



Using AR Fee Assessment

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

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Information Technology Services

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Using AR Fee Assessment

Introduction to AR Fee Assessment

Purpose The Georgia Banner Enhanced Student and Financial Aid AR Fee Assessment provides the fee assessment rules required for charges to be placed on student accounts during the registration process. Fee assessment occurs each term.

Target Audience Accounting and Business Officers

Purpose and Scope of Document This document explains how to use the Georgia Enhanced AR Fee Assessment.

This chapter includes the following topics:

- Set up codes and rules
- Assign, delete, expire attributes

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 Accounts Receivable*.

Support



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

Web http://www.usg.edu/customer_services (self-service ticket submission)

E-mail helpdesk@usg.edu

For urgent or production down situations, call the ITS HelpDesk:

Local 706-583-2001

Toll free within Georgia 1-888-875-3697

AR Fee Assessment Forms and Processes Reference

Overview

Use the following forms:

Descriptive Title	Name
Student Attribute Validation Form	STVATTS
Crosswalk Validation Form	GTVSDAX
Term Control Form	SOATERM
Registration Fee Assessment Rules Form	SFARGFE
Student Additional Information Form	SGASADD

Use the following processes:

Descriptive Title	Name
Student Attribute Assignment Process	ZGRATTR
Student Attribute Delete Process	ZGRATTD

Fee Assessment Process Flow

Description

The Banner Accounts Receivable module requires fee assessment rules for charges to be placed on student accounts during the registration process. Fee assessment occurs each term.

The Fee Assessment flow includes the following major steps:

- Set up codes and rules
- Assign, delete, expire attributes

Timeframe

Fee Assessment is required when registration occurs on a student account and charges are assessed.

Fee Assessment Process Flow Overview

Complete the following steps to set up and maintain detail codes within the Banner Accounts Receivable module.

I. Setting Up Codes and Rules	
1. Create attribute codes	STVATTS
2. Build crosswalk validation rules	GTVSDAX
3. Set reverse non-tui/fee indicator	SOATERM
4. Build fee assessment rules	SFARGFE

↓

II. Assigning Attributes	
Assign attribute codes	ZGRATTR
Student Attribute Delete Process	ZGRATTD

Fee Assessment

I. Setting Up Codes and Rules

Introduction

Fee assessment will be used to address the Guaranteed Tuition Plan and Student Health Insurance.

The Student Attribute Validation form (STVATTS) will be used to define specific attribute codes for each. These attribute codes will be associated with the student’s account.

The Crosswalk Validation form (GTVSDAX) will be used to build a rule to allow the user to refund charges with a detail category code other than TUI/FEE only.

The Term Control form (SOATERM) will be used to set the Reverse Non Tuition/Fee Charges indicator.

Fee assessment rules will be built in the Registration Fee Assessment Rules form (SFARGFE) using the created attribute code to assess charges to each student account that has the attribute code assigned.



Institutions are advised to establish attribute codes that are term and program specific. This will prevent students from being erroneously charged for fees that are not applicable to the student record.

1. Create attribute codes (STVATTS)

Create attribute codes to be used for processing the Guaranteed Tuition Plan and Student Health Insurance in the Student Attribute Validation form (STVATTS).

Code	Description	Activity Date
SHP	Student Health Insurance Progr	26-AUG-2009
SP07	Spring 2007 Guaranteed Tuition	19-JUN-2006
SP08	Spring '08 Gua. Tuition	09-APR-2007
SP09	Spring '09 Gua. Tuition	09-APR-2007
ST07	Spring 2007 Transfer GT	19-JUN-2006
ST08	Spring '08 Gua. Tuition	09-APR-2007
ST09	Spring '09 Transfer GT	09-APR-2007
SU07	Summer '07 Gua. Tuition	09-APR-2007
SU08	Summer '08 Gua. Tuition	09-APR-2007

2. Build crosswalk validation rules (GTVSDAX)

Create the crosswalk validation rules in the Crosswalk Validation form (GTVSDAX). The rule will allow non tuition/fee charges to be reversed.

The External Code set to 'Y' will allow charges with a category code other than TUI and FEE to be reversed from accounts. This rule will be required for those institutions that set up the insurance detail code with a specific detail category code.

3. Set Reverse Non Tuition/Fee Indicator (SOATERM)

Set the Reverse Non-Tuition/Fee Charges indicator in the Term Control form (SOATERM). This indicator will allow, in conjunction with the GTVSDAX rule, charges with a category code other than TUI and FEE to be reversed from accounts.

4. Create fee assessment rules (SFARGFE)

Create fee assessment rules in the Registration Fee Assessment Rules form (SFARGFE). The attribute created will be assigned to the fee assessment rule that will assess charges based on the Guaranteed Tuition Plan or Student Health Insurance.

The illustrated fee assessment rules are for fees to be charged to a student based on the 0506 attribute code created in STVATTS.

Note: The rules below indicate fee assessment for the Guaranteed Tuition Plan.

Sequence Type	Copy Number	Detail Code	Category Code	Per Credit Charge	Minimum Charge	Maximum Charge	Override	Campus	Course Level	Course Attribute	User ID	Activity Date
P	R	2	1102	TUI	.00	771.00	771.00				AMARSHAL	12-AUG-2009
P	R	3	1202	TUI	257.00	257.00	3,083.00				JBROZ	17-AUG-2009
P	R	4	1202	TUI	.00	3,083.00	3,083.00				JBROZ	17-AUG-2009
P	R	19	1402	FEE	.00	35.00	35.00				JBROZ	11-AUG-2009
P	R	20	1502	FEE	.00	45.00	45.00				JBROZ	11-AUG-2009
P	R	21	1602	NRF	.00	25.00	25.00				JBROZ	11-AUG-2009
P	R	22	1702	FEE	.00	35.00	35.00				JBROZ	11-AUG-2009
P	R	23	INPF	PRE	358.00	358.00	358.00				AMARSHAL	26-AUG-2009

II. Assigning, deleting, or expiring Attributes

Overview

Students not entered in the population selection process will no longer have the attributes deleted from the Additional Student Information Form (SGASADD) for the specified term unless indicated by the user when executing the process.

1. Execute ZGRATTR/ ZGRATTD

The ZGRATTR process creates a student attribute record in the General Student Additional Information Form (SGASADD). A term code is assigned to the record based on the term entered in the parameters of the process. The process will maintain previously assigned attributes. The ZGRATTD process deletes or expires attribute codes based on the attribute code and term specified. A report of the records created is provided as part of the .lis file.

Only students with SGASTDN records will be processed. If a student in the population selection does not have a general student record, the message “No student record exists” will appear in the .lis file and no attribute will be added to SGASADD.

Parameters for ZGRATTR

No	Name	Required?	Description/Instructions	Default Values
01	Run Mode	Yes	Enter A for Audit mode or U for Update mode	A
02	Attribute Code	Yes	Enter the attribute code to be assigned	
03	Term Code	Yes	Enter effective term	
04	Application	Yes	Enter the application code for the population selection	
05	Selection Identifier	Yes	Enter the selection ID for the population selection	
06	User ID	Yes	Enter the user ID of the population selection	
07	Creator ID	Yes	Enter the creator ID for the population selection	

Sample ZGRATTR.lis

```

09-MAY-2013 17:24:04          Database          Page: 1
ZGRATTR 8.4          Student Attribute Process

ID          Name          Message
@00010207   Roses, Torrey F
@00010231   Smith, William J
147147147   Special, Guy R
@00010235   Tarply, Andrea E      No student record exists.
@00010277   Testerson, Testie T   No student record exists.

09-MAY-2013 17:24:04          Database          Page: 2
ZGRATTR 8.4          Student Attribute Process
          * * * REPORT CONTROL INFORMATION * * *

Parameter Description          Parameter Value(s)
Update Mode                    A
Attribute Code                 HOUS
Term Code                     201302
Application Code              STUDENTS
Selection Identifier          CINDY_MANUALPOPSEL
User ID                       CTAYLOR
Creator ID                    CTAYLOR
Report Line Limit            55
Record Count                  68

ZGRATTR 8.4 completed successfully
    
```

Sample ZGRATTR.log

```

Username: Connected.

RUN SEQUENCE NUMBER:
id 033033033 pidm 1056925
id 256369999 pidm 43376
id @00010180 pidm 45102
id 001156462 pidm 1156462

ZGRATTR 8.4 completed successfully
92 lines written to /home/banjob/zgrattr_837792.lis

Process began 09-MAY-2013 17:24:04
Process ended 09-MAY-2013 17:24:05
Connected.
Connected.
    
```

Parameters for ZGRATTD

No	Name	Required?	Description/Instructions	Default Values
01	Run Mode	Yes	Enter A for Audit mode or U for Update mode	A
02	Attribute Code	Yes	Enter the attribute code to be assigned	
03	Term Code	Yes	Enter effective term	
04	Process Attribute	Yes	Enter E to expire the attribute or D to delete the attribute	
05	Application Code	Yes	Enter the application code for the population selection	
06	Selection Identifier	Yes	Enter the selection ID for the population selection	
07	User ID	Yes	Enter the user ID of the population selection	
08	Creator ID	Yes	Enter the creator ID for the population selection	

Sample ZGRATTD.lis

```
06-07-2013 at 10:56:11          Database          PAGE 1
                               Student Attrib Delete Process      ZGRATTD

ID          Name                Message
001054538   Jensen, Jamie           Student will be expired if program run in update mode
333666666   Tier, Wrong                Student will be expired if program run in update mode

06-07-2013 at 10:56:11          Database          PAGE 2
                               Student Attrib Delete Process      ZGRATTD

* * * REPORT CONTROL INFORMATION * * *

ZGRATTD 8.23

Run Mode: A
Attribute Code: ATHL
Term Code: 201008
Process : E
Application Code: STUDENTS
Selection ID: BARRY
User ID: BMEEK
Creator ID: BMEEK
Report Line Limit: 55
Record Count: 2

ZGRATTD 8.23 completed successfully
```

Sample ZGRATTD.log

```
Username: Connected.

RUN SEQUENCE NUMBER: zgrattd completed successfully
29 lines written to /home/banjob/zgrattd_839860.lis

      ZGRATTD 8.23 completed successfully
Connected.
Connected.
```

Appendix A: Document History

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

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 8.0, March 31, 2010			Update screenshots for V8 release
December 2010	SFARGFE	7	Insert correct screenshot for SFARGFE
Georgia Enhancements 8.23 June 28, 2013	ZGRATTD	7-10 B-1	Update ZGRATTR/ZGRATTD section. Update Appendix B: Process Flow.

Appendix B: Process Flow

