



# **Using Tuition Classification Changes**

## **Georgia Enhanced Banner Student and Financial Aid Systems User Documentation**

Version 8.18

**Information Technology Services**

**February 2013**

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## Using Tuition Classification Changes

### Introduction to Tuition Classification Changes

#### Purpose

The Audit Department has requested the Board of Regents provide the USG institutions with a standard method of monitoring and reporting any tuition classification changes to student records on campus. The institution is required to identify all students that have a change in tuition classification, the individual responsible for the change within Banner, the number of changes to tuition classification, and indication that the changes were reviewed and approved.

The Tuition Classification Changes Report (ZSRTUIC.sql) will be used to provide information related to classification changes for students enrolled at the institution based on a requirement by the Audit Department. Changes in the tuition classification must be recorded and tracked based on the approval of the change and the user making the changes to the classification in Banner.

The report output will be used by the institution to audit their files internally before it becomes time for an audit. As a result, the output would be provided to the appropriate person on the campus (possibly the tuition classification officer).

#### Target Audience

Registrar's Office, Business Office, and Tuition Classification Officer

#### Purpose and Scope of Document

This document explains how to use the Tuition Classification Changes process.

This chapter includes the following topics:

- Setting up rules and Codes
- Creating tuition classification changes
- Reporting tuition classification changes

#### Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.



Steps for recovery or support.



For additional information, see references.



Exercise caution.



Warning: an error here is critical.

## References



For information about the baseline product, see *Using SCT Banner User Manual for Student*.

## Support



For additional ITS resources and support, contact the ITS Helpdesk:

- Web support request self-service:  
[http://www.usg.edu/customer\\_services](http://www.usg.edu/customer_services)
- E-mail: [Helpdesk@usg.edu](mailto:Helpdesk@usg.edu)

For emergency, business interruptions, or production down situations, call the ITS Helpdesk immediately

- i. 706-583-2001

Toll free within Georgia: 1-888-875-3697

## Tuition Classification Changes Forms and Processes Reference

### Overview

Use the following forms to maintain Tuition Classification Changes:

| <b>Descriptive Title</b>     | <b>Name</b> |
|------------------------------|-------------|
| Comment Type Validation Form | STVCMTT     |
| Originator Validation Form   | STVORIG     |
| Contact Code Validation Form | STVCTYP     |
| General Student Form         | SGASTDN     |
| Comment Form                 | SPACMNT     |

Use the following processes to report Tuition Classification Changes:

| <b>Descriptive Title</b>              | <b>Name</b> |
|---------------------------------------|-------------|
| Tuition Classification Changes script | ZSRUIC.sql  |

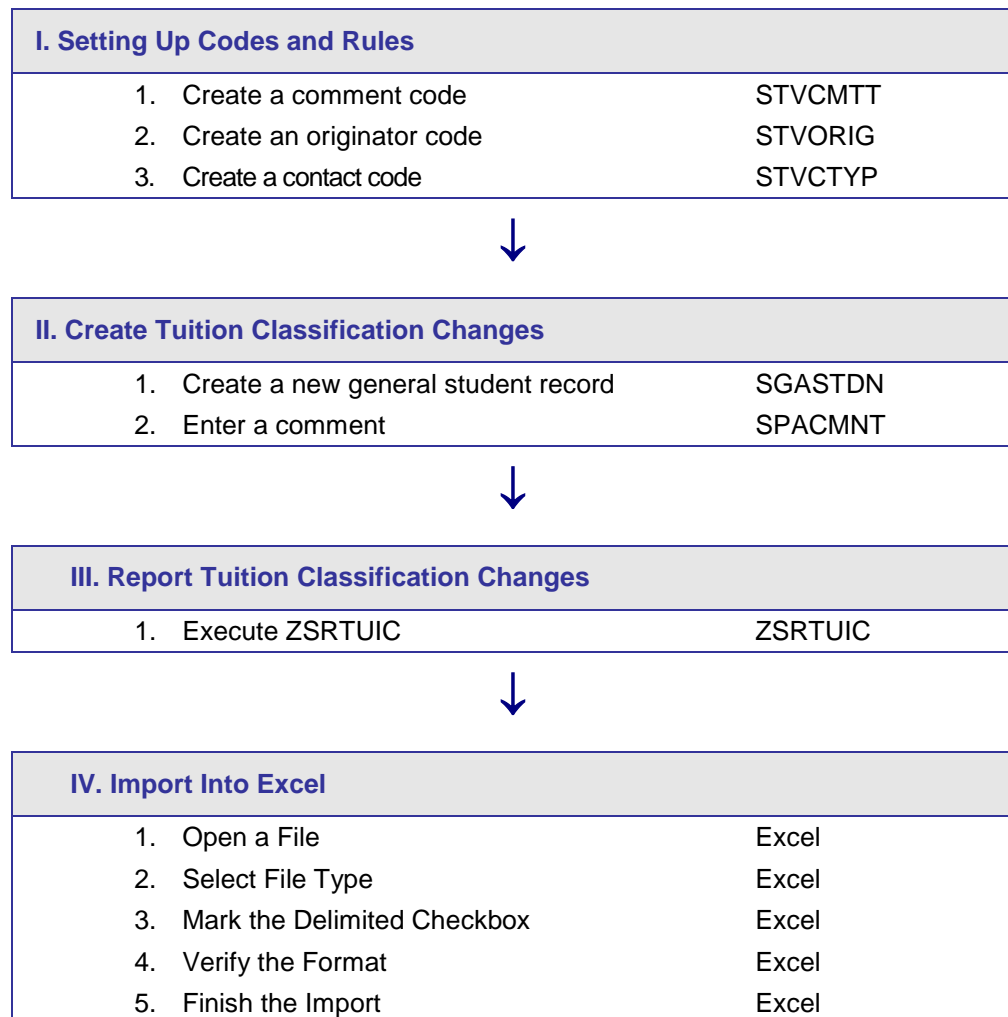
## Tuition Classification Changes Flow

**Description** The Tuition Classification Changes report (ZSRTUIC.sql) provides output for review of classification changes made to student records. A student can appeal a tuition classification based on the BOR policy and the procedures defined by the institution. This information should be tracked in Banner.

When a tuition classification change is approved, a new General Student Record (SGASTDN) should be created for the term the change will take effect. A comment is entered on the Comment form (SPACMNT) for the comment code specified for tuition classification changes. The comments should describe why the classification was changed, who approved the change, and the individual that made the change to the SGASTDN record.

### Overview of Tuition Classification Changes

Complete the following steps to implement and execute Tuition Classification Changes information into Banner.





## Implementing Tuition Classification Changes

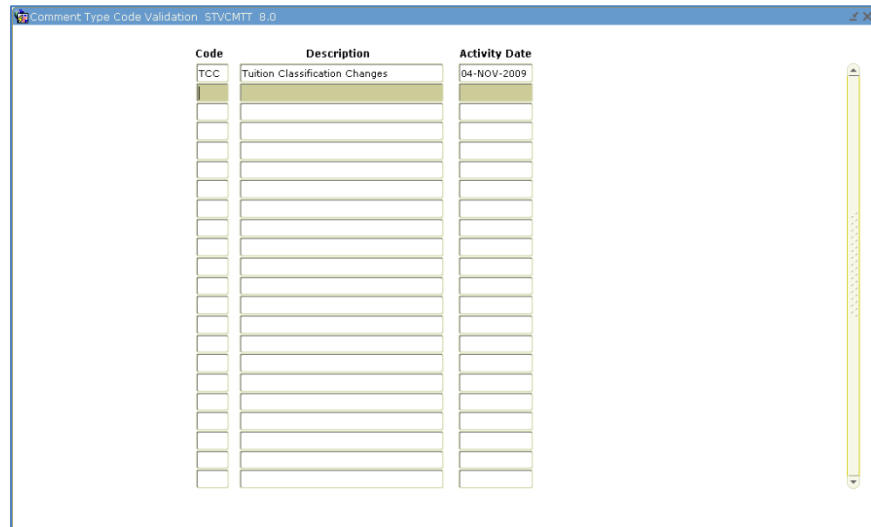
### I. Setting Up Rules and Codes

#### Overview

Tuition classification changes will require institutional users to set up rules and codes related to the changes. Comments will be entered in the Comment form (SPACMNT) with a specific comment code.

#### 1. Create a comment code

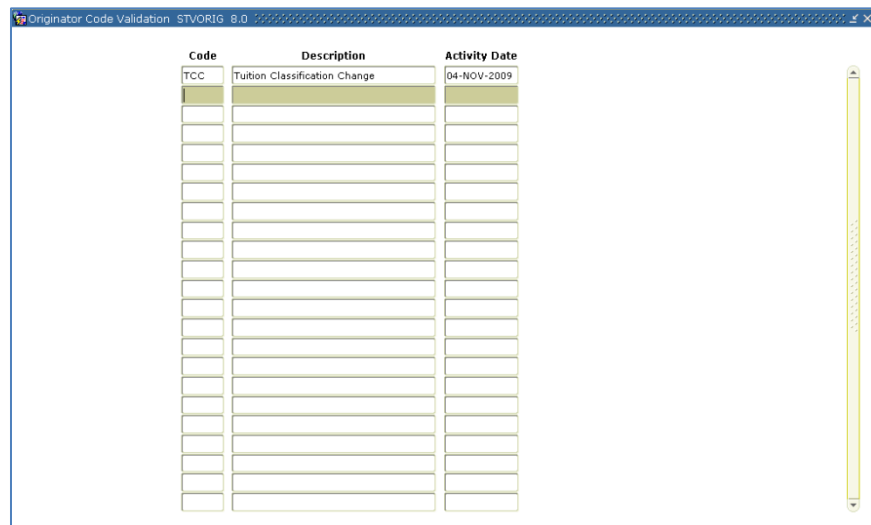
The comment code is created in the Comment Type Validation form (STVCMTT). The code 'TCC' with a description of 'Tuition Classification Change' will be used for the tuition classification change comments.



| Code | Description                    | Activity Date |
|------|--------------------------------|---------------|
| TCC  | Tuition Classification Changes | 04-NOV-2009   |
|      |                                |               |
|      |                                |               |
|      |                                |               |
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#### 2. Create an originator code

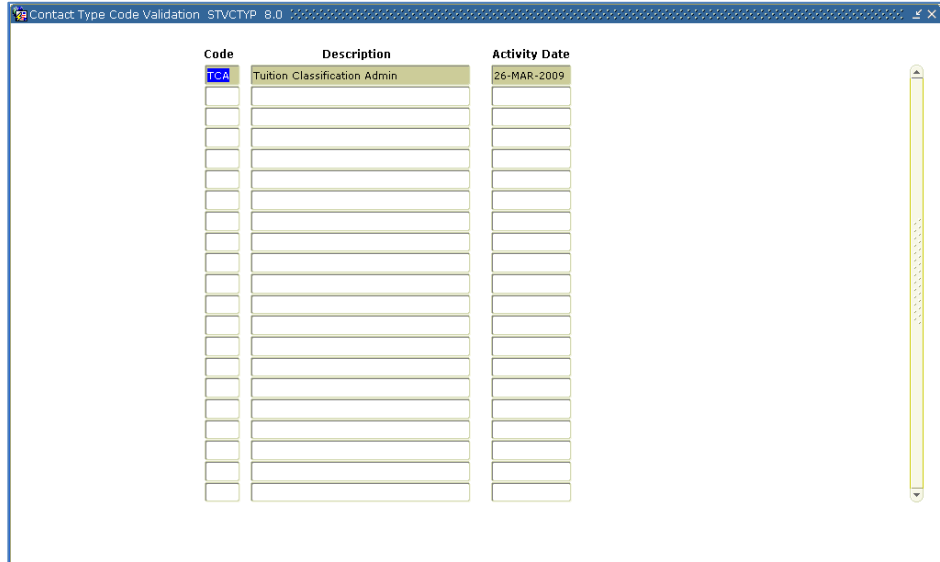
The Originator Validation form (STVORIG) is used to define the originator codes associated with a comment. The code related to the tuition classification change will be 'TCC' with a description of 'Tuition Classification Change'.



| Code | Description                   | Activity Date |
|------|-------------------------------|---------------|
| TCC  | Tuition Classification Change | 04-NOV-2009   |
|      |                               |               |
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**3. Create a contact code**

A comment allows for the entry of a contact. The contact code of 'TCA' with a description of 'Tuition Classification Admin' will be created in the Contact Code Validation form (STVCTYP).



## II. Create tuition classification changes

### Overview

Tuition classification changes will be recorded in the General Student form (SGASTDN) and the Comment form (SPACMNT). The creation of the change records is based on the approval of the tuition classification change.

### 1. Create a new general student record

Once approval of the tuition classification is completed, a new student record is created for the term the classification takes effect in the General Student form (SGASTDN).

The screenshot displays the 'General Student: SGASTDN 8:2' window. At the top, it shows the student's ID as @00010001 and name as Marshall, Bradlee T. The 'Term' is set to 200908. Below this are tabs for 'Learner', 'Curricula', 'Activities', 'Veteran', 'Comments', 'Academic and Graduation Status, Dual Degree', and 'Miscellaneous'. The 'General Learner' section includes fields for 'New Term' (200908, Fall 2009), 'Student Status' (AS, Active), 'Student Type' (B, New Freshman), 'Residence' (Q, In State Resident), 'Fee Assessment Rate', 'Class' (FR, Freshman), and 'Full or Part Time' (Full Time selected). An 'Additional Information' box contains 'Site' (MIL, Milledgeville Campus), 'Session', 'Block', and 'Citizenship' (C, U.S. Citizen). Below this is the 'Curricula Summary - Primary' table:

| Priority Term | Program                  | Catalog         | Level              | Campus | Rate: College      | Degree              |   |
|---------------|--------------------------|-----------------|--------------------|--------|--------------------|---------------------|---|
| 1             | 200508 BBA in Accounting | 200508          | Undergraduate Seme |        | School of Business | Bachelor of Busine: |   |
| End:          | Outcome Key:             | Admission Type: | New Student        |        |                    |                     | Admission: 200508 Matriculation: 200508 |

At the bottom is the 'Field of Study Summary' table:

| Priority Term | Type   | Field of Study | Department | Attached to Major |                          |
|---------------|--------|----------------|------------|-------------------|--------------------------|
| 1             | 200508 | Major          | Accounting | Accounting        | <input type="checkbox"/> |
|               |        |                |            |                   | <input type="checkbox"/> |
|               |        |                |            |                   | <input type="checkbox"/> |

- 2. Enter a comment** A comment is entered in the Comment form (SPACMNT) using the comment code, comment originator code, and the comment contact code created. The comment should reflect the individual responsible for the change within Banner, the term approved, and indicate that the changes were reviewed and approved.

The screenshot displays the 'Person Comment SPACMNT 8.2' form. At the top, it is marked as 'Confidential'. The ID field is populated with '@00010001' and 'Marshall, Bradlee T.'. The form includes several dropdown menus and checkboxes for metadata: 'Comment Type' (TCC - Tuition Classification), 'Originator' (TCC - Tuition Classification changes), 'Contact' (TCA - Tuition Classification Admin), 'Contact Date' (30-APR-2010), 'Appointments' (checked), 'Confidentiality' (unchecked), 'From Time', 'To Time', 'Add Date' (30-APR-2010), 'Activity Date' (30-APR-2010), and 'Last Updated by'. Below these are two text areas: 'Comments' containing 'This student had a change in tuition classification.' and 'Narrative Comments' containing 'This student is not a resident of the state of Georgia. Her tuition classification change was approved by the Dean of Students. The change was made by Jane Doe by inserting a new SGASTDN record with a new residency status code.'

### III. Execute ZSRTUIC

#### Overview

The Tuition Classification Change Report (ZSRTUIC) is used to review the tuition classification changes made in Banner for a specified term. The report output will provide the student level, the current term and associated classification, prior term and associated classification, comments entered, the date the comment was entered, and the user associated with the comment.

The process will generate a lis file that users may export into Excel.

#### 1. Execute ZSRTUIC

The ZSRTUIC script is executed through Job Submission (GJAPCTL). Log and lis files are created. The lis file will be exported into Excel.

#### Parameters for ZSRTUIC

| No | Name         | Required | Description/Instructions               | Default Values |
|----|--------------|----------|--|----------------|
| 01 | Term         | Yes      | Enter term to be processed.            |                |
| 02 | Comment Code | Yes      | Enter the comment code to be selected. |                |

#### Sample Files

Sample of the lis file follow:

#### Sample zsrtuic

```

001042459;Jensen, Jeffrey;US;200408;R;200008;O;TCC;BMEER;06-SEP-12;06-SEP-12;
001042459;Jensen, Jeffrey;US;200408;R;200008;O;TCC;BMEER;06-SEP-12;06-SEP-12;This student had a change in tuition classificaiton.
001121703;Jensen, Olalekan;US;200408;R;200208;L;TCC;BMEER;06-SEP-12;06-SEP-12;
001121703;Jensen, Olalekan;US;200408;R;200208;L;TCC;BMEER;06-SEP-12;06-SEP-12;Test.
001032650;Jensen, Youliya;;200408;I;200208;L;;;
001145947;Jensen, Brandi;US;200408;O;200308;N;TCC;BMEER;01-OCT-12;01-OCT-12;
001145947;Jensen, Brandi;US;200408;O;200308;N;TCC;BMEER;01-OCT-12;01-OCT-12;This student had a classificaiton change.

```

## IV. Import into Excel

### Introduction

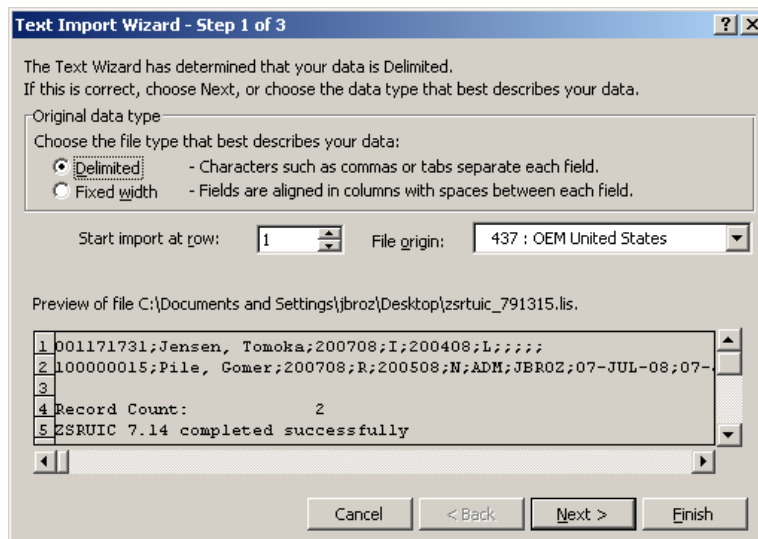
ZSRUIC creates a lis file to be loaded into Excel. The file produced contains the values required to evaluate the tuition classification changes made for a specified term.

### 1. Open a file

In Excel, open one of the text files created by ZSRUIC. This should start the Text Import Wizard.

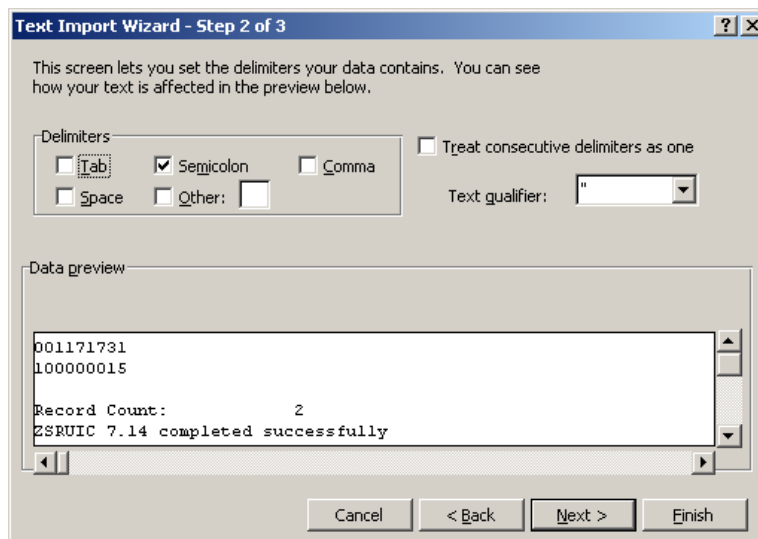
### 2. Select file type

Click the Delimited Radial button to identify the file as delimited. Verify the file is importing on the correct row (the row may change if you are loading multiple files or all files to the same workbook or spreadsheet). Click next.



### 3. Mark the delimited checkbox

Verify the Semicolon checkbox is marked. Make sure that no other delimited indicator checkboxes are marked. Click next.

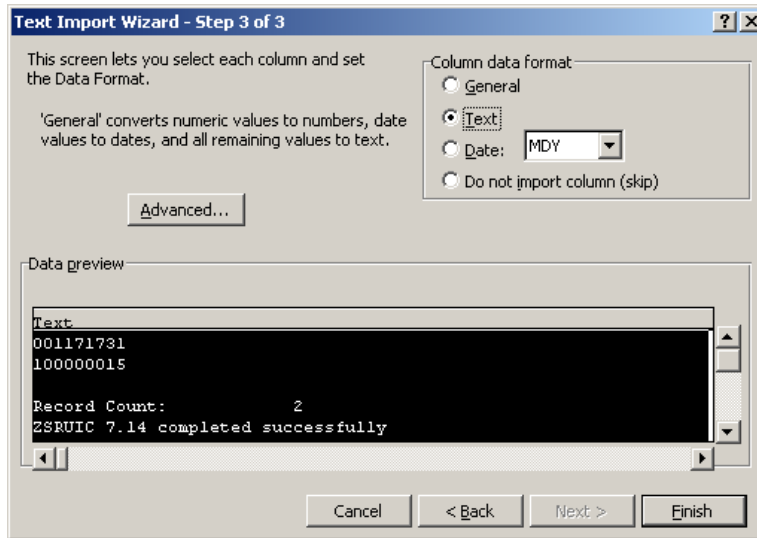


#### 4. Verify the format

##### Warning



Click the text button to verify the Column Data Format is in Text format. Failure to use the text format may cause an unwanted decimal place in the course number.



#### 5. Finish the import

Click finish to import the file.

##### Sample Files

##### Sample of an Excel file:

|   | A                                  | B               | C      | D | E      | F | G   | H        | I        | J        | K  | L | M | N |
|---|------------------------------------|-----------------|--------|---|--------|---|-----|----------|----------|----------|--|---|---|---|
| 1 | 001204125                          | Jensen, Megan   | 200802 | R | 200908 | N | TCC | AMARSHAL | 8-Feb-08 | 8-Feb-08 | Megan is a resident of the state. This was a data entry error.   |   |   |   |
| 2 | 001196486                          | Jensen, Melissa | 200802 | R | 200908 | N | TCC | AMARSHAL | 8-Feb-08 | 8-Feb-08 | Changed the tuition classification based on appeal approval.   |   |   |   |
| 3 | 001212735                          | Jensen, Daniel  | 200802 | R | 200908 | N | TCC | AMARSHAL | 8-Feb-08 | 8-Feb-08 | This student record has been changed to reflect a new tuition classification code. The student has proved the he is a resident of the state of Georgia by providing a valid drivers license. He has also provided proof of employment at a Georgia based company. He is a full time employee seeking a degree based on the terms of employment. This was approved by the Dean of Academic Affairs and was brought forth to him through a recommendation by the Residency Status Committee. The record was updated by Joe Blow on February 8, 2008 for the spring term. Blah, blah, blah. |   |   |   |
| 4 | Record Count: 3                    |                 |        |   |        |   |     |          |          |          |  |   |   |   |
| 5 | ZSRUIC 7.11 completed successfully |                 |        |   |        |   |     |          |          |          |  |   |   |   |
| 6 |                                    |                 |        |   |        |   |     |          |          |          |  |   |   |   |
| 7 |                                    |                 |        |   |        |   |     |          |          |          |  |   |   |   |

Note: This file has been modified for formatting to allow you to view all the information found in the file.

## Appendix A: Document History

This section details the history of the document and updates made for each modification.

| <b>Release and Date</b>                     | <b>Page</b> | <b>Update Description</b>   |
|---|-------------|---|
| Georgia Enhancements 7.11,<br>February 2008 | NA          | Original  |
| Georgia Enhancements 7.14,<br>July 2008     | NA          | Fixed duplicate student entries for students with name changes and corrected multiple line comment codes to only display as a single line in the output file. |
| Georgia Enhancements 7.20,<br>June 2009     | N/A         | Removed the activity date comparison and modified the residency code comparison to select appropriate records for the report output.                          |
| Georgia Enhancements 8.0,<br>March 31, 2010 | All         | Inserted new screen captures.   |



## Appendix B: Process Flow

### Tuition Classification Changes Process Flow

