tab is active.

At the top, there is an "ID:" field with the value "TST1" and a dropdown menu showing "Smith, Bob J.". To the right is a "Generate ID:" button with a refresh icon.

Below the navigation bar, there is another "ID:" field with "TST1" and a "Name Type:" dropdown menu.

The form is divided into two main sections: "Person" and "Non-Person".

Person Section:

- Last Name: Smith
- First Name: Bob
- Middle Name: J.
- Prefix: (empty)
- Suffix: (empty)
- Preferred First Name: (empty)
- Full Legal Name: (empty)

Non-Person Section:

- Name: (empty)

ID and Name Source Section:

- Last Update
- User: FIMSMGR
- Activity Date: 15-NOV-2000
- Origin: FTMVEND

Original Creation Section:

- User: (empty)
- Create Date: (empty)

Steps

Follow these steps to enter guardian information.

1. Access the General Person Identification Form (SPAIDEN).
2. Click the Generate **ID** icon.

Note: You may be taken to the Common Matching Entry Form (GOAMTCH), if your institution has enabled this. For detailed procedures on working with common matching, please refer to the Banner General Common Matching Training Workbook.

3. Enter the guardian's name in the **Last Name** field.
4. Enter the guardian's name in the **First Name** field.
5. Click the **Save** icon.
6. Select the **Address** tab.
7. Enter a date in the **From Date** field.
8. Select an address type in the **Address Type** field.
9. Enter an address in the **Street Line 1** field.
10. Enter a city in the **City** field.
11. Enter a state or province in the **State or Province** field.
12. Enter a zip or postal code in the **Zip or Postal Code** field.
13. Select a telephone type in the **Telephone Type** field.
14. Enter telephone number in the **Telephone** field.
15. Click the **Save** icon.
16. Write down the ID number of the guardian.
17. Click the **Exit** icon.

Banner form

Guardian Information SOAFOLK 8.0 (BAN8)

ID: 601000070 Davis, Mac S.

Prefix: Mr. Last Name: Smith First Name: Bob Middle Initial: J Suffix: Deceased

Relationship: U Guardian Degree: Employer: Title:

Address Type: PR Permanent From Date: 21-JUN-1991 To Date: Sequence Number: 1 Source:

Street Line 1: 492 Yukon Street Line 2: Street Line 3:

City: Indianapolis State or Province: IN Indiana Zip or Postal Code: 60008 County: Nation:

Telephone Type: Telephone: More Phone Numbers Exist

Steps

Follow these steps to complete the process using the Guardian Information Form (SOAFOLK).

1. Access the Guardian Information Form (SOAFOLK).
2. Enter the student's ID number in the **ID** field.

Note: If you do not know the student ID number, you can select the down arrow in the **ID** field to perform a query using the student name.

3. Enter the prefix of the guardian in the **Prefix** field.
Example: *Mr., Ms., Mrs., Pastor*
4. Enter the last name of the guardian in the **Last Name** field.
5. Enter a name in the **First Name** field.
6. Select the **Deceased** checkbox if the guardian is deceased.
7. Select a relationship type in the **Relationship** field.

8. Enter values, if applicable, in the **Degree**, **Employer**, and **Title** fields.

Note: These fields can be left blank if information is not requested or is not available.

9. Enter an address type in the **Address Type** field.

Result: The student's address information defaults from the student file.

10. Click the **Save** icon.

11. Select Add/Change Address Detail to view the guardian's address information.

12. Enter the guardian's ID in the **ID** field.

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

14. Select the **Address** tab to view the guardian's address information.

15. Click the **Exit** icon.

Maintaining Sports Records

Purpose

The purpose of the Athletic Compliance Form (SGASPRT) is to allow assignment of sport codes by term to a student. This form allows institutions to track students by sport code, status code, eligibility code, and term.

This form maintains competition and attribute information, as well as allowing you to enter or review athletic eligibility, admissions and transfer data for the individual athlete. The admissions summary information includes any applications the athlete has submitted, high school attendance, and test score data. The transfer summary information includes transfer institutions, transfer courses, and transfer attendance period GPA data. A compliance (sport) record must exist in order to enter data that is not term-dependant, such as athletic eligibility, general comments, admissions information, and transfer information).

Comments may also be associated with a student's sport code. These comments are maintained in the Comments section of the Athletic Compliance Form, both on the **Eligibility and General Comments** tab on the Compliance Block and on the **Comments** tab in the Competition Block.

You can enter and update compliance information for an athlete with the minimal requirement that a general person record (SPRIDEN) exists. If you wish to require that an ID have an associated general student record, you may do so. A student status is displayed for the record for the term for an ID with a general student record.

At a term and sport level, the associated competition data (including total number of seasons of competition available and number of seasons of competition used), athletic attributes, and athletic comment information can be entered. Sport records, the current competition for the sport, and optionally, athletic attributes for the sport, can be copied to a future term.

At the athletic level, athletic eligibility, general comments, admissions information, and transfer information can be maintained, once an athlete has been assigned to a sport/compliance record. While multiple sport records can exist for the athlete per term or terms, only a single eligibility, admission, or transfer record can exist for an athlete. Multiple general comments can be recorded for an athlete. The use of athletic eligibility, general comments, admissions, and transfer information is optional and can be deleted at any time

Sport records in a term can be deleted individually from SGASPRT as long as no associated competition data (history or current), athletic attributes, or athletic comments exist. If athletic eligibility, general comments, admissions, or transfer data exists, the last sport record cannot be deleted. To delete the last sport record, the athletic eligibility, general comments, admissions, or transfer data must be deleted, as well as any attributes and comments associated with the sport.

Note: A sport record can never be deleted if any associated competition data (history or current) exists.

More details about the Athletic Compliance Form and associated processes are described in the *Banner Student Athletic Compliance* workbook.

Banner form

Athletic Compliance SGASPR 8.1 (s10b80)

Confidential
ID: 817111111 Flath, Hannah

Compliance Eligibility and General Comments Admissions Transfer

Athletic Compliance
Term: 200823 Spring - Dani Prospect: Applicant: Student: Student Status: Active

Copy	Sport	Status	Eligible	Athletic Aid	Academic Eligibility
* <input type="checkbox"/>	170 Tennis Team	AC Active	RE Recruit	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User ID: SAISUSR Activity Date: 31-OCT-2008

Competition Attributes Comments

Athletic Competition Record Status:

Begin Term of Eligibility:

End Term of Eligibility:

Seasons of Competition Available:

Reason:

Season of Competition Used:

Seasons of Competition Used:

Seasons of Competition Remaining:

User ID: Activity Date:

Steps

Follow these steps to assign a sport code to a student.

1. Access the Student Sport Form (SGASPR).
2. Enter the ID of the student in the **ID** field.

Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.
4. Select a sport in the **Sport Code** field.
5. Select a status code in the **Status** field.

6. Select an eligibility code in the **Eligible** field.
7. Click the **Athletic Aid** checkbox, if appropriate.

Note: If the **Athletic Aid** checkbox is checked, then the value of the Athletic Aid Indicator on the Student Right To Know Report (SGRKNOW) is set to *Yes*. Use this Indicator to process Athletic Aid Students as a group..

8. Click the **OK** button.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Maintaining and Monitoring Student Right to Know Reporting

Introduction

The Student Right to Know act proposes regulations that require an institution of higher education to disclose information about its student body's completion or graduation rates. This act expands the types of "consumer" information that institutions are required to disclose to current and prospective students through appropriate publications and mailings.

Institutions are required to report a completion or graduation rate for full-time certificate-seeking or degree-seeking undergraduate students. Also, institutions that award athletically related student aid are required to report completion or graduation rates of various student populations at the institution, including student athletes. If an institution cannot calculate the graduation rate of the most recent cohort of students that has had an opportunity to graduate, the institution would report a persistence rate until it can disclose an actual graduation rate of an entering cohort of students. This statute requires an institution to make these disclosures to current and prospective students by July 1, 1993, and annually thereafter.

The legislation

For references to the "Legislation" in this procedure, refer to the Notice of Proposed Rule Making that was published in the July 10, 1992 Federal Register. It is recommended that you read either this information or the Chapter 12 General Student Dear Colleague Letter from the US Department of Education dated August 21, 1991 before this processing is implemented.

Sports that require reporting

If your institution awards athletically-related financial aid, your institution is required to report the graduation rates of certain groups of student athletes in addition to the required institution-wide graduation rate.

The sports in which the graduation rates of student athletes must be tracked are

- basketball
- baseball
- football
- cross country/track
- all other sports combined.

Purpose

The Student Right To Know Report (SGRKNOW) is used to produce data that will assist your institution in calculating graduation and completion rates by cohort and optionally by sport codes. If sport reporting is used, those students who receive athletically based financial aid may be specifically selected to be processed by sport.

Banner form

Process: SGRKNOW Student Right To Know Report Parameter Set:

Printer Control
 Printer: Special Print: Lines: 60 Submit Time:

Parameter Values

Number	Parameters	Values
01	Report Term	
02	Cohort Start Term	
03	Enrollment Term	
04	Cohort Code	
05	Activity Sport Code	
06	Degree Level	
07	Athletic Aid Indicator	
08	Print Detail Report Indicator	

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

Submission
 Save Parameter Set as Name: Description: Hold Submit

Steps

Follow these steps to run the Student Right To Know Report.

1. Access the Student Right To Know Report (SGRKNOW).
2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Req'd?	Parameter	Value
✓	Report Term	Enter the term in which you are running the report.
✓	Cohort Start Term	Enter the start term of the cohort codes to be processed.

Req'd?	Parameter	Value
	Enrollment Term	Enter the term in which students must have enrollment to be counted as a cohort.
✓	Cohort Code	Enter the code(s) processed to those specified with a matching start term. A wildcard (%) will process all cohort codes with a matching start term.
	Activity Sport Code	Enter the sport activity code(s) to be processed for each cohort code. Enter a wildcard (%) to process all sport activity codes.
✓	Degree Level	Enter the cohort code(s) to be processed to match the degree level as specified on the Cohort Code Validation Form (STVCHRT), or a wildcard (%) may be entered to process all degree levels.
	Athletic Aid Indicator	Enter Y to select only those students with the sport code(s) to be processed where the Athletic Aid Indicator for the sport code is checked.
	Print Detail Report Indicator	Enter Y to print a detailed listing of students in each category.

4. Click the **Save Parameter Set as** checkbox if you want to save the parameter set for future use.
5. Enter a name and description in the **Name** and **Description** fields.
6. Click the **Submit** radio button.
7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

8. Select **Review Output** on the **Options** menu to review the report.
9. Click the **Exit** icon.

Entering Disability Information

Purpose

The Student Disability Services Form (SGADISA) is used to capture information about disabilities, as well as services provided for those disabilities, for a student on a term-by-term basis. A student record must exist for the student on the General Student Form (SGASTDN) for the term specified.

Banner form

Student Disability Services SGADISA 8.0 (BAN8)

ID: 601000070 | Davis, Mac S. | Term: 199901

Student Disabilities						
Disability Code	Description	Medical Code	Service Code	Primary	Activity Date	
<input type="checkbox"/> MI	Mobility Impaired	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	08-APR-2008	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	08-APR-2008	
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

Disability Services										
Service Type	Status Code	Provided Code	Provider Code	Exemption Code	Result	Originator	Campus	Contacts	Service Begin Date	Service End Date
<input type="text"/>										
<input type="text"/>										
<input type="text"/>										
<input type="text"/>										
<input type="text"/>										
<input type="text"/>										
<input type="text"/>										

Steps

Follow these steps to enter disability information.

1. Access the Student Disability Services Form (SGADISA).
2. Enter the student's ID in the **ID** field.
3. Enter the current or appropriate term in the **Term** field.
4. Perform a **Next Block** function.
5. Enter the disability code associated with the Student's disability in the **Disability Code** field.

Note: The code comes from the Disability Type Code Validation Form (STVDISA) and the description will default into the **Description** field.

6. Enter the appropriate medical code in the **Medical Code** field.

Note: This code comes from the Medical Code Validation Form (STVMEDI).

7. Enter the service code in the **Service Code** field.

Note: This code comes from the Disability Service Validation Form (STVSPSR).

8. If appropriate, select the **Primary** checkbox to indicate that this is the primary disability.
9. Perform a **Next Block** function.

10. Complete the fields in the Disability Services block as appropriate. Use the following as a guide to the fields.

Note: Not all these fields are entered with data at the same time; various fields will be updated with information as that information becomes available

Field	Description
Service Type	Indicates the type of service provided by the institution for the disability.
Status Code	Indicates the status of the service type provided.
Provided Code	Indicates whether the service type been provided by the Institution.
Provider Code	Indicates who or what provided the service.

Field	Description
Exemption Code	Indicates whether the student is exempt from having the service provided.
Result	Result of the Service Type that was provided.
Originator	Originator of the Disability Services record.
Campus	Campus at which the student is enrolled.
Contacts	Number of times the Originator has had contact with the student.
Service Begin Date	Date that service is to take effect.
Service End Date	End date of the service.

11. Click the **Save** icon.

12. Click the **Exit** icon.

Entering EOPS Information

Purpose

The purpose of the Education Opportunity Programs and Services Form (SGAEOPS) is to record and monitor the EOPS information for a student based on an effective term. EOPS status and multiple eligibility factors may be specified for a student. A general student record must exist on SGASTDN prior to creating or updating the EOPS information.

Banner form

Education Opportunity Programs & Services SGAEOPS 8.0 (BAN8)

ID: 601000070 Davis, Mac S. Term: 199901

From Term: 199901 Maintenance To Term: 999999

EOPS Status: ER Student is Eligible State Financial Aid Eligibility:

Acceptance Reason: AN Withdrawal Reason:

Planned Credits: Acceptance Date:

Eligibility Factor

From Term: 199901 Maintenance To Term: 999999

Eligibility Factor	Description	Primary Indicator
F	Financial	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>

Steps

Follow these steps to enter EOPS information.

1. Access the Education Opportunity Programs and Services Form (SGAEOPS).
2. Enter the student's ID in the **ID** field.
3. Enter the appropriate term in the **Term** field.
4. Perform a **Next Block** function.

Note: The **Maintenance** icon is used to copy the record to a new Effective Term because more information is available for that new term, and the record needs to be updated. You can also use this icon to set the End Term of the record.

5. Enter the student's EOPS status in the **EOPS Status** field.
6. Enter the student's eligibility for state financial aid in the **State Financial Aid Eligibility** field.
7. Enter the reason for acceptance in the **Acceptance Reason** field.
8. Enter a withdrawal reason in the **Withdrawal Reason** field, if applicable.
9. Enter the planned credits in the **Planned Credits** field.
10. Enter an acceptance date in the **Acceptance Date** field.
11. Perform a **Next Block** function to access the Eligibility Factor block.
12. Enter the appropriate code in the **Eligibility Factor** field.

Result: The description will default into the **Description** field.

13. Select the **Primary Indicator** checkbox, if appropriate.

Note: This checkbox indicates whether the eligibility factor is the primary eligibility factor, or the primary reason for needing the Educational Opportunity Program.

14. Select **Other Educational Programs** from the **Options** menu to access the Other Educational Programs window.

Note: This window allows you to capture Educational Opportunity Program information for two different programs. Not all fields are required, and can be entered as the information is received.

Other Educational Programs SGAEOPS 8.0 (BAN8)

From Term: Maintenance  To Term:

EOPS Status: 
Accept Reason: 

Marital Status: 
AFDC Duration: 

Planned Credits:

State Financial Aid Eligibility: 
Withdrawal Reason: 

Number of Dependents: 

Acceptance Date: 

15. Enter the student's EOPS status in the **EOPS Status** field.
16. Enter the student's eligibility for state financial aid in the **State Financial Aid Eligibility** field.
17. Enter the reason for acceptance in the **Accept Reason** field.
18. Enter a withdrawal reason in the **Withdrawal Reason** field, if applicable.
19. Enter the student's marital status in the **Marital Status** field.
20. Enter the student's number of dependents, if applicable, in the **Number of Dependents** field.
21. Enter the code for the AFDC duration time in the **AFDC Duration** field.
22. Enter the student's planned credits in the **Planned Credits** field.
23. Enter an acceptance date in the **Acceptance Date** field.
24. Click the **Save** icon.
25. Click the **Exit** icon.

Maintaining Required Information

Purpose

The Institutional Reporting Requirements Form (SGAUSDF) is used to maintain information about students which is specifically required by the institution on a term-by-term basis. This form and the supporting validation forms allow an institution to determine which additional data must be maintained regarding the student.

Each of the reporting elements numbered 1 - 10 is supported by a Student Element (Number) Validation Form (STVSUDA through STVSUDJ) which is used to create, update, insert, and delete institutionally specific information. Element 1 values are derived from the Student Element One Validation Form (STVSUDA), Element 2 values are derived from the Student Element Two Validation Form (STVSUDB), and Element 3 values are derived from the Student Element Three Validation Form (STVSUDC), and so on through Element 10 and the Student

Element Ten Validation Form (STVSUDJ).

Note: A general student record must exist on the General Student Form (SGASTDN) for the student during the term before information is entered on this form.

Banner form

Institutional Reporting Elements	
	Element Code
Element 1:	ACTIVITY Student Activities
Element 2:	
Element 3:	
Element 4:	

Steps

Follow these steps to use the Institutional Reporting Requirements Form (SGAUSDF).

1. Access the Institutional Reporting Requirements Form (SGAUSDF).
2. Enter the student's ID in the **ID** field.
3. Enter the appropriate term in the **Term** field.
4. Perform a **Next Block** function.
5. Enter the appropriate codes in the **Element** field for **Element 1** through **Element 10**, as appropriate.

Performing Purge Processes

General Student Purge Purpose

The General Student Purge Process (SGPSTDN) purges the general student information for a student who never registered based on the user-specified effective term and activity date. You can choose to leave the High School, Prior College, Guardian, Test Score, and Hold information on the database also by parameter selection.

General Student information will not be purged if

- the student has any active holds
- the student has Academic History information
- the student has any Financial Aid information.

General Student Purge Banner process

The screenshot shows the 'Process Submission Controls' window for the 'General Student Purge' process. The window title is 'Process Submission Controls GJAPCTL 8.0 (BAN8)'. The 'Process' dropdown is set to 'SGPSTDN' and the 'Parameter Set' dropdown is empty. The 'Printer Control' section includes a 'Printer' dropdown, 'Special Print' text box, 'Lines' set to '55', and 'Submit Time' text box. The 'Parameter Values' section has a table with 8 rows, each with a 'Number' (01-08), a 'Parameters' dropdown, and a 'Values' dropdown. The parameters listed are: Process Term, Purge Option, Effective Term, Activity Date, Purge High School Information, Purge Prior College Informatio, Purge Guardian Information, and Purge Test Score Information. Below the table, it says 'LENGTH: 6 TYPE: Character O/R: Required M/S: Single'. The 'Submission' section has a 'Save Parameter Set as' checkbox, 'Name' and 'Description' text boxes, and radio buttons for 'Hold' and 'Submit'.

Number	Parameters	Values
01	Process Term	
02	Purge Option	
03	Effective Term	
04	Activity Date	
05	Purge High School Information	
06	Purge Prior College Informatio	
07	Purge Guardian Information	
08	Purge Test Score Information	

General Student Purge Steps

Follow these steps to run the general student purge.

1. Access the General Student Purge Form (SGPSTDN).
2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Description
Process Term	Enter the term that you want to process.
Purge Option	Enter a date in DD-MM-YYYY format.
Effective Term	Enter a term for which you want this process to be effective.
Activity Date	Enter <i>Y</i> for Yes or <i>N</i> for No.
Purge High School Information	Enter <i>Y</i> for Yes or <i>N</i> for No.
Purge Prior College Information	Enter <i>Y</i> for Yes or <i>N</i> for No.
Purge Guardian Information	Enter <i>Y</i> for Yes or <i>N</i> for No.
Purge Test Score Information	Enter <i>Y</i> for Yes or <i>N</i> for No.
Purge Hold Information	Enter <i>Y</i> for Yes or <i>N</i> for No.
Run Mode	Enter <i>A</i> for audit mode or <i>U</i> for update mode.

4. Click the **Save Parameter Set as** checkbox if you want to save the parameter values for future use.
5. Enter a name and description in the **Name** and **Description** fields.
6. Click the **Submit** radio button.
7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log

and list file.

8. Select **Review Output** on the **Options** menu to review the report.
9. Click the **Exit** icon.

Hold Purge Process Purpose

The Hold Purge Process (SGPHOLD) purges all expired holds based on the user specified parameters of expiration date, activity date, and hold type. You can choose one of two options:

- Option 1: hold expiration date (date must exist to be purged)
- Option 2: hold activity date

Warning: Only the Registrar should be permitted to run the process to purge all expired holds. The purge process is run before the start of registration for the Fall, Spring, and Summer terms.

Hold Purge Process Banner process

The screenshot shows the 'Process Submission Controls' window for the 'SGPHOLD' process. The window title is 'Process Submission Controls GIAPCTL 8.0 (BAN8)'. The 'Process' dropdown is set to 'SGPHOLD' and the 'Parameter Set' dropdown is empty. The 'Printer Control' section includes a 'Printer' dropdown, 'Special Print' text box, 'Lines' set to 55, and 'Submit Time' text box. The 'Parameter Values' section is a table with columns for 'Number', 'Parameters', and 'Values'. The parameters listed are: 01 Process Term, 02 Purge Option, 03 Hold Expiration Date, 04 Hold Activity Date, 05 Excluded Hold Type, and 06 Run Mode. The 'Values' column is currently empty. Below the table, it specifies 'LENGTH: 6 TYPE: Character O/R: Required M/S: Single'. The 'Submission' section at the bottom has a 'Save Parameter Set as' checkbox, 'Name' and 'Description' text boxes, and radio buttons for 'Hold' and 'Submit' (which is selected).

Number	Parameters	Values
01	Process Term	
02	Purge Option	
03	Hold Expiration Date	
04	Hold Activity Date	
05	Excluded Hold Type	
06	Run Mode	

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

Save Parameter Set as Name: Description: Hold Submit

Hold Purge Process Steps

Follow these steps to run the hold purge process.

1. Access the Hold Purge Form (SGPHOLD).
2. Leave the **Parameter Set** field empty.
3. Perform a **Next Block** function to access the Printer Control Block.
4. Double-click in the **Printer** field and select an available printer.
5. Perform a **Next Block** function to navigate to the Parameter Values block.

Note: The system will automatically populate the parameters.

6. Enter the appropriate values for each parameter in the **Values** column.

Note: Use the Values **Search** icon to access tables with appropriate values.

Parameter	Value
Process Term	Enter the term code associated with the process.
Purge Option	Choose from one of the two purge options listed in the description: hold expiration date or hold activity date.
Hold Expiration Date	Holds with end date less than or equal to the date entered will be purged.
Hold Activity Date	Holds with activity dates that match the date entered will be purged.
Excluded Hold Type	Hold types specified will be excluded from the purge process. Multiple requests are permitted.
Run Mode	Enter <i>A</i> to produce a listing of all selected purge data without affecting the database. Enter <i>U</i> to update the database after purging the selected data.

7. Check the **Save Parameter Set as** checkbox if you want to save the parameter values for future use.
8. Enter a name and description for your job parameters in the **Name** and **Description** fields.

Note: Run the process in Update Mode.

9. Select the **Submit** radio button.
10. Click the **Save** icon.
11. Click the **Exit** icon.

General Student Mass Entry

Overview

Mass entry processing is based on user-defined search and update criteria. Users can select students based on form search criteria and update their data based on the update criteria. The selected students can be reviewed and the updates selectively processed. Updates can be processed immediately or held for later processing in job submission using a batch process (SORMEBP). A Results tab is used to view processing results for Mass Entry, whether the results are processed immediately or via batch. Audit information is retained for each Mass Entry process, and may later be purged. Data retained includes User ID, date, timestamp, search criteria, update criteria, students that were processed and the results. Mass entry forms may also be used to query student information only, in which case audit results are not retained.

The General Student Mass Entry Form (SGAMSTU) is used for mass entry general student processing. You can search and update general student records using SGAMSTU when a general student record exists for the student on SGASTDN for the effective term that is entered in the search criteria. The effective term is required when any other search criteria are entered in order to proceed to the Results tab.

Updates can be selected for the processing term on the Update tab. Updates take place for new and existing student records, if they satisfy the search criteria, regardless of any holds the students may have.

The search results are displayed by ID and name based on the data required by the mass entry form, the search criteria, and the population selection, if used. All records returned in the Results tab can be selected for update, all deselected, or not selected. Individual records can be selected for update. Records may be added or deleted manually.

When no search criteria are entered, you can still manually enter students for update. Records that are manually entered require that the student has a general student record and a valid effective term. Updates cannot be performed when the student has a registration record for the update criteria learner effective term. Mail submission is also not updated when a student has a registration record for the search criteria effective term.

Banner Form

General Student Mass Entry SGAMSTU 8.0 (UDCSysT)

Search Update Results

Search Criteria

Effective Term: 199710 Fall 1996
 Search Learner Effective Term Equal To

Student Status: AS Active
Student Type: N New First Time
Residence: R Resident

Fee Assessment Rate:
Education Level:
Education Goal:
Expected Graduation Date:
Graduation Term:
Graduation Year:
Cohort:
Attribute:

Class:
Level:
Campus:
College:
Degree:
Program:
Field of Study Type:
Field of Study Code:
Department:
Admission Term:
Admission Type:
Curricula:

Population Selection

Application:
Selection ID:
Creator ID:
User ID:

Steps

Follow these steps to execute the General Student Mass Entry process.

1. Access the General Student Mass Entry form (SGAMSTU).
2. Search for and enter all the criteria for your search in the Search Criteria section of the form. Please note that results will only be returned for Students whose records meet the search criteria on this form AND who have an existing General Student record (SGASTDN). Effective Term is the only required field.

Note: A new record will be created with a new Effective Term code.

3. Optionally, you may fill in the Population Selection section of the form. This is not another block, it is accessed by pressing the **Tab** key to move to the next form field.

Note: Familiarity with Population Selection is a prerequisite for this course.

4. Press **Next Block** or the **Update** tab to move to the **Update** tab.
5. Enter the General Student Update values desired.

General Student Mass Entry SGAMSTU 8.0 (UDCSysT)

Search Update Results

Student Update Values

Learner Effective Term: 199710 Fall 1996
 Student Status:
 Student Type:
 Fee Assessment Rate:
 Education Level:
 Education Goal:
 Expected Graduation Date: 12-MAY-2001
 Graduation Term: 200120 Spring 2001
 Graduation Year: 2001 2000-2001

Attribute:
 Cohort:
 Copy previous term attributes and cohorts
 Block:

Mail Submission

Letter Code:
 Initials:
 Initiated Date:
 Print Date:
 Wait Days:

Note: These updates will be applied to the General Student record (SGASTDN).

6. After filling in the updated values, you may optionally update the Communication Plan for all of the selected student records by filling in the Mail Submission section of the form. This is not a separate Block, but is accessed by pressing **Tab** to move to the next form field.
7. Press **Next Block** or click on the *Results* tab to move to the *Results* Tab. All records that satisfy the requirements specified in the Search Tab, and that have an existing General Student record (SGASTDN) are listed. You can review the selected records on this Tab and select All, None or some subset of these records for processing.

Note: Records may be manually entered on this tab, and selected for update. They will be updated if they have an existing General Student record (SGASTDN).

General Student Mass Entry SGAMSTU 8.0 (UDCSysT)

Search Update Results

Results

Select Indicator: Select All Deselect All None

Select	ID	Name	Term Code	Hold	Deceased	Conf	Manually Added	Yes	No	Partial	None	Message
<input type="checkbox"/>	061672321	Lisch, Scott A.	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	@0000050	Lytle, Margaret	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	610009601	Maris, Keith	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	300000001	Murphy, Justin M.	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input checked="" type="checkbox"/>	210009609	Phillips, Sandra	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Learner copied
<input type="checkbox"/>	484598209	Rosenberg, Willow	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	021341212	Straub, Therese	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	777111111	University, Sabanci	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	610009621	Volker, Pamela	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input type="checkbox"/>	510000007	Wilson, Kevin M.	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per
<input checked="" type="checkbox"/>	610009605	Young, Abbie	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Learner copied
<input type="checkbox"/>	210009605	Young, Celia	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates per

Submission

Submit Hold for Job Submission Batch Process ID:

8. To execute the Mass Entry for General Student immediately, select the Submit check box, as shown above. To execute it later as a Batch Process, select the Hold for Job Submission check box. Please see the section *Mass Entry Batch Update* in this workbook for more information about running the Mass Entry Batch process.

9. Once the process has been executed, the results are displayed on this tab. Each record is displayed with status indicators and a message type which contains more information for each record's update results.

Indicator	Description
Manually Added	Checked when the record has been manually added to the selected group for update.
Yes	Checked when the update has been completed successfully.
No	Checked when the update has not been completed at all.
Partial	Checked when one part of the update was successfully completed while another part was not.
None	Checked when the update was not attempted, (such as if the record was not selected).

Indicator	Description
Message	A link to a message explaining the status of the update for that record.

10. Click the **Save** icon to execute the process.

11. Click the **Exit** icon.

Steps

Follow these steps to review Mass Entry Audit files.

1. Access the Mass Entry Audit form (SOAMAUD).
2. Using the Key Block, enter the Submit Date From, Submit Date to, User ID and/or Form Name to search for Audit Session files. Select one, and move to the **Search/Update** tab.

3. Note the following data is contained at the top of the Search/Update Tab:

Field	Description
Date Initiated	The date the Mass Entry was initiated
User ID Initiated	User ID of the individual who initiated the Mass Entry.
Date Completed	The date the Mass Entry update was complete; If Batch process has not yet been run this field will be empty.

Field	Description
User ID Completed	User ID of the individual who ran the update; If Batch process has not yet been run this field will be empty.
Batch Process ID	The Batch Process ID assigned by the system to this session, if Batch processing was selected. If the update was processed in real time, this field will be empty.
Form Name	Identifies the form used for Mass Entry
Session Name	The name of the session selected

- The Search Criteria from the original Mass Entry form is reproduced in the Search Criteria block on the **Search/Update** tab.
- The Update Criteria from the original Mass Entry form is reproduced in the Update Criteria block on the **Search/Update** tab.
- The Mass Entry process updates the mass entry tables with result codes and associated result messages once updates have taken place. Results may be viewed on the **Results** tab, and include both records selected for update, and records that satisfied the Search criteria that were not selected for update.

Mass Entry Audit SOAMAUD 8.0 (UDCSysT)

Submit Date From: 21-APR-2008 Submit Date To: 21-APR-2008 User ID: LDAVIS Form Name: SGAMSTU

Sessions Search/Update Results

Date Initiated: 21-APR-2008 08:26:59 AM User ID Initiated: LDAVIS Date Completed: 21-APR-2008 08:35:40 AM User ID Completed: LDAVIS Batch Process ID: [Empty]

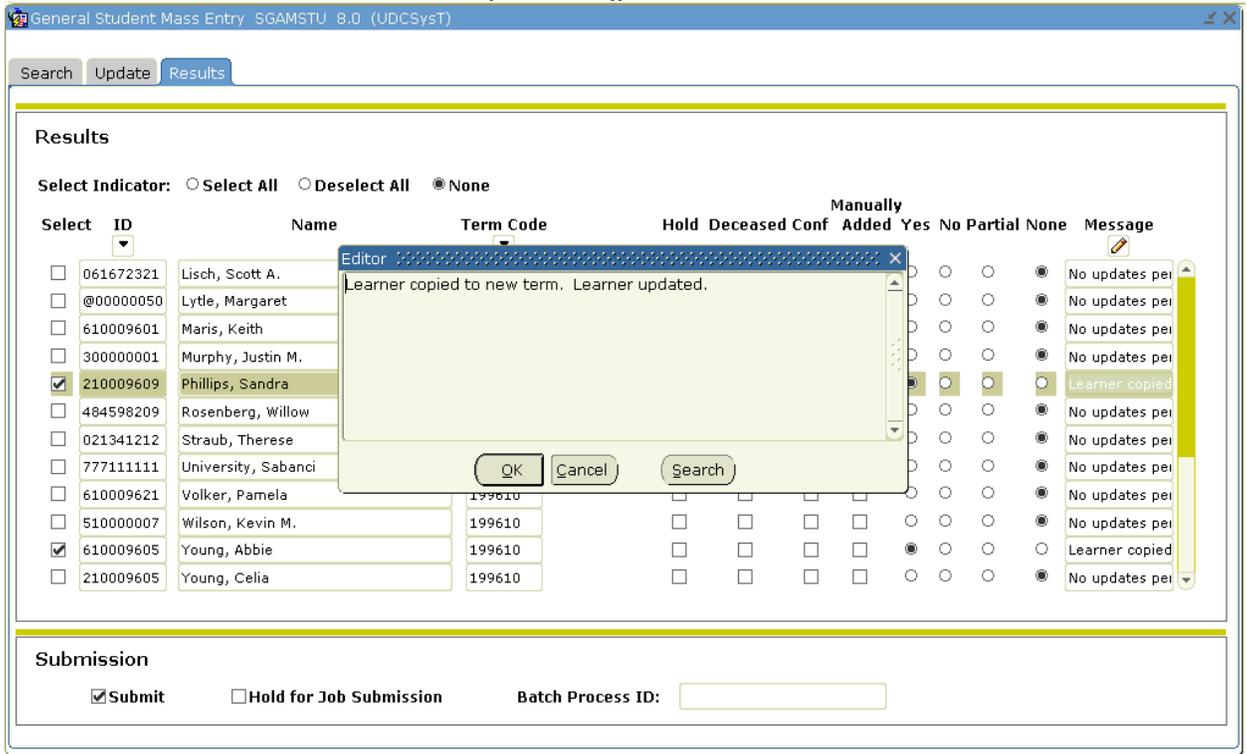
Form Name: SGAMSTU General Student Mass Entry

ID	Name	Effective Term	Manually Hold Added	Yes	No	Partial	None	Message	Process Indicator
610009101	Adams, Anthony T.	199110	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
N00013058	Adams, Samuel	199510	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
900017878	Anderson, Bob	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
210009613	Barker, James R.	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
610009603	Barrens, Chip	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
111938492	Brown, Sam D.	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
N00012997	Bunte, Frank C.	199510	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
N00013005	Bunte, Fred A.	199510	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
610009613	Clark, Donald J.	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Learner copied to new	<input checked="" type="checkbox"/>
610009103	Correll, Nikome M.	199110	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
210009623	Cory, Janice	199610	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
610009105	Edwards, Michael C.	199110	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>
061620009	Erwine, Kyle L.	199710	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No updates performed	<input type="checkbox"/>

Confidential: Deceased:

Note: The **Update** radio group in the **Results** tab show whether the updates were

successful (*Yes*), partially successful (*Partia*), not successful (*No*) or that no updates were considered (*None*). The **Message** field displays related result messages for the update, such as that shown in the illustration below. The **Process Indicator** shows whether that record was selected for processing.



- The audit tables are updated when the mass entry updates are processed in real time on a mass entry form. The tables are also updated when job submission batch processing (SORMEBP) is run for updates that have been held for later processing.
- After reviewing the results of your selected session, click on the **Exit** icon.

Mass Entry Batch Update

Overview

The Process Mass Entry Report (SORMEBP) is used to process mass entry updates in batch that are held for job submission processing in the Results tab of the mass entry form. When a process is held for job submission, all of the data is written to the Mass Entry Audit tables without a date completed or an update result, but with a batch process identifier. The batch process ID can be submitted through job submission using SORMEBP when you are ready to process the updates.

This report processes the mass entry updates based on the mass entry form name, the ID of the user who initiated the updates, the date and time the records were saved for batch update, and the batch process ID. Only records with no completion date are considered for update. Output is listed in alphabetical order and can show summary, detail or totals information.

The report can be run in Audit or Update mode. Audit Mode permits the user to run the batch process as a "trial," and the update results and associated messages are not shown on the report output. When run in Update mode, updates are made to the parent forms of the mass entry forms, and the audit table is updated with the ID of the user who ran the report, the date completed, the results and the setting of the Process Indicator on the Audit form.

Banner form

The screenshot shows the 'Process Submission Controls' window for the SORMEBP process. The window title is 'Process Submission Controls: QJAPCTL: 8.0 (s7s80)'. The 'Process' dropdown is set to 'SORMEBP' and the 'Parameter Set' dropdown is empty. The 'Printer Control' section shows 'Printer: DATABASE', 'Special Print: [empty]', 'Lines: 55', and 'Submit Time: [empty]'. The 'Parameter Values' section is a table with 7 rows and 3 columns: 'Number', 'Parameters', and 'Values'. The 'Parameters' column has a dropdown menu. The 'Values' column has a dropdown menu. The 'Submission' section has a 'Save Parameter Set as' checkbox, 'Name: [empty]', 'Description: [empty]', 'Hold' radio button, and 'Submit' radio button.

Number	Parameters	Values
01	Form Name	SGAMSTU
02	Add User ID	
03	Add Date From	
04	Add Date To	
05	Batch Process ID	SYSTEM24MSTU000033
06	Report Option	D
07	Run Mode	U

Steps

Use the following steps to execute the selected Batch process report.

1. Access the Batch Update Process Report (SORMEBP).
2. Enter the Form Name into the Parameter Value block, and query to locate your Batch Process ID.
3. Select the Batch Process you wish to run.
4. Select the Report Option.
5. Select the Run Mode. The choices are U (Update) or A (Audit). Update causes the Batch Process to run. Audit allows you to view the results without running the Batch process or updating the Student Record(s).
6. Press **Next Block** to move to the Submission block.
7. To save the parameter set for use again in future queries you can fill in the name and description fields, and click on the check box for Save Parameter Set as.
8. Click on the **Save** icon.
9. Click on the **Exit** icon.
10. To confirm that the Batch process did run, access the Mass Entry Audit form (SOAMAUD), and navigate to the Audit file associated with the Batch ID you just processed. You can then review the **Results** tab to note the results of the Batch process.

Mass Entry Purge Audit

Overview

Audit tables may be very large, and you may wish to remove them after the processing is complete and the audit confirms the results. Records can be selected for deletion based on mass entry form, user ID, from and to dates, delete option (update status to be deleted), or batch process ID. The update status can be:

- All completed updates
- Failed updates
- Incomplete updates
- No updates
- Partial updates
- Successful updates.

The process can be run in Audit Mode or Update Mode, and can show summary, detail or totals information.

Banner form

The screenshot shows a web-based form titled "Process Submission Controls QJAPCTL 8.0 (s7s80)". The form is divided into several sections:

- Process:** SOPMAUD (dropdown), Purge Mass Entry Audit (text field), Parameter Set: (dropdown)
- Printer Control:** Printer: DATABASE (dropdown), Special Print: (text field), Lines: 55 (text field), Submit Time: (text field)
- Parameter Values:** A table with columns for Number, Parameters, and Values.

Number	Parameters	Values
01	Form Name	SHAMDEG
02	User ID	
03	Add Date From	
04	Add Date To	
05	Delete Option	A
06	Run Mode	A
07	Report Option	A
08	Batch Process ID	SYSTEM18MDEG000007
- Submission:** Save Parameter Set as, Name: (text field), Description: (text field), Hold, Submit

Additional text below the Parameter Values table: LENGTH: 30 TYPE: Character O/R: Optional M/S: Single Generated Batch Identifier created if update was held for Job Submission.

Steps

Follow these steps to purge the Audit file you created earlier.

1. Access the Purge Mass Entry Audit form (SOPMAUD).
2. Press on **Next Block** to access the parameter values.
3. The form name is required. In this case, enter SGAMSTU.
4. Enter the Batch ID, if you created one when you executed SGAMSTU. You can also enter other parameters that will further narrow the list of sessions returned to you, such as your User ID or the Add Dates.
5. When the selected file is displayed, you can choose to select individual records for deletion, or you can Select All for deletion. Follow your instructor's directions as to which records to delete.
6. Click on the **Save** icon.
7. Click on the **Exit** icon.

Summary

Let's review

As a result of completing this workbook, you have

- created a general student record
- changed a major and added a minor
- processed a leave of absence request
- entered veteran information
- added or changed advisor information
- entered additional student information
- entered cooperative education information
- created Communication Plan information
- viewed a student's information
- added and maintained a sports record
- maintained and monitored Right to Know reporting
- entered disability information
- entered EOPS information
- maintained required information
- performed purge processes
- performed mass entry of student records
- performed batch processing of mass entered student records
- audited mass entry records
- purged mass entry record audit.

Self Check

Directions

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

Question 1

What are the two forms you can use to create a student record?

Question 2

On SAAQUIK, which window do you access to add a student's major?

Question 3

What window on the General Student Form (SGASTDN) do you access to add or change a major?

Question 4

What other type of information can be entered on the Miscellaneous Student Information window?

Question 5

What form is used to enter veteran information?

Question 6

On the Multiple Advisors Form (SGAADVR), on which block is information returned to after an advisor is selected?

Question 7

What are the two ways that cohorts and attributes can be added to a student's record?

Question 8

Does an employer have to exist in the Banner system before you can add cooperative education information for a student?

Question 9

What are the validation forms are used with the Student Sport Form (SGASPRT)?

Question 10

What purge process do you run for a student who never registered?

Answer Key for Self Check

Question 1

What are the two forms you can use to create a student record?

Admissions Decision Form (SAADCRV)

Quick Entry Form (SAAQUIK)

Question 2

On SAAQUIK, which window do you access to add a student's major?

Curricula window

Question 3

What window on the General Student Form (SGASTDN) do you access to add or change a major?

Curricula window

Question 4

What other type of information can be entered on the Miscellaneous Student Information window?

Practical training

Question 5

What form is used to enter veteran information?

Veteran Information Form (SGASTDN)

Question 6

On the Multiple Advisors Form (SGAADVR), on which block is information returned to after an advisor is selected?

Advisor Information block

Question 7

What are the two ways that cohorts and attributes can be added to a student's record?

- **Created manually on the Additional Student Information Form (SGASADD)**
- **Rolled from the Admissions module when creating the student record**

Question 8

Does an employer have to exist in the Banner system before you can add cooperative education information for a student?

No. You can add an employer on the Employer Code Validation Form (STVEMPL).

Question 9

What validation forms are used with the Student Sport Form (SGASPRT)?

Student Activity Code Validation Form (STVACTC)

Sports Status Code Validation Form (STVSPST)

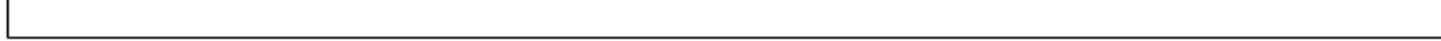
Eligibility Code Validation Form (STVELIG)

Question 10

What purge process do you run for a student who never registered?

The General Student Purge (SGPSTDN)

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
SAADCRV	Admissions Decision	enter decisions for an admissions application.
SAAQUIK	Quick Entry	quickly enter and register persons on the system.
SGAADVR	Multiple Advisors	associate student with multiple advisors. Also allows a view of student's advisors for an effective term range.
SGACLSR	Student Classification Rules	establish and maintain the academic classification rules based on the range of hours entered and user-defined student attributes. Requires STVCLAS, STVLEVL and STVATTR be established prior to creating this form.
SGACOOB	Cooperative Education	maintain data relating to student's cooperative education positions, including employer information and comments on duties involved.
SGADISA	Student Disability Services	capture information about disabilities, as well as services provided for those disabilities, for a student on a term-by-term basis.
SGAEOPS	Education Opportunity Programs and Services	record and monitor the EOPS information for a student based on an effective term.
SGAMSTU	General Student Mass Entry	create and/or update General Student records for the effective term. Requires SGASTDN for each ID selected.

Form	Full Name	Use this Form to...
SGASADD	Additional Student Information	maintain cohort codes and attributes assigned to student by effective term. May be created manually or by rolling from the Admissions module on creation of student record.
SGASPRT	Student Sport	assign sport codes by term to a student. Track students by sport code, status code, eligibility code and term. Uses STVACTC, STVSPST and STVELIG.
SGASTDN	General Student	maintain current and historical information about a student.
SGASTDQ	General Student Summary	display all general student records on file for the specified term(s) for the student identified in the Key Information.
SGAUSDF	Institutional Reporting Requirements	maintain information about students which is specifically required by the institution on a term-by-term basis.
SGPHOLD	Hold Purge Process	purge all expired holds based on the user-specified parameters of expiration date, activity date and hold type.
SGPSTDN	General Student Purge Process	purge the general student information for a student who never registered based on the user-specified effective term and activity date.
SGRKNOW	Student Right To Know Report	produce data that will assist your institution in calculating graduation and completion rates by cohort and optionally by sport codes.
SOACOMM	Communication Rules	define the different types of Communication Plans as applied to campus, level, college and degree, and to define the rules for the automatic assignment of communication plans to people and the processing of the plan.

Form	Full Name	Use this Form to...
SOAFOLK	Guardian Information	establish and maintain information about a student's guardian. Guardian must exist in SPAIDEN first.
SOAMAUD	Mass Entry Audit Form	review mass updates for General Student.
SOPMAUD	Purge Mass Entry Audit	remove Audit table records.
SORMEBP	Mass Entry Batch Update Process	apply mass updates to General Student via batch updates.
SPAIDEN	General Person Identification	add or maintain general person IDs on the system.
STVACTC	Student Activity Code Validation	create, update, insert and delete activity codes, such as Debate Club or ROTC.
STVADVR	Advisor Type Code Validation	create, update, insert and delete advisor type codes for students, such as academic advisor or athletic advisor.
STVAFDC	Student CARE AFDC Duration Validation	create, update, insert and delete CARE AFDC codes. These codes indicate length of time a CARE student has been on AFDC at the time of enrollment for the current term.
STVASTD	Academic Standing Code Validation	create, update, insert and delete academic standing codes, such as Good Standing, Deans List or Suspension.
STVATTR	Attribute Validation	create, update, insert and delete degree program codes, such as Affiliated Teaching Requirement, Language Requirement or Writing Intensive Requirement.
STVATTS	Student Attribute Code Validation	create, update, insert and delete student attribute codes, such as First Year Student, Achieved Senior Standing or Non-degree Student.

Form	Full Name	Use this Form to...
STVBLCK	Block Code Validation	create, update, insert and delete block codes which are used in Block Scheduling processing. Represent sets or groupings of class sections.
STVCAMP	Campus Code Validation	create, update, insert and delete campus codes, such as Main Campus or Downtown Campus.
STVCAST	Combined Academic Standing Code Validation	create, update, insert and delete combined academic standing codes, which are defined by a combination of an academic standing code and a progress evaluation code.
STVCHRT	Cohort Code Validation	create, update, insert and delete cohort codes used in various modules to track a cohort grouping based on user-defined criteria.
STVCLAS	Class Code Validation	create, update, insert and delete class codes, such as Freshman or First Year Law.
STVCMTT	Comment Type Code Validation	create, update, insert and delete comment types and their respective codes, such as General Comment, Special Needs or Added via ACT Tape.
STVCPLN	Communication Plan Code Validation	create, update, insert and delete communication plan codes used in Recruiting, Admissions and General Student modules.
STVCREA	Cohort Reason Code Validation	create, update, insert and delete cohort reason codes, such as Peace Corps or Military Assignment. Used in conjunction with inactivation of a cohort for an individual to identify the reason for inactivation.

Form	Full Name	Use this Form to...
STVCTYP	Contact Type Code Validation	create, update, insert and delete recruiting contact type codes, such as Campus Visit, College Night or Merit List Letter.
STVDEPS	Student CARE Number of Dependents Validation	create, update, insert and delete codes indicating a CARE student's number of dependent children.
STVDISA	Disability Type Code Validation	create, update, insert and delete disability codes such as Blind, Multiple Sclerosis or Hearing Impaired.
STVDLEV	Degree Level Code Validation	create, update, insert and delete degree level codes, such as Associate, Bachelor, Master, etc.
STVELIG	Eligibility Validation	create, update, insert and delete eligibility codes, used in Student Right to Know tracking by SGASPRT.
STVEMPL	Employer Code Validation	maintain employer codes which represent employer's name, address and phone number.
STVEOPS	Education Opportunity Prog/Serv Status Validation	create, update, insert and delete EOPS status codes, such as No Service, Student Eligible or Student Not Eligible. Used by SGAEOPS.
STVESEL	Eligibility Factor Validation	create, update, insert and delete eligibility factor codes, such as Did Not Graduate HS NO GED, Financial Consideration or HS GPA below 2.5. Used by SGAEOPS.
STVLEVL	Level Code Validation	create, update, insert and delete level codes, such as No Level Declared, Undergraduate or Non-matriculated Graduate.
STVMARS	Student CARE Marital Status Validation	create, update, insert and delete codes which indicate marital status of a CARE student.

Form	Full Name	Use this Form to...
STVMEDI	Medical Code Validation	create, update, insert and delete medical codes, such as Blind, Deaf, or Prosthetic Limb. Used by GOAMEDI.
STVORIG	Originator Code Validation	create, update, insert and delete originator codes, such as Bursar's Office, Student Accounts or Dean of Students.
STVPREV	Progress Evaluation Code Validation	create and define valid progress evaluation codes.
STVRSLT	Appointment Result Code Validation	create, update, insert and delete appointment result codes, such as Attended Interview, Did not Attend, or Late to Interview.
STVSEPR	Services Provided Validation	create, update, insert and delete support services provided codes, such as Services Accepted, Services Provided, or Services Rejected.
STVSFAE	State F/A Eligibility Validation	create, update, insert and delete State F/A Eligibility codes, such as AFDC Recipient Status or SSI Recipient Status.
STVSPRV	Service Provider Validation	create, update, insert and delete the service provider codes, such as Training Center, Counseling Center or Learning Center.
STVSPSR	Disability Service Code Validation	create, update, insert and delete disability service codes, such as County Paratransit Service, Hearing Aid Required or Disabled Student Services. Used by GOAMEDI.
STVSPST	Sport Status Code Validation	create, update, insert and delete sport status codes. Used by SGASPRT.
STVSSER	Service Code Validation	create, update, insert and delete service codes, such as Day Care, Career Planning or Transportation.

Form	Full Name	Use this Form to...
STVSSRS	Service Result Validation	create, update, insert and delete student service result codes, such as Promotion Obtained, Job Obtained or Goal Not Met.
STVSSST	Services Status Validation	create, update, insert and delete services status codes, such as In Progress, Service Refused or Referred to Provider.
STVSTST	Student Status Code Validation	create, update, insert and delete student status codes, such as Active, Withdrawn, Inactive Due to Graduation.
STVSTYP	Student Type Code Validation	create, update, insert and delete student type codes, such as Returning Freshman, Continuing, Transfer. Specific student type codes are required for IPEDS reporting.
STVSUDA (through STVSUDJ)	Student Element One (through Ten) Validation	create, update, insert and delete institutional reporting data elements specific to an institution's needs for state or local reporting for a student. See SGAUSDF.
STVTRAC	Acceptance Reason Validation	create, update, insert and delete an EOPS Reason for Acceptance code, such as Accept Basis: Essay, Accept Basis: Financial Need or Eligibility Demonstrated.
STVVETC	Veteran Type Code Validation	create, update, insert and delete veteran type codes, such as Chapter 32 Post Vietnam Vet, Other Veteran or ROTC. Used by SGASTDN.
STVWTHD	Student EOPS/CARE Withdrawal Reason Validation	create, update, insert and delete codes which indicate reason for student's withdrawal from EOPS and/or CARE programs for the following term, such as Lack of Resources, Family Problems or Discontinued (Academic Reasons).

Terminology

Combined Academic Standing

This user defined code is a combination of an academic standing code and a progress evaluation code.

Cohort

A member of a group of students who have similar characteristics such as starting a program at the same time

Communication Plan

A set of rules designed to implement an institution's preferences regarding who should receive which materials and when those materials should be sent. Materials can be generated (letter or label) or published (department brochures).

Example: All accepted high school students who apply for admissions into the Education program receive a letter acknowledging acceptance into both the university and the Education program. However, all accepted high school students who apply for admissions into the Nursing program receive a letter acknowledging acceptance into just the university and instructions for next steps on how to apply at a later time to the Nursing program. Prospective nursing students also receive a Nursing program brochure along with their acceptance letter into the university.

EOPS

Education Opportunity Programs and Services.

Student Right to Know Act

This legislation requires that an institution of higher education annually disclose information about its student body's completion and graduation rates.

For more information, refer to *Maintaining and Monitoring Student Right to Know Reporting* in *Section: Day-to-Day Operations* of this training workbook.