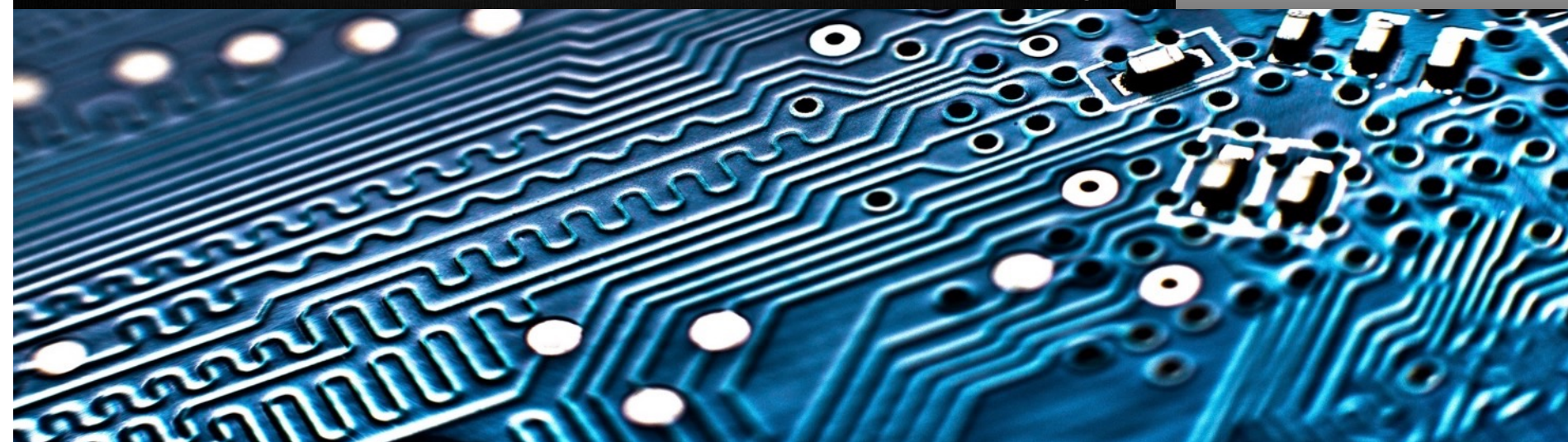


Train the Trainer: Implementing Student Self-Service Banner for Accounts Receivable 9x

March 2023



Agenda

- When should you implement 9.x SSB?
- How to get help?
- Where is the documentation?
- What's new or different?
- Live Demos (Functional Users Updates and Review of Student Self Service)
- Ask your peers
- More training sessions coming soon

When should you implement 9.x SSB?

- **Do it now!**
- All 8.x SSB entered Maintenance Support until March 2024
 - Continue to receive regulatory and severity 1 change request updates, including security fixes
- Ellucian to announce Sustaining Support

When should you implement 9.x SSB?

Summary of Support Statuses

Type of Support	Active	Maintenance	Sustaining	End of Support
Ability to submit software enhancement requests or 'ideas' for the next version	•			
Ability to add a low severity change request	•			
Additional enhancements to the product are released	•			
New releases and related documentation	•			
New hot fixes or updates for severity 1 issues	•	•		
Regulatory updates	•	•		
Support from Cloud technical resources and Action Line analysts via the Ellucian Support Center, email or phone	•	•	•	
Access to previously supplied hot fixes and regulatory updates	•	•	•	
Full access to online content such as knowledge base articles, product documentation, eCommunities forums, and product downloads	•	•	•	

- [Ellucian Article 000041256 - What is the support status of Self Service Banner 8.x \(SSB 8.x\)?](#)
- [Ellucian Article 000038478 - Ellucian Support Assurance](#)
 - Support status table
- [Ellucian Article 000050967 - What is the support status and future of Self Service Banner 8.x Admissions?](#)

Single Sign-On Health Check

- Perform Single Sign-On (SSO) health check with **all** 3rd party vendors
- Test with vendors to ensure no impact on student's ability to seamlessly move from Banner to vendor websites
 - Take payments
 - Sign up for payment plans
 - Sign up for housing
- Including but not limited to:
 - Touchnet
 - Cashnet
 - Nelnet
 - Star Rez
- Confirm successful SSO prior to Production


How to get help?

- ITS Helpdesk ticket for GeorgiaBEST team
 - Self-Service questions
 - Subscribe to a listserv
- If Ellucian expertise required, we will open an Ellucian Customer Center case


Where is the documentation?

- GeorgiaBEST website



Search GeorgiaBEST:





Home

Application Development and Support 

Application Development and Support Information

 Banner 

 Banner 9 

Banner 9

What is Banner 9?

The design principles focus on usability, enhanced functions, app configuration over customization of code, extensibility and scalability. When institutions adopt Banner 9, they will see improved usability, new functionality, responsive design, a custom look and a reduction in the cost of ownership.

[Ellucian Customer Center Information](#)

[Webcasts and Training](#)

[Checklists and Resources](#)

[Technical Information](#)

[Implementation Grid](#)

Where is the documentation?

- Need an Ellucian Customer Center account?
 - <https://login.ellucian.com/>
 - Click “Sign up for an account”
- Ellucian Customer Center > Resources > Documentation > All Products to access Ellucian Documentation, then use Product A-Z to filter for Banner

Banner Self Service

Find information about common functionality across multiple Banner 9 Self-Service applications.

Student Self-Service

View consolidated student information and academic progress.

Accounts Receivable (Banner)

Manage charge and payment information for individual accounts.

Download these!





Banner Self-Service Overview and Webinars Channel

Informal channel that contains webinars and overviews

FOLLOWING



1/2



ellucian

Learn more about
Ellucian Banner
Self-Service
Enhanced capabilities for your
students, staff, and faculty



Watched



Doc

Watched



WE

Watched



WE

Watched



WEBINAR



WE

Watched

[Click here](#) to go to the
Adoption Channel

Banner 9 Self-Service
Capabilities

Cathy Proviano
a year ago

303 views



Ellucian Banner: Pathways
to Self-Service

CP Cathy Proviano
a year ago

179 views | 1h 00m



Introducing Banner
Employee Self-Service 9.12

CP Cathy Proviano
a year ago

136 views | 55m 08s



Introducing Banner Finance
Self-Service

CP Cathy Proviano
a year ago

116 views | 1h 01m



Introducing Banner
Financial Aid and Accounts
Receivable Self-Service

CP Cathy Proviano
a year ago

142 views | 59m 50s



Introducing Banner Financial Aid and Accounts Receivable Self- Service

60 minute video

Banner 9 Self-Service Frequently Asked Questions and Answers

13 page pdf containing basic FAQs

Implementing Your First Banner Self-Service Application

45 slide presentation pdf (2021 Ellucian Live)

Registration Self-Service Basic Install & Configure Steps (Part A)

6 page pdf (Theme Editor, photos, name display rules, menu
trees)

Web Tailor Functions in Banner Self-Service 9 Channel

9 video demos

FOLLOWING



1/4



Documentation

Guide



Banner Faculty Self-Service
Installation Guide

CP Cathy Proviano
a year ago

42 views



Banner Finance Self-Service
Installation Guide

CP Cathy Proviano
a year ago

25 views



Web Tailor Functions in Banner Self-Service 9 Channel

Informal Channel - These video demonstrations and quick reference guide provide support for performing tasks in Self-Service 9 that used to be...

FOLLOWING



1/2



Web Tailor Functions in Banner Self-Service 9 Channel

Banner 8 Web Tailor Functions in Self-Service Banner 9

What? Function formerly performed in Web Tailor	Where? Where to find this function in Self-Service Banner 9	Resources
Display Audit for Banner Self-Service Logins	GUACONF	 Video Display Audit Records  Documentation Banner Self-Service Auditing Feature  Article Banner 9 Self-Service Auditing
Graphic Customizations	Theme Editor	 Video Ellucian Theme Editor Use  Documentation Ellucian Theme Editor Theme Editor Handbook  Article Steps to Use Theme Editor with Self-Service
Information Text	GUAINFO	 Video Edit Information Text  Documentation Banner Self-Service Information Text
LDAP Administration and Login Return Location	Single Sign On (SSO) Configuration	 Handbook Banner Single Sign-On Handbook  Documentation Configure Banner General Self-Service SSO  Documentation Banner Configuration for CAS SSO
User Roles	GUAUSRL	 Video Add and Delete User Roles  Documentation Maintain Self-Service User Roles  Article How to Create a New Role for Banner Self-Service
Web Menus and Procedures	GUASMNU	 Videos Menu Tree Proxy Menu Global Proxy Delete Proxy Pgs.  Documentation Manage Self Service Menus  Article How to Configure the Banner 9 Menu for Self-Service  Article General Self-Service Global Proxy Access Setup
Web Rules and Parameters	GUACONF	 Video Create and Modify Web Rules and Parameters  Documentation Self-Service Rules Self-Service Parameters  Article Web Tailor 9x Administrative Pages for Self-Service
Web Tailor Overrides	Configure Page Components Tool	 Documentation Configure Page Components Tool  Article What Extensibility Tools Are Available for Banner 9x?

Where is the documentation?

KB000500907 - Banner Accounts Receivable Self-Service Master Article

[Home](#) > [Knowledge](#) > [Customer Self-Service Articles \(Knowledge Base\)](#) > [General](#)

KB000500907

Subscribed

Banner Accounts Receivable Self-Service Master Article
5mo ago • 123 Views • ★★★★★

[No Title]

Description

Banner Accounts Receivable Self-Service pages are delivered through Banner Student Self-Service. Any configuration information can be found in the Banner Student Self-Service Configure document for 9x.

This article provides a link to any articles related to the Accounts Receivable Self-service pages, configuration, and functionality.

Where is the documentation?

Ellucian Articles related to Banner 9x Self-Service

- [000043866](#) - Banner 9 Steps to Modify the Banner 9 Self Service Landing Page Dashboard to include URLs
- [000045859](#) - How can we access the Accounts Receivable Self Service pages
- [000045994](#) - How to configure the Banner Menu to have Banner 9 Self Service applications and not Banner 8 SSB menus
- [000051530](#) - Steps to amend the "Note" label 'This is an unofficial copy of the form 1098-T and is provided for information only' from the Tax Notification presented in Student Self Service'
- [000046034](#) - Banner 9 Self Service Product Links (fully qualified url)
- [KB000500383](#) - Banner Self-Service 8 (SSB8x) to 9 (SSB9x) FAQ
- [000041225](#) - Student Self-Service 9.x links
- [KB000500749](#) - SSB9x Platform 9.39 June 2022 changes to config values for configJob and applicationPageRoleJob impacting GUACONF
- [000034220](#) – Set up Deposit and Fee Payments in Self-Service
- [000039922](#) - Steps to modify SSB links after installing Banner 9 Student Self Service

Where is the documentation?

- KB000500608 – Banner 9 Web Tailor tables
– What happens to the Web Tailor Tables with functionality moving to Banner 9 forms?
- 000051317 – Banner 9 Self-Service Guided Adoption

What's new or different?

Banner 8x

Select term prior to viewing 1098-T

No printer icon

No column sorting

No show/hide option for columns

No search option

No display of student holds

Columns could not be moved

Banner 9x

Terms are pre-populated for 1098-T

Printer icon

Column sorting

Show/hide options for columns

Search option

Student holds displayed on SSB pages

Columns can be moved

Functional User Updates

- Detail Code Control Form (TSADETC)
 - Update Payment History check box on detail codes for payments
- Accounts Receivable and Billing Control (TGACTRL)
 - Update the Statement and Payment History Months
- Accounts Receivable Term Control (TSATERM)
 - Enable terms to work with Pay Now buttons and other functions
- Object Maintenance (GUAOBSJ)
 - Enable exporting data to Excel for Banner pages
 - Search for GUAINFO
 - Go Tools Menu on the page and Export

Live Demo



Functional User Updates

Detail Code Control Form (TSADETC)

- Update Payment History check box for payments

ellucian Detail Code Control Form - Student TSADETC 9.3.21.1 [GA 9.4.1]												
DETAIL CODE CONTROL FORM - STUDENT												
Active filters: Payment History : checked Clear All Filter Again												
Detail Code *	Detail Code Description *	Type *	Category *	Payment History	Grant Type	Priority *	Refund Code	Direct Deposit	Refundable	Receipt	Active	Term Based
CASH	Cash	P	CSH	<input checked="" type="checkbox"/>		000		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CCRD	Credit Card Payment	P	CSH	<input checked="" type="checkbox"/>		000		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PPAL	Pay Pal for HREG	P	CSH	<input checked="" type="checkbox"/>		000		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TDFS	Deposit-Tuition-Semester	P	CSH	<input checked="" type="checkbox"/>		000		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WBCK	Web Check Payment	P	WRP	<input checked="" type="checkbox"/>		000		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Functional User Updates

Accounts Receivable and Billing Control (TGACTRL)

- Update Statement History Months
 - Default value set to 3 months
- Update Payment History Months
 - Default value set to 3 months

ellucian Accounts Receivable Billing Control TGACTRL 9.3.22

ADD RETRIEVE RELATED TOOLS

ACCOUNTS RECEIVABLE BILLING CONTROL

Insert Delete Copy Filter

Default Rule Class []

☐ Automatic Receipt Print

☒ Enforce Restrictions on User Profile Form

☐ Assign Cashiers to Supervisor

☐ Address Required for Miscellaneous Transactions

☒ Store Accounting Feed Detail on TGIFEDH

Feed Priors Using ☐ Transaction Date ☒ System Date

☐ Feed Future Effective Transactions

Feed Futures Using ☒ Transaction Date ☐ System Date

Holds Password BUS

Invoice Prefix * S

Statement History * 3

Months

Payment History * 3

Months

Functional User Updates

Accounts Receivable Term Control (TSATERM)

- Choose the term and click Go
- Enable Term
- Enable Pay Now buttons
- Summarize by Detail Code
- Show Account Detail totals for
 - Account Balance only
 - Balance and Current Due
- Include Display of
 - Authorized Aid
 - Aid Memos
 - Other Memos
- Show Totals for
 - No calculated amounts
 - Adjust Balance only
 - Both Adjusted Balance and Current Due

Functional User Updates

Accounts Receivable Term Control (TSATERM)

Accounts Receivable Term Control TSATERM 9.3

Term: 202202 Spring Semester 2022

ADD RETRIEVE RELATED TOOLS

Start Over

ACCOUNT DETAIL FOR TERM PARAMETERS

Insert Delete Copy Filter

<input checked="" type="checkbox"/> Enable Term	Current Due Effective Date	01/10/2022
<input checked="" type="checkbox"/> Enable Pay Now buttons	Show Account Detail * totals for	Balance and Current Due
<input checked="" type="checkbox"/> Summarize by Detail Code		

Include Display of		Show totals for	
<input checked="" type="checkbox"/> Authorized Aid		Both Adjusted Balance and Current Due	
<input checked="" type="checkbox"/> Aid Memos	<input checked="" type="checkbox"/> Other Memos	Both Adjusted Balance and Current Due	

Functional User Updates

- **Information Text Editor (GUAINFO)**
 - No refresh timing delay for updated information messages
 - Use the Tools Menu to export messages to Excel for review once enabled on GUAOBS
 - Exporting data--filter by the Source Indicator
 - B = Banner Baseline (Delivered messages)
 - L = Local (Local School Message Changes)
 - Update blue information text
 - STUDENTLANDINGPAGE
 - Create headers and naming for each item below the header
 - AR%
 - Create information text and 'Note' Label text on 1098-T's
- **Banner Applications Configuration (GUACONF)**
 - Refresh timing delay = 30 minutes past the hour
 - Application ID = SSS

Information Text Editor (GUAINFO)

Information Text Editor GUAINFO 9.3.19

ADD RETRIEVE RELATED TOOLS

INFORMATIONAL MESSAGES

Active filters: Page Name: STUDENTLANDINGPAGE% Locale: en_US Clear All Filter Again

Page Name *	Message Label *	Source Indicator *	Audience *	Description	Locale *	Sequence Number *	Text Type *
STUDENTLANDINGPAGE	STUDENT.LANDPAGE....	Baseline	DEFAULT		en_US	3	Normal
STUDENTLANDINGPAGE	STUDENT.LANDPAGE....	Baseline	DEFAULT		en_US	2	Normal
STUDENTLANDINGPAGE	STUDENT.LANDPAGE....	Baseline	DEFAULT		en_US	1	Normal
STUDENTLANDINGPAGE	STUDENT.LANDPAGE....	Local	DEFAULT		en_US	1	Normal

1 of 1 10 Per Page Record 4 of 4

Information Text Editor GUAINFO 9.3.19

ADD RETRIEVE RELATED TOOLS

INFORMATIONAL MESSAGES

Active filters: Page Name: STUDENTLANDINGPAGE% Locale: en_US Clear All Filter Again

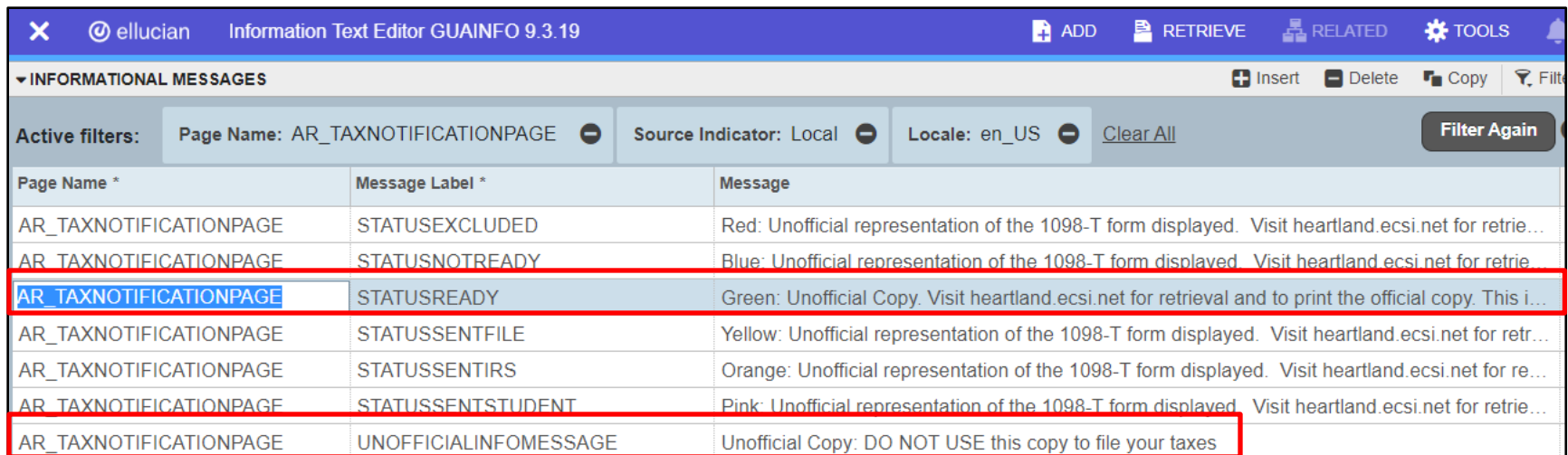
Message	Start Date	End Date	Comment
Hello	07/28/2018		Normal text for student self service landing pag
Student Services	07/28/2018		Header for student self service landing page
This is the entry page for Banner Student. From here, you can navigate to the following page...	07/28/2018		Normal text for student self service landing pag
Information Text Editor (GUAINFO) Filter criteria--Page Name: STUDENTLANDINGPAGE Lo...	01/26/2023		Normal text for student self service landing pag

1 of 1 10 Per Page Record 4 of 4

Information Text Editor (GUAINFO)

Page Name: AR_TAXNOTIFICATIONPAGE

- Message Label
 - 'STATUSREADY' Message starts with 'Green'
 - 'UNOFFICIALINFOMESSAGE' starts with 'Unofficial Copy'



Information Text Editor GUAINFO 9.3.19

ADD RETRIEVE RELATED TOOLS

INFORMATIONAL MESSAGES

Insert Delete Copy Filter

Active filters: Page Name: AR_TAXNOTIFICATIONPAGE Source Indicator: Local Locale: en_US Clear All Filter Again

Page Name *	Message Label *	Message
AR_TAXNOTIFICATIONPAGE	STATUSEXCLUDED	Red: Unofficial representation of the 1098-T form displayed. Visit heartland.ecsi.net for retrie...
AR_TAXNOTIFICATIONPAGE	STATUSNOTREADY	Blue: Unofficial representation of the 1098-T form displayed. Visit heartland.ecsi.net for retrie...
AR_TAXNOTIFICATIONPAGE	STATUSREADY	Green: Unofficial Copy. Visit heartland.ecsi.net for retrieval and to print the official copy. This i...
AR_TAXNOTIFICATIONPAGE	STATUSSSENTFILE	Yellow: Unofficial representation of the 1098-T form displayed. Visit heartland.ecsi.net for retr...
AR_TAXNOTIFICATIONPAGE	STATUSSSENTIRS	Orange: Unofficial representation of the 1098-T form displayed. Visit heartland.ecsi.net for re...
AR_TAXNOTIFICATIONPAGE	STATUSSSENTSTUDENT	Pink: Unofficial representation of the 1098-T form displayed. Visit heartland.ecsi.net for retrie...
AR_TAXNOTIFICATIONPAGE	UNOFFICIALINFOMESSAGE	Unofficial Copy: DO NOT USE this copy to file your taxes

Student Tax Notification (TSATAXN)

TSATAXN

- Status Ready to Send

GUAINFO

- AR_TAXNOTIFICATIONPAGE
- Message Label
 - STATUSREADY

ellucian Student Tax Notification TSATAXN 9.3.19

Tax Year: 2021 ID: 913255307 Jackie Lovejoy

▼ STUDENT TAX INFORMATION

Last Name * Lovejoy

SSN

First Name * Jackie

Middle Name *

Address Line 1 Anywhere Road

Address Line 2

Eligible Amounts Box 1

Adjustments Box 4

☐ Includes January-March

☒ Half Time Enrollment

☐ Remove Notification

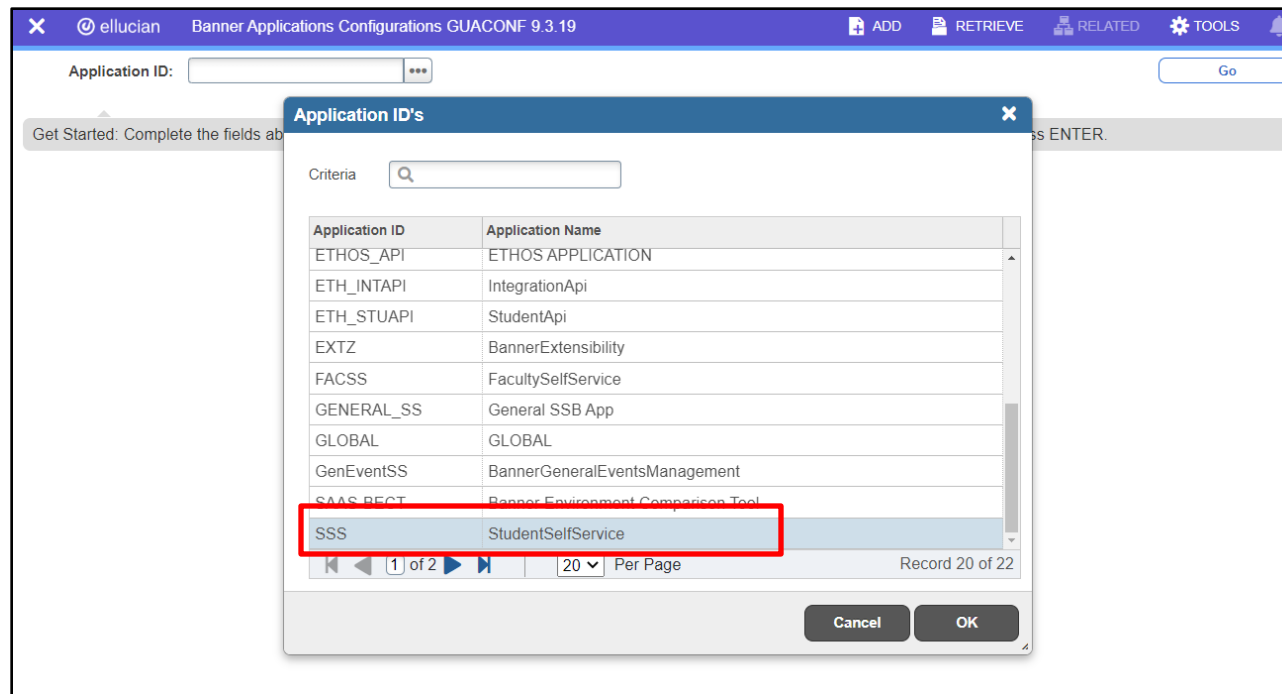
Student Notification Ready to Send

IRS Report Ready to Send

Banner Applications Configuration (GUACONF) for 1098-T's

Application ID = SSS

Application Name = StudentSelfService



Banner Applications Configuration (GUACONF) for 1098-T's

- Click on the Configurations tab
- Choose the Configuration Name
- Update the Configuration Value
 - Watermark can be toggled between True or False
 - If the watermark is disabled with False as the 'Configuration Value' in GUACONF, it is not printed in the PDF in Self-Service
 - Changes may take from 30 minutes to one hour or more to appear in Self-Service

Configuration Name	Configuration Type	Configuration Value
banner.student.accounts.receivable.tax.notification.displayUnofficialCopyWatermark	Boolean	True/False

Note: "The 1098-T form in Banner Self-Service is not an official copy approved by the IRS and is not a valid substitute for the printed 1098-T form. It is a representation of the IRS form."

Banner Applications Configuration (GUACONF) for 1098-T's

What is the difference for the Unofficial Copy Watermark between true and false?

The screenshot shows the Banner Applications Configurations GUACONF 9.3.19 interface. The top navigation bar includes a close button, the ellucian logo, the application name, and buttons for ADD, RETRIEVE, RELATED, TOOLS, and a notification bell. Below the navigation bar, the application ID is SSS StudentSelfService, and there is a Start Over button. The main content area has tabs for Application Pages, Configurations (selected), Self-Service Rules, and Self-Service Parameters. Under the Configurations tab, there is a section for CONFIGURATIONS with buttons for Insert, Delete, Copy, and Filter. Below this, there are active filters for Configuration Name and User Preference Indicator, with a Clear All button and a Filter Again button. The main table displays configuration details for 'banner.student.accounts.receivable.tax.notification.displayUnofficialCopyWa'. The table has columns for Configuration Name, Configuration Type, Configuration Value, and User Preference Indicator. The configuration value is 'true'. Below the table, there is a pagination bar showing '1 of 1' and '10 Per Page'. At the bottom, there is a Comments section with a text area containing the text 'Ability to control the display of unofficial Copy watermark.'

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
banner.student.accounts.receivable.tax.notification.displayUnofficialCopyWa	boolean	true	<input type="checkbox"/>

Banner Applications Configuration (GUACONF) for the Pay Now button in SSB

Application ID = GENERAL_SS

Application Name = General SSB App

- Filter for %banner%pay% on the Configurations Tab
 - Using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
 - Update the Configuration Values
 - banner.nonpci.payment.gateway.url = vendor URL
 - banner.payment.vendor = Touchnet/Cashnet
 - **NOT** using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
 - Update the Configuration Values
 - banner.pci.payment.gateway.url = vendor URL
 - banner.payment.vendor = Touchnet/Cashnet

Banner Applications Configuration (GUACONF) for the Pay Now button in SSB

Application ID = GENERAL_SS

Application Name = General SSB App

- Filter for %banner%pay% on the Configurations Tab

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
banner.nonpci.payment.gateway.url	string	If using SSO with vendor use nonpci create URL of payment vendor	<input type="checkbox"/>
banner.payment.vendor	string	Touchnet/Cashnet	<input type="checkbox"/>
banner.payment.vendor.url	string	If not using SSO with a vendor use PCI update URL for the vendor here.	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.available	boolean	false	<input type="checkbox"/>

Banner Applications Configuration (GUACONF) for the Pay Now button in SSB page level

Application ID = SSS

Application Name = StudentSelfService

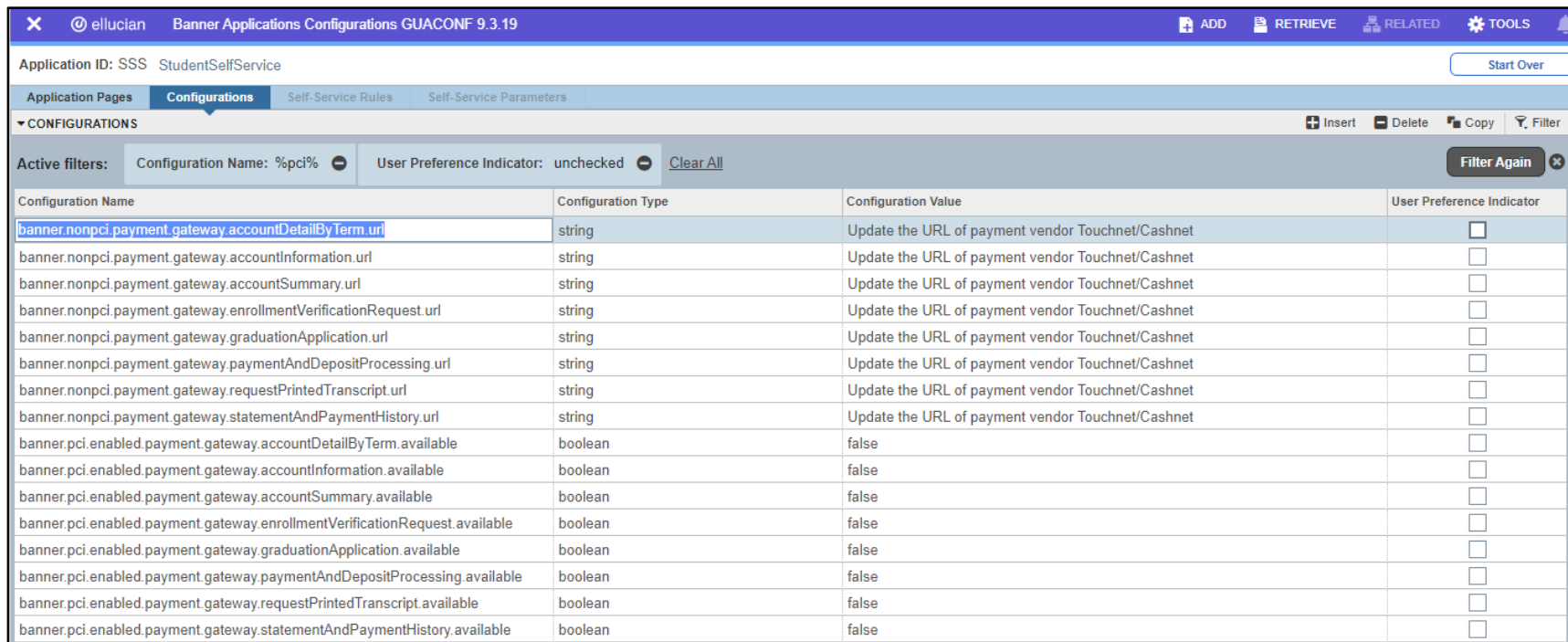
- Filter for %pci% on the Configurations Tab
 - If using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
 - Update the Configuration Values
 - Set all: nonpci values to the vendor URL
 - Set all: pci values to false

Banner Applications Configuration (GUACONF) for the Pay Now button in SSB page level

Application ID = SSS

Application Name = StudentSelfService

- Filter for %pci% on the Configurations Tab



Application ID: SSS StudentSelfService

Application Pages: Configurations | Self-Service Rules | Self-Service Parameters

▼ CONFIGURATIONS

Active filters: Configuration Name: %pci% | User Preference Indicator: unchecked | Clear All

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
banner.nonpci.payment.gateway.accountDetailByTerm.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.accountInformation.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.accountSummary.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.enrollmentVerificationRequest.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.graduationApplication.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.paymentAndDepositProcessing.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.requestPrintedTranscript.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.nonpci.payment.gateway.statementAndPaymentHistory.url	string	Update the URL of payment vendor Touchnet/Cashnet	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.accountDetailByTerm.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.accountInformation.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.accountSummary.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.enrollmentVerificationRequest.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.graduationApplication.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.paymentAndDepositProcessing.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.requestPrintedTranscript.available	boolean	false	<input type="checkbox"/>
banner.pci.enabled.payment.gateway.statementAndPaymentHistory.available	boolean	false	<input type="checkbox"/>

Live Demo



Student Accounts in Self Service

- Example list for display in Accounts Receivable Self-Service
 - Account Summary
 - Account Detail For Term
 - Tax Notification (1098-T)
 - Account Information
 - Statement and Payment History
 - Payment and Deposit Processing

Banner Applications Configuration (GUACONF)

Unofficial Copy
Watermark

Tax Notification

Holds 1

Tax Year

2021

Green: Unofficial Copy. Visit heartland.ecsi.net for retrieval and to print the official copy. This important tax information will be provided to you and furnished to the Internal Revenue Service.

Form 1098-T

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number ITS University 2500 Daniels Bridge Rd., BLDG 300 Athens GA 30606 United States of America (706) 5832001		1 Payments received for qualified tuition and related expenses \$6,041.24	2021 Form 1098-T	Tuition Statement
		2 \$		
FILER'S employer identification no. 586001997	STUDENT'S TIN 3			
STUDENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code Jackie Lovejoy Anywhere Road Athens GA 30606		4 Adjustments made for a prior year \$	5 Scholarships or grants \$5,423.29	Note: Unofficial Copy: DO NOT USE this copy to file your taxes
		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January-March 2022 <input type="checkbox"/>	
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$	

Information Text Editor (GUAINFO)

AR_TAXNOTIFICATIONPAGE

- Create blue information text messages
- Create a 'Note' label unofficialInfoMessage

Tax Notification

Holds

Tax Year

2021

Green: Unofficial Copy. Visit heartland.ecsi.net for retrieval and to print the official copy. This important tax information will be provided to you and furnished to the Internal Revenue Service.

Form 1098-T

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number ITS University 2500 Daniels Bridge Rd., BLDG 300 Athens GA 30606 United States of America (706) 5832001		1 Payments received for qualified tuition and related expenses \$6,041.24	<div>2021</div> <div>Form 1098-T</div>	<div>Tuition Statement</div>
		2 \$		
FILER'S employer identification no. 586001997	STUDENT'S TIN	3		
STUDENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code Jackie Lovejoy Anywhere Road Athens GA 30606		4 Adjustments made for a prior year \$	5 Scholarships or grants \$5,423.29	<div> <div>Note:</div> <div>Unofficial Copy: DO NOT USE this copy to file your taxes</div> </div>
		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January-March 2022 <input type="checkbox"/>	
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$	

Banner 9x AR Self-Service

Account Summary

- Overview
- Term
- Period

Account Summary

View By Overview

View By Overview

View By Term

View By Period

Account Balance ?

\$8,058.95

\$8,058.95


Detail Code	Description	Charge	Payment	Balance
ATHF	Athletic Fee-Fall Term	\$215.00		\$0.00
ATHS	Athletic Fee-Spring Term	\$215.00		\$215.00
BORI	BOR-Institutional Fees	\$484.00		\$242.00

Banner 9x AR Self-Service

Account Summary Overview

- Sort by any heading
- Show or hide columns

Account Summary

 **Holds** ¹ **Pay Now**

View By Overview ▾

i Want to change the "Informational Message" Go to GUAINFO, Filter or AR_%, Locale: en_US. Review summarized charges and payments to your account. Anticipated third party contract payments, financial aid payments, and memo items are NOT included in this summary.

Current Amount Due as of 02/01/2023 [?]

\$8,058.95

Account Balance [?]

\$8,058.95

Detail Code	Description	Charge	Payment
ATHF	Athletic Fee-Fall Term	\$215.00	
ATHS	Athletic Fee-Spring Term	\$215.00	
BORI	BOR-Institutional Fees	\$484.00	

Show/Hide Column ▾

Select All

Detail Code

Charge

Payment

Balance

Search

\$0.00

\$215.00


\$242.00

Banner 9x AR Self-Service

Account Summary Overview

- Print
- Holds
- Pay Now
- Search



Account Summary



Holds ¹

Pay Now

View By Overview ▾

 Want to change the "Informational Message" Go to GUAINFO, Filter or AR_%, Locale: en_US. Review summarized charges and payments to your account. Anticipated third party contract payments, financial aid payments, and memo items are NOT included in this summary. 

Current Amount Due as of 02/01/2023 ⓘ

\$8,058.95

Account Balance ⓘ

\$8,058.95

Show/Hide Columns

DOSO

Detail Code	Description	Charge	Payment	Balance
DOSO	Dorm-Southwestern Oaks	\$5,600.00		\$2,800.00
Total		\$5,600.00	\$0.00	\$2,800.00

Current Amount Due as of 02/01/2023 ⓘ

\$8,058.95


Account Balance ⓘ

\$8,058.95

Banner 9x AR Self-Service

Account Information

Account Information




Holds

1


Pay Now


Account Transactions

Deposits




Charges and payments on your account are listed below, beginning with the most recent. Anticipated credits including pending financial aid are NOT included in this listing.



Current Amount Due as of 03/03/2023 


\$8,058.95

Account Balance 

\$9,693.95

Show/Hide Column

search



Date Recorded	Description	Term	Charge	Payment
03/03/2023	Undergrad-In-State TuitionFall	Spring Semester 2023	\$900.00	
03/03/2023	Canes Card ID	Spring Semester 2023	\$10.00	
03/03/2023	Housing Student Engagement Fee	Spring Semester 2023	\$25.00	
03/03/2023	Student Success Center Fee	Spring Semester 2023	\$38.00	

Banner 9x AR Self-Service

- See 000046353 – Banner Accounts Receivable Advance Deposit Processing Master Article

Banner 9x AR Self-Service

- See Article 000034220 – Setup for Deposit and Fee Payments in Self Service
 - Deposit Type Code Validation (TTVDTYP)
 - Payment Code Validation (TTVPTYP)
 - Deposit Detail Control (TGADEPC)
 - Deposit Crosswalk Form (TGADEPX)
 - Web Payment Rules Form (TSAWPAY)


Banner 9x AR Self-Service

Payment and Deposit Processing

Payment and Deposit Processing

Holds¹

Cash Type Payment for Spring Semester 2023 ▾

 Select the checkbox against the transaction to make a payment. The required transaction to be paid is already selected. Enter ... ▾

Description	Amount	Number of Payments
<input checked="" type="checkbox"/> Matriculation Deposit	\$200.00	1
Total	\$200.00	

Pay Now

Ask your peers

- Ask your peers
 - Helpful hints
 - Lessons learned
- Self-reported implementation status
 - Banner 9 Implementation Grid

Banner 9 Implementation						
The Banner Releases Summaries page specifies the most current release information.						
Fall 2022 Survey Results	Student	Financial Aid	Accounts Receivable	General	Student Registration	Faculty
Abraham Baldwin Agricultural College	Prod 9.20.1.1	Prod 9.3.31	Prod 9.3.22	Prod 9.11	Prod 9.25	Prod 9.18
Albany State University *	Not Implemented	Not Implemented	Not Implemented	Not Implemented	Test 9.21	Not Implemented
Atlanta Metropolitan State College	Prod 9.20.1.1	Prod 9.3.32.0.4	Not Implemented	Prod 9.11 (01/01 /2021)	Prod 9.25.1 (04/01 /2021)	Prod 9.18.1

Ask your peers

- If you have implemented...
 - Level and speed/ease of user acceptance (students & staff)
 - Share helpful hints or gotchas
 - Willing to share your plan
- If you have not implemented yet...
 - Plan or timeframe for testing, implementing, training
 - Concerns or hurdles

More training sessions coming soon

Topic	Date
Student Registration	Wednesday, January 25, 2023
Page Builder	Wednesday, February 8, 2023
Faculty Self-Service	Wednesday, February 22, 2023
Accounts Receivable	Wednesday, March 8, 2023
Communication Management	Wednesday, March 22, 2023
Proxy Management	Wednesday, April 5, 2023
Student Self-Service	Wednesday, April 19, 2023
Action Item Processing	Wednesday, May 3, 2023



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Information Technology Services