

Banner Student Transfer Articulation Training Workbook

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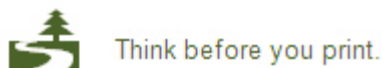


Table of Contents

| | |
|--|-----------|
| Introduction | 4 |
| Process Introduction..... | 6 |
| Set Up | 9 |
| Validation Forms That Control Transfer Articulation | 10 |
| Acceptance Code Validation | 11 |
| Calendar Type Validation | 12 |
| Source/Background Institution Code Validation | 13 |
| Transfer Level Code Validation | 15 |
| Institutional Accreditation Status Validation..... | 17 |
| Highest Level of Work Code Validation..... | 18 |
| Program Accreditation Code Validation | 19 |
| Acceptance Authority Code Validation | 20 |
| Transfer Articulation Course Status Validation | 21 |
| Self Check..... | 22 |
| Answer Key for Self Check | 23 |
| Day-to-Day Operations | 24 |
| Process Introduction..... | 25 |
| Creating a Transfer Articulation Agreement..... | 27 |
| Defining Transfer Grades | 31 |
| Transferring Courses | 34 |
| Creating Transfer Organization Equivalency Information | 38 |
| Associating a Transfer Institution with a Student | 42 |
| Associating Courses with a Student's Record | 45 |
| Transfer Catalog Data Import Process | 48 |
| Summary | 52 |
| Self Check..... | 53 |
| Answer Key for Self Check | 55 |
| Appendix..... | 57 |
| Forms Job Aid | 58 |
| Terminology..... | 59 |

Introduction



Course goal

This course is intended to teach you to identify key forms, tables, and reports in the Banner System. In addition, you will learn to follow key processes and query tables. The workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-day operations
- Reference

Course objectives

In this course you will learn how to

- complete validation forms needed for Transfer Articulation
- create a transfer articulation institution
- define transfer grades
- transfer courses
- create transfer organization equivalency information
- associate transfer articulated courses to students
- roll equivalent courses to academic history.

Intended audience

Registrar and/or admissions offices staff, as well as staff members who interface with these offices for the purpose of accomplishing Transfer Articulation

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
- administrative rights to create and perform the necessary set up in Banner

Process Introduction

Introduction

The Transfer Articulation process of Banner Student allows an institution to pre-define targeted transfer institutions' articulated courses with their institutional equivalencies. This will make transfer credit processing for a student easier. In addition, transfer institutions that are not articulated can easily be defined and transfer courses and equivalencies built during the processing of the student's transfer evaluation.

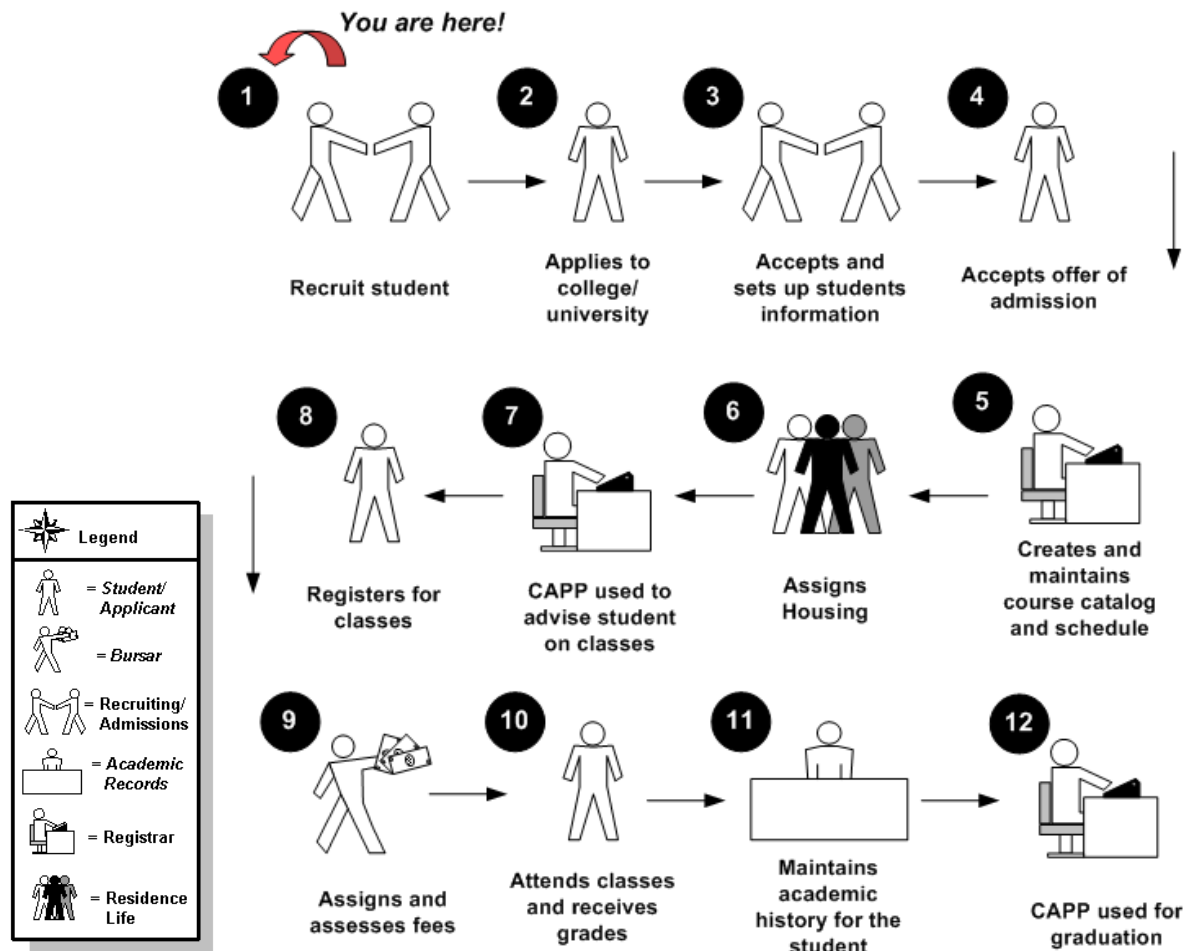
People who are entered in Banner can have transfer work processed without having to be a recruit, admit or a student. Transfer courses can have GPAs calculated, if appropriate. Transfer institution equivalency information can be printed as a transfer catalog as well.

Before a student's transfer work is rolled to history, thereby printable on a transcript, a transfer worksheet can be printed and reviewed.

If an institution articulates courses based on a program, transfer courses can be articulated specifically to a program.

Flow diagram

This diagram highlights the processes used to enter prospective students into the Banner System within the overall Student process.



About the process

- Rule and validation forms are set up on the Banner System. Unless a new code is required, this step is performed only once.
- Transfer institutions and their grade schemes must be defined prior to articulating courses.
- Courses can be articulated independently of a person, thus feeder school articulations can be created to facilitate transfer processing for a person.
- A person can have all of his or her transferring institutions evaluated in Banner and coursework can apply towards graduation requirements in CAPP using the equivalencies created in the transfer process. Hours and GPAs can also be calculated for transfer work.

Set Up



Section goal

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner System to handle Transfer Articulation at your institution.

Objectives

In this section you will learn how to complete validation forms needed for Transfer Articulation.

Validation Forms That Control Transfer Articulation

Types of validation forms needed

Before entering any Transfer Articulation information into the system, several validation forms need to be set up or created.

The validation forms listed below play important roles in the Transfer Articulation process.

Note: The forms that are preceded with an asterisk already have the necessary seed data input in the system and need only to be reviewed.

| Form Description | Banner Name |
|--|-------------|
| Acceptance Code Validation | STVACPR |
| *Calendar Type Validation | STVCALD |
| *Source/Background Institution Code Validation | STVSBGI |
| *Transfer Level Code Validation | STVTLVL |
| Institutional Accreditation Status Validation | STVACST |
| Highest Level of Work Code Validation | STVHLWK |
| Program Accreditation Code Validation | STVPRGA |
| Acceptance Authority Code Validation | STVTAAU |
| Transfer Articulation Course Status Validation | STVTAST |

Acceptance Code Validation

Purpose

The Acceptance Code Validation Form (STVACPR) is used to create and maintain the codes used to indicate the organization's practice of accepting credit from the transferring organization.

Banner Form

| Code | Description | Activity Date |
|------|--------------------------------|---------------|
| AG | Credit generally accepted | 04-JAN-1991 |
| AP | Credit accepted provisionally | 04-JAN-1991 |
| N | Credit not ordinarily accepted | 04-JAN-1991 |
| NP | No policy determined | 04-JAN-1991 |
| | | |
| | | |
| | | |
| | | |

Steps

Follow these steps to complete the process.

1. Access the Acceptance Code Validation Form (STVACPR).
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.

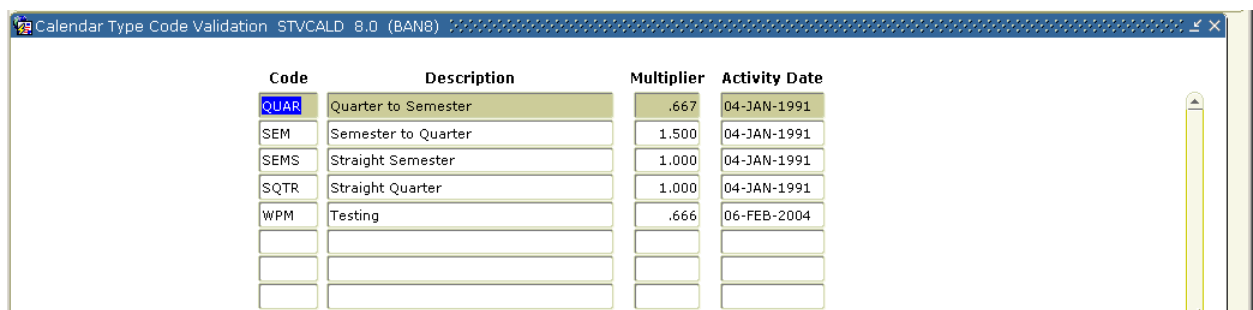
Calendar Type Validation

Purpose

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another. It allows you to convert different credit hour values for organizations with different calendar types.

Note: You only need to review this form, as all of the calendar type data that you need is in the seed data.

Banner Form



| Code | Description | Multiplier | Activity Date |
|------|---------------------|------------|---------------|
| QUAR | Quarter to Semester | .667 | 04-JAN-1991 |
| SEM | Semester to Quarter | 1.500 | 04-JAN-1991 |
| SEMS | Straight Semester | 1.000 | 04-JAN-1991 |
| SQTR | Straight Quarter | 1.000 | 04-JAN-1991 |
| WPM | Testing | .666 | 06-FEB-2004 |
| | | | |
| | | | |
| | | | |

Steps

Follow these steps to complete the process.

1. Access the Calendar Type Validation Form (STVCALD).
2. Review the system-provided data.
3. Click the **Exit** icon.

Source/Background Institution Code Validation

Purpose

The Source/Background Institution Code Validation Form (STVSBGI) is used to create, update, insert, and delete source/background institution codes. Several other modules use this form to validate these codes.

Note: This form already has the necessary seed data input in the system and only needs to be reviewed. If a new institution needs to be added, follow the procedure shown below.

Banner Form

| Source or Background Institution | Description | Type | Source Indicator | Admissions Request | Electronic | FICE | Voice Response Message Number |
|----------------------------------|-------------|------|--------------------------|--------------------------|------------|------|-------------------------------|
| | | | <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 complete the process.

1. Access the Source/Background Institution Code Validation Form (STVSBGI).
2. Perform an **Execute Query** function.
3. Review the data.

Note: If you do not need to add an institution, you can click the **Exit** icon now.

4. Perform an **Insert Record** function.
5. Enter a code in the **Source/Background Institution** field.

Example: For practice, enter your initials.

6. Enter a description of the code in the **Description** field.
7. Enter *C* (for college) in the **Type** field.
8. Click the **Source Indicator** checkbox if the institution is a recruiting source.
9. Select *CLT1* (College Transcript) in the **Admissions Request** field to add this items to the admissions checklist.
10. Enter *P* (PESC/XML), *E* (EDI), or *N* or *Null* (No, print paper transcript) in the **Electronic** field to indicate whether the institution can receive electronic transcripts or not, and if so, whether they should be sent in EDI or XML format.
11. Enter a number in the **FICE** field.

Note: The FICE field is used for the Federal Interagency Commission on Education (FICE) Number assigned to each institution. If the FICE code is used as the Source/Background Institution Code, it does not need to be entered in the FICE field. A valid FICE code is required to send transcripts electronically via EDI to those institutions which are capable of receiving them. If a value exists in the FICE field, then this number will be used in the EDI process.

12. Enter a number in the **Voice Response Message Number** field to assign a number to the recorded message that describes the source/background institution code for telephone applications.
13. Click the **Save** icon.
14. Click the **Exit** icon.

Transfer Level Code Validation

Purpose

The Transfer Level Code Validation Form (STVTLVL) is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations. It is recommended that levels here be identical to the levels created on the Level Code Validation Form (STVLEVL).

Note: You only need to review this form, as all of the transfer level code validation data that you need is in the seed data.

Banner Form

| Code | Description | Activity Date |
|------|------------------------------|---------------|
| 01 | Undergraduate | 04-JAN-1991 |
| 02 | Graduate | 04-JAN-1991 |
| 03 | Adult Education | 04-JAN-1991 |
| 04 | First Professional | 04-JAN-1991 |
| 05 | CEU Test | 07-APR-2003 |
| AD | Adult Education/Life Learner | 07-JUL-2003 |
| AP | Apprentice | 08-AUG-2003 |
| BB | Transfer Level Graduate | 13-MAY-2003 |
| BH | Bettys transfer level | 26-DEC-2002 |
| GR | Graduate Quarter | 07-MAY-1999 |
| GS | Graduate Semester | 07-MAY-1999 |
| LW | College of Law | 03-APR-2003 |
| MT | Marian's Transfer UG | 30-NOV-2001 |
| MV | Marian's UG level | 20-AUG-2002 |
| UG | Undergraduate Quarter | 07-MAY-1999 |
| US | Undergraduate Semester | 07-MAY-1999 |
| YY | Why Not Level | 18-DEC-2002 |
| ZZ | Any Level You Want | 05-AUG-2002 |
| | | |
| | | |
| | | |
| | | |
| | | |

Transfer level code.
Record: 1/18 | | ... | | <OSC>

Steps

Follow these steps to complete the process.

1. Access the Transfer Level Code Validation Form (STVTLVL).
2. Review the system-provided data.
3. Click the **Exit** icon.

Institutional Accreditation Status Validation

Purpose

The Institutional Accreditation Status Validation Form (STVACST) is used to create and maintain the codes used to indicate the transferring organization's accreditation status.

Banner Form

| Code | Description | Activity Date |
|------|--------------------------------|---------------|
| C | Candidate of Accreditation | 04-JAN-1991 |
| IC | Assoc. of Independent Colleges | 04-JAN-1991 |
| MS | Middle States Assoc. of C & S | 04-JAN-1991 |
| NE | New England Assoc. of C & S | 04-JAN-1991 |
| SA | Southern Assoc. of C & S | 04-JAN-1991 |
| WA | Western Assoc. of C & S | 04-JAN-1991 |
| | | |
| | | |
| | | |

Steps

Follow these steps to complete the process.

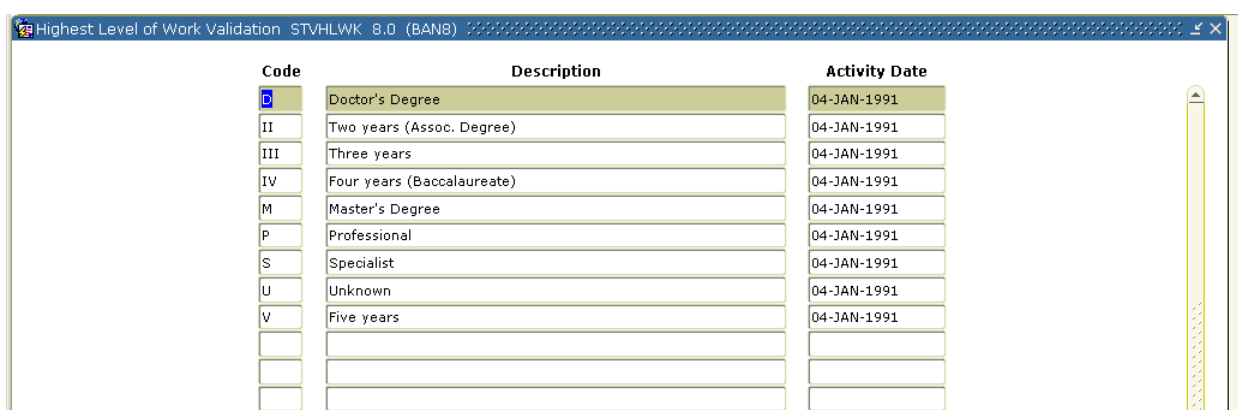
1. Access the Institutional Accreditation Status Validation Form (STVACST).
2. Enter up to a three-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Highest Level of Work Code Validation

Purpose

The Highest Level of Work Code Validation Form (STVHLWK) is used to create and maintain the codes used to indicate the highest level of work offered by the organization. An example of this may be First Professional Degree.

Banner Form



The screenshot shows a web-based form titled "Highest Level of Work Validation STVHLWK 8.0 (BAN8)". It contains a table with three columns: "Code", "Description", and "Activity Date". The table has several rows, with the first row highlighted in yellow. The first row contains the code "D", the description "Doctor's Degree", and the activity date "04-JAN-1991". The other rows contain codes II, III, IV, M, P, S, U, and V, with corresponding descriptions and activity dates. The table is scrollable, as indicated by the vertical scrollbar on the right.

| Code | Description | Activity Date |
|------|----------------------------|---------------|
| D | Doctor's Degree | 04-JAN-1991 |
| II | Two years (Assoc. Degree) | 04-JAN-1991 |
| III | Three years | 04-JAN-1991 |
| IV | Four years (Baccalaureate) | 04-JAN-1991 |
| M | Master's Degree | 04-JAN-1991 |
| P | Professional | 04-JAN-1991 |
| S | Specialist | 04-JAN-1991 |
| U | Unknown | 04-JAN-1991 |
| V | Five years | 04-JAN-1991 |
| | | |
| | | |
| | | |

Steps

Follow these steps to complete the process.

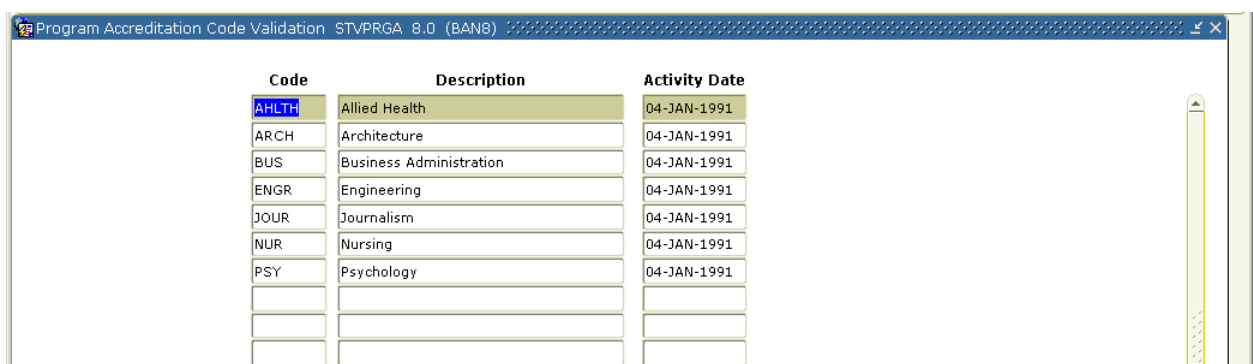
1. Access the Highest Level of Work Code Validation Form (STVHLWK).
2. Enter up to a three-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Program Accreditation Code Validation

Purpose

The Program Accreditation Code Validation Form (STVPRGA) is used to create and maintain the codes used to indicate the programmatic accreditation offered by an organization.

Banner Form



| Code | Description | Activity Date |
|-------|-------------------------|---------------|
| AHLTH | Allied Health | 04-JAN-1991 |
| ARCH | Architecture | 04-JAN-1991 |
| BUS | Business Administration | 04-JAN-1991 |
| ENGR | Engineering | 04-JAN-1991 |
| JOUR | Journalism | 04-JAN-1991 |
| NUR | Nursing | 04-JAN-1991 |
| PSY | Psychology | 04-JAN-1991 |
| | | |
| | | |
| | | |

Steps

Follow these steps to complete the process.

1. Access the Program Accreditation Code Validation Form (STVPRGA).
2. Enter up to an eight-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.

Acceptance Authority Code Validation

Purpose

The Acceptance Authority Code Validation Form (STVTAAU) is used to create and maintain the codes used to indicate those persons or positions that have the authority to accept transfer courses from other organizations.

Banner Form

| Code | Description | Activity Date |
|------|-------------------------------|---------------|
| ACS | Director of Academic Services | 04-JAN-1991 |
| ADM | Director of Admissions | 04-JAN-1991 |
| DEA | Office of the Deans | 04-JAN-1991 |
| OAA | Office of Academic Affairs | 04-JAN-1991 |
| REG | Office of the Registrar | 04-JAN-1991 |
| | | |
| | | |
| | | |

Steps

Follow these steps to complete the process.

1. Access the Acceptance Authority Code Validation Form (STVTAAU).
2. Enter up to a three-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.

Transfer Articulation Course Status Validation

Purpose

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that indicate whether the transfer course is active or inactive. Multiple active and inactive course statuses may be used.

Banner Form

| Code | Description | Status Indicator | Activity Date |
|------|------------------------|-------------------------------------|---------------|
| AC | Active Course | <input checked="" type="checkbox"/> | 04-JAN-1991 |
| IN | Inactive | <input type="checkbox"/> | 04-JAN-1991 |
| PN | Pending Deans Approval | <input type="checkbox"/> | 04-JAN-1991 |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |

Steps

Follow these steps to complete the process.

1. Access the Acceptance Authority Code Validation Form (STVTAAU).
2. Enter a two-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Status Indicator** checkbox if this is an active course type.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Self Check

Directions

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

Question 1

Which forms necessary for Transfer Articulation have seed data already input in the system?

Question 2

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another.

True or False

Question 3

Which form is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?

Question 4

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that

- A. indicate the organization's practice of accepting credit from the transferring organization.
- B. indicate whether the transfer course is active or inactive.
- C. indicate the programmatic accreditation offered by an organization.

Answer Key for Self Check

Question 1

Which forms necessary for Transfer Articulation have seed data already input in the system?

- **The Calendar Type Validation Form (STVCALD)**
- **The Source/Background Institution Code Validation Form (STVSBGI)**
- **The Transfer Level Code Validation Form (STVTLVL)**

Question 2

The Calendar Type Validation Form (STVCALD) enables you to build the multiplier that will be used when it is necessary to convert from one type of calendar to another. (True or False)

True

Question 3

Which form is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?

The Transfer Level Code Validation Form (STVTLVL) is used to create and maintain the codes used to indicate the level of transfer courses to be articulated from other organizations?

Question 4

The Transfer Articulation Course Status Validation Form (STVTAST) is used to create and maintain the codes that

- A. indicate the organization's practice of accepting credit from the transferring organization.
- B. indicate whether the transfer course is active or inactive.**
- C. indicate the programmatic accreditation offered by an organization.

Day-to-Day Operations



Section goals

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

Objectives

In this section you will learn how to

- create a transfer articulation institution
- define transfer grades
- transfer courses
- create transfer organization equivalency information
- associate transfer articulated courses to students
- roll equivalent courses to academic history.

Process Introduction

About the process

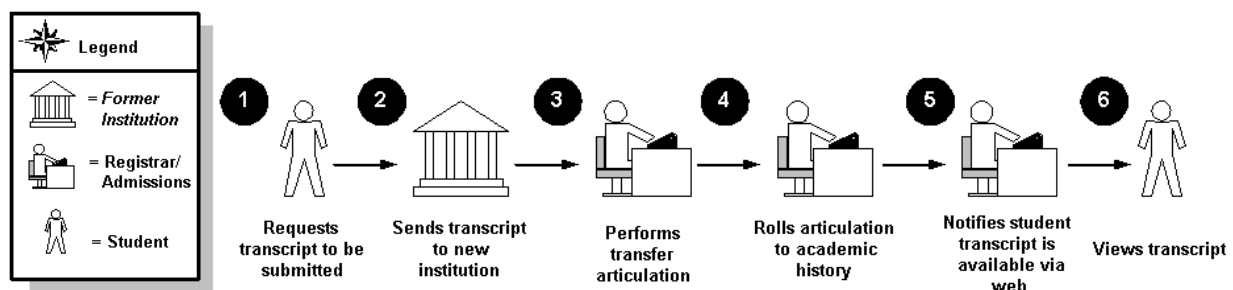
People attending or planning on attending the institution request transcripts sent from former institutions.

Registrar/Admissions offices process the Transfer Articulation for a person.

Once the information has been rolled to academic history, the person can be informed to view it on the self service transcript.

Flow diagram

This diagram represents a day-to-day perspective of the Transfer Articulation process.



What happens

The stages of the process are described in this table

| Stage | Description |
|-----------------------------|--|
| Student | |
| 1 | Requests transcripts to be submitted |
| Former Institution | |
| 2 | Sends transcript to new institution |
| Registrar/Admissions | |
| 3 | Performs Transfer Articulation |
| 4 | Rolls articulation to Academic History |
| 5 | Notifies student transcript is available via web |
| Student | |
| 6 | Views transcript |

Creating a Transfer Articulation Agreement

Background

The Transfer Articulation Institution Form (SOABGTA) maintains all the information about the transfer institution based on effective term. 'From' and 'to' terms are provided on all sections of the form so that the data is maintained as it changes over time. This is handled in the same manner as the effective terms in the catalog module.

For example, if the calendar type of an institution changes from semester to quarter in 2001, then a record for 2000 indicating a semester calendar type and a record for 2001 indicating a quarter calendar type can be created. This allows all courses being presented for transfer in 2000 to be articulated under a semester calendar and all courses being presented for transfer in 2001 to be articulated under a quarter calendar.

The transfer level information is important to the Transfer Articulation process. This section maintains the valid levels of work that will be presented for transfer from the sending institution. This level is used in establishing the valid grades and the way that the grades should be handled in transfer GPA calculations. Again, this section contains a 'from' and 'to' term to maintain changes over time.

Transfer organization information can be built for either a college or a high school. The transfer organization must be established on the Source/Background Institution Validation Form (STVSBGI) before building data on the Transfer Articulation Institution Form (SOABGTA). Valid transfer levels must be established on this form before creating the valid transfer grades on the Transfer Grade Code Maintenance Form (SHATGRD).

Purpose

The Transfer Articulation Institution Form (SOABGTA) is used to capture and maintain information pertaining to the transfer institution and its articulation practices, calendar type, transfer levels, and any comment information. The key to the form is the institution code and the effective term associated with the transfer information.

Banner Form

Transfer Articulation Institution SOABGTA 8.0 (BAN8)

Institution: 000030 Morris Brown College Term: 200710

General Information

From Term: 199801 Maintenance To Term: 999999

Highest Degree Level Offered: III Three years

Acceptance Practice:

Calendar Type and Multiplier: QUAR Quarter to Semester .667

Acceptance Authority: ACS Director of Academic Services

Reported By:

Transfer Levels

From Term: 199801 Maintenance To Term: 999999

| Level | Description |
|-------|-----------------------|
| 01 | Undergraduate |
| UG | Undergraduate Quarter |
| | |
| | |

Highest degree level offered; press LIST for valid codes.

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

Steps

Follow these steps to complete the process.

1. Access the Transfer Articulation Institution Form (SOABGTA).
2. Select an institution in the **Institution** field.
3. Enter the beginning of time (000000) for the term in the **Term** field.
4. Perform a **Next Block** function.

Result: The **From Term** and **To Terms** will default.

5. Select a value in the **Highest Degree Offered** field.
6. Select a value in the **Acceptance Practice** field.
7. Select a value in the **Calendar Type and Multiplier** field.
8. Select a value in the **Acceptance Authority** field.
9. Select a value in the **Level** field.
10. Repeat step 9 as needed to enter all levels of work the institution will accept.

11. Perform a **Next Block** function.

Result: The Institution Accreditation window opens.

Transfer Articulation Institution SOABGTA 8.0 (BAN8)

Institution: 000030 Morris Brown College Term: 200710

Institution Accreditation SOABGTA 8.0 (BAN8)

From Term: 199801 Maintenance To Term: 999999

Accreditation Description Institution Accreditation Date

C Candidate of Accreditation

From Term: 199801 Maintenance To Term: 999999

Program Accreditation Description

ENGR Engineering

Comments

From Term: 199801 Maintenance To Term: 999999

sssss

Institution accreditation code; press LIST for valid codes.

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

12. Select a value in the **Accreditation** field.

13. Enter a date in the **Institution Accreditation Date** field.

14. Repeat steps 12 and 13 to enter all accreditations for the institution.

15. Select a value in the **Program Accreditation** field.

16. Repeat step 15 as needed to identify all accredited programs.

17. Enter any comments regarding the institution in the **Comments** field.

18. Click the **Save** icon.

19. Click the **Exit** icon.

Defining Transfer Grades

Purpose

The Transfer Grade Code Maintenance Form (SHATGRD) is designed to capture and maintain all the transfer institution's grading symbols and associated quality points. In addition, this form permits the end user to provide the rules governing which hours (e.g., earned, GPA) are affected by the specific grade symbol. The grade codes are stored by level within the institution. If an institution does not compute transfer GPA, quality points and count in GPA are not entered.

Grading scheme

A grading scheme must be created for each transfer institution. The grading scheme is the valid set of grades that the sending school uses when grading its courses. To ease the data entry process, a **Default Institution** field has been added to the Key Information of the Transfer Grade Code Maintenance Form (SHATGRD). This allows the grades from a predefined default institution (not a real school) to be copied to another school via the transfer institution code.

Example: The default institution plus/minus is set up with a plus/minus grading scheme (A, A-, B-, B, etc.) that has been created on SHATGRD. Now the University of ABC is being created, and they have the same grading scheme. The transfer institution code from the Source Background Institution Validation Form (STVSBGI) for default institution plus/minus would be entered as the default institution when creating the grades for University of ABC. Then any adjustments, deletions, or additions that may need to be made can be done on the form.

Count in

The **Count in** fields provided on SHATGRD is used to define each grade for the transfer institution. The **Institution Grade** and (Grading) **Mode** fields are used for performing an automatic grade code conversion when articulating the transfer work.

Example: Some schools convert all grades during the articulation process to a standard transfer grade such as **TR** with a grade mode of T, regardless of what grade the student received at the sending school. The **Numeric Value** field is used to determine and calculate the minimum grade criteria when articulating courses.

Banner form

Transfer Grade Code Maintenance SHATGRD 8.0 (BAN8)

Institution: Morris Brown College Default Institution:

| Transfer Grade | Effective Term <input type="button" value="v"/> | Level <input type="button" value="v"/> | Abbreviation | Status Ind | Quality Points | -----Count In----- Attempted Passed Earned | GPA | Numeric Value | Institution Grade <input type="button" value="v"/> | Mode <input type="button" value="v"/> |
|----------------------|---|---|----------------------|----------------------|----------------------|--|----------------------|----------------------|--|--|
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| <input type="text"/> | <input type="text"/> | <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 define grades that will be transferred from the other institution.

1. Access the Transfer Grade Code Maintenance Form (SHATGRD).
2. Enter the institution in the **Institution** field.
3. Enter in a transfer grade code in the **Transfer Grade** field.
4. Select the term this transfer grade became effective in the **Effective Term** field.

Note: You can select a specific term or use the beginning of time (000000).
5. Enter a level code in the **Level** field.
6. Enter a grade abbreviation in the **Abbreviation** field.

7. Enter *A* for active or *I* for inactive in the **Status Indicator** field.

8. Enter a number in the **Quality Points** field.

Note: If your institution will not compute transfer GPAs, you will not enter quality points or GPA fields.

9. Enter an *N* for no or *Y* for yes in the **Count In Attempted** field.

10. Enter an *N* for no or *Y* for yes in the **Count In Passed** field.

11. Enter an *N* for no or *Y* for yes in the **Count In Earned** field.

12. Enter an *N* for no or *Y* for yes in the **Count In GPA** field.

13. Enter a numeric value associated with this grade in the **Numeric Value** field.

14. Enter your institution's grade in the **Institution Grade** field.

| IF... | THEN... |
|---|--------------------------|
| actual grades are to be viewed for the transfer courses | enter the actual grades. |
| all grades will be TR for transfer grade | enter TR. |

15. Enter a grade mode of *T* in the **Grade Mode** field.

16. Click the **Save** icon.

Note: Repeat this process until all of the necessary transfer grades have been entered into the Banner system.

17. Click the **Exit** icon.

Transferring Courses

Purpose

The sending institution's courses may be entered on either the Transfer Institution Catalog Entry Form (SHATATC) or the Transfer Course Articulation Form (SHATATR).

The Transfer Institution Catalog Entry Form (SHATATC) is used to enter and maintain a transfer institution's catalog information. SHATATC allows for the display and maintenance of the sending institution's course catalog that will be used when articulating courses. Because some courses articulate differently for different degree programs, a program code has been provided in the Key Information. Transfer course work may be articulated under a specific program or without a program code. If a program code is used, then the specific course equivalencies associated with the program code will be used in articulation. This allows a course to be articulated differently under different programs. A null (blank) program code indicates this is the default or standard program code that should be used.

If more than one transfer course is required to equate to one or more courses at the institution, a group code is required. One course in the group must be flagged as the primary course of the group.

Banner form

Transfer Institution Catalog Entry SHATATC 8.0 (BAN8_WIN)

Institution: 2125 Delaware County Cmty College Program: Default Institution:

Transferring Course

| Group | Primary | Term | Level | Subject | Course | Status | Title |
|--------------------------|--------------------------|--------|-------|---------|--------|--------|-------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | CS | 250 | AC | BASIC Programming |
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | EN | 101 | AC | Composition |
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | SOC | 200 | AC | Sociology |
| <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"/> | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | | |

Protect From Import: ☐ Select All ☐ Deselect All ☒ None

Course Attributes

| Code | Description |
|------|-------------|
| | |
| | |
| | |
| | |
| | |
| | |

Course Comments

| |
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| |

Course Details

| Equivalent Exists | Credits Low | Credits High | Minimum Grade | Catalog | Protect from Import |
|-------------------------------------|-------------|--------------|---------------|---------|--------------------------|
| <input checked="" type="checkbox"/> | | | | 0000 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | | | | | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | | | | | <input type="checkbox"/> |
| <input type="checkbox"/> | | | | | <input type="checkbox"/> |
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Course Description

Course Description

Transfer Institution Catalog Entry SHATATC 8.0 (BAN8_WIN)

Institution: 2125 Delaware County Cmty College Program: Default Institution:

Transferring Course

| Group | Primary | Term | Level | Subject | Course | Status | Title |
|--------------------------|--------------------------|--------|-------|---------|--------|--------|-------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | CS | 250 | AC | BASIC Programming |
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | EN | 101 | AC | Composition |
| <input type="checkbox"/> | <input type="checkbox"/> | 000000 | 01 | SOC | 200 | AC | Sociology |
| <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"/> | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | | |

Protect From Import: ☐ Select All ☐ Deselect All ☒ None

Course Attributes

| Code | Description |
|------|-------------|
| | |
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Course Comments

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Course Details

Course Description

Course Description

Steps

Follow these steps to enter courses that will be transferred to your institution.

1. Access the Transfer Institution Catalog Entry Form (SHATATC).
2. Enter the name of the institution courses will be transferred from in the **Institution** field.
3. Enter a program code only if you will accept different transfer work based on the program that the student is enrolled in at your institution in the **Program** field. This field will limit which courses are transferred from the **Default Institution**.
4. The **Default Institution** field should be filled in so that you can copy all existing transfer course records associated with the **Default Institution** value into the tables for the Source/Background Institution Code Validation Form (STVSBGI) code entered in the **Institution** field. For a transfer course to be copied, its level code must be valid according to the records in the Transfer Levels block of the Transfer Articulation Institution Form (SOABGTA).
5. Since it cannot be assumed that effective terms for different transfer level codes defined in the Transfer Level block of SOABGTA are the same from institution to institution, transfer level effective terms play an important role in determining the effective term of transfer courses when they are defaulted from one institution to another.
6. Click on the **Next Block** icon to copy the selected course records from the default institution. You are then able to access and update the Transferring Courses block on this form. Note that this block has been divided into sections, and Course Details and Course Description sections are accessed via tabs.
7. Select the term an equivalent exists for in the **Effective Term** field.

Example: *200710*
8. Enter an appropriate level in the **Level** field.
9. Enter a subject in the **Subject** field.

Note: This should be the same code as reflected on the transfer institution's transcript.
10. Enter the course number in the **Course** field.
11. Enter a status code in the **Course Status** field to indicate if this course is active or inactive.

12. Enter a title for the course in the **Title** field.
13. If the **Course Details** tab is not the one on top, click on it.
14. The **Equivalencies Exist** field will default when course equivalencies are added.
15. Enter the lowest and highest (lowest only hours set) hours that will be accepted for the course in the **Credits Low** and **High** fields.
16. Enter the minimum grade that will be transferred in the **Minimum Grade** field.

Note: This grade must be defined on SHATGRD.

17. Enter a catalog reference for the institution in the **Catalog** field.
18. Note the **Protect from Import** checkbox. If selected, this checkbox protects the selected record from being updated by the Transfer Catalog Data Import Process (SHRTCIM). You may wish to run SHRTCIM in Audit Mode to review the transfer course records that will be updated when you run the process in Update Mode. (See the section about this process later in this workbook).

Note: Selecting the Protect from Import checkbox does NOT protect the record from being updated by another person using this form.

19. Click on the **Course Description** tab.
20. Enter a comment in the **Comments** field by clicking on the **Edit** icon and adding the comment in the Edit window.
21. Click on the **Next Block** icon to move to the Course Attributes Block. This block permits users to enter or view course attribute information by code and description. This data can be collected to help in the determination of which courses are institutional equivalents. Because transfer course codes and descriptions exist in another institution's system, they are not validated. Both the course attribute code and a description must be entered.
22. Enter the **Code** (Course attribute code for the transfer course) and the **Description** (the description of the course attribute code for the transfer course).

23. Click the **Save** icon.

24. Perform a **Rollback** function.

Note: Repeat these steps to enter 2 or 3 more courses.

25. Click the **Save** icon.

26. Click the **Exit** icon.

Creating Transfer Organization Equivalency Information

Purpose

Equivalent courses are added and maintained on the Transfer Course Articulation Form (SHATATR). The Transfer Institution Catalog Entry Form (SHATATR) is used to allow for the creation and maintenance of both the transfer course information and the equivalent course data for a transfer institution.

Equivalent courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102. An OR condition is also available so that PSYC 101 may be equivalent to PSYC 110 or BIOL 101. In an OR condition, upon saving the articulation a pop up window will appear displaying and allowing a choice of which course to populate as the equivalency when performing the articulation process. Parenthesis may also be used when creating course equivalencies to group together the appropriate course equivalencies.

Equivalent course comments may be added and maintained for each course in the Institution Course Comments window for any equivalent course on SHATATR. Use a List function from the Subject field in the Equivalent Course section of SHATATR to see the valid subjects and a Count Query Hits function to see existing courses that are in the catalog for the effective term.

Banner form

Transfer Course Articulation SHATATR 8.0 (BAN8_WIN)

Institution: 2125 Delaware County Cmty College Program: Default Institution:

Transferring Course

| Group | Primary | Subject | Course | Title | Term | Equivalent Exists | Level | Status | Minimum Grade | Transferred Credits Low | High | Protect from Import |
|--------------------------|--------------------------|---------|--------|-------------------|--------|----------------------|-------|--------|------------------|----------------------------|------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | CS | 250 | BASIC Programming | 000000 | Yes | 01 | AC | | | | <input type="checkbox"/> |
| Transfer Catalog: 0000 | | | | | | Converted: .000 .000 | | | | | | |

Equivalent Course

| And | Or | Left Parenthesis | Subject | Course | Title | Catalog Low | Catalog High | Credits Used | Right Parenthesis |
|-----------------------|-----------------------|--------------------------|---------|--------|-------------------|-------------|--------------|-----------------|--------------------------|
| * | <input type="radio"/> | <input type="checkbox"/> | TMTH | 105 | Pramming in BASIC | | | 2.000 | <input type="checkbox"/> |
| <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | | | | | | | <input type="checkbox"/> |
| <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | | | | | | | <input type="checkbox"/> |

Equivalent Course Attributes

| Code | Description |
|------|----------------------------|
| UPPR | Upper Division Requirement |
| | |
| | |

Equivalent Course Comments

Additional elective requirement for CORE courses.

Steps

Follow these steps to assign equivalency courses to those courses created in the previous procedure.

1. Access the Transfer Course Articulation Form (SHATATR).
2. Enter the institution you have been working with in the **Institution** field.
3. Enter a program code only if you will accept different transfer work based on the program that the student is enrolled in at your institution in the **Program** field. This field will limit which courses are transferred from the **Default Institution**.
4. The **Default Institution** field should be filled in so that you can copy all existing transfer course records associated with the **Default Institution** value into the tables for the Source/Background Institution Code Validation Form (STVSBGI) code entered in the **Institution** field. For a transfer course to be copied, its level code must be valid according to the records in the Transfer Levels block of the Transfer Articulation Institution Form (SOABGTA).
5. Since it cannot be assumed that effective terms for different transfer level codes defined in the Transfer Level block of SOABGTA are the same from institution to institution, transfer level effective terms play an important role in determining the effective term of transfer courses when they are defaulted from one institution to another.
6. Perform a **Next Block** function.

Note: The courses you added in the Transfer Institution Catalog Entry Form (SHATATC) should display once the organization is selected and a **Next Block** function is performed.

Note: The Transferring Course block displays the courses entered in the previous procedure. Use the scroll bar to view all of them.

7. Perform a **Next Block** function to copy the selected course records from the default institution. You are then able to access and update the Transferring Course block on this form. Note that this block has been divided into sections, and Details, Description and Attributes sections are accessed via tabs. Use these sections to add text for the course by clicking on the Edit icon and entering the text in the Editor window. This data can be collected to help in the determination of which courses are institutional equivalents.
8. If the **Details** tab is not the one on top, click on it.
9. Note the lowest and highest (lowest only hours set) hours that will be accepted for the course in the **Credits Low** and **High** fields.

10. Review the minimum grade that will be transferred in the **Minimum Grade** field.

Note: This grade must be defined on SHATGRD.

11. Note the **Protect from Import** checkbox. If selected, this checkbox protects the selected record from being updated by the Transfer Catalog Data Import Process (SHRTCIM). You may wish to run SHRTCIM in Audit Mode to review the transfer course records that will be updated when you run the process in Update Mode. (See the section about this process later in this workbook).

Note: Selecting the Protect from Import checkbox does NOT protect the record from being updated by another person using this form.

12. Click on the **Description** tab.

13. Enter text in the **Description** field by clicking on the **Edit** icon and adding the description in the Editor window. Data can be loaded into this field using the Transfer Course Import Process (SHRTCIM) or can be entered manually.

14. Click on the **Attributes** tab.

15. This section allows attribute codes and descriptions associated with transfer courses to be stored in the system, so they can be used during the determination of institutional equivalents. Because transfer course codes and descriptions exist in another institution's system, they are not validated. Both the course attribute code and a description must be entered.

16. Enter the **Code** (Course attribute code for the transfer course) and the **Description** (the description of the course attribute code for the transfer course).

17. Select an equivalent course from your catalog for each of the courses in the **Course** field.

18. Click the **Save** icon.

19. Perform a **Previous Block** function.

20. Perform a **Next Record** function to access the next transferring course.

Now repeat steps 5, 6, and 7 above until all equivalencies have been entered and saved.

21. Click the **Exit** icon.

Associating a Transfer Institution with a Student

Purpose

Information about each transfer institution and attendance period is captured using a two-position short hand notation to identify each entry. The attendance periods entered must pertain to a specific student level (e.g., undergraduate, graduate). If a student had taken both graduate and undergraduate course work at the same institution, and you wished to capture this information, it would be necessary to identify two attendance periods: one for the undergraduate work and one for the graduate work. Optionally, the user may define multiple attendance periods relating to the same level if the need arises.

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

The Transfer Course Form (SHATRNS) is used to capture and maintain information relating to transfer institutions for a student.

Banner form

Transfer Course Information SHATRNS 8.0 (BAN8)

ID: Transfer Institution Number:
Attendance Period Number:

Transfer Institution

Institution:
Transcript Receipt Date:
☐ Official

Transfer Attendance Period

Attendance Period:
Acceptance Date:
Effective Term:
Term Type:
Apply to Level:
Transfer Degree:
Attendance Begin Date:
Attendance End Date:

ID number, press LIST for name/ID search.
Record: 1/1 | ... | List of Valu... | <OSC>

Steps

Now that you have created all the necessary Transfer Articulation organization information, you are ready to associate this information with a student.

Follow these steps to complete the evaluation process.

1. Access the Transfer Course Form (SHATRNS).
2. Enter a student's ID in the **ID** field or click the **Search** icon to search for a student.
3. Enter the transfer organization number in the **Transfer Institution Number** field.
4. Enter an attendance period number in the **Attendance Period Number** field.
5. Perform a **Next Block** function.
6. Enter the institution you have been working with in the **Institution** field of the Transfer Institution block.

7. Click the **Official** checkbox if the transcript is official.
8. Click the **Save** icon.
9. Access the Transfer Attendance Period block.
10. Enter a value in the **Attendance Period** field.
11. The **Acceptance Date** field defaults to today's date.
12. Select an appropriate term in the **Effective Term** field.
13. Enter a term type in the **Term Type** field.

Example: Semester or quarter.

14. Select a value in the **Apply to Level** field.

Example: Undergraduate.

15. Select a value in the **Transfer Degree** field if the student has received a degree from the transfer institution.
16. Enter the dates the student began attending the previous institution in the **Attendance Begin Date** field.
17. Enter the dates the student finished attending the previous institution in the **Attendance End Date** field.
18. Click the **Save** icon.
19. Click the **Exit** icon.

Associating Courses with a Student's Record

Purpose

Articulation can be processed for a student for a transfer institution that equates to institutional courses. This is entered on the Transfer Articulation Evaluation Form (SHATAEQ). The Transfer Articulation Evaluation Form (SHATAEQ) is used to allow for the creation and maintenance of the student's Transfer Articulation information for a transfer institution.

Transfer courses do not have to exist on the Transfer Course Articulation Form (SHATATR) to be entered on this form. If the course does not exist on SHATATR, then the user must create the course by searching on the subject flashlight and selecting the define courses option. This will take the user back to the SHATATR form where the transfer and equivalent course(s) can be entered and saved.

A grade code is required on all transfer courses. These must be valid grades on the Transfer Grade Code Maintenance Form (SHATGRD). These grades are used to populate the transfer hours and GPA (if defined) line on the student's academic record.

Banner form

Transfer Articulation Evaluation - SHATAEQ 8.0 (BAN8)

ID: Institution: Program:

| Attendance | | | Transfer | | | | | | Articulate Ind | Equivalent | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Period | Term | Level | Group | Primary Ind | Subject | Course | Credit Hours | Grade | | Level | Subject | Course | Credit Hours | Grade |
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Steps

Follow these steps to associate the courses that will be transferred to a student's record.

1. Access the Transfer Articulation Evaluation Form (SHATAEQ).
2. Enter the student's ID in the **ID** field, or use the **Search** icon to search for a transfer student.
3. Select the transfer institution number in the **Institution** field.
4. Perform a **Next Block** function.
5. Select a value in the **Attendance Period** field.
6. Select a term in the **Term** field.
7. Select a level in the **Level** field.
8. Select a subject code in the **Subject** field in the Transfer section.
9. Select a course code in the **Course** field.

10. Enter the number of credit hours in the **Credit Hours** field.
11. Select a grade code in the **Grade** field.
12. Click the **Save** icon.
13. Select Perform Articulation from the **Options** menu.
14. Click the **Save** icon.
15. Perform a **Next Block** function to view data in the Equivalent Course GPA Information block.

Note: You should see total hours to be rolled to History.
16. Perform a **Next Block** function to access the Equivalent Roll block.
17. Enter a *Y* in the **Roll to History** field.
18. Click the **Save** icon to dynamically roll the courses to the SHATRNS form in Academic History.
19. Click the **Exit** icon.

Transfer Catalog Data Import Process

Introduction

This process (SHRTCIM) is used to import an XML extract file of course catalog data into a Banner database. After entering the input file name and other default values, the user can choose between running the process in Audit Mode or Update Mode. In Audit Mode, the process compares the records in the incoming data file with transfer course records that already exist in the system. Records in the incoming data file that are found to match existing records will be identified as partial or exact matches.

When run in Audit Mode, the process calls an application programming interface for matching logic.

- If an incoming transfer course does not match any existing transfer courses based on the institution ID plus the subject plus the course number plus the transfer level, then it will be identified as a new record.
- If an incoming transfer course matches an existing transfer course based on institution ID plus the program plus the transfer level plus the subject plus the course number plus the effective term plus the group, then it will be identified as an exact match (even though values in the Title, Credit Hours Low, Credit Hours High, Minimum Grade, Catalog Year, and Course Description fields may differ).

Existing transfer courses that have been entered with a value in the Program and/or Group fields will not match incoming transfer course records. As such, many incoming transfer course records that do match existing records based upon institution ID, plus transfer level, plus the subject, plus the course number, plus the effective term, but not on program or group, will fall into the next category.

- If an incoming transfer course does not satisfy the criteria to be identified as new or an exact match, then it will be flagged as a partial match.

After the input file has been processed in Audit Mode, users can review those courses identified as exact matches to see if any data exists in the Title, Credit Hours Low, Credit Hours High, and/or Course Description fields that should be added to the system. If not, you can check the **Protect from Import** field for the existing transfer courses in the Transfer Institution Catalog Entry form (SHATATC) or the Transfer Course Articulation form (SHATATR). Those courses will not be updated when the input file is processed again in Update Mode.

Similarly, after the input file has been processed in Audit Mode, users can review those courses identified as partial matches to see if any data exists in the Title, Credit Hours Low, Credit Hours High, and/or Course Description fields that should not be added to the

system. If so, the **Protect from Import** field can be checked for those records, and those courses will not be updated when the input file is processed again in Update Mode.

When the process is run in Update Mode, new records from the input file are imported into the SHBTATC and SHRTCAT tables. Records identified as exact matches will update the existing records, unless the **Protect from Import** field is checked. Records identified as partial matches will update existing records if the matched fields are the Institution ID, Effective Term, Transfer Level, Subject, and Course Number, unless the **Protect from Import** field is checked. Otherwise, the partial matches will be loaded as new courses.

Banner Form

The screenshot shows the Banner Form interface for Process Submission Controls. The window title is "Process Submission Controls GIAPCTL 8.0 (BAN8_WIN)".

Process: SHRTCIM (dropdown) Transfer Catalog Data Import (text field) **Parameter Set:** (dropdown)

Printer Control

Printer: DATABASE (dropdown) **Special Print:** (text field) **Lines:** 55 (text field) **Submit Time:** (text field)

Parameter Values

| Number | Parameters | Values |
|--------|----------------|--------|
| 01 | Input File | |
| 02 | Run Mode | A |
| 03 | Institution ID | |
| 04 | Effective Term | |
| 05 | Level Code | |
| 06 | Status Code | |
| 07 | Minimum Grade | |
| 08 | Catalog Year | |

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Input directory path and file name.

Submission

☐ Save Parameter Set as **Name:** (text field) **Description:** (text field) ☐ Hold ☒ Submit

Steps

1. Access the Transfer Catalog Data Import Process (SHRTCIM).
2. Click on the **Next Block** icon to navigate to the Printer Control block.
3. Select the printer by clicking on the drop down arrow and choosing the printer as directed by your instructor.

4. Click on the **Next Block** icon to navigate to the Parameter Values. Select the values as directed by your instructor:

| Field | Req'd? | Description | Value |
|----------------|--------|---|---|
| Input File | Y | Enter the complete directory path and name of the file containing the incoming records. | |
| Run Mode | Y | Enter <i>A</i> for Audit Mode (compares incoming records to existing ones) or <i>U</i> for Update Mode (imports the data into Banner). The default is <i>A</i> . | A (Audit) or U (Update) |
| Institution ID | Y | Enter the source/background institution code to be loaded as the institution ID for the incoming records. In Audit Mode, this value is used to select existing records for comparison. In Update Mode, this value is loaded into the SHBTATC table for each incoming transfer course record. | Source/Background Institution Code Validation Form (STVSBGI) |
| Effective Term | Y | Enter the effective term to be loaded for the incoming records. In Audit Mode , this value is used to select existing records for comparison. In Update Mode, this value is loaded into the SHBTATC table for each incoming transfer course record. | Term Code Validation Form (STVTERM) |
| Level Code | N | Enter the transfer course level codes to be loaded for the incoming records. If an incoming record has multiple levels associated with it, only those matching the values entered in the parameter will be processed. | Level Code Validation Form (STVLEVL) |
| Status Code | Y | Enter the status code to be loaded for the incoming records. In Audit Mode, this value will not be used to select existing records for comparison. | Transfer Articulation Course Status Validation Form (STVTAST) |

| Field | Req'd? | Description | Value |
|---------------|--------|---|-------|
| Minimum Grade | N | Enter the minimum grade code (SHATGRD) to be loaded for the incoming records. In Audit Mode, this value will not be used to select existing records for comparison. | |
| Catalog Year | N | Enter the catalog year to be loaded for the incoming records. In Audit Mode, this value will not be used to select existing records for comparison. | |

5. Click on the **Next Block** icon to navigate to the Submission Block on this window.
6. Optionally, you can give this collection of settings a name and save this parameter set to use again in the future.
7. You can execute this process either in Real Time or you can save it to be run in Job Submission via a batch process.
8. To submit this job in real time, select the **Submit** radio button (the default).
9. To submit this job as a batch process to be run later, select **Hold** to create a batch process to be run later.
10. Click on the **Save** icon.
11. If you ran the report in Audit Mode, or executed the process in Real Time, you can select **Review Output** from the **Options** Menu to see the report on your screen or to print it out.
12. Click on the **Exit** icon.

Summary

Let's review

As a result of completing this workbook, you have

- reviewed and created validation forms that control transfer articulation
- created a transfer articulation institution
- defined transfer grades
- transferred courses
- created transfer organization equivalency information
- associated transfer articulation courses to a student
- rolled equivalent courses to academic history.

Now you are ready to begin determining what information related to transfer institutions and their courses will be implemented within the Banner Student Transfer Articulation module. Decisions will need to be made based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as what your values will be on these forms.

Self Check

Directions

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

Question 1

The transfer organization must be established on which validation form before building data on the Transfer Articulation Institution Form (SOABGTA).

Question 2

(fill in the blank) and *(fill in the blank)* terms are provided on all sections of the form so that the data is maintained as it changes over time.

Question 3

If more than one transfer course is required to equate to one or more courses at the institution, a *(fill in the blank)* is required.

Question 4

Equivalent transfer courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102

True or False

Question 5

What form is used to add a student to Banner to associate the transfer institution to a student?

Question 6

Transfer courses must exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ)

True or False

Answer Key for Self Check

Question 1

The transfer organization must be established on which validation form before building data on the Transfer Articulation Institution Form (SOABGTA).

The Source/Background Institution Validation Form (STVSBGI)

Question 2

(fill in the blank) and *(fill in the blank)* terms are provided on all sections of the form so that the data is maintained as it changes over time.

From and to terms are provided on all sections of the form so that the data is maintained as it changes over time.

Question 3

If more than one transfer course is required to equate to one or more courses at the institution, a *(fill in the blank)* is required

If more than one transfer course is required to equate to one or more courses at the institution, a *group code* is required.

Question 4

Equivalent transfer courses may be singular, such as ACCT 101 is equivalent to ACCT 51, or multiple, such as ENGL 100 is equivalent to ENGL 100 and ENGL 102 (True or False)

True

Question 5

Which form must be used to add a student to Banner to associate the transfer institution to a student?

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

Question 6

Transfer courses must exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ) (True or False)

False. Transfer courses do not have to exist on the Transfer Course Articulation Form (SHATATR) to be entered on the Transfer Articulation Evaluation Form (SHATAEQ).

Appendix



Forms Job Aid

| Form | Full Name | Use this Form to... |
|---------|--|---------------------|
| STVACPR | Acceptance Code Validation | |
| STVCALD | Calendar Type Validation | |
| STVSBGI | Source/Background Institution Code Validation | |
| STVTLVL | Transfer Level Code Validation | |
| STVACST | Institutional Accreditation Status Validation | |
| STVHLWK | Highest Level of Work Code Validation | |
| STVPRGA | Program Accreditation Code Validation | |
| STVTAAU | Acceptance Authority Code Validation | |
| STVTAST | Transfer Articulation Course Status Validation | |

Terminology

Feeder school

Former institutions from which students attended prior to enrolling at your institution.

Equivalencies

Courses at your institution that are articulated from a transfer institution. The equivalent courses print on the transcript.