

Using AR Fee Assessment

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 8.23

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.
Ø	Steps for recovery or support.
M	For additional information, see references.
	Exercise caution.
Dangeri	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:

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

E-mail <u>helpdesk@usg.edu</u>

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

706-583-2001

Toll free within 1-888-875-3697 Georgia

Local

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 for c	Banner narges ess. Fe	Accounts Receivable module to be placed on student account e assessment occurs each term	requires fee assessment rules ts during the registration
	The	Fee Ass	sessment flow includes the foll	owing major steps:
		Set	up codes and rules	
		• Ass	ign, delete, expire attributes	
Timeframe	Fee A	Assessn unt and	nent is required when registration charges are assessed.	ion occurs on a student
Fee Assessment Process Flow Overview	Com the E	plete th anner A	e following steps to set up and Accounts Receivable module.	l maintain detail codes within
		I. Setti	ng 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
			\downarrow	
		II. Ass	gning Attributes	

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).

JIVAII.		
Code	Description	Activity Date
SHIP	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
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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.

🤹 Crosswalk Valida	tion GTVSDAX 8.0 2000000				eccesses ≝ ×
Inte	rnal				
Code: Description: Reporting Date:	FAREVNRF Sequence: Reverse Non-Tui/Fee Charges	Group: FEE ASSESSMENT	External Code: Translation Code: Activity Date:	Y 02-NOV-2009	
Code: Description: Reporting Date:	Sequence:	Group:	External Code: Translation Code: Activity Date:		
Code: Description: Reporting Date:	Sequence:	Group:	External Code: Translation Code: Activity Date:		
Code: Description: Reporting Date:	Sequence:	Group:	External Code: Translation Code: Activity Date:		×

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.

B Term Control SOATERM 8.2 99999999999999999999999999999999999	ϵ \ge .000000000000000000000000000000000000
Schedule CRN Starting Sequence Number: 00525	
Registration ☑ In Progress Hold Password: ☑ Permit Re-Admit: ☑ Calculate Time Status ☑ Include Attempted Hours	Registration Fee Assessment Image: Constraint of the system of
Gradebook Parameters Process Gradebook Controls	Title IV Date Source * Term Date OPart-of-Term Dates
Web Self-Service, Voice Response and Partner Systems	Control Settings
On-line Assessment O Batch Update Batch Only Not Available	□ Print Bill ☑ Master Web Term Control ☑ Synchronize Partner Systems Process Web Controls

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.

😨 Re	egis	tratio	on Fe	e Asse	issment Ru	iles SFARC	GFE 8.2 XXX			-000-					≚×
Te Ce	erm opy	: Rule	2009 s to f	08 💌 New T	Fall Seme Ferm 👔	ester 2009	I	Rule ⁻ Set	Type: STUDENT	•		Entry Ty Process	ype: REGULA Copy Indicate	r 💌	
R	egi	istra	atior	n Cha	rges an	d Fees									
1	yp	e	Sopy	Sequer Numb	nce Detail er Code 💌	Category Code	Per Credit Charge	Minimum Charge	Maximum Charge Over	ride	Course Course Campus Level	Course Attribute	User ID	Activity Date	
ОР		■ R	~	2	1102	TUI	.00	771.00	771.00				AMARSHAL	12-AUG-2009	
ОР		₿ R	-	3	1202	TUI	257.00	257.00	3,083.00				JBROZ	17-AUG-2009	
ОР	. (R	-	4	1202	TUI	.00	3,083.00	3,083.00				JBROZ	17-AUG-2009	
ОР	. (R	1	19	1402	FEE	.00	35.00	35.00				JBROZ	11-AUG-2009	3
ОР		• R	~	20	1502	FEE	.00	45.00	45.00				JBROZ	11-AUG-2009	
ОР		■ R	-	21	1602	NRF	.00	25.00	25.00				JBROZ	11-AUG-2009	
ОР		■ R	~	22	1702	FEE	.00	35.00	35.00				JBROZ	11-AUG-2009	
© P	1	• R		23	INPF	PRE	358.00	358.00	358.00				AMARSHAL	26-AUG-2009	-
St	ude Stu	ent C Ider	urricu nt/C	ourse	Registrati	on Criteria	Student	:/Course							
SI	ude	ent A	ttribu	ite: S	HIP 🔻	Student 1	'ype: 📘 🗖	Student Rate:	Res	idena	cy: 📃 💌 Visa:	-	Class: 📃 💌	рот:	•
G	oho	rt:			•	Assess by	y Course :	Grade Mode:	▼ Instru	tion	al Method:		Schedule Typ	e:	•

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	А
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 1	7:24:04	Datab	ase		Page: 1
ZGRATTR 8.4	5	Student Attr	ibute Process		
ID	Name		Message		
000010207	Roses, Torrey	y F			
000010231	Smith, Willia	am J			
147147147	Special, Guy	R			
000010235	Tarply, Andre	ea E	No student re	cord exists.	
00010277	Testerson, Te	estie T	No student re	cord exists.	
	1	1 C C C C C C C C C C C C C C C C C C C			
09-MAY-2013 1	7:24:04	Datab	ase		Page: 2
09-MAY-2013 1 ZGRATTR 8.4	17:24:04	Datab Student Attr	ase ibute Process		Page: 2
09-MAY-2013 1 ZGRATTR 8.4	17:24:04 * * * I	Datab Student Attr REPORT CONTR	ase ibute Process OL INFORMATION		Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc	17:24:04 * * * I	Datab Student Attr REPORT CONTR Parameter	ase ibute Process OL INFORMATION Value(s)	• • •	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode	17:24:04 * * * 1 cription	Datab Student Attr REPORT CONTR Parameter A	ase Tibute Process OL INFORMATION Value(s)	• • •	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode ttribute Code	17:24:04 \$	Datab Student Attr REPORT CONTR Parameter A HOUS	ase fibute Process OL INFORMATION Value(s)	•••	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode ttribute Code erm Code	.7:24:04 5 * * * 1 pription	Datab Student Attr REPORT CONTR Parameter A HOUS 201302	ase fibute Process OL INFORMATION Value(s)	•••	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode ttribute Code erm Code pplication Co	.7:24:04 * * *] cription :	Datab Student Attr REPORT CONTR Parameter A HOUS 201302 STUDENTS	ase ibute Process OL INFORMATION Value(s)	* * *	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode ttribute Code erm Code pplication Cde election Ider	.7:24:04 * * *] pription tode toffier	Datab Student Attr REPORT CONTR Parameter A HOUS 201302 STUDENTS CINDY MANU	ase ibute Process IOL INFORMATION Value(s) VALPOPSEL	•••	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 Parameter Desc pdate Mode ttribute Code erm Code pplication Cc election Ider ser ID	7:24:04 * * * I pription tode putifier	Datab Student Attr REPORT CONTR Parameter A HOUS 201302 STUDENTS CINDY_MANU CTAYLOR	ase fibute Process NOL INFORMATION Value(s) NALPOPSEL	* • •	Page: 2
09-MAY-2013 1 ZGRATTR 8.4 arameter Desc pdate Mode ttribute Code erm Code pplication Co election Ider ser ID reator ID	7:24:04 * * * P pription : ode ttifier	Datab Student Attr REPORT CONTR Parameter A HOUS 201302 STUDENTS CINDY_MANU CTAYLOR CTAYLOR	ase fibute Process NOL INFORMATION Value(s) VALPOPSEL		Page: 2
arameter Desc pdate Mode ttribute Code erm Code pplication Co election Ider ser ID reator ID eport Line Li	.7:24:04 * * * F pription : bde btifier mit	Datab Student Attr REPORT CONTR Parameter A HOUS 201302 STUDENTS CINDY_MANU CTAYLOR 55	ase ibute Process KOL INFORMATION Value(s) VALUE		Page: 2

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	А
02	Attribute Code	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 a	t 10:56:11	Database											PAGE 1
		Student Attrib Delete	Process										ZGRATTD
ID	Name		Message										
001054520	Tenera Tenér		Courdonse		b -								
333666666	Tier Wrong		Student	will	be	expired	. 1I if	program	run	in	update	mode	-
	fici, wrong		bouncino	****	20	Capillo		program	Lan		apaaoe	mour	
06-07-2013 a	t 10:56:11	Database											PAGE 2
		Student Attrib Delete	Process										ZGRATTD
* * * PEDODT	CONTROL INFORMAT	TON * * *											
A A A REPORT	CONTROL INFORMAT	ION " " "											
ZGRATTD 8.23													
Run Mode: A													
Attribute Co	de: ATHL												
Term Code: 2	01008												
Process : E													
Application (· BADDY												
Delection ID: BARKI Near TD: BMFFX													
Greator 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

