Banner
Open Learning Registration Handbook

Release 8.0
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SUNGARD HIGHER EDUCATION

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Student 8.0
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May 2008	New version that supports Banner 8.0 software.

Think before you print.

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Chapter 3 Open Learning Course and Section Setup

Chapter 4 Course Registration and Drops/Withdrawals

Chapter 5 Using Extensions with Open Learning Registration

Chapter 6 Assessment and Refunding

Chapter 7 Self-Service Information

1 Overview

The *Open Learning Registration Handbook* provides information for administrative staff who handle the daily activities of the registrar's offices supported by the Student product.

This handbook is a procedural overview of the open learning registration functionality for baseline, self-service, and Voice Response users. More in-depth explanations of the various forms and processes used in open learning registration are available in Online Help and in the following Banner manuals:

- *Student User Guide*
- *Student Self-Service User Guide*
- *Faculty and Advisor Self-Service User Guide*
- *Financial Aid User Guide*
- *Financial Aid Self-Service User Guide*
- *Voice Response Implementation Guide*

Note

The self-service and Voice Response products are optionally licensed products. Please be advised that the functionality described in this handbook is applicable only if those products are actually licensed at your site.

This chapter covers the following topics:

Understanding Open Learning Registration

Open learning processing includes the following characteristics.

- Open learning courses and sections can be integrated with traditionally delivered courses, using the same forms and term structure. (*Open learning only.*)
- You can define course offerings with an established term *but* without the constraints of term dates and rules for registration. (*Open learning only.*)

- Open learning courses are bound by the term structure (for administrative purposes) but are not dependent on the established part-of-term functionality. Registration dates and rules are defined for the section, thereby eliminating the need for multiple parts-of-term.
- Registration and withdrawal/drop processing is flexible and student-centric.
- Students can be given the ability to choose when they want to start their course, *or* all students can be mandated to start on the same date.
- There is no requirement that meeting times must be defined for the open learning section in order to allocate instructors.
- Students will be permitted to extend the amount of time given to complete a course based on section level rules and fees reflecting institutional policy.
- Open learning section level rules/fees automatically default when a new section is created, based on course/section characteristics. Also, batch processes are available to populate these rules.
- Withdrawal/drop processing is not based on static dates but on an individual learner's progress in the course.
- A process is available to assign user-defined grades to all ungraded registration records past a specified grace period (number of calendar days). (*Open learning only.*)

Some open learning functionality can also be used for traditional courses.

- You can define the purpose of scheduled meeting times (for example, class, chat).
- A rudimentary syllabus can be used at the course and section levels to house information that can be displayed on the Web, giving learners more information about the class so they can make a more informed registration decision.
- A long course and/or section title (up to 100 characters) can be defined. Display options can be used for self-service and reports.
- Expanded course and section descriptions, up to 32K of data, augmenting the existing course/section text can be used.
- Faculty can define and publish their contact hours through Faculty and Advisor Self-Service.
- Fee types exist for use with open learning and traditional courses.
- The display of data in the self-service products is controlled through a flag rather than through Web registration dates.

- Web search criteria can be used and are controlled at the term level. The values in the Web search pull-down list are dynamically controlled without the need to add a Web indicator to the tables.
- The term-based control of the display of grades and waitlists on the Web can be overridden at the section level.

Note

Automated waitlist processing is not used with open learning courses.

With the existence of section level controls, there is a greater responsibility to set the rules up appropriately to reflect your academic policies. It is also possible to have multiple terms open at the same time, thereby increasing the need to plan your terms carefully, keeping in mind the possible impacts on end-of-term processing.

Traditional and Non-Traditional Processing

This section describes and compares traditional and non-traditional processing in the following:

- "Course Catalog" on page 1-4
- "Class Schedule" on page 1-5
- "Section Level Fees" on page 1-6
- "Open Learning Rules" on page 1-7
- "Registration" on page 1-7
- "Fee Assessment" on page 1-8
- "Student Self-Service Catalog and Schedule" on page 1-9
- "Faculty and Advisor Self-Service Catalog and Schedule" on page 1-11
- "Academic History" on page 1-13

Course Catalog

Traditional	Non-Traditional
Course Catalog (by term range)	

Features common to both:

- Long course description capabilities
- Ability to define an optional long course title
- Ability to define an optional long course description (with cut and paste capabilities)
- Ability to define a rudimentary syllabus (student learning objectives, technical requirements, required materials/booklist)
- Provide additional course search capabilities by term start/end dates. This provides administrative staff with the same search capabilities that students have on the Web

Traditional:

Define course information including such things as:

- Grading mode
- Credit hours, billing hours, lab hours, lecture hours, other hours
- Applicable levels
- Continuing education indicator
- Fees (flat or per billing hour basis)
- Co-requisites
- Course equivalencies
- Prerequisites
- Text
- Test score requirements
- Registration restrictions (college, major, class, level, degree, program, campus)
- Section creation restrictions (term and campus)

This information defaults to the individual section records and will not be used in processing.

Non-Traditional:

Same as traditional with the following additions:

- Ability to enter a course duration (in user-defined periods of time such as days, weeks, months).

This information defaults to the individual section records and will not be used in processing.

Note: The **Instructional Method** field on STVSCHD is used to automatically connect an instructional method with a schedule type. This is not a mandatory exercise, as the instructional method can be attached independently to the section record in SSASECT.

Class Schedule

Traditional	Non-Traditional

Class Schedule (by term)

Features common to both:

- Meeting type on meeting records to provide the ability to define the purpose (for example, chat)
- Ability to house long section description (with cut and paste capabilities)
- Ability to define an optional long section title and document course content URL (non-functioning)
- Ability to define a rudimentary syllabus (student learning objectives, technical requirements, required materials/booklist) either by defaulting the course syllabus information or entering new data directly
- Expanded search capabilities including instructional method, as well as other client-requested parameters
- Additional methods to define registration fees (by duration, by credit hour)
- Mass population process for section level registration fee rules
- Ability to default or enter a course duration (in user-defined periods of time: days, weeks, months)
- Ability to tie a course content delivery method (instructional method) to a section

Traditional

Define course offerings including:

- Campus
- Indicator to display on the Web
- Enrollment and waitlist limits
- Parts-of-term
- Reserved seat allocation (level, major, class)
- Meeting dates, days, times, and places
- Assigned primary or secondary instructors (with workload information)
- Room scheduling information

The section can be:

- Cross-listed with other sections

or

- Linked to other sections

Non-Traditional

Same as traditional with the following additions (excluding waitlist capabilities):

- Define section-specific registration dates (date range that section is open for registration) and start/end dates (date range the student can elect to start the course). These dates are independent of part-of-term.
- Assign instructors without the constraint of defining meeting records.
- Define registration status codes and refunding rules at the section level independent of part-of-term.
- Refund registration fees dynamically based on the student's individual start date, the percentage of course completed or duration completed.
- Define extension rules at the section level independent of part-of-term.

Note: Term is still used for open learning sections to provide administration periods, as well as the ability to tie courses to an academic year.

Traditional	Non-Traditional
Class Schedule (by term) (*continued*)	
Ability to change defaulted information from the course or enter it directly: • Grading mode • Fees (flat or per billing hour basis) • Co-requisites • Course equivalencies • Prerequisites • Text • Test score requirements • Registration restrictions (college, major, class, level, degree, program, campus) Define blocks of courses for registration purposes.	N/A

Section Level Fees

Traditional	Non-Traditional
Features common to both: • Ability to define default section level fees in SSADFEE based on course/section characteristics: college, department, campus, schedule type, instructional method (for new sections only) • Batch process that can be used to default SSADFEE rules for existing sections, if no rules have been previously defined	
Can charge fees based on: • Billing hours • Credit hours • Flat fee	Can charge fees based on: • Billing hours • Credit hours • Section duration • Flat fee

Open Learning Rules

Traditional	Non-Traditional
N/A	The following information will default to the individual sections based on section/course criteria (level, department, campus, college, schedule type, and/or instructional method): • Default section level registration start/end dates • Default registration status codes and their definition • Default extension processing rules • Default refund processing rules

Registration

Traditional	Non-Traditional
Registration (by institutionally defined start date)	Registration (by institutionally defined *or* student-specified start date)

Feature common to both:

- Active registration records and complete registration history available for each student, exclusive of term

Registration defined by institution start date: • Students are registered in sections based on term-specific registration rules. • Start date is institutionally defined via term, part-of-term, or meeting times.	Registration defined by either institution or student-selected start date: • Students can be registered in sections based on either term-specific or section-specific rules, depending on the set-up of the section. • Students have the ability to pick their course start or end dates. If the start date is pre-selected, the expected completion date of the registration will be calculated based on the duration of the section. If the end (expected completion) date is pre-defined, the start date will be calculated based on the duration of the section. • Students can extend the expected completion date of the registration with or without an additional fee. Extension processing history is also available. • The auto grade assignment process assigns a user-defined grade to registration records based on values in the run parameters.

Fee Assessment

Traditional	Non-Traditional

Feature common to both:

- Multiple methods to define section level registration fees (including by duration, by credit hour)

Traditional

Assessment of fees is based on any or all of the following:

- Registration fee rules established at the section (flat fee or per billing hour)
- Student-specific fees
- Fees established for the term (per credit hour) based on student characteristics, course level and/or course campus with the capability to enforce minimum/maximum fees and ranges based on registered credits

Refunding rules are established:

- As part of the term registration status code definition based on static date ranges
- As registration eligibility code definition based on static date ranges
- For the term, based on static date ranges

Fee assessment and refunding processes can be generated online or in batch mode.

Non-Traditional

The following information is defaulted from the open learning rules to the individual sections based on section/course criteria (level, department, campus, college, schedule type, and/or instructional method):

- Registration status codes and their definitions
- Extension processing rules
- Refund processing rules

With registration extension processing, the student can be allowed to “buy” additional time to complete a course as follows.

- Fees amount and detail codes can be predefined in the extension processing rule
- Fees can be waived (for example, expected completion date elongated due to faculty member sickness or leave).
- Fee rules can be overridden if an extension rule is established with this capability.

Static date processing is not possible with the continuous entry model. Therefore refunding criteria have been provided (by duration completion or percentage completion) and are achieved dynamically based on the student's start/end dates.

Fee assessment and refunding processes can be generated online or in batch mode.

Student Self-Service Catalog and Schedule

Traditional	Non-Traditional

Public/Unsecured Self-Service Catalog and Schedule

Features common to both:

- Catalog and schedule information are dynamically displayed based on institutionally defined preferences.
- Schedule information is linked to course data.
- Syllabus information is available.
- Expanded course descriptions and section text are available.
- Prospective students can request schedule information for a specific term or a range of availability dates.

Traditional	Non-Traditional

Student Self-Service (*continued*)

Features common to both:

- Students can search for classes based on a term or range of dates.
- Students can view all active (non-rolled) registration activity, regardless of term, with links to grade detail, course information, instructor hours.
- Students can view all registration activity, regardless of term, with links to grade detail, course information.
- The week at a glance page (with associated detail) displays all active registration records, thereby crossing term boundaries.

Traditional

See Registration category above.

Students can:

- Search for available classes and register by term
- View their class schedules by term
- Change class options of registered courses by term
- View their financial obligations to the institution (account information)
- Withdraw/drop classes by term
- View their registration statuses by term
- View holds
- View grades by term
- Request various types of transcripts
- View their academic progress through the degree evaluation process
- Pay registration fees via credit cards
- View and update personal information (for example, address, phone number)
- Review their tax information

Students can formally apply for admission into a program or with a minimum of information (quick admit) to facilitate registration. This process is governed by a series of institutionally defined rules.

Non-Traditional

See Registration category above.

Note: Students can not request an extension through the Web at this time.

Same as traditional with the following exceptions.

- Students are not required to access information by first entering a term.
- Through the class search by date capability, students can register directly from the search results without first specifying a term. Students can also register in multiple terms at the same time provided that a date search was performed.
- Information about registered classes (for example, grades, class detail) is available from either the active or historical registration activity without the need to know or inquire by term.

Faculty and Advisor Self-Service Catalog and Schedule

Traditional	Non-Traditional

Public/Unsecured Self-Service Catalog and Schedule

Features common to both:

- Catalog and schedule information are dynamically displayed based on institutionally defined preferences.
- Schedule information is linked to course data.
- Syllabus information is available.
- Expanded course descriptions and section text are available.
- Prospective student can request schedule information for a specific term or a range of availability dates.

Faculty and Advisor Self-Service

Features common to both:

- Faculty and advisors can view active assignments (any class where students have not been rolled to academic history) with links to grade entry applications and course information.
- Faculty and advisors can view all assignments with links to course information and class lists.
- The week at a glance page (with associated detail and class lists) displays all active assignments thereby crossing term boundaries.
- Faculty and advisors can establish contact hours with appropriate phone number and/or email address.
- Faculty and advisors can enter syllabus information.
- Faculty and advisors can access student information directly from class list.

Traditional	Non-Traditional
Faculty and Advisor Self-Service (*continued*)	
Faculty and advisors can: • Search for available classes and register students by term • View their schedule by term • View their class list by term • View waitlisted students by term • Establish registration overrides by term • Withdraw/drop students by term • Enter grades by term • View student's transcript information • View a student's academic progress through the degree evaluation process • View student's address, email, and phone information	Same as traditional with the following exceptions. • Faculty and advisors will not be required to access information by first entering a term. • Through the class search by date capability, faculty and advisors can register a student directly from the search results without first specifying a term. • Information about assigned classes (for example, grades, class lists) will be available from either the active or historical class assignment schedule without the need to know or inquire by term.

Academic History

Traditional	Non-Traditional
Academic History	
Feature common to both: • Ability to display start/end dates on transcripts	
Features include: • Transfer coursework from another institution either directly or through transfer articulation • Request student transcripts based on institutionally defined rules • Maintain progress towards student goal (for example, degree, certificate) • Apply completed coursework to student goal • Apply institutional policy with regard to repeat and equivalent courses • Record non-academic student achievements and formal awards • Graduate a student. • Determine a student's academic standing • Establish and maintain Dean’s lists • Calculate a variety of GPAs • Maintain student grades and produce grade mailers • Maintain IPEDS reports and Web upload files • Establish and maintain curriculum rules	Same as traditional with the following additions: • Capture of actual registration start/end dates • Capture of number of extensions • Capture of long course/section title

Where to Go Next

This handbook is organized in chapters which are described below. The information has been consolidated so that baseline, self-service, and telephone registration processing are discussed jointly under the appropriate topics.

- This chapter defines the characteristics of open learning and summarizes the differences between traditional registration and non-traditional registration.
- Chapter 2, "Setting Up Open Learning Registration", describes system requirements, validation table data, conversion information, and how to set up open learning terms, traditional terms, and blended terms.
- Chapter 3, "Open Learning Course and Section Setup", discusses how to set up courses and sections for baseline and self-service, how to build section-related rules, and how to use the long title and long description information.
- Chapter 4, "Course Registration and Drops/Withdrawals", details course registration, drops, and withdrawals, as well as using registration status codes, restriction codes, start and end date processing, and history, for baseline, self-service, and telephone registration.
- Chapter 5, "Using Extensions with Open Learning Registration", describes the use of extensions in baseline registration, including drops, withdrawals, and refunds.
- Chapter 6, "Assessment and Refunding", discusses how to use fee assessment and refunding with open learning, including many examples of processing and the results.
- Chapter 7, "Self-Service Information", contains information on using self-service processing for students and faculty with open learning registration.
- Chapter 8, "Financial Aid", details how SCT Banner Financial Aid interfaces with Student for open learning registration.

Related Documentation

In addition to the *Open Learning Registration Handbook*, the following documentation supports your work with the Student System:

Student User Guide — a user/reference manual that provides information needed by the administrative staff who handle the daily activities of the offices supported by the Student product.

Financial Aid User Guide — a user/reference manual that provides information needed by the administrative staff who handle the daily activities of the offices supported by the Financial Aid product.

Banner Getting Started Guide — a user/reference manual that describes the features and components of the SCT Banner system and SCT Banner Online Help.

CAPP Handbook — a reference manual for the Curriculum, Advising and Program Planning (CAPP) module, its functions, and its features. CAPP allows you to offer degree evaluations (compliances) via the Web.

Course Request and Scheduling Handbook — a handbook which describes the batch registration scheduling process and programs.

Student Release Guide — a document containing notes about a release of the product, including descriptions of the enhancements and other modifications in the new release.

Student Upgrade Guide — a technical guide to support your institution's conversion to the newest release.

SCT Banner Documentation Bookshelf Getting Started Guide — a how-to manual directing the installation and maintenance of the Bookshelf.

Student Object:Access Reporting Guide — a user/reference manual for the Object:Access views for the Student System.

GTVSDAX Handbook — a user/technical/reference manual describing the setup and use of the Concept/Crosswalk Validation Form (GTVSDAX).

General User Guide — a user's guide to the General system, its functions and features.

General Technical Reference Manual — a technical reference manual on General utilities, with application-specific supplements.

Student Technical Reference Manual — a technical reference supplement that complements the *General Technical Reference Manual*.

2 Setting Up Open Learning Registration

This chapter describes the steps you need to take set up open learning registration for Banner Student, Banner Student Self-Service, and Banner Faculty and Advisor Self-Service. It covers the following topics:

- "Validation Table Seed Data" on page 2-1
- "Set Up Terms for Registration" on page 2-2

Validation Table Seed Data

The following seed data is supplied by SunGard Higher Education.

Validation Table	Seed Data
Meeting Type Validation Table (GTVMTYP)	CLAS - required value
Fee Type Validation Table (STVFTYP)	FLAT - required value CRED - required value BILL - required value DURN - required value
Duration Units Validation Table (GTVDUNT)	WEEK - 1 Unit = 7 days MTHS - 1 Unit = 31 days
Crosswalk Validation Table (GTVSDAX)	*Dynamic Schedule by Date Range Parameter* Internal Code - SCHBYDATE Group - WEBREG External Value - Y
	Student Name on Web Transcript Parameter Internal Code - NAMEWTRAN Group - WEBTRANSTUNAME External Value - TRUE

Set Up Terms for Registration

This section covers the following procedures:

- "Set Up an Open Learning Term" on page 2-2
- "Set Up a Blended Term (Traditional and Open Learning)" on page 2-6
- "Set Up a Traditional (Non-Open Learning) Term" on page 2-9

See the *Student Self-Service User Guide* for information setting up time tickets, registration appointments, and alternate PINs.

See the *Voice Response Implementation Guide* for information setting up time tickets and alternate PINs.

Set Up an Open Learning Term

Use the following steps to define an open learning term.

1. Define the term on the Term Code Validation Form (STVTERM).

2. If you are using section term restrictions in the Catalog Schedule Restrictions Form (SCASRES), define the required term type(s) on the Term Type Validation Form (STVTRMT).

3. On the Term Control Form (SOATERM), define the term controls for the following:
   - Schedule section of the main window
   - Registration section of the main window
   - Fee Assessment section of the main window
   - Web Self Service and VR section of the main window (if applicable)
   - Registration Error Checking window
   - Web Processing Controls window (if applicable)
   - Base Part of Term block (where you must still define part-of-term *1*)
   - Web Registration Dates block (which does not restrict the availability of data on the Web but does control whether students are permitted to register, regardless of the section level controls)

4. If you are using Voice Response to process registrations, define the term on the Voice Response Registration and Grading Term Based Rules Form (GORRGTM).

Note

For open learning registration, the dates in the Voice Response Registration Add Dates block is not used in favor of the registration from/ to dates defined for the section in the Schedule Form (SSASECT). The dates defined in the Voice Response Registration Drop Dates block is not used, as this information is ascertained based on the open learning rules defined for the section in Schedule Processing Rules Form (SSARULE).■

5. Make sure that all appropriate instructional methods (course content delivery methods) been define on the Instructional Method Validation Form (GTVINSM).

   If you are using Voice Response to process registrations, make sure that the appropriate Voice Response message numbers have been entered. See the *Voice Response Implementation Guide* for specific message numbers.

6. Make sure that all required duration units and calendar day equivalencies have been defined on the Duration Unit Validation Form (GTVDUNT).

   If you are using Voice Response to process registrations, make sure that the the appropriate Voice Response message numbers have been entered. See the *Voice Response Implementation Guide* for specific message numbers.

   When creating equivalent values, remember that they will be used to calculate expected completion dates, as well as to determine a student's progress in a course.

7. Make sure that all required schedule types have been defined on the Schedule Type Code Validation Form (STVSCHD).

8. If you are associating a schedule type with an instructional method, make sure that the appropriate relationships been formed on STVSCHD.

9. Make sure that all required enrollment status codes been defined with the appropriate characteristics (for example, withdrawal indicator, prevent registration) have been defined on the Enrollment Status Code Validation Form (STVESTS).

10. If you are using Voice Response to process registration records, make sure that all required registration status codes have been defined on the Voice Response Registration Status Rules Form (GORRSTS).

Note

For open learning registrations, GORRSTS drop registration status codes are not used. This is determined based on the open learning rules defined for the section in SSARULE. However, a valid GORRSTS registered registration status code is still required for all open learning (and traditional) courses. ■

11. If your institution permits students to extend their registrations, select the **Extention Indicator** checkbox on the Course Registration Status Code Validation Form (STVRSTS) for each registration status code that you want to be extendable.

12. If your institution permits students to drop or withdrawal from extensions, select the **Extention Indicator** checkbox for the applicable drop registration status codes on STVRSTS.

13. Make sure that all required enrollment status codes have been defined for the term on the Enrollment Status Control Form (SFAESTS).

14. Define registration and census dates for all instructional methods to be used for the term on the Open Learning Section Default Rules Form (SOAORUL).

15. Make sure that all courses have been created or updated for this term on the Basic Course Information Form (SCACRSE).

16. Check the following for each course.

Note

Much of this information defaults to a section when it is created.

- Make sure that all the course detail has been defined appropriately in the Course Detail Information Form (SCADETL).
- If there are restrictions, make sure that they have been created on Course Registration Restrictions Form (SCARRES).
- If you wish to define section creation restrictions, make sure that they have been defined on the Catalog Schedule Restrictions Form (SCASRES).
- Make sure that the appropriate prerequisites have been defined in the Catalog prerequisites and Test Score Restrictions Form (SCAPREQ).
- If desired, define the course syllabus information on the Course Syllabus Form (SCASYLB).

17. Make sure that all sections have been either created or rolled from another term on the Schedule Form (SSASECT).

- Make sure that instructional methods, course duration, number of allowed extensions (if applicable), registration from/to, and start from/to dates have been defined appropriately for open learning sections.
- Make sure that the correct course information has defaulted in for the restrictions, section detail (including section level fees), and prerequisites.
- Make sure that the section syllabus information has been created for the sections.
- If applicable, set up the section for use by the Voice Response and self-service applications using the **Voice Response and Self-Service Available** checkbox on SSASECT.

18. Make sure that the section level rules in Schedule Processing Rules Form (SSARULE) reflect your institutional policy.

19. If registration via the self-service products is permitted, define the following internal group code entries on the Crosswalk Validation Form (GTVSDAX):

    - *WEBREG*
    - *REGISTRATION*

    Refer to the *Student User Guide*, the *Student Self-Service User Guide*, or the *Faculty and Advisor Self-Service User Guide* for more information about the *AUTODROP* and *ADMINDROP* internal codes and how they affect registration.

20. If you want to assign meeting types to class meeting time records in SSASECT, make sure that the required values have been entered on the Meeting Type Validation Form (GTVMTYP).

21. If you are using Voice Response to process registrations, make sure that the appropriate Voice Response message numbers have been entered on GTVMTYP. (Refer to the *Voice Response Implementation Guide* for specific message numbers.)

22. If you are using or plan to use Voice Response to process registration records, make sure that all required duty flags have been set on the Voice Response Duty Flag Rules Form (GORFLAG).

    The `REG_BYPASS_TERM` duty flag is used to specify whether you are using term-based selection registration or non-term based selection registration.

    The `REG_SCHEDULE_DELIVER` duty flag is used to specify which kind of schedule is delivered to callers.

    Refer to the *Voice Response Implementation Guide* for more information about duty flags.

23. If you are using or plan to use Voice Response to process registration records, make sure that all required menu rules been established on the Voice Response Menu Controls Rules Form (GORMENU).

    If you specify that students must first select the term in which they wish to register (using the duty flags in the previous step), you can use menu options `REG_APPL_MENU` and `REG_CLASS_MENU` to allow callers to change terms during a single phone session. Refer to the *Voice Response Implementation Guide* for more information about menu options.

Set Up a Blended Term (Traditional and Open Learning)

Use the following steps to define a blended term.

1. Define the term on the Term Code Validation Form (STVTERM).

2. If you are using section term restrictions in the Catalog Schedule Restrictions Form (SCASRES), define the required term type(s) on the Term Type Validation Form (STVTRMT).

3. Define the part-of-term code on the Part of Term Code Validation Form (STVPTRM).

4. On the Term Control Form (SOATERM), define the term controls for the following:

   - Schedule section of the main window
   - Registration section of the main window
   - Fee Assessment section of the main window
   - Web Self Service and VR section of the main window (if applicable)
   - Registration Error Checking window
   - Web Processing Controls window (if applicable)
   - Base Part of Term block (where you must still define part-of-term *1*)
   - Web Registration Dates block (which does not restrict the availability of data on the Web but does control whether students are permitted to register, regardless of the section level controls)

5. If you are using Voice Response to process registrations, define the term on the Voice Response Registration and Grading Term Based Rules Form (GORRGTM).

Note

For open learning registration, the dates in the Voice Response Registration Add Dates block is not used in favor of the registration from/to dates defined for the section in the Schedule Form (SSASECT). The dates defined in the Voice Response Registration Drop Dates block is not used, as this information is ascertained based on the open learning rules defined for the section in Schedule Processing Rules Form (SSARULE).

6. Make sure that all appropriate instructional methods (course content delivery methods) been define on the Instructional Method Validation Form (GTVINSM).

   If you are using Voice Response to process registrations, make sure that the appropriate Voice Response message numbers have been entered. See the *Voice Response Implementation Guide* for specific message numbers.

7. Make sure that all required duration units and calendar day equivalencies have been defined on the Duration Unit Validation Form (GTVDUNT).

   If you are using Voice Response to process registrations, make sure that the the appropriate Voice Response message numbers have been entered. See the *Voice Response Implementation Guide* for specific message numbers.

   When creating equivalent values, remember that they will be used to calculate expected completion dates, as well as to determine a student's progress in a course.

8. Make sure that all required schedule types have been defined on the Schedule Type Code Validation Form (STVSCHD).

9. If you are associating a schedule type with an instructional method, make sure that the appropriate relationships been formed on STVSCHD.

10. Make sure that all required enrollment status codes been defined with the appropriate characteristics (for example, withdrawal indicator, prevent registration) have been defined on the Enrollment Status Code Validation Form (STVESTS).

11. If you are using Voice Response to process registration records, make sure that all required registration status codes have been defined on the Voice Response Registration Status Rules Form (GORRSTS).

Note

For open learning registrations, GORRSTS drop registration status codes are not used. This is determined based on the open learning rules defined for the section in SSARULE. However, a valid GORRSTS registered registration status code is still required for all open learning (and traditional) courses.

12. If your institution permits students to extend their registrations, select the **Extension Indicator** checkbox on the Course Registration Status Code Validation Form (STVRSTS) for each registration status code that you want to be extendable.

13. If your institution permits students to drop or withdrawal from extensions, select the **Extension Indicator** checkbox for the applicable drop registration status codes on STVRSTS.

14. Make sure that all required enrollment status codes have been defined for the term on the Enrollment Status Control Form (SFAESTS).

15. Make sure that all applicable registration status codes, effective date ranges, and refunding rules have been defined for the term on the Course Registration Status Form (SFARSTS).

16. For open learning courses, define registration and census dates for all instructional methods to be used for the term on the Open Learning Section Default Rules Form (SOAORUL).

17. Make sure that all courses have been created or updated for this term on the Basic Course Information Form (SCACRSE).

18. Check the following for each course.

Note

Much of this information defaults to a section when it is created. ■

- Make sure that all the course detail has been defined appropriately in the Course Detail Information Form (SCADETL).
- If there are restrictions, make sure that they have been created on Course Registration Restrictions Form (SCARRES).
- If you wish to define section creation restrictions, make sure that they have been defined on the Catalog Schedule Restrictions Form (SCASRES).
- Make sure that the appropriate prerequisites have been defined in the Catalog prerequisites and Test Score Restrictions Form (SCAPREQ).
- If desired, define the course syllabus information on the Course Syllabus Form (SCASYLB).

19. Make sure that all sections have been either created or rolled from another term on the Schedule Form (SSASECT).

- Make sure that instructional methods, course duration, number of allowed extensions (if applicable), registration from/to, and start from/to dates have been defined appropriately for open learning sections.
- Make sure that the correct course information has defaulted in for the restrictions, section detail (including section level fees), and prerequisites.
- Make sure that the section syllabus information has been created for the sections.
- If applicable, set up the section for use by the Voice Response and self-service applications using the **Voice Response and Self-Service Available** checkbox on SSASECT.

20. Make sure that the section level rules in Schedule Processing Rules Form (SSARULE) reflect your institutional policy.

21. If registration via the self-service products is permitted, define the following internal group code entries on the Crosswalk Validation Form (GTVSDAX):

- *WEBREG*
- *REGISTRATION*

Refer to the *Student User Guide*, the *Student Self-Service User Guide*, or the *Faculty and Advisor Self-Service User Guide* for more information about the *AUTODROP* and *ADMINDROP* internal codes and how they affect registration.

22. If you want to assign meeting types to class meeting time records in SSASECT, make sure that the required values have been entered on the Meeting Type Validation Form (GTVMTYP).

23. If you are using Voice Response to process registrations, make sure that the appropriate Voice Response message numbers have been entered on GTVMTYP. (Refer to the *Voice Response Implementation Guide* for specific message numbers.)

24. If you are using or plan to use Voice Response to process registration records, make sure that all required duty flags have been set on the VR Duty Flag Rules Form (GORFLAG).

    The `REG_BYPASS_TERM` duty flag is used to specify whether you are using term-based selection registration or non-term based selection registration.

    The `REG_SCHEDULE_DELIVER` duty flag is used to specify which kind of schedule is delivered to callers.

    Refer to the *Voice Response Implementation Guide* for more information about duty flags.

25. If you are using or plan to use Voice Response to process registration records, make sure that all required menu rules been established on the VR Menu Controls Rules Form (GORMENU).

    If you specify that students must first select the term in which they wish to register (using the duty flags in the previous step), you can use menu options `REG_APPL_MENU` and `REG_CLASS_MENU` to allow callers to change terms during a single phone session. Refer to the *Voice Response Implementation Guide* for more information about menu options.

Set Up a Traditional (Non-Open Learning) Term

Use the following represents steps to define a traditional (non-open learning) term.

1. Define the term on the Term Code Validation Form (STVTERM).

2. If you are using section term restrictions in the Catalog Schedule Restrictions Form (SCASRES), define the required term type(s) on the Term Type Validation Form (STVTRMT).

3. Define the part-of-term code on the Part of Term Code Validation Form (STVPTRM).

4. On the Term Control Form (SOATERM), define the term controls for the following:

    - Schedule section of the main window

    - Registration section of the main window

- Fee Assessment section of the main window
- Web Self Service and VR section of the main window (if applicable)
- Registration Error Checking window
- Web Processing Controls window (if applicable)
- Base Part of Term block (where you must still define part-of-term *1*)
- Web Registration Dates block (which does not restrict the availability of data on the Web but does control whether students are permitted to register, regardless of the section level controls)

5. If you are using Voice Response to process registrations, define the term on the VR Registration and Grading Term Based Rules Form (GORRGTM).

6. Make sure that all required schedule types have been defined on the Schedule Type Code Validation Form (STVSCHD).

7. Make sure that all required enrollment status codes been defined with the appropriate characteristics (for example, withdrawal indicator, prevent registration) have been defined on the Enrollment Status Code Validation Form (STVESTS).

8. If you are using Voice Response to process registration records, make sure that all required registration status codes have been defined on the VR Registration Status Rules Form (GORRSTS).

9. If your institution permits students to extend their registrations, select the **Extension Indicator** checkbox on the Course Registration Status Code Validation Form (STVRSTS) for each registration status code that you want to be extendable.

10. If your institution permits students to drop or withdrawal from extensions, select the **Extension Indicator** checkbox for the applicable drop registration status codes on STVRSTS.

11. Make sure that all required enrollment status codes have been defined for the term on the Enrollment Status Control Form (SFAESTS).

12. Make sure that all applicable registration status codes, effective date ranges, and refunding rules have been defined for the term on the Course Registration Status Form (SFARSTS).

13. Make sure that all courses have been created or updated for this term on the Basic Course Information Form (SCACRSE).

14. Check the following for each course.

Note

Much of this information defaults to a section when it is created.

- Make sure that all the course detail has been defined appropriately in the Course Detail Information Form (SCADETL).
- If there are restrictions, make sure that they have been created on Course Registration Restrictions Form (SCARRES).
- If you wish to define section creation restrictions, make sure that they have been defined on the Catalog Schedule Restrictions Form (SCASRES).
- Make sure that the appropriate prerequisites have been defined in the Catalog prerequisites and Test Score Restrictions Form (SCAPREQ).
- If desired, define the course syllabus information on the Course Syllabus Form (SCASYLB).

15. Make sure that all sections have been either created or rolled from another term on the Schedule Form (SSASECT).
    - Make sure that the correct course information has defaulted in for the restrictions, section detail (including section level fees), and prerequisites.
    - Make sure that the section syllabus information has been created for the sections.
    - If applicable, set up the section for use by the Voice Response and self-service applications using the **Voice Response and Self-Service Available** checkbox on SSASECT.

16. Make sure that the section level rules in Schedule Processing Rules Form (SSARULE) reflect your institutional policy.

17. If registration via the self-service products is permitted, define the following internal group code entries on the Crosswalk Validation Form (GTVSDAX):
    - *WEBREG*
    - *REGISTRATION*

    Refer to the *Student User Guide*, the *Student Self-Service User Guide*, or the *Faculty and Advisor Self-Service User Guide* for more information about the *AUTODROP* and *ADMINDROP* internal codes and how they affect registration.

18. If you want to assign meeting types to class meeting time records in SSASECT, make sure that the required values have been entered on the Meeting Type Validation Form (GTVMTYP).

19. If you are using Voice Response to process registrations, make sure that the appropriate Voice Response message numbers have been entered on GTVMTYP. (Refer to the *Voice Response Implementation Guide* for specific message numbers.)

20. If you are using or plan to use Voice Response to process registration records, make sure that all required duty flags have been set on the VR Duty Flag Rules Form (GORFLAG).

    The `REG_BYPASS_TERM` duty flag is used to specify whether you are using term-based selection registration or non-term based selection registration.

    The `REG_SCHEDULE_DELIVER` duty flag is used to specify which kind of schedule is delivered to callers.

    Refer to the *Voice Response Implementation Guide* for more information about duty flags.

21. If you are using or plan to use Voice Response to process registration records, make sure that all required menu rules been established on the VR Menu Controls Rules Form (GORMENU).

    If you specify that students must first select the term in which they wish to register (using the duty flags in the previous step), you can use menu options `REG_APPL_MENU` and `REG_CLASS_MENU` to allow callers to change terms during a single phone session. Refer to the *Voice Response Implementation Guide* for more information about menu options.

3 Open Learning Course and Section Setup

This chapter covers the following:

Set Up Courses

Courses can be set up to reflect both traditional and open learning course content delivery methods without the need to define multiple course records.

Ensure that all section-related rules and validation codes have been defined in Banner. See Chapter 2, “Setting Up Open Learning Registration”, for more information.

For detailed information on the various Catalog forms, refer to Chapter 4, “Catalog”, of the *Student User Guide*.

The rest of this section covers the following procedures:

Set Up a New Course for Traditional and Open Learning Registration

Before setting up new courses, make sure all course-related rules and validation codes have been defined in Banner.

1. Access the Basic Course Information Form (SCACRSE).

2. Enter the subject code, course number, and effective term in the key block.

3. In the Course Information block, enter all applicable information including course high/low hour information.

   - If the course is a continuing education course, select the **Continuing Education** checkbox.

   - Enter the duration and duration units if the course could be offered as an open learning course. If the course will not be offered in an open learning format, duration is not required but can be defined for non-open learning courses. However, the duration information defaulted from the course record to the Schedule Form (SSASECT) will not be used for traditional sections. An error message will be displayed, and the duration information must be removed from the section setup.

Note

Duration information is optional for the course and can be specified when creating the individual sections.

4. Access the Course Level window, and add applicable course level code information. For example, if the course is a continuing education course and has been designated as such in the Course Information block, use this window to assign a level for continuing education to the course.

5. Access the Grading Mode window, and enter applicable grading modes for the course. Make sure that one mode is designated as the default.

6. Access the Schedule Type window, and enter applicable schedule types for the course. The schedule type codes are entered in the **Schedule** field or selected using the List of Values from STVSCHD.

   If the schedule type has been created with an attached instructional method, the instructional method is also displayed when the schedule type code is added. This is optional, as the schedule type/instructional method relationship can be established when creating the individual sections. It is possible to override or delete the attached instructional method.

7. Save your changes. This causes the associated table entries to be created.

8. Access the Course Syllabus Form (SCASYLB).

9. Enter the following:

    - Long course title (if the course title exceeds the standard 30 characters available in SCACRSE, the long course title (maximum of 100 characters) can be entered in SCASYLB)
    - URL of the course content
    - Learning objectives
    - Technical requirements
    - Required materials

Note

Unlike other course default information, course syllabus information does not automatically default to the section. You must copy all or some of this information to the individual sections, as syllabus information might not be desired for all sections of the same course or might differ depending on the content delivery method.

10. Access the Transcript Type Rules Form (SHATRPT).

    - If you want the long course title from the syllabus to be printed on the transcript, check the **Long Course Title** checkbox.
    - If you want the student's start and/or end dates to be printed on the transcript, check the **Registration Start and End Dates** checkbox.

Update an Existing Course for Open Learning Registration

Before updating existing courses, use the following procedure to make sure that all course-related rules and validation codes have been defined in Banner.

1. Access the Basic Course Information Form (SCACRSE).
2. Enter the subject code, course number, and effective term in the key block.
3. Access the Course Information block, and enter the duration and duration units for the course. This information is used in the registration process to calculate the student's expected completion date based on the date the student elects to start the course.

Note

Duration information is optional for the course and can be specified when the individual sections are created.

4. Save your changes. This causes the associated table entries to be updated.

5. Access the Course Syllabus Form (SCASYLB) if course syllabus information (long course title, URL, learning objectives, technical requirements and/or required materials) is associated with this course.

Set Up Course Catalog Displays for Self-Service

This procedure explains how to implement your course catalog on the Web. Refer to the *Student User Guide* for more information about Banner forms.

1. For each subject that you want displayed on the Web, select the **Web Ind** checkbox on the Subject Code Validation Form (STVSUBJ).

2. For each term that you want included in the Web course catalog, select the **Web Catalog Term** checkbox in the Web Processing Controls window of the Term Control Form (SOATERM).

3. In the Web Display Controls window of SOATERM, take the following actions as appropriate.

   3.1. To include levels in the **Level** pull-down list, select the **Search by Level** checkbox.

   3.2. To include schedule types in the **Schedule Type** pull-down list, select the **Search by Schedule Type** checkbox.

   3.3. To include colleges in the **College** pull-down list, select the **Search by College** checkbox.

   3.4. To include divisions in the **Division** pull-down list, select the **Search by Division** checkbox.

   3.5. To include departments in the **Department** pull-down list, select the **Search by Department** checkbox.

   3.6. To include courses in the **Course Attributes** pull-down list, select the **Search by Course Attribute** checkbox.

   3.7. To allow the search and display of long course titles (which are defined on the Course Syllabus Form [SCASYLB]), select the **Display Long Course Title** checkbox.

   3.8. To allow the search and display of long course descriptions (which are defined on the Course Detail Information Form [SCADETL]), select the **Display Long Course Description** checkbox.

   For more information about how to display long course titles, see "Course/Section Title Reporting/Display Hierarchy" on page 3-26.

4. On the Web Display List Customization Form (SOAWDSP), specify which validation codes are to be displayed on the Web for the following validation tables:
    - Level Code Validation (STVLEVL)
    - Schedule Type Code Validation (STVSCHD)
    - College Code Validation (STVCOLL)
    - Division Code Validation (STVDIVS)
    - Department Code Validation (STVDEPT)
    - Attribute Validation (STVATTR)
5. On the Web Display List Customization Form (SOAWDSP), specify which validation codes are to be displayed on the Web for the following validation tables:

Search for Courses in Baseline

Use the Course Search Form (SCASRCH) to provide non-term search capabilities to administrative users. Users can search for all courses (either by subject and course or by subject only) that are active for a specified date range. The date ranges entered are compared against the term start and end dates in the Term Code Validation Form (STVTERM). This term is then used to retrieve all course records based on the effective term range of the course as contained in the SCBCRKY and SCBCRSE tables.

For example:

STVTERM

Term	Start Date	End Date
200510	01-SEP-2004	31-DEC-2004
200520	01-JAN-2005	15-APR-2005

SCBCRSE

From Term	To Term	Subject	Course
200410	200520	ENGL	100
200520	200530	ENGL	101
200610	999999	ENGL	101

Sample Query 1

SCASRCH Key Block

Subject	Course	Start Date	End Date (inclusive)
ENGL		01-DEC-2004	31-JAN-2005

This query would return the first two records (or all records where the search start and end dates are between the term start and end dates).

Sample Query 2

SCASRCH Key Block

Subject	Course	Start Date	End Date (inclusive)
ENGL	101	01-DEC-2004	31-JAN-2005

This query would return the ENGL 101 record with the effective term of 200520 (or all records where the search start and end dates are between the term start and end dates).

Search for Courses in Self-Service

The following procedure explains how a user searches for courses in your course catalog.

1. From your institution's Web site, the user selects **Course Catalog** from one of the following:
   - An unsecured Web page designated by your institution
   - The Student Records menu
   - The Faculty Services menu

2. The Catalog Term page is displayed. The user chooses a term from the **Search by Term** pull-down list, and then selects the **Submit** button.

3. The Search for Courses page is displayed. On this page the student can choose from a variety of course characteristics to narrow the search. At a minimum, at least one selection must be made from the **Subject** pull-down list.

Note

Your institution can control what is displayed in the pull-down lists (with the exception of **Subject**) on the Web Display List Customization Form (SOAWDSP).

Multiple selections can be made in the pull-down lists using the Shift key (for consecutive values) and/or the Ctrl key (for non-consecutive values).

For fields in which the user enters values, the wildcard character (%) can be used.

The student then selects one of the buttons.

- **Get Courses** causes the Catalog Entries page to display.
- **Reset** clears the choices the user made so the user can begin again.

4. The Catalog Entries page is displayed with the courses and related information found using the search criteria specified on the Search for Courses page.

   If the user selects the link composed of the subject, course number, and title, the Detailed Course Information page is displayed.

   If the user selects a schedule-type link, the Class Schedule Listing page for the course is displayed.

   The student can also select **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Search for Courses page to be displayed.
   - **New Search** causes the Catalog Term page to be displayed.

5. The Detailed Course Information page displays further information about the course selected on the Catalog Entries page.

   If available, the following links can be selected:

   - Schedule type to go to the Class Schedule Listing
   - Prerequisites to go to the Catalog Entries page
   - Corequisites to go to the Catalog Entries page

   The student can also select **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Catalog Entries page to be displayed.
   - **New Search** causes the Catalog Term page to be displayed.

6. The Class Schedule Listing page displays the specific section that is available for that term and related information for the schedule type the student selected on the Detailed Course Information page.

   The student can also select **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Detailed Course Information page to be displayed.
   - **New Search** causes the Catalog Term page to be displayed.

For more information about the course catalog on the Web, including complete page descriptions, see Chapter 2, “Course Catalog”, in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Catalog Term	`bwckctlg.p_disp_dyn_ctlg`
Search for Courses	`bwckctlg.p_disp_cat_term`
Catalog Entries	`bwckctlg.p_display_courses`

Page Name	Package/Procedure
Detailed Course Information	bwckctlg.p_disp_course_detail
Class Schedule Listing	bwckctlg.p_disp_listcrse

Set Up Open Learning Rules

Before setting up section fee assessment, extension, and refunding rules for open learning courses, make sure the term control record has been established in the Term Control Form (SOATERM), and the required registration date values and registration status codes have been defined in the Open Learning Section Default Rules Form (SOAORUL).

The rest of this section covers the following procedures:

- "Set Up Section Default Rules" on page 3-8
- "Rule Defaulting" on page 3-11
- "Set Up Section Level Rules" on page 3-12

Set Up Section Default Rules

1. Access the Open Learning Section Default Rules Form (SOAORUL). Enter the desired term, and access the Registration Date Defaults block.

   Use this form to create default rules for open learning sections. It is mandatory to enter the registration dates; however, the registration status codes, extension, and refund processing rules are optional. If extension and refunding rules are not defined here, you must manually enter this information in the Schedule Processing Rules Form (SSARULE) after the section has been created. Information in this form does not depend on part-of-term data and does not rely on static processing dates.

Note

If revisions are made to the information in this form, those changes are only reflected for new sections when they are created and do not impact existing sections that meet the course and/or course/section characteristics as well as the section characteristics.

2. Define the registration dates to be defaulted to the section record when new CRNs are created.

   An error message is displayed in the Schedule Form (SSASECT) if open learning sections are created and no default registration dates have been defined. The dates defined here are used in lieu of part-of-term dates.

The minimum information required is:

- Instructional method
- Start date
- End date
- Census 1 date

However, if you wish to define specific rules for sections based on course and section characteristics, you can enter any combination of college, department, campus, schedule type, and instructional method. For example, you can enter different sets of rules for sections with an instructional method of *WEB* that are held on the campus.

If the **Override** checkbox for the originating rule has been selected on SOAORUL, you can modify the information in this block. However, if no override is permitted, the data remains as defaulted.

3. Save your changes.

4. Go to the Section Default Registration and Extension Rules window to enter registration status codes, extension rules, and refunding rules to be associated with the previously defined rules. To access this window, place your cursor on the applicable rule in the Registration Date Defaults block, and select the **Detail** button.

5. In the Default Registration Status Code Definition block of the Section Default Registration and Extension Rules window, enter the registration status codes that will be available and should be defaulted to the sections with the defined characteristics. Use the **Summary** button to return to the main window.

Note

You can add more codes and delete defaulted codes in SSARULE, as desired.

6. Use the Default Extension Processing Rules block of the Section Default Registration and Extension Rules window to define extension processing rules. You can access this blockonly if the **Extension** checkbox is selected in the Default Registration Status Code Definition block for the associated registration status code.

7. In the Default Extension Processing Rules block, enter the extension percentage (the percentage of the original registration duration) that will be granted to a student when an extension is applied. Also define the detail code and amount to be applied to a student's account when an extension is processed.

   If this is a rule that must be followed, you can ensure that updates to the rule cannot be made in SSARULE by leaving the **Override** checkbox cleared.

8. Use the Section Default Refunding Rules window to define refunding rules for status codes to be available for drop/withdrawal processing.

To access this window, place the cursor on the applicable registration status code in the Default Registration Status Code Definition block, and perform a Next Block, or use the Refunding Rules item in the Options Menu. Use the **Summary** button to return to the main window.

The **Percent Complete** field is used in lieu of static dates and represents the completion percentage of a student's progress in a course at the time when this status code is applied. For example, if a status code is only effective prior to the student actually starting their course, you can define a rule with a percent complete of zero (0). The tuition and fee percentages represent the percentage of the course charges to be returned to the student.

An extension percentage is used in situations where the registration is being dropped/withdrawn from and will be applied to any active extensions. It is also possible to drop/withdraw from extensions through the use of a status code defined only for use with extensions. In this case, the status code of each individual extension could be applied through the Student Registration History and Extension Information Form (SFARHST) prior to the complete course withdrawal.

Alternately, individual extensions can be dropped without impacting the overall status of the registration. Dropping/withdrawing from an extension does not imply that the course has been dropped.

Note

In the section level rules, there is a second refunding criteria, duration complete, that can be defined in place of the percent complete information entered here. As the duration is defined at the section level, and validation is required to ensure that the duration assigned in the rule corresponds to that defined at the section, the duration complete information cannot be defined at this time.

If students will be permitted to register for this course through the self-service products, it is imperative that the registration status code defined for the *WEBRSTSREG* internal group code in the Crosswalk Validation Form (GTVSDAX) is also defined for the section.

If students will be permitted to register for this course through Voice Response, ensure that the registration status code matches the Voice Response eligible code defined on the Voice Response Registration Status Rules Form (GORRSTS). Drop codes must have been definedon the Course Registration Status Code Validation Form (STVRSTS) with a value of *D* in the **Type** field. The drop registration status codes entered in GORRSTS are ignored for open learning courses. (Refer to the *Student Self-Service User Guide* and the *Faculty and Advisor Self-Service User Guide* for more information about the status codes and how they affect the self-service products.)

Rule Defaulting

When a new section is created, the Section Default Rules Table (SOBODTE) and associated repeating tables are searched to find the most applicable rules based on course and/or section characteristics for the section being generated. The rule with the most matching criteria should be used.

Example of Rules Setup

Rule	Department	College	Campus	Schedule Type	Instructional Method
Rule 1	AA	BB	CC	DD	EE
Rule 2			CC		
Rule 3				DD	EE
Rule 4					EE

Section and Course Information

Section	Course Department	Course College	Section Campus	Section Schedule Type	Section Instructional Method
11111	AA	BB	CC	DD	EE
22222	GG	GG	CC	TT	ZZ
33333	HH	HH	MM	DD	FF
44444	AA	BB	NN	DD	EE
55555	JJ	BB	PP	XX	EE

Section	Description
Section 11111	This section matches the criteria created in Rules 1, 3, and 4. However, Rule 1 would be most applicable, because all of the identifying criteria matches.
Section 22222	Rule 2 would be selected, because the campus codes of the rule and the section match.
Section 33333	No rules would be applicable.

Section	Description
Section 44444	Rule 3 would be applicable, because schedule types and instructional methods of both the rule and section match.
Section 55555	Rule 4 matches the instructional method of the section.

Set Up Section Level Rules

1. Create CRNs using the Term Roll Process (SSRROLL) or the Schedule Form (SSASECT) to default the appropriate registration, extension, and refunding rules to the section.

   All new open learning sections (those sections defined with no part-of-term), are populated with section level registration dates. Registration status codes, extension rules, and refunding rules are defaulted if they are defined on SOAORUL. If default rules were established on the Open Learning Section Default Rules Form (SOAORUL) after the sections were created, the Schedule Open Learning Rule Default Process (SSPRDEF) can be run to build registration status codes, extension, and withdrawal rules for those sections with no current rules defined on the Section Registration Status Codes Form (SSARULE). This process does not overwrite existing section level rules.

   This information defaults from SOAORUL. The registration from and to dates reflect the most appropriate registration dates according to the section characteristics defined in SOAORUL. These rules are accessible using SSARULE.

   Modifications to the registration and student start dates, and defaulted registration status codes, extension rules), and refunding rules are permitted if the original open learning rule has been denoted as overridable.

   If the status codes and rules have not been set up to default when a new section is created, the registration status codes, at a minimum, must be established prior to registration processing. If no extensions are permitted for this section, an extension rule is not necessary.

2. Establish fee assessment information on the Schedule Detail Form (SSADETL).

   - If course level fees have been defined on the Course Detail Information Form (SCADETL) and/or Section Fees Assessment Control Form (SSADFEE), they default to the section when a new CRN is created.
   - If sections were created before default values were defined in SSADFEE, and this information should be carried over to individual sections, run the Section Level Mass Fee Population Process (SSPMFEE) to generate fee records. This process defaults fee rules only if the associated fee table entry (SSRFEES) is blank for this CRN.

3. Once established at the section level, the Track by CRN function controlled in the Term Control Form (SOATERM) adds the CRN number to all fee assessment transactions on the student's accounts receivable records, and the Track by Course function does the same in the refunding process. This capability facilitates the tracking of fees to an individual registration record.

Set Up Sections

Sections can be created for both traditional and open learning course content delivery methods in the same term using the Schedule Form (SSASECT). The following information is specific to open learning sections:

- Registration and start from/to dates (instead of part-of-term information)
- Duration information
- Instructional method
- Section-level registration status codes (on the Section Registration Status Codes Form [SSARULE])
- Section-level refunding rules (on SSARULE)

Ensure that all section-related rules and validation codes have been defined in Banner. See Chapter 2, "Setting Up Open Learning Registration", for more information.

For detailed information on the various Schedule forms, refer to Chapter 5, "Class Schedule", of the *Student User Guide*.

The rest of this section covers the following procedures:

- "Set Up an Open Learning Section" on page 3-13
- "Update an Existing Section to be an Open Learning Section" on page 3-16
- "Set Up a Traditional (Non-Open Learning) Section" on page 3-18
- "Set Up Class Schedule Displays for Self-Service" on page 3-19

Set Up an Open Learning Section

Before setting up an open learning section, make sure all section-related rules and validation codes have been defined in Banner.

1. Access the Schedule Form (SSASECT).

2. Enter the term in the **Term** field, then enter *ADD* in the **CRN** field in the key block.

3. In the Section Information block, enter all applicable information including the subject code and course number.

   The section inherits the instructional method assigned to the course when the schedule type is entered or selected. If this association has not been made prior to the creation of the section, you must enter this information for open learning sections.

   The duration units and number of duration units are automatically defaulted if they are defined for the course. If they are not defined, you must enter this information for open learning sections.

   The part-of-term information is not required for open learning courses.

   The registration from and to dates and start from and to dates are required. If the date record in the Open Learning Section Default Rules Form (SOAORUL) is defined with the **Override** selected, those dates can be modified in SSASECT.

   - The registration dates default from SOAORUL and represent the period of time a student can register in this section.
   - The start dates also default from SOAORUL and represent the date range the student can actually start the course.
   - The census 1 and census 2 dates (if defined) are populated with the corresponding information from SOAORUL.

   The maximum number of extensions that will be granted to an individual student registered in this section default to zero and should be changed if the institution's policy permits the extension of the expected completion date.

   If you are using the contract analysis functionality in the Faculty Load module, the attendance method should be set to a code defined as Independent Studies if the section will not have regular instructor/student contact hours. Then the instructor is not penalized in the daily and weekly contact hour calculations. This information is displayed in a separate window and is accessible by selecting the **Detail** button next to the **Attendance Method** field.

   The lab, lecture, and other hours information is contained in a separate window. To access this window, select the **Detail** button next to the **Contact** field.

   If the section is available to the self-service or Voice Response products, check the **Voice Response and Self-Service Available** checkbox.

4. Save your changes. At this time, a CRN is assigned, replacing the word *ADD* in the key block, and the appropriate registration status code, extension rules, and refunding rules are created for the section and housed on the Section Registration Status Codes Form (SSARULE).

   In addition, the Faculty and Advisor Self-Service indicators, used to control the display of midterm grades, final grades, and waitlists, are created. These checkboxes are defaulted to allow access and can be changed in the Section Web Controls Form (SSAWSEC).

If you wish to override the student midterm, final, and/or grade detail display options for this section, you can override the values defined in the Term Control Form (SOATERM) in this form. See "Set Up Section Level Self-Service Display Controls" on page 3-21 for more information.

5. Use the **Detail** button next to the **Registration Dates** fields to view or update the registration status code rules, refunding rules, or extension rules that are stored on SSARULE.

6. In the Meeting Time block, record scheduled meeting times or other scheduled events.

   It is not mandatory to establish contact times in the Meeting Time block if the section has been deemed to be open learning one (that is, no part-of-term has been defined).

   - If there is a face-to-face component of the course or an online chat available to students on a regular schedule, enter a meeting code to default in start and end dates, days of the week, and times, or enter the meeting information manually.
   - Enter the meeting type for the purpose of the meeting. A meeting type of *CLAS* defaults into the **Meeting Type** field but can be changed.

     This information appears on the student's hardcopy class schedule or Web schedule in Student Self-Service.

7. Save your changes.

8. In the Instructor block, assign an instructor or tutor to the section.

   If the section has been defined as open learning, instructor IDs can be entered without the dependency of meeting time records.

9. Save your changes.

10. Access the Section Syllabus Form (SSASYLB) to enter syllabus information for display on the Web.

    - If syllabus information has already been entered for the course, this information can be copied from the Course Syllabus Form (SCASYLB) to SSASYLB using the **Copy from Course** button, which can be found in all blocks of this form. Once the information is copied to the section, it is updatable.
    - If no course syllabus information has been stored, you can enter or copy-and-paste information into any of the text fields. The text fields can store approximately one and one half pages of text.

11. Access the Section Registration Status Codes Form (SSARULE) to review the defaulted open learning rules.

- If the rule information that defaulted to the section from SOAORUL is acceptable, or the information cannot be overridden, the section setup process is complete.
- If no registration status codes, extension rules, or refunding rules were defined in SOAORUL, this information must be entered to permit registration. All registration processes verify that the appropriate registration status codes and rules were set up.
- To enter, update, or delete an extension rule, place the cursor on the applicable status code record (the **Extension** checkbox is selected), then make the modification.
- To enter, update, or delete a refunding rule, place the cursor on the applicable status code record, then make the modification.

Note

If there is a requirement for all students to start on the same date, the start from/to dates can be set to the same date. For example, to define a continuing education class with set meeting times, set the start dates to the first day of class. In doing so, all the benefits of an opening learning class (such as section level rules) can be realized without needing to define specific parts-of-term. ■

Update an Existing Section to be an Open Learning Section

Before updating an existing section to be an open learning section, make sure all section-related rules and validation codes have been defined in Banner.

Note

Although you can redefine an existing traditional section as an open learning section, you cannot redefine an existing open learning section as a traditional section. To accomplish the latter, you must delete the tradition section and define a new open learning section in its place. ■

The following steps can be performed only if there are no existing registration records for the section.

1. Access the Schedule Form (SSASECT).

2. Enter the term and CRN in the key block.

3. In the Section Information block, enter all applicable information including the subject code and course number.

   An instructional method, registration from and to dates, start from and to dates, duration, and duration units are required to identify this section as available for open learning registration.

   - Remove the existing part-of-term information to ensure that the registration from and to dates will default from the Open Learning Section Default Rules Form (SOAORUL). You might need to delete meeting time or instructor assignments to accomplish this.
   - Update the **Maximum Extensions** field if extensions are permitted for this section.

4. Save your changes.

5. In the Meeting Time block, add any meeting time records (if required).

6. Save your changes.

7. In the Instructor block, specify the instructor to be assigned to the registering students as the primary instructor, if there are multiple instructors assigned to the section.

Note

The student-tutor allocation process ignores other instructor records at time of registration.

8. Save your changes.

9. Access the Section Registration Status Codes Form (SSARULE) to add the open learning rules.

   - Open learning section rules should be entered to permit registration. All registration processes will verify that the appropriate registration status codes and rules were set up here.
   - To enter the extension processing rule, position the cursor on the status code record where the **Extension** checkbox is checked, and use Next Block.
   - To enter a refunding rule, position the cursor on the appropriate status code record, and use Next Block.

10. Faculty and Advisor Self-Service display controls must be defined if the final and midterm grades should be accessible to instructors through Faculty and Advisor Self-Service.(Since students are not permitted to waitlist sections, the waitlist display option does not need to be defined for open learning sections.)

    For a traditional section, this information is usually associated with each part-of-term defined for the term on the Term Control Form (SOATERM). However, since open learning sections are not defined with a part-of-term, this association is made through the Faculty Self-Service Display Controls block in the Section Web Controls Form (SSAWSEC).

If you wish to override the student midterm, final, or grade detail display options for the section, you can use SSAWSEC to override the values defined in SOATERM. See “Set Up Section Level Self-Service Display Controls” on page 3-21 for more information.

Set Up a Traditional (Non-Open Learning) Section

Before setting up a traditional (non-open learning) section, make sure all section-related rules and validation codes have been defined in Banner.

1. Access the Schedule Form (SSASECT).

2. Enter the term in the **Term** field, then enter *ADD* in the **CRN** field in the key block.

3. In the Section Information block, enter all applicable information, including the subject code and course number.

   The part-of-term information is mandatory, and an applicable part-of-term number must be entered. (The value for part-of-term 1 does not default in.)

4. Save your changes. At this time, a CRN is assigned, replacing the word *ADD* in the key block.

5. In the Meeting Time block, record scheduled meeting times.

6. Enter a meeting code to default in start and end dates, days of the week, and times, or enter the meeting information manually. Also enter the meeting type for the purpose of the meeting. A meeting type of *CLAS* defaults into the **Meeting Type** field but can be changed.

   This information appears on the student’s hard copy class schedule or Web schedule in Student Self-Service.

7. Save your changes.

8. In the Instructor block, assign an instructor or tutor to this section.

9. Save your changes.

10. Access the Section Syllabus Form (SSASYLB) to enter syllabus information for display on the Web.

    - If syllabus information has already been entered for the course, this information can be copied from the Course Syllabus Form (SCASYLB) to SSASYLB using the **Copy from Course** button, which can be found in all blocks of this form. Once the information is copied to the section, it is updatable.

    - If no course syllabus information has been stored, you can enter or copy-and-paste information into any of the text fields. The text fields can store approximately one and one half pages of text.

11. If you wish to override the midterm, final, and/or grade detail Student Self-Service display options or the midterm, final, and waitlist Faculty and Advisor Self-Service display options for the section, you can use the Section Web Controls Form (SSAWSEC) to override the values defined in the Term Control Form (SOATERM). See "Set Up Section Level Self-Service Display Controls" on page 3-21 for more information.

Set Up Class Schedule Displays for Self-Service

This section explains how to set up your class schedule on the Web. Refer to the *Student User Guide* for more information about Banner forms.

1. Specify which fields you want to have included on the Class Schedule Search selection page. You can include either or both of the following.

    - To include the term in the **Search by Term** pull-down list, select the **Master Web Term Control** checkbox in the Web Processing Controls window of the Term Control Form (SOATERM).

    - To display the **Search by Date Range** fields, set up the following row on the Crosswalk Validation Form (GTVSDAX).

External Code	Internal Code	Internal Code Seq Number	Internal Code Group	Description	Activity Date
Y	SCHBYDATE	1	WEBREG	Dynamic Schedule by Date Range	Sysdate

2. In the Web Display Controls window of the Term Control Form (SOATERM), specify which fields you want to have included on the Class Schedule Search page. You can include as many or as few of the following as you want.

    2.1. To include schedule types in the **Schedule Type** pull-down list, select the **Search by Schedule Type** checkbox.

    2.2. To include instructional methods in the **Instructional Method** pull-down list, select the **Search by Instructional Method** checkbox.

2.3. To include campuses in the **Campus** pull-down list, select the **Search by Campus** checkbox.

2.4. To include levels in the **Course Level** pull-down list, select the **Search by Level** checkbox.

2.5. To include durations in the **Duration** pull-down list, select the **Search by Duration** checkbox.

2.6. To include instructors in the **Instructor** pull-down list, select the **Search by Instructor** checkbox.

2.7. To include sessions in the **Session** pull-down list, select the **Search by Session** checkbox.

2.8. To include course attributes in the **Attribute Type** pull-down list, select the **Search by Course Attribute** checkbox.

2.9. If you want to allow the search and display of long course titles (which are defined on the Course Syllabus Form [SCASYLB]), select the **Display Long Course Title** checkbox. (For more information about how to display long course titles, see "Course/Section Title Reporting/Display Hierarchy" on page 3-26.)

3. On the Web Display List Customization Form (SOAWDSP), specify which validation codes are to be displayed on the Web for the following validation tables:

- Schedule Type Code Validation (STVSCHD)
- Instruction Method Validation (GTVINSM)
- Campus Code Validation (STVCAMP)
- Level Code Validation (STVLEVL)
- Part of Term Code Validation (STVPTRM)
- Session Code Validation (STVSESS)
- Attribute Validation (STVATTR)

4. For each subject that you want to be available on the Web, select the **Web Ind** checkbox on the Subject Code Validation Form (STVSUBJ).

5. For each section that you want to be available on the Web, select the **Voice Response and Self-Service Available** checkbox on the Schedule Form (SSASECT).

Note

Leaving the **Web Ind** checkbox cleared will not prevent a student from registering on the Web if he or she enters the CRN in the Add Classes Worksheet on the Add or Drop Classes page (`bwskfreg.P_AddDrpCrse`).

6. If you want to allow the search and display of long section titles, select the **Display Long Section Title** checkbox on SOATERM. (For more information about how to display long section titles, see "Course/Section Title Reporting/Display Hierarchy" on page 3-26.)

Set Up Section Level Self-Service Display Controls

When an open learning section is created, a record is automatically inserted in the Faculty Web Display Control Table (SSBFSEC) with default values of *Y* or *Display*. For a traditional section, this information is usually associated with each part-of-term defined for the term on the Term Control Form (SOATERM). However, since open learning sections are not defined with a part-of-term, this association is made through the display controls in the Section Web Controls Form (SSAWSEC). If you you are using Faculty and Advisor Self-Service, this is the only circumstance where it is mandatory to have a record in the SSBFSEC table.

If you wish to override the midterm, final, and/or grade detail Student Self-Service display options or the midterm, final, and waitlist Faculty and Advisor Self-Service display options for a section, you can do so by creating records on SSAWSEC. The values defined for the section take precedence over those defined on SOATERM.

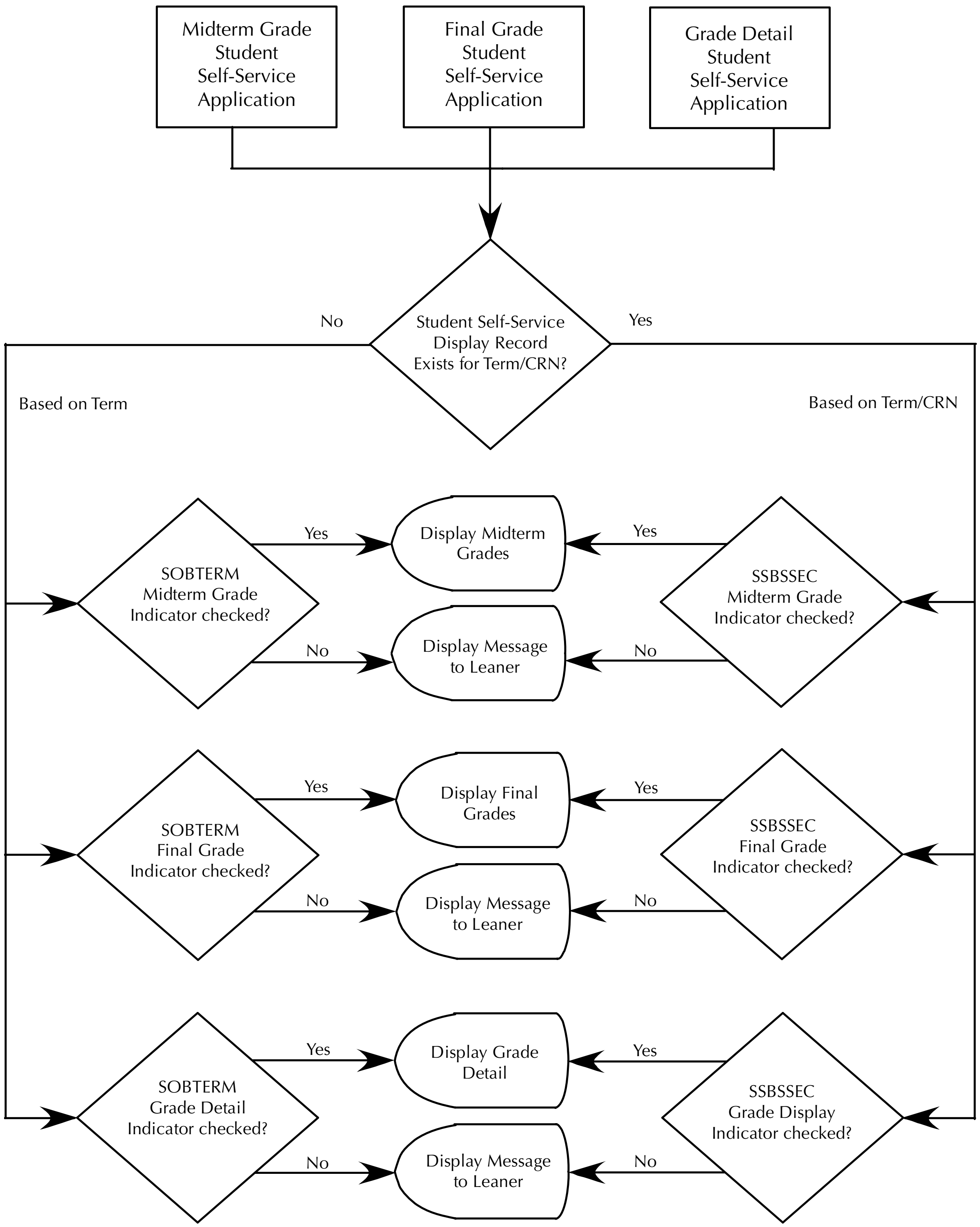
Note

If you want to remove an override, you cannot simply clear the applicable checkbox; you *must* delete the record altogether for Student Self-Service controls and non-open learning Faculty and Advisor Self-Service controls.

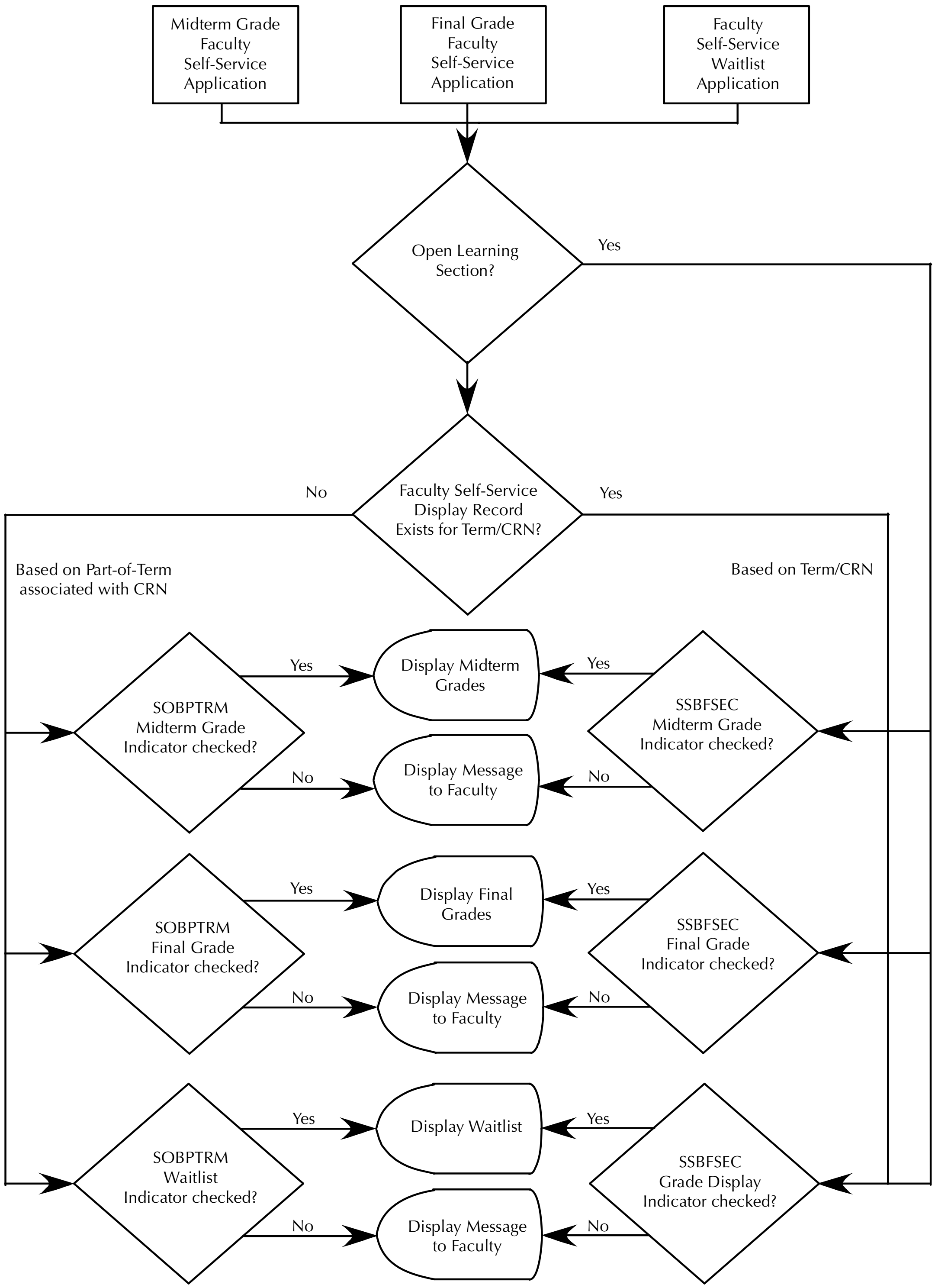
The following flowcharts explain the option checking in the self-service products:

- "Student Self-Service Display Options Process Flow" on page 3-22
- "Faculty and Advisor Self-Service Display Options Process Flow" on page 3-23

Student Self-Service Display Options Process Flow



Faculty and Advisor Self-Service Display Options Process Flow



Search for Classes in Self-Service

The following procedure explains how a user searches for classes in your class schedule.

1. From your institution's Web site, the user selects **Class Schedule** from one of the following:
   - An unsecured Web page designated by your institution
   - The Student Records menu
   - The Faculty Services menu
2. The Class Schedule Search page is displayed. The user can choose a term from the **Search by Term** pull-down list or enter a date range in the **From** and **To** fields. The user then selects the **Submit** button.
3. The Class Schedule Search page is displayed. On this page the user can choose from a variety of course characteristics to narrow the search. At a minimum, at least one selection must be made from the **Subject** pull-down list. The user then selects the **Class Search** button.

Note

Your institution can control what is displayed in the pull-down lists (with the exception of **Subject**) on the Web Display List Customization Form (SOAWDSP).

Multiple selections can be made in the pull-down lists using the Shift key (for consecutive values) and/or the Ctrl key (for non-consecutive values).

For fields in which the user enters values, the wildcard character (%) can be used.

4. The Class Schedule Listing page displays the courses and related information found using the search criteria specified on the Class Schedule Search page.

   If the user selects the link composed of the subject, course number, and title, the Detailed Class Information page is displayed.

   If the user selects a **Syllabus Available** link, the Syllabus Information page is displayed.

   The user can also select either **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Class Schedule Search page to be displayed.
   - **New Search** causes the Class Schedule Search page to be displayed.

5. The Detailed Class Information page displays further information about the course selected on the Class Schedule Listing page.

   If available, the following links can be selected to go to the Catalog Entries page for the selected section:

   - Prerequisites
   - Corequisites

   The user can also select either **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Class Schedule Listing page to be displayed.
   - **New Search** causes the Class Schedule Search page to be displayed.

6. If the user chooses the **Syllabus Available** link on the Detailed Class Information page, the Syllabus Information page is displayed.

   The user can also select either **Return to Previous** or **New Search**.

   - **Return to Previous** causes the Detailed Class Information page to be displayed.
   - **New Search** causes the Class Schedule Search page to be displayed.

For more information about the class schedule on the Web, including complete page descriptions, see Chapter 3, “Class Schedule”, in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Class Schedule Search	bwckschd.p_disp_dyn_sched
Class Schedule Search	bwckgens.p_sel_term_date
Class Schedule Listing	bwckschd.p_get_crse_unsec
Detailed Class Information	bwckctlg.p_disp_detail_sched
Syllabus Information	bwckschd.p_disp_syllabus

Course/Section Title Reporting/Display Hierarchy

If an existing course/section title does not allow you to enter the complete title, you can enter long course and long section titles (up to 100 characters) and long course and section descriptions in Banner and choose to have them displayed on the Web. Titles can entered on the following forms:

- Basic Course Information Form (SCACRSE) (base course title, required)
- Course Syllabus Form (SCASYLB) (long course title, optional)
- Schedule Form (SSASECT) (modified section title, optional)
- Section Syllabus Form (SSASYLB) (long section title, optional)

If you want to display long titles on the Web, you must do the following in the Web Display Controls window of the Term Control Form (SOATERM).

- To display long course titles, select the **Display Long Course Title** checkbox.
- To display long section titles, select the **Display Long Section Title** checkbox.

If you want to display long descriptions on the Web, you must do the following in the Web Display Controls window of SOATERM.

- To display long course descriptions, select the **Display Long Course Description** checkbox.
- To display long section descriptions, select the **Display Long Section Description** checkbox.

To determine which title or description to display on the Web, the system follows a complex hierarchy. The following steps describe the hierarchy for titles in detail. The same hierarchy is followed for descriptions, substituting the description checkboxes for the title checkboxes.

Refer to the flowcharts at the end of this section that illustrate how the system determines which title or description to use.

The rest of this section covers the following:

- “Course Catalog Pages” on page 3-27
- “Class Schedule and Registration Pages” on page 3-27
- “Long Course Title Process Flow” on page 3-28
- “Long Course Description Process Flow” on page 3-29
- “Title Information Display Hierarchy” on page 3-30

Course Catalog Pages

1. If the **Display Long Course Title** checkbox on SOATERM is *cleared*, the base course title in the **Course Title** field of SCACRSE is displayed.

2. If the **Display Long Course Title** checkbox on SOATERM is *selected*, the system checks SCASYLB.

   - If a title is entered in the Long Course Title block on SCASYLB, the long course title is displayed.

   - If a title is *not* entered in the Long Course Title block on SCASYLB, the base course title from SCACRSE is displayed.

Class Schedule and Registration Pages

1. The system determines whether the **Display Long Section Title** checkbox on SOATERM is selected.

   - If it is selected, processing continues with step 2.

   - If it is cleared, processing continues with step 3.

2. If the **Display Long Section Title** checkbox on SOATERM is selected, the system checks SSASYLB.

   - If a long title exists in the Section Long Title block of SSASYLB, the long section title is displayed.

   - If a long title does not exist in the Section Long Title block of SSASYLB, processing continues with step 3.

3. The system checks SSASECT.

   - If the title in the field to the right of the **Course Number** field on SSASECT has been modified from the base course title (on SCACRSE), the modified section title is displayed.

   - If the title on SSASECT has *not* been modified, the system proceeds to step 4.

4. The system check SOATERM.

   - If the **Display Long Course Title** checkbox in the Web Display Controls window is cleared, the base course title from SCACRSE is displayed.

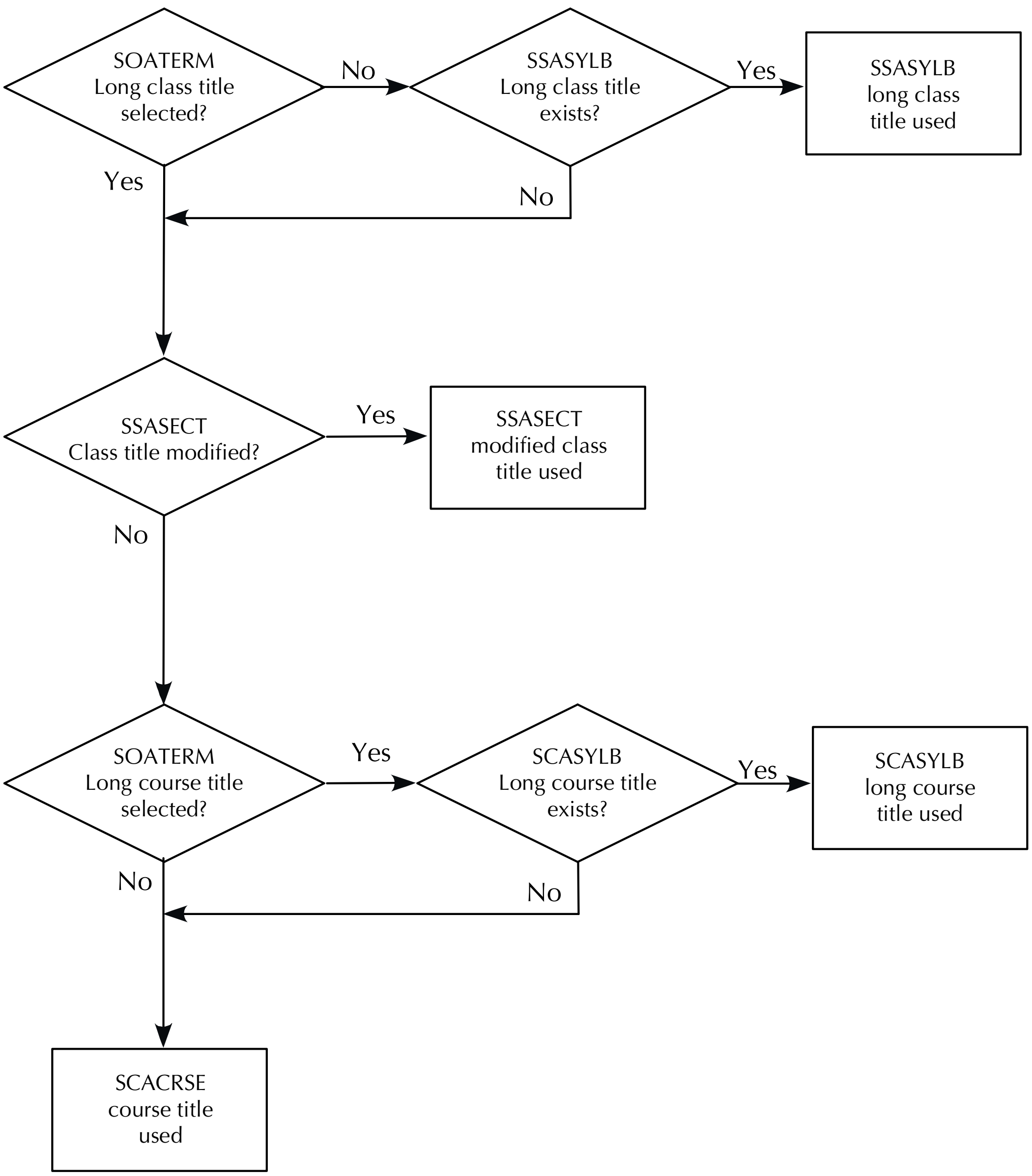
   - If the **Display Long Course Title** checkbox in the Web Display Controls window is selected, the system proceeds to step 5.

5. The system checks SCASYLB.

   - If a long title exists in the Long Course Title block of SCASYLB, the long course title is displayed.
   - If a title is *not* entered in the Long Course Title block on SCASYLB, the base course title from SCACRSE is displayed.

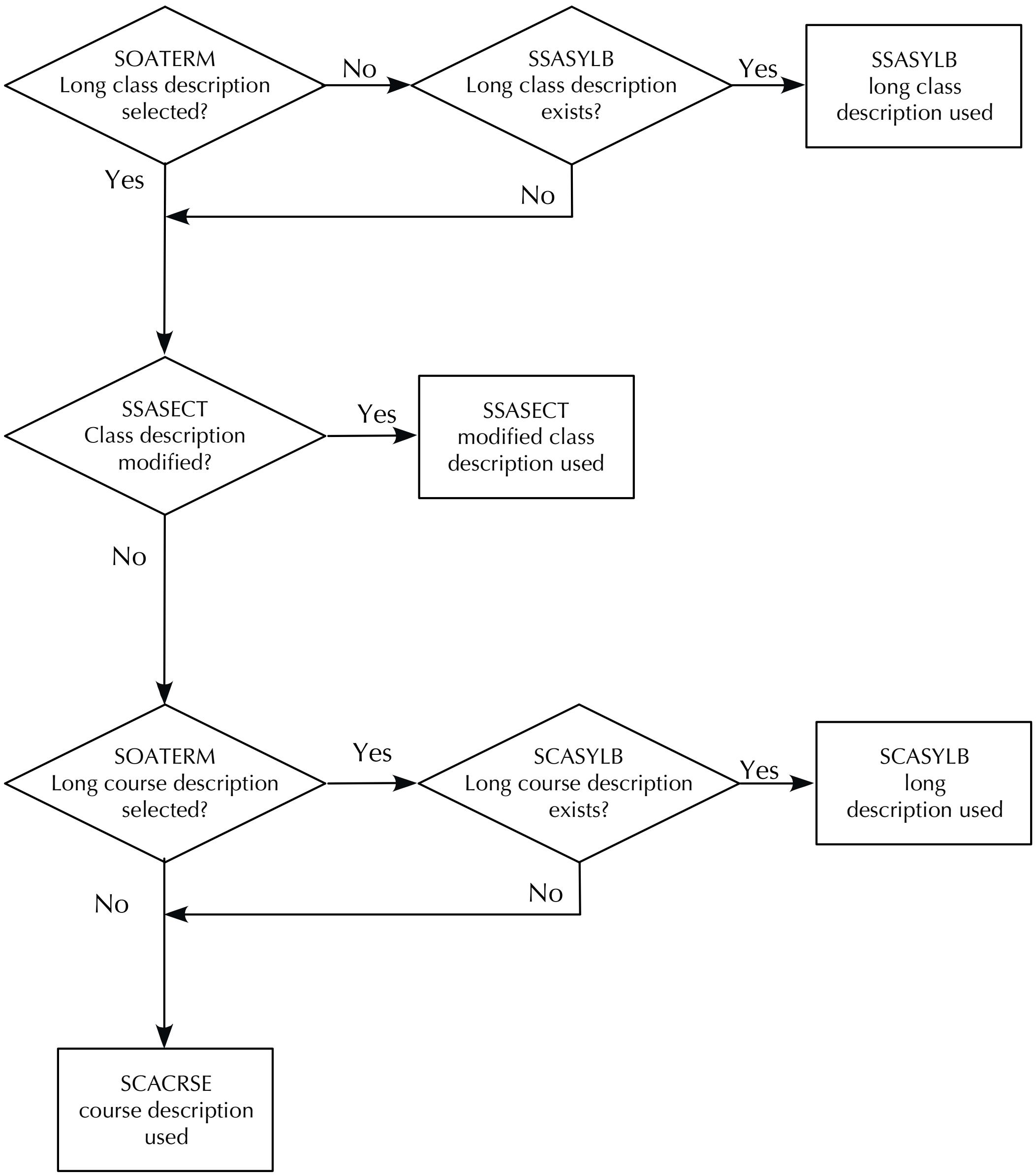
Long Course Title Process Flow

The following process flow illustrates how the system checks for long titles.



Long Course Description Process Flow

The following process flow illustrates how the system checks for long descriptions.



Title Information Display Hierarchy

The following table reflects title information that is displayed in self-service or on reports based on the type of title information defined for the course/section in relationship to the Web controls defined on the Term Control Form (SOATERM) or the values entered in the run parameter for reports.

Section/Course Data	SOATERM Setting (Web) or Report Run Parameters			
Catalog and Schedule	Long Course Title *On/Yes* Long Section Title *On/Yes*	Long Course Title *On/Yes* Long Section Title *Off/No*	Long Course Title *Off/No* Long Section Title *On/Yes*	Long Course Title *Off/No* Long Section Title *Off/No*
Course Title (SCBCRSE) Long Course Title (SCRSYLN) Section Title (SSBSECT) Long Section Title (SSRSYLN)	Long Section Title	Section Title	Long Section Title	Section Title
Course Title (SCBCRSE) Long Course Title (SCRSYLN) No Section Title (SSBSECT) Long Section Title (SSRSYLN)	Long Section Title	Long Course Title	Long Section Title	Course Title
Course Title (SCBCRSE) Long Course Title (SCRSYLN) Section Title (SSBSECT) No Long Section Title (SSRSYLN)	Section Title	Section Title	Section Title	Section Title
Course Title (SCBCRSE) Long Course Title (SCRSYLN) No Section Title (SSBSECT) No Long Section Title (SSRSYLN)	Course Title	Long Course Title	Course Title	Course Title
Course Title (SCBCRSE) No Long Course Title (SCRSYLN) Section Title (SSBSECT) Long Section Title (SSRSYLN)	Long Section Title	Section Title	Long Section Title	Section Title
Course Title (SCBCRSE) No Long Course Title (SCRSYLN) No Section Title (SSBSECT) Long Section Title (SSRSYLN)	Long Section Title	Course Title	Long Section Title	Course Title

Section/Course Data	SOATERM Setting (Web) or Report Run Parameters			
Course Title (SCBCRSE) No Long Course Title (SCRSYLN) Section Title (SSBSECT) No Long Section Title (SSRSYLN)	Section Title	Section Title	Section Title	Section Title
Course Title (SCBCRSE) No Long Course Title (SCRSYLN) No Section Title (SSBSECT) No Long Section Title (SSRSYLN	Course Title	Course Title	Course Title	Course Title

Academic History	Long Title On/Yes	Long Title Off/No
Section Title (SHRTCKN) Long Title (SHRTCKN)	Long Section Title	Section Title
Section Title (SHRTCKN) No Long Title (SHRTCKN)	Section Title	Section Title

Note

The hierarchy of section title versus course title is enforced with the section information that is rolled to Academic History.

4 Course Registration and Drops/Withdrawals

This chapter covers the following:

Registration Status Codes

When a student registers in an open learning course, registration status codes defined for the section in the Section Registration Status Codes Form (SSARULE) are used instead of codes defined in the Course Registration Status Form (SFARSTS).

Students registered in an open learning course can potentially have a variety of start dates, which means that a particular student's progress in the course cannot be measured against static dates. Therefore, the period of time (defined as percent or duration complete) that the registration status code can be used is significant. The student's percent or duration completion in the course is calculated to determine whether the appropriate registration status code is applied to the registration record. The exception to this verification process is code *RE* (Registered). This code is always available and is restricted by the registration from/to dates assigned to the section.

Negative usage cutoff values are permitted and indicate that a registration code is valid prior to the learner's start date. To specify that a registration code is valid “from the day the learner registers until . . .”, leave the **Usage Cutoff Percentage From** or **Usage Cutoff Duration From** field (as appropriate) blank.

The first step in calculating a learner’s completion rate is to determine how many days of class have been completed. This is done by subtracting the learner’s start date from the registration status date. If the learner's start date is in the future, it is not counted in the number of days completed (see Examples 1 and 2 below). If the learner's start date has been reached, one day is added to the number of days completed, making the completion rate inclusive of both the learner's start date and the registration status date (see Examples 3 and 4 below).

Example 1

A learner is registered for History 3005 and has elected to start on 17-NOV-2008. On 03-NOV-2006, he or she decides to drop the course.

Number of Days Complete	=	(Registration Status Date - Learner Start Date)
	=	("03-NOV-2008" - "17-NOV-2008")
	=	-14

Example 2

A learner is registered for History 3005 and has elected to start on 17-NOV-2008. The day before the start date, he or she decides to drop the course.

Number of Days Complete	=	(Registration Status Date - Learner Start Date)
	=	("16-NOV-2006" - "17-NOV-2006")
	=	-1

Example 3

A learner is registered for History 3005 and has elected to start on 17-NOV-2008. On 20-NOV-2008, he or she decides to drop the course. (Because the start date is has been reached, it is included in the number of days completed).

Number of Days Complete	=	(Registration Status Date - Learner Start Date)
	=	("20-NOV-2006" - "17-NOV-2006") + 1
	=	(3) + 1
	=	4

Example 4

The learner is registered for History 3005 and has elected to start on 17-NOV-2008. On the first day of class, he or she decides to drop the course. (Because the start date has been reached, it is included in the number of days completed).

Number of Days Complete	=	(Registration Status Date - Learner Start Date)
	=	("17-NOV-2006" - "17-NOV-2006") + 1
	=	(0) + 1
	=	1

As the above examples show, the number of days completed can never equal zero. Therefore, the student's percentage complete or duration complete will never equal zero. However, this does not restrict zero from being used on SSARULE or SOAORUL.

A value of zero in the **Usage Cutoff Percentage** (or **Duration**) **From** field specifies "From the day the learner starts class until . . . " and can be followed only by a positive number in the **Usage Cutoff Percentage** (or **Duration**) **To** field. A value of zero in the **Usage Cutoff Percentage** (or **Duration**) **To** field specifies "until the day before the learner starts class" and can be preceded only by NULL or a negative number in the **Usage Cutoff Percentage** (or **Duration**) **From** field.

The following examples show how registration status code usage cutoff percentages work for a 10-week course.

Example 1

Status Code	Usage Cutoff Percentage From	Usage Cutoff Percentage To
DD	null	0

- *DD* is avaliable from the day the learner registers until the day before he or she starts class.

Example 2

Status Code	Usage Cutoff Percentage From	Usage Cutoff Percentage To
DD	null	-10
DW	-9	0
DC	0	10

- *DD* is avaliable from the day the learner registers until one week before he or she starts class.
- *DW* is available only for the six days prior to the learner starting class.
- *DC* is available from the day the learner starts class through his or her first week of class.

Example 3

Status Code	Usage Cutoff Percentage From	Usage Cutoff Percentage To
DD	null	-10
DW	-10	0

- *DD* is avaliable from the day the learner registers until one week before he or she starts class.
- *DW* is available for the entire week before the learner starts class.

The following examples show how registration status code usage cutoff durations work for a 10-week course.

Example 4

Status Code	Usage Cutoff Duration From	Usage Cutoff Duration To
DD	null	0

- *DD* is avaliable from the day the learner registers until the day before he or she starts class.

Example 5

Status Code	Usage Cutoff Duration From	Usage Cutoff Duration To
DD	null	-1
DW	-.99	0
DC	0	1

- *DD* is avaliable from the day the learner registers until one week before he or she starts class.
- *DW* is available only for the six days prior to the learner starting class.
- *DC* is available from the day the learner starts class through his or her first week of class.

Example 6

Status Code	Usage Cutoff Duration From	Usage Cutoff Duration To
DD	null	-1
DW	-1	0

- *DD* is avaliable from the day the learner registers until one week before he or she starts class.
- *DW* is available for the entire week before the learner starts class.

In Examples 3 and 6 immediately above, both registration status codes (*DD* and *DW*) are available on the same day, exactly one week before the learner starts class. To avoid having multiple codes available on the same day, usage cutoff values in the **From** and **To** fields must not overlap. The only exception to this is zero, as explained above.

Tip: Make sure the code of *RE* is defined in the Open Learning Section Default Rules (SOAORUL) to facilitate data entry, or defined for the section in SSARULE if the course is available for registration. If registration is available through the self-service products, make sure that the registration code defined on GTVSDAX is also defined in SOAORUL (if status codes are defaulted to individual sections) and SSARULE.

Registration Start/End Date Processing

When the registration record is saved in either the self-service products or baseline Banner, a window is displayed prompting for either the date the student wishes to start the course or the date the student wishes to complete the course. Based on the start from/to dates and duration information defined for the section, the permitted start and end dates are displayed in this window to indicate acceptable dates.

If the start date is entered, the expected completion date is calculated using the calendar day equivalency defined in the Duration Unit Validation Table (GTVDUNT) for the duration defined for the section. Similarly, if the end date is entered, the start date will be calculated. Both the entered and calculated dates are validated to ensure that they are within the acceptable range of dates.

Registration History

You can view a student's registration history for open learning courses in baseline and in self-service.

Baseline

In open learning, the use of term primarily serves administrative needs and plays a lesser role in the registration process. The Student Registration History and Extension Form (SFARHST) is used to retrieve a student's registration activity, unrelated to term. You can display all course registration, regardless of term or registration status, based solely on the student's ID.

The associated term, open learning start/end dates, number of extensions processed (open learning sections only), and grade information are displayed. The registration status displayed represents either the original registration status (non-open learning registration records or open learning registration records with no extensions) or the status of the most current active extension.

Self-Service

Registration information is displayed only for terms for which the **Master Web Term Control** checkbox has been checked in the Web Processing Controls window of the Term Control Form (SOATERM).

Registration History

The Registration History page (`bwskhreg.p_reg_hist`) displays all of a student's registration activity, regardless of status or term. This page can be accessed via the Registration menu. Since there is no term requirement, the registration information displayed might cross various terms. Therefore, the information is presented by course within term.

Active Registrations

The Active Registrations page (`bwsksreg.p_active_regs`) displays all of a student's registration records that are considered active (that is, that have not been graded and rolled to Academic History). This page can be accessed via the Registration menu. Since there is no term requirement, the registration information displayed might cross various terms. Therefore, the information is presented by course within term.

Additional Registration Information Table

When a registration record is finalized, a record is created in the Additional Registration Information Table (SFRAREG) for both traditional and open learning registration records. For open learning registrations, the selected and calculated start/end dates are recorded. For non-open learning registrations, the part-of-term start/end dates defined for the section are stored. The Number of Extensions field is populated with a value of *0* (zero), denoting the original registration.

The SFRAREG table is also used to process registration extensions. For examples of how the data in this table is maintained, see Chapter 5, "Using Extensions with Open Learning Registration". If extensions are processed for a registration record, the extension status code (SFRAREG) is reflected on the main registration record (SFRSTCR).

The following examples illustrate how registration status codes are used with extensions:

- Extension Status Code: *RX*
- Extension Withdrawal Status Code: *WX*

Note

Extension withdrawals do not signify a course withdrawal and canbe processed only via the Student Registration History and Extension Form (SFARHST). You must use the Student Course Registration Form (SFAREGS) to drop the course and all associated extensions.

Registration Status Code of the main registration record (SFRSTCR)	Extension Records and Status Codes (SFRAREG)	
RX	0 record (original extension) 1 record (first extension) 2 record (second extension) Number of extensions = 2	RE RX RX
RX	0 record (original extension) 1 record (first extension) 2 record (second extension) Number of extensions = 1	RE RX WX

Registration Status Code of the main registration record (SFRSTCR)	Extension Records and Status Codes (SFRAREG)	
RE	0 record (original extension) 1 record (first extension) 2 record (second extension) Number of extensions = 0	RE WX WX
RX	0 record (original extension) 1 record (first extension) 2 record (second extension) 3 record (third extension) Number of extensions = 2	RE RX WX RX

Instructor Allocation

A continuous-entry, non-classroom-based instruction model such as open learning uses the assignment of a tutor to the student to answer questions and offer assistance. This assignment of the tutor does not use the percent responsibility defined for the instructor in the Instructor block of the Schedule Form (SSASECT) or the faculty workload information housed in the Faculty Load module. If no meeting times are defined for the section, it is assumed that the instructor's role is non-instructional.

The primary instructor assigned to the section is captured at the time the Additional Registration Information Table (SFRAREG) entry is created. In Student Self-Service, this instructor is displayed, and access is granted to the instructor's contact hours, if available. If, later, the primary instructor is changed or deleted in SSASECT, the instructor information on this record is updated to reflect the change.

Title IV Processing

For Title IV processing, you must choose to use either term or part-of-term dates in the Title IV calculations in Banner Student. The current calculations reflect only term enrollment and do not address attendance.

- Neither of these calculations take into consideration possible gaps in registration activity (attendance), and the resulting calculation might not accurately represent the period of time the student was actually enrolled.
- Title IV calculations do not count any registration extensions.

For blended or open learning only terms, select the **Term Dates** radio button in hte TIV Date Source radio group in the Term Control Form (SOATERM). If the **Part-of-Term**

Dates radio button is selected, and students are enrolled in open learning courses (which do not have a part-of-term), the following warning message is displayed on the Student Withdrawal Form (SFAWDRL):

> **WARNING * Open Learning enrollment exists for the term. Enrollment dates defaulted to term dates.*

The following examples reflect the type of data that is passed to Financial Aid when Title IV processing is used.

Example 1 - Traditional Registration

The term dates are September 1, 2007 to December 31, 2007.

Part-of-Term	Part-of-Term Dates
P/T 1	September 1, 2007 - September 30, 2007
P/T 2	September 1, 2007 - October 31, 2007
P/T 3	November 1, 2007 - December 15, 2007

The student withdraws on November 1, 2007.

The student can take a course at the beginning of the term (September 1 to September 30, 2007 - P/T 1) and another at the end of the term (November 1 to December 15, 2007 - P/T 3) with an attendance gap between the two courses.

If term dates are specified:

- Possible days in term = 122 days
- Days attended = 62 days
- Percent enrolled = 50.8%

If part-of-term dates are specified:

- Possible days in term = 106 days
- Days attended = 62 days
- Percent enrolled = 58.5%

Example 2 - Open Learning Registration

This example depends on how the terms have been defined and whether the registration is included in the Title IV boundaries, based on the government definitions of "distance learning."

The term dates are September 1, 2007 to December 31, 2007.

Part-of-Term	Part-of-Term Dates
P/T 1	September 1, 2007 - September 30, 2007
P/T 2	September 1, 2007 - October 31, 2007
P/T 3	November 1, 2007 - December 15, 2007

The student withdraws on November 1, 2007.

The student can start an open learning course at the beginning of the term (September 1 to September 30, 2007) and another open learning course outside the boundaries of the term (January 1 to February 15, 2008) with an attendance gap between the two courses.

The results would be:

- Possible days in term = 122 days
- Days attended = 62 days
- Percent enrolled = 50.8%

Example 3 - Open Learning Registration with 12 month term

The term dates are September 1, 2007 to August 31, 2008.

Part-of-Term	Part-of-Term Dates
P/T 1	September 1, 2007 - August 31, 2008
P/T 2	September 1, 2007 - October 31, 2007
P/T 3	November 1, 2007 - December 15, 2007

The student withdraws on November 1, 2007.

The student can take a traditional course at beginning of the term (September 1 to September 30, 2007 - P/T1) and an open learning course at the end of the term (June 1 to July 15, 2008) with an attendance gap between the two courses.

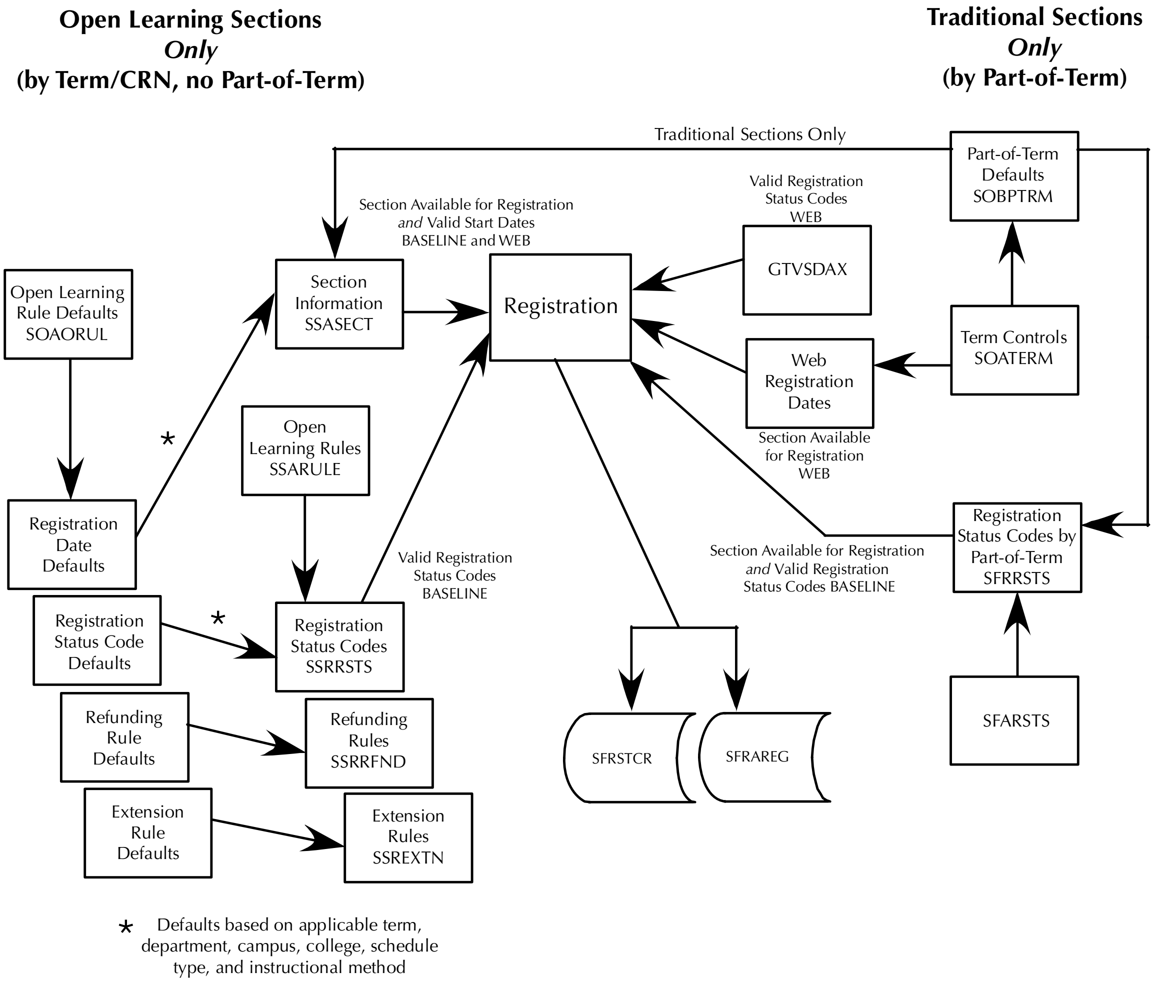
The results would be:

- Possible days in term = 365 days
- Days attended = 62 days
- Percent enrolled = 17.0%

For more information on Title IV processing, please refer to Chapter 12, “Registration”, of the *Banner Student User Guide* and to the *Return of Title IV Funds and Title IV Authorizations Handbook.*

Registration Controls Process Flow

The following process flow shows how open learning sections and traditional sections are processed based on registration rules.



Registration Procedures

This section includes the following procedures:

- “Register a Student in an Open Learning Class Using Baseline” on page 4-12
- “Drop or Withdraw a Student from an Open Learning Class Using Baseline” on page 4-13
- “Search for Classes and Registering Using Self-Service” on page 4-13

Register a Student in an Open Learning Class Using Baseline

Before processing registration records for an open learning course, the open learning rules and course sections must have been defined in Banner.

Note

Waitlisting is not permitted for open learning classes.

1. Access the Student Course Registration Form (SFAREGS).
2. Enter the required term and student ID.
3. In the Course Information block, enter the course reference number in the **CRN** field. If the CRN is unknown, you can also enter the subject, course number, and section directly.
4. Save your changes, and fix any errors.
5. The Start/End Date Entry window is displayed for open learning courses. Enter the start or end date selected by the student.
   - If the start date is entered, the expected completion date of the course is calculated based on the duration defined for the section.
   - If the end date is entered, the start date is calculated based on the duration defined for the section. The start date, regardless of how derived, is checked against the start from and to dates on the section record.
6. Save the date information. The system returns to the Course Information block, where you must save again to trigger the checking for registration restrictions (for example, pre-requisites, time conflicts).
7. Save your changes so that fee assessment processing can take place.

   An entry is created in the Additional Registration Information Table (SFRAREG) for the start and end dates and the information for the instructor or tutor assigned to the student for the section. The Number of Extensions field is populated with *0* (zero) to signify the original registration record.

Note

Entries are created in this table for traditional and open learning course registration records. This information is then available for Financial Aid processing.

Drop or Withdraw a Student from an Open Learning Class Using Baseline

1. Access the Student Course Registration Form (SFAREGS).
2. Enter the required term and student ID.
3. In the Course Information block, enter the appropriate drop or withdrawal code in the **Status** field.

Note

If extensions have been processed for the registration, they will also be dropped.

4. Save your changes. The system updates the existing registration record and the most current and future records in the Additional Registration Information Table (SFRAREG). The status code of withdrawn extensions are not affected.
5. Save again. This generates the appropriate refunds based on the open learning refunding rules, if online fee assessment has been turned on in the Term Control Form (SOATERM). Otherwise, you will need to run the Batch Fee Assessment Process (SFRFASC) to update the student's account.

Search for Classes and Registering Using Self-Service

Open learning-related rules must be defined in Banner, and all sections must be appropriately set up in Banner so that users can locate the desired classes and register for them.

Students can search and register for classes via Student Self-Service. Faculty members and advisors with appropriate access can also search for classes and register students in them via Faculty and Advisor Self-Service.

1. The user selects the **Look Up Classes** option from one of the following menus:
    - Registration menu in Student Self-Service
    - Faculty Services menu in Faculty and Advisor Self-Service

2. The Select Term or Date Range page is displayed, on which the user either selects a term from the pull-down list or enters a date range, and then selects the **Submit** button to proceed.

Note

The terms presented in the pull-down are not restricted to those that are available for registration, but are delineated by the **Master Web Term Control** checkbox in the Web Processing Controls window of the Term Control Form (SOATERM). If the Web registration dates are not active, the message *View only* is displayed to the right of the term. ■

3. If the user is a faculty member or advisor, he or she must take the following steps.

   3.1. If the user has not selected a student, the Student and Advisee ID Selection page is displayed, on which the user selects the student.

   The system displays the Student Verification page, on which the user verifies that the correct student was selected.

   3.2. If the user has not had the student enter his or her PIN, the Faculty Student PIN page is displayed, on which the student enters the PIN to authorize the changes to be made.

4. The Look Up Classes page is displayed. It contains 16 parameters that can be used to narrow the user's search for the desired class. After selecting search parameters, the user selects the **Class Search** button to initiate the search.

5. The Look Up Classes results page is displayed. Only classes that have been identified as available on the Web (that is, those for whom the **Voice Response and Self-Service Available** checkbox on the Schedule Form [SSASECT] has been selected) are displayed.

Note

This page is different from the page seen by a prospective student on the unsecured side of the Web site. ■

If desired, the user can select the CRN link for a specific class to view more in-depth information about the class, including the syllabus, to make a more informed decision as to the suitability of the course. Then the user can return to the Look Up Classes search result page.

The user now can decide to add the desired class to the worksheet (see step 5), conduct another class search (see step 6), or register directly for the section (see step 7).

6. To add classes to the worksheet, the user selects the **Select** checkbox for the applicable sections, then selects the **Add to Worksheet** button to go to the Add or Drop Classes page, at which point the system populates the Add Classes Worksheet with the selected CRN.

Note

The **Add to Worksheet** button is not available if the search is being performed for a date range that spans multiple terms. ■

Note

The student is not registered in the class until the user selects the **Submit Changes** button. ■

7. To continue searching for classes, the user selects the **Class Search** button to go to the Look Up Class Search Criteria page.

8. To register directly for the class, the user selects the **Select** checkbox for the applicable sections, then selects the **Register** button.

   If the class (or one of the classes, if multiple are selected) is an open learning class, the Registration Start Date Confirmation page is displayed, requiring the student to enter a desired start or end date for the registration. The start date determined on this page represents the official start of the class, with the end date identifying the expected completion date of the course. The user selects the **Submit Changes** button to proceed with the registration and display the Add or Drop Classes page.

9. A successful registration creates an opening record in the new Additional Registration Information table (SFRAREG). This table stores the selected/derived start and expected completion dates for open learning courses or the part-of-term start/end dates of the section in which the student registered. These dates, instead of the census dates, are now used in the Financial Aid process.

   For open learning course registrations, the Additional Registration Information table (SFRAREG) also stores the instructor assigned to the student, that is, the primary instructor assigned to the section.

For more information about registration-related Web pages, including complete page descriptions, see Chapter 6, "Registration", in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Select Term or Date Range	`bwskfcls.p_sel_crse_search`
Look Up Classes	`bwckgens.p_sel_term_date`
Look Up Classes results	`bwskfcls.P_GetCrse`
Add or Drop Classes	`bwskfreg.P_AddDropCrse`

Page Name	Package/Procedure
For Faculty and Advisor Self-Service	
Select Term or Date Range	`bwlkffcs.p_fac_sel_crse_search`
Student and Advisee ID Selection	`bwckgens.p_sel_term_date`
Student Verification	`bwlkoids.P_FacVerifyID`
Faculty Student PIN	`bwlkilib.P_FacStuPIN`
Look-Up Classes	`bwckgens.p_sel_term_date`
Look Up Classes results	`bwlkffcs.P_FacGetCrse`
Add or Drop Classes	`bwskfreg.P_AddDropCrse`

Define Registration Restriction Codes

For each class for which a student cannot register, one of the following codes is displayed.

Code	Description
NR	Not Allowed for Registration Generally associated with registration restrictions on the course, which come from the following: • **Registration Dates** (**First** and **Last**) fields on the Schedule Form (SSASECT). • **Start** and **End** fields on the Course Registration Status Form (SFARSTS) for traditional courses for that part-of-term or on the Section Registration Status Codes Form (SSARULE) for open learning courses associated with the *WEBREGRSTS* internal code on the Crosswalk Validation Form (GTVSDAX). • Enrollment Status Dates block of the Enrollment Status Control Form (SFAESTS). • Web Registration Dates block of the Term Control Form (SOATERM).
SR	Student Restriction Generally associated with registration restrictions on the student and term, which come from the following: • time tickets or third-party controls • student status • academic standing • holds • readmit term

Code	Description
C	Closed Class Closed classes are displayed on this page only if your institution has selected the **Display Closed Section** checkbox on the Web Display Controls window of SOATERM.

The system determines whether a section is available for registration as follows.

- For open learning courses, the system checks the dates entered in the **Registration Dates** fields on the Schedule Form (SSASECT). The system also checks for a section-level registration status code on the Section Registration Status Codes Form (SSARULE) that has been defined as the *WEBREGRSTS* internal code on the Crosswalk Validation Form (GTVSDAX).
- For traditional courses, the system checks the dates associated with the *WEBREGRSTS* internal code on GTVSDAX in the Base Part of Term block of SOATERM.

If you have set up alternate PIN processing, a user using Look Up Classes is prompted to enter the alternate PIN once classes have been selected for registration. If alternate PINs have been set up for multiple terms, the user is prompted for all alternate PINs at the same time.

Register for a Known CRN Using Self-Service

Open learning-related rules must be defined in Banner, and all sections must be appropriately set up in Banner.

This procedure explains how a student can register (or be registered by a faculty member or advisor with appropriate access) for a class if the user knows the CRN.

1. The user selects the **Add or Drop Classes** option from one of the following menus:
   - Registration menu in Student Self-Service
   - Faculty Services menu in Faculty and Advisor Self-Service
   - Student Information menu in Faculty and Advisor Self-Service
2. If the user has not yet selected a term in this Web session, the system displays the Registration Term page (for Student Self-Service) or the Select Term page (for Faculty and Advisor Self-Service). The user selects the desired term from the **Select a Term** pull-down list and selects the **Submit** button.

Note

The terms presented in the pull-down are not restricted to those that are available for registration, but are delineated by the **Master Web Term Control** checkbox in the Web Processing Controls window of the Term

Control Form (SOATERM). If the Web registration dates are not active, the message *View only* is displayed to the right of the term. ■

3. If the user is a faculty member or advisor, he or she must take the following steps.

    3.1. If the user has not selected a student, the Student and Advisee ID Selection page is displayed, on which the user selects the student.

    The system displays the Student Verification page, on which the user verifies that the correct student was selected.

    3.2. If the user has not had the student enter his or her PIN, the Faculty Student PIN page is displayed, on which the student enters the PIN to authorize the changes to be made.

4. The system displays the Add or Drop Classes page.

5. The user enters the CRN in the Add Classes Worksheet, then selects the **Submit Changes** button.

    If the class (or one of the classes, if multiple are selected) is an open learning class, the Registration Start Date Confirmation page is displayed, requiring the user to enter a desired start or end date for the registration. The start date determined on this page represents the official start of the class, with the end date identifying the expected completion date of the course. The user selects the **Submit Changes** button to proceed with the registration and display the Add or Drop Classes page.

Note

Waitlisting is not permitted for open learning classes. ■

6. A successful registration creates an opening record in the new Additional Registration Information table (SFRAREG). This table stores the selected/derived start and expected completion dates for open learning courses or the part-of-term start/end dates of the section in which the student registered. These dates, instead of the census dates, are now used in the Financial Aid process.

    For open learning course registrations, the Additional Registration Information table (SFRAREG) also stores the instructor assigned to the student, that is, the primary instructor assigned to the section.

For more information about registration-related Web pages, including complete page descriptions, see Chapter 6, “Registration”, in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Registration Term	bwskflib.P_SelDefTerm
Add or Drop Classes	bwskfreg.P_AddDrpCrse
Registration Start Date Confirmation	bwckcoms.P_Regs
For Faculty and Advisor Self-Service	
Select Term	bwlkostm.P_FacSelTerm
Student and Advisee ID Selection	bwckgens.p_sel_term_date
Student Verification	bwlkoids.P_FacVerifyID
Faculty Student PIN	bwlkilib.P_FacStuPIN
Add or Drop Classes	bwlkfrad.P_FacAddDropCrse
Registration Start Date Confirmation	bwckcoms.P_Regs

Register Using Voice Response

Through the use of the REG_BYPASS_TERM duty flag, Voice Response offers a choice between two different methods of telephone registration.

- The first option is the traditional term selection-based registration method, where a caller is required to select a term prior to conducting any registration activity.
- The second option, non-term selection registration (or bypass term selection), eliminates the need to select a term, thereby offering cross-term registration capabilities in a non-term-based call flow.

Term Selection-Based Registration

The term selection-based registration call flow requires that a term be selected, thereby creating a *term in context* for any registration activity performed, before the caller can access the registration functions. This method of registration also offers optional cross-term registration capabilities through the use of the REG_APPL_MENU and the REG_CLASS_MENU. These menu options allow a caller to select a different term within a single, active registration session. Callers can register for courses within multiple terms without having to retrace steps up the call menu tree.

Non-Term Selection (or Bypass Term Selection) Registration

The non-term selection registration call flow eliminates the need to pre-select a term before accessing the registration functions. A caller can register for any currently available course, regardless of term, through direct CRN entry. The non-term selection registration method is used with all term-specific Voice Response administrative controls, student eligibility, and error checking processes, and incorporates any appropriate term-specific information as part-of-course detail, call prompts, and error messaging delivered to the caller.

Note

The Withdraw from Term and Check Course Availability functions are disabled for the non-term selection registration method. ■

If a variable start date range exists for an open learning course, Voice Response informs the caller of the start date range and course duration. It then prompts the caller to enter the desired start date for the course. Based on the start date entered, an expected completion date is calculated and delivered to the caller for confirmation.

Registration in open learning courses is subject to all Voice Response administrative controls and student eligibility functions, with the following exceptions.

- The registration from and to dates assigned to the individual open learning course (on the Schedule Form [SSASECT]) take precedence over the information associated with the corresponding term code in the Voice Response Registration Add Dates block on the VR Registration and Grading Term Based Rules Form (GORRGTM).
- When a course is being added, if a capacity error results in the caller being given the option to check for alternative available course sections, Voice Response returns only other available open learning or part-of-term based courses, corresponding to the type of course originally requested by the caller.

Voice Response Schedule Delivery Options

The `REG_SCHEDULE_DELIVER` duty flag provides the ability to deliver either a traditional term-based schedule or a weekly schedule, which lists all active, registered courses (regardless of term) for a specified week in time. Both options offer the ability to list a schedule with day, time, and room assignments or to list courses only.

Note

There are certain dependencies, which are explained in the following sections, for which schedule options are available based on the registration method in use. ■

Term-Based Schedule Delivery

Delivery of a traditional, term-based schedule is optional under the term selection-based method of registration. After a caller chooses to list his or her schedule with day, time, and room assignments or to list courses only, Voice Response delivers a schedule of all active, registered courses for the term in context.

Weekly Schedule Delivery (Non-Term Specific)

The weekly scheduling option supports cross-term registration capabilities by providing a caller with a Monday-through-Sunday schedule of all active, registered courses, regardless of term, for a specified week in time.

- Use of the weekly schedule is optional with the term selection-based method of registration.
- The weekly schedule function is required using the bypass term selection method of registration.

Voice Response prompts the caller to enter any date within the desired schedule week. Based on the date entered, Voice Response calculates the week in context and deliver a Monday-through-Sunday schedule of all active, registered courses, regardless of term, to the caller.

Schedule Delivery and Open Learning Courses

Either schedule feature also delivers additional information for open learning courses under specific conditions. If an open learning course has no assigned meeting record (SSRMEET), or if a meeting record is assigned and the **Meeting Type** field in the Meeting Time window of the Sschedule Form (SSASECT) is not equal to *CLAS* (classroom-based), Voice Response delivers the instructional method, as well as the start date and expected completion dates for the course.

Sample Voice Response Registration Session

The following steps provide a sample telephone registration session using Voice Response.

1. From the Main Voice Response Menu, the caller selects the Registration Main Menu.

   The system delivers the Registration Main Menu and accepts and verifies the caller's entry. The system permits the caller a finite number of tries (as defined by the institution on GORPARM) to make a correct selection.

2. The system delivers the following Registration Main Menu selections:

   “To register for classes, press 1.
   For general registration information, press 2.
   To change your personal identification number, press 3.
   To return to the Main Menu, press 9.
   To transfer to an operator, press 0.
   Enter your selection now.”

   When the caller chooses to register for classes (menu option 1 from the Registration Main Menu), the system first asks for the caller’s student ID and PIN. If your institution is using term selection-based registration, the system prompts the caller to make an initial term selection. After going through this sequence, the system delivers the Registration Application Menu.

Note

If the caller has previously entered a student ID and PIN, the system does not ask for this data again. ■

3. If the caller has not yet entered a student ID, the system delivers:

> "Please enter your student ID."

The system accepts an eight- or nine-digit student ID, sends this ID to Banner, then retrieves the caller's PIN and name. Voice Response permits the caller a finite number of tries (as specified on the VR Operator Availability and System Parameter Rules Form [GORPARM]) to enter a valid student ID before transferring the caller to a Registration operator.

Once the student ID has been validated, the system delivers:

> "Enter your personal identification number."

The system accepts a six-digit numeric PIN and permits a finite number of tries to enter a valid PIN.

The system optionally spells the student's last name as determined by the institution on the VR Duty Flag Rules Form (GORFLAG):

> "Your last name is spelled (name)."

4. If your institution is using term selection-based registration, the system determines which terms are available for registration and offers the choices to the caller.

Note

If your institution is using non-term selection (or bypass term selection) registration, the caller is not prompted to enter a term, although you must still set up valid terms on the VR Registration and Grading Term Based Rules Form (GORRGTM) for a caller to be able to perform registration activity for courses associated with a particular term. ■

The system accepts and verifies the caller's choice and verifies the term on Banner. If the term is not valid, the system returns the caller to the Main Menu.

The system accepts the term selection if it is a valid term on the host table.

The system validates the caller's chosen term and delivers:

> "You are registering for ... (term, year), ..."

5. After the student ID, PIN, and term (if applicable) are entered, the caller is presented with the Registration Application Menu, which delivers the following selections:

   "To register or drop classes, press 1.
   To list your schedule, press 2. [for term-based schedule delivery] or
   To list your schedule for a specified week, press 2. [for weekly schedule delivery]
   To withdraw from term, press 3.
   To select a different term, press 4."

6. When the caller chooses to add a class (menu option 1 from the Register or Drop Classes Menu), the system delivers:

   "Enter the five-digit course request number of the course you wish to add or the star key followed by the pound key to end."

   When the caller enters a valid course request number, the system checks the host to determine whether there are any restrictions on registration for the course. It checks the status of the course's available grading modes, if any, and credit hours.

   If there are no errors, the system delivers:

   "Your request for ...(course number and section) ... has been received. Remember to confirm when all courses have been entered."

   If the system finds problems or errors, the system delivers the appropriate message(s) from the Registration Message Table.

7. If your institution is using non-term selection (or bypass term selection) registration, the system can search for the requested CRN across multiple available terms. It is, therefore, possibile that multiple courses with the same CRN might be available for registration. If this occurs, the caller is notified of the total number of available courses and prompted to select which course to be added. The system delivers:

   "xx courses are currently available with course request number xxxxx.
   To add (matching course 1: subject, course number, section, etc.) press 1.
   To add (matching course 2: subject, course number, section, etc.) press 2.
   To add (matching course n: subject, course number, section, etc.) press 3."

   The system can list up to six matches at a time and provide the option to repeat the courses, list additional courses (if applicable), or cancel the request.

   Once the caller selects the course to be added, processing continues.

8. If the caller has chosen to register for an Open Learning course that does not have a fixed start date, the system delivers:

   "(Open Learning courses) offer a variable start date and you must therefore select a start date for your course. Your expected completion date will be calculated on a course duration of (duration unit number and message code).

You may start this course between (month, day, year) and (month, day, year). Enter your six-digit start date using the MM/DD/YY format."

After the caller enters a start date, the system confirms that the date entered falls between the defined course start date range and calculates the expected completion date. The caller can accept this start (and completion) date or chose to enter a different start date. The system delivers:

"Based on a start date of (month, day, year), your expected completion date is (month, day, year). To accept these dates press 1. Otherwise, to enter a different start date, press 2."

Once the caller confirms the start/completion dates, processing continues.

9. For each course that the student has added or dropped during a phone session, the system must confirm the student registration request. When the caller chooses to confirm registration (menu option 3 from the Register or Drop Classes Menu), the system delivers:

   "Please hold while your course requests are confirmed."

   Voice Response saves the information to Banner and reviews all the registration and error results with the caller. The student's requests are either registered, waitlisted, or dropped. All courses with fatal errors are dropped as they are reviewed to the student.

Note

Under bypass term selection registration, courses are confirmed in term code order.

10. Once all course confirmation processing is complete, the system delivers details on all course requests confirmed during this phone session (in the order shown):

    "During this call you have made the following changes to your schedule:
    You are registered for (subject, course number, section...)
    You are waitlisted for...
    You have dropped..."

5 Using Extensions with Open Learning Registration

The extension process allows a student to acquire more time in the course in order to complete the registration. Registration extensions can be processed only for open learning registration records and must be performed on the Student Registration History and Extension Form (SFARHST). The Student Course Registration Form (SFAREGS) will not process registration status codes defined with the **Extension Indicator** checkbox selected on the Course Registration Status Code Validation Form (STVRSTS).

Note

Extensions cannot be processed through the self-service products.

This chapter covers the following:

Process an Extension for an Open Learning Course

Before creating an extension for an open learning course, make sure all open learning rules and course sections, with the **Maximum Extensions** field set to the maximum number of extensions permitted per student (greater than zero), have been defined in Banner.

Extensions are not permitted under the following circumstances.

- The student has holds that prevent registration.
- The student would exceed the maximum number of extensions defined for the section.
- The student's current completion date has passed.
- The registration record has a final grade, regardless of whether that grade has been rolled to academic history.

- The extension requires special approval that has not been granted.
- The course has been dropped or withdrawn from.

1. Access the Student Registration History and Extension Information Form (SFARHST), and enter the ID of the student for whom you wish to process the extension.

2. In the Registration History block, select the record for the course to be extended.

3. Place the cursor on the desired course, and use Next Block or select the Course Extension item from the Options Menu to access the Registration Extensions block.

Note

You will not be allowed to proceed if a final grade has already been processed for the course, the selected course has not been defined as open learning, the class has been dropped or withdrawn from, or the section has not been set up to allow extensions. ■

4. Insert a record in the Registration Extension block. The contents of the extension rule defined for the section on the Schedule Processing Rules Form (SSARULE) are interpreted and used to populate the fields in this record. The transaction amount is calculated and represents the charge that will be applied to the student's account.

Note

Extension processing is not possible if the student has passed the expected completion date, the student will exceed the maximum number of extensions allowed for the section, or the student has registration holds. ■

5. If the section requires pre-approval, use the **Approval Override** checkbox to indicate that special approval has been granted.

6. If, in the case of an administrative extension, the charge amount should be waived, select the **Waive** checkbox, and the **Amount** field will be set to zero.

7. Save your changes once you are satisfied that the correct information exists. A new entry is entered in the Additional Registration Information Table (SFRAREG).

8. If online fee assessment is turned on in the Term Control Form (SOATERM), fee assessment processing can take place for the extension fees (evidenced by the assessment date). If online fee assessment has not been turned on, you must run the Batch Fee Assessment Process (SFRFASC) to update the student's account.

Note

If multiple extension status codes are defined for the section, you will be asked to choose the correct code when creating an extension for an individual student. Prior to selecting the appropriate status code, no rule information will be defaulted. ■

Drop or Withdraw from an Extension

Extension withdrawals or drops are not permitted under the following circumstances.

- The registration status code has not been defined on the Schedule Processing Rules Form (SSARULE) for the section.
- The registration status code used has not been defined on the Course Registration Status Code Validation Form (STVRSTS) with the **Withdrawal Indicator** *and* **Extension Indicator** checkboxes selected.
- The extension is current or completed (that is, the process date falls between the start or end date of the extension record being processed).
- The registration record has a final grade, regardless of whether that grade has been rolled to academic history.

When the rule for the extension status code(s) is defined, the detail code used determines whether or not refunds are processed by the fee assessment logic. Only the detail codes defined in Detail Code Control Form (TSADETC) with a category (`TBBDETC_DCAT_CODE`) of *TUI* or *FEE* are eligible for the refund.

1. Access the Student Registration History and Extension Information Form (SFARHST), and enter the ID for the required student.
2. In the Registration History block, select the course to be dropped or withdrawn from.
3. Position the cursor on the required course, then use Next Block or select the Course Extension item in the Options Menu.
4. In the Registration Extensions window, use Next Record to locate the extension to be dropped or withdrawn from.
5. Enter an appropriate registration status code.(The status code *must* be defined in STVRSTS with both the **Withdrawal Indicator** and **Extension Indicator** checkboxes selected.)

Note

Only active, future-dated extensions can be dropped or withdrawn from. This process does not drop or withdraw the student entirely from the course. *Extension records cannot be removed.*

6. Save your changes. Only the dropped or withdrawn entry in the Additional Registration Information Table (SFRAREG) is affected. If online fee assessment is turned on in the Term Control Form (SOATERM), fee assessment processing performs the necessary calculations to determine the student's financial obligation to your institution. If online fee assessment has not been turned on, you must run the Batch Fee Assessment Process (SFRFASC) to update the student's account.

Additional Registration Record Processing

This section provides sample registration scenarios and shows the resulting changes in data.

The current SFRAREG record is defined as the record that is active for the point in time the scenario is being processed. For example, there might be multiple extension records, but the record where the process date falls between start and end dates of the extension record is considered to be the active record.

No changes can be made to the original registration record with the exception of the **Comments** field.

These scenarios make the following assumptions:

- Extension Processing Code = *RX*
- Extension Withdrawal Code = *WX*
- Drop/Withdrawal Code = *DD*

#	Example	SFRSTCR and SFRAREG Records
1	Initial Registration **Note:** The *RE* code *must* be set up in SSARULE for the section if this is an open learning course.	SFRAREG and SFRSTCR records are created from all registrations, regardless of the product used (that is, self-service, baseline, Voice Response) *SFRSTCR Main Registration Record* • Status Code = RE *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date (open learning registration), derived start date (open learning registration), or section part-of-term start date • End Date = User-defined end date (open learning registration), derived end date (open learning registration), or section part-of-term end date • Assmt Date = Null

#	Example	SFRSTCR and SFRAREG Records
2	A registration extension is requested. The original expected completion date has passed, and an extension has been requested. *or* The student has a registration hold, and an extension has been requested. *or* Special approval is required but has not been granted when processing the extension. *or* The maximum number of extensions would be exceeded if the extension was processed. *or* The course has been assigned a final grade, and an extension has been requested.	No action.

#	Example	SFRSTCR and SFRAREG Records
3	A registration extension is requested. The original registration is still in progress. (The expected completion date has not yet passed.) The initial extension is processed via SFARHST. **Note:** The *RX* code must be set up in SSARULE for the section.	Registration extensions can only be processed for open learning courses through SFARHST. A new SFRAREG record is created to house the extension start date and the new expected completion date. The SFRSTCR record status is also updated. *SFRSTCR Main Registration Record* • Status Code = RX *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = RX • No Ext. = 1 • Status Code = Code assigned in SFARHST • Start Date = Current expected completion, date + one day • End Date = New start date + duration of extension • Assmt Date = Null (if online fee assessment is turned off) or the date of fee assessment. (If online fee assessment is used, this date will be reflected immediately.)

#	Example	SFRSTCR and SFRAREG Records
4	An additional registration extension is requested. The expected completion date of the original registration has passed. The first extension is in progress (and is not past the current expected completion date but is past the current start date). An additional extension is requested and processed using SFARHST, if the extension maximum has not been exceeded.	A new SFRAREG record is created to house the extension start date and the new expected completion date. *SFRSTCR Main Registration Record* • Status Code = RX *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = RX (or the code defined for the section in SSARULE) • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment *SFRAREG Second Extension Record* • Status Code = RX (or the code defined for the section in SSARULE) • No Ext. = 2 • Start Date = First extension expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Null (if online fee assessment is turned off) or the date of fee assessment. (If online fee assessment is used, this date will be reflected immediately.)

#	Example	SFRSTCR and SFRAREG Records
5	The registration is dropped or withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS. No extensions are processed. **Note:** The *DD* code must be set up in SSARULE for the section if this is an open learning course.	The status of both records is updated with the new status code. No change is made to any fields other than the registration status code. An audit record is generated. *SFRSTCR Main Registration Record* • Status Code = DD *SFRAREG Original Registration Record* • Status Code = DD • No Ext. = 0 • Start Date = Previous expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Null
6	The registration is dropped or withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS. The extension is in progress (and is not past the current expected completion date but is past the current start date). **Note:** The *DD* code and/or the withdrawal code must be set up in SSARULE for the section.	The existing SFRAREG record is updated with new status code. To accommodate extension refund processing, no change is made to start and end dates. The SFRSTCR record status is also updated, triggering the creation of an audit record in SFASTCA. *SFRSTCR Main Registration Record* • Status Code = DD *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = DD • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment

#	Example	SFRSTCR and SFRAREG Records
7	The registration is dropped or withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS. The extension is not yet in effect (and is not past the extension start date). **Note:** The *DD* code and/or the withdrawal code must be set up in SSARULE for the section.	All current and subsequent SFRAREG records (0 and 1 records in the following example) are updated with new status code. The SFRSTCR record status is updated, triggering the creation of an audit record in SFASTCA. *SFRSTCR Main Registration Record* • Status Code = DD *SFRAREG Original Registration Record* • Status Code = DD • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = DD • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment

#	Example	SFRSTCR and SFRAREG Records
8	The registration was previously dropped or withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS, and by default, the extension is dropped. The extension was in progress (and is not past the current expected completion date but is past the current start date). The student is re-registered in the same section at their request. **Notes**: • If the course was dropped by accident (such as an administrative error), the student would be re-registered in the same section with the same dates. All extensions would need to be re-processed. • Measures would need to be taken to update the student's account accordingly. • If the extension fee is waived, a zero amount will be stored in SFARHST for the extension record. Therefore, no TBRACCD record would be created.	Prior to re-registration: This reflects the circumstances outlined in either example 6 or 7. above. The following example reflects example 7. *SFRSTCR Main Registration Record* • Status Code = DD *SFRAREG Original Registration Record* • Status Code = DD • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = DD • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date =Date of fee assessment **Result of re-registration:** All SFRAREG records are deleted, and new records are created. *SFRSTCR Main Registration Record* • Status Code = RE *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null

#	Example	SFRSTCR and SFRAREG Records
9	Only one extension is processed, and that extension is withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS. The extension is not yet in effect (and is not past the extension start date). **Note:** The extension withdrawal code must be set up in SSARULE for the section.	The SFRSTCR record status is not updated, and therefore, does not trigger the creation of an audit record in SFASTCA. *SFRSTCR Main Registration Record* • Status Code = RE *SFRAREG Original Registration Record* • Status Code = RE • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = WX • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment

#	Example	SFRSTCR and SFRAREG Records
10	Multiple extensions have been processed, and one extension is withdrawn from (**Withdrawal Indicator** on STVRSTS is set to *Y)* via SFAREGS. The extension is not yet in effect (and is not past the extension start date). **Note:** The extension withdrawal code must be set up in SSARULE for the section.	The SFRSTCR record status is not updated, and therefore, does not trigger the creation of an audit record in SFASTCA. *SFRSTCR Main Registration Record* • Status Code = RX *SFRAREG Original Registration Record* • Status Code = RX • No Ext. = 0 • Start Date = User-defined start date *or* derived start date • End Date = User-defined end date *or* derived end date • Assmt Date = Null *SFRAREG First Extension Record* • Status Code = RX • No Ext. = 1 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment *SFRAREG Second Extension Record* • Status Code = WX • No Ext. = 2 • Start Date = Original registration expected completion date + one day • End Date = New start date + duration of extension • Assmt Date = Date of fee assessment

6 Assessment and Refunding

This chapter covers the following:

For more information on registration fee assessment, refer to Chapter 12, "Registration", in the *Student User Guide*.

Charge Rules Processing

The following table shows the different ways you can place charges on a student's account.

Charge	Charge Basis	Defined in Banner
Registration fees defined for the section	Credit Hour Billing Hour Duration Flat	SSADETL
Registration fees by campus, course level, course attributes, student characteristics	Credit Hour Flat	SFARGFE
Additional registration fees	Flat	SFAEFEE SFAAFEE
Registration extension fees	Credit Hour Billing Hour Duration Flat	SSARULE

As part of the open learning functionality, you can charge by credit hours or by billing hours, as well as by flat fees or by duration. Institutions that have been charging section fees by *C* (credit hours) need to be aware that billing hours were actually being used in the processing. If you want to use billing hours in assessment processing and previously used credit hours, you need to change the *C* (credit hours) definition so fees are charged by billing hours (STVFTYP code *BILL*).

When refund by total is in effect for a term, fee assessment considers the student registration as: the student is either in or not in the class. A student registered in a course is liable for 100% of the billing hours and credit hours. If the student drops a course, he or she is liable for 100% of 0 (zero) billing hours, as well as 0 credit hours.

However, refund by course works differently from refund by total. With refund by course, the student is liable for a percentage of the billing hours for the course. The liability percentage is the complement of the defined refund percentage. So a student who drops a course during a 100% refund period is liable for 0% of the billing hours. If the course is dropped during a 0% or no refund period, the student is liable for 100% of the billing hours. Similarly, if a course is dropped during a 25% refund period, the student is liable for 75% of the billing hours for the course.

For discussion purposes in this chapter, the focus is on registration fees defined for the section and registration extension fees.

Section-Level Registration Fees

Section-level registration fees are set up for each section to provide flexibility in processing registration charges. Therefore, each section for a given course can be defined with a different fee schedule and can be tracked by CRN when applied to a student's account. You can also define fee structures based on the course level (that is, one set of fees for an undergraduate, one set for a graduate) within the same rule set.

There are two ways to default section-level fees.

- When section-level fees are defined for the course, they are defaulted when a new section is created.
- Fees defined in the Section Fees Assessment Control Form (SSADFEE) are also defaulted to newly created section based on course/section characteristics.

If section-level fees are defined for the course and in SSADFEE, both fee structures are defaulted. You need to make sure that duplicate fees are not defaulted.

Processing Algorithms

The fee type used is associated with a specific processing algorithm.

Fee Type	Processing Algorithm
CRED	`SSRFEES_AMOUNT * SFRSTCR_CREDIT_HR`
BILL	`SSRFEES_AMOUNT * SFRSTCR_BILL_HR`
DURN	`SSRFEES_AMOUNT * SFRAREG_NUMBER_OF_UNITS`
FLAT	`SSRFEES_AMOUNT`

Warning

Extreme care must be taken when creating section-level (SSADETL) and term-level (SFARGFE) fee rules, as term-level rules do not have the same flexibility of fee type as the section-level rules. Also, term-level rules can be developed for part-of-term and/or registration from/to dates that are be applicable to open learning courses. ■

Examples of Simple Section-Level Fee Assessment

Section Setup

CRN 10001 characteristics:

- Open learning course
- 10 week duration
- 3 billing hours
- 4 credit hours

CRN 10002 characteristics:

- Traditional section defined with part-of-term
- 3 billing hours
- 4 credit hours

#	Detail Code	Amount	Fee Type	Duration
1	T100	900.00	FLAT	
2	T100	300.00	BILL	
3	T100	90.00	DURN	Week
4	T200 COMP	100.00 25.00	DURN FLAT	Week
5	T200 TECH	100.00 50.00	CRED FLAT	

The following represents the TBRACCD entries that would be placed on the learner's account:

CRN 10001

Scenario 1	T100	900.00	
Scenario 2	T100	900.00	300.00 X 3
Scenario 3	T100	900.00	90.00 X 10
Scenario 4	T200 COMP	1000.00 25.00	100.00 X 10
Scenario 5	T200 TECH	400.00 50.00	100.00 X 4

CRN 10002

Scenario 1	T100	900.00	
Scenario 2	T100	900.00	300.00 X 3
Scenario 3	Fee assessment would not be accomplished on a duration basis (entry of this scenario would be prohibited in SSADETL).		
Scenario 4	Fee assessment would not be accomplished on a duration basis (entry of this scenario would be prohibited in SSADETL).		
Scenario 5	T200 TECH	400.00 50.00	100.00 X 4

Registration Extension Rules Processing

Extension fees are defined on the Schedule Processing Rules Form (SSARULE) for each open learning section and are set up for the registration status code allocated for extension processing (where the **Extension Indicator** checkbox on the Course Registration Status Code Validation Form [STVRSTS] is selected). When an extension is processed for a student in the Student Registration History and Extension Form (SFARHST), the extension rule is retrieved and the calculated cost of the extension is displayed. This amount will be treated as a flat fee when the fee assessment process is activated and represents the charge to be applied to the student's account.

When the **Track by CRN** checkbox is selected in the Fee Assessment section of the Term Control Form (SOATERM), the CRN is attached to the charge record in TBRACCD. If the **Online** checkbox is selected in the Fee Assessment section of SOATERM, the charge is immediately placed on the student's account. Otherwise, the batch Registration Fee Assessment Process (SFRFASC) must be run to generate the charge. The date that the assessment was processed is stored on the Additional Registration Information Table (SFRAREG).

Processing Algorithms

The fee type used is associated with a specific processing algorithm.

Fee Type	Processing Algorithm
If Fee Type = CRED	SSREXTN_AMOUNT * SFRSTCR_CREDIT_HR
If Fee Type = BILL	SSREXTN_AMOUNT * SFRSTCR_BILL_HR
If Fee Type = DURN	SSREXTN_AMOUNT * (SSREXTN_EXTENSION_PCT * SFRAREG_NUMBER_OF_UNITS)
If Fee Type = FLAT	SSREXTN_AMOUNT

Examples of Simple Registration Extension Fee Assessment

Section Setup

CRN 10001 characteristics:

- Open learning course
- 10 week duration
- 3 billing hours
- 4 credit hours

CRN 10002 characteristics:

- Traditional section defined with part-of-term
- 3 billing hours
- 4 credit hours

#	Detail Code	Amount	Fee Type	Extension Duration Percentage	Original Duration
1	T100	450.00	FLAT	50	10 Weeks
2	T100	150.00	BILL	50	10 Weeks
3	T100	90.00	DURN	10	10 Weeks
4	T200	90.00	CRED	40	10 Weeks

The following represents the TBRACCD entries that would be placed on the learner's account:

CRN 10001

Scenario 1	T100	450.00	5 Weeks *	
Scenario 2	T100	450.00	5 Weeks *	150.00 X 3
Scenario 3	T100	90.00	1 Week *	90.00 X 1
Scenario 4	T200	360.00	4 Weeks *	90.00 X 4
			* Duration of Extension	

CRN 10002

Registration extensions are reserved for open learning courses only.

Registration Fee Refund Rules Processing

At the section level, the criteria for refunding fees is defined via section-level rule processing. Refunds are based on a student's progress in a course (elapsed time).

The amount of time elapsed since the student started the course is calculated in the liability assessment logic. Since it is possible for students registered in the same section to have individualized start dates, the traditional means of refunding based on static dates is not used in this situation. The learner's registration start and end dates are stored in the SFRAREG table and are used in the algorithms that follow in this discussion.

This functionality does not depend on how the original fees were assessed. Therefore, if section-level fees or fees assessed through the Registration Fee Assessment Rules Form (SFARGFE) were used in the calculation of the original charge, there is no change in refund processing.

Note the following.

- Refunding rules are tied to a registration status and are activated whenever that status is applied to a registration record.
- The refund rules processing used on the Registration Fee Assessment Refund by Total Rules Form (SFARFND) and the Course Registration Status Form (SFARSTS) is not applicable for open learning courses.
- Open learning registration records are not eligible for refunding by total.

Refunding rules can be defined in the following ways:

Percent Complete	This is based on the amount of time given to the student to complete the course. Payment would be refunded on the percentage of "used" or elapsed time, which is calculated on the individual student's start date and represents a percentage of the total course duration.
Duration Complete	This is based on the duration units and duration period assigned to the section on the Schedule Form (SSASECT). Refunding rules can be developed to assess the number of duration periods that have passed with the student's start date. Refund of payment is based on rules established on the Schedule Processing Rules (SSARULE) for the section.

Processing Algorithms

The registration status change date (SFRSTCR_RSTS_DATE) should be considered as the current date. This date reflects the date entered by the user in the key block of the Student Course Registration Form (SFAREGS) or the processing date in the case of self-service and Voice Response.

Example:

A student started a 15-week course on April 1, 2005, with an expected completion date of July 15, 2005. On April 22, 2005, the student wants to drop.

Percent Complete Calculation

Number of days elapsed in the registration:

Calculate the number of days between the registration start date (SFRAREG_START_DATE) of the original registration record and the current date (SFRAREG_RSTS_DATE).

Example:

Difference between April 1, 2005, and April 22, 2005 = 21 days

Number of days available in the registration:

Calculate the number of days between the registration start date (SFRAREG_START_DATE) of the original registration record and the current expected completion date (SFRAREG_END_DATE).

Example:

Difference between April 1, 2005, and July 15, 2005 = 105 days

Calculate the percent complete:

(Number of days elapsed in registration / number of days available in the registration) * 100

Example:

(21 / 105) * 100 = 20.00%

This percentage would be compared to the percent-complete rule defined for the registration code (defined in the SSRRFND table) to determine the refund percentage to be used in the calculation of the refund amount.

Duration Complete Calculation

Number of duration units elapsed in the registration:

Calculate the number of days between the registration start date (SFRAREG_START_DATE) of the original registration record and the current date, and divide by the number of days defined for the duration code (SFRAREG_DUNT_CODE) assigned to the section (GTVDUNT_NUMBER_OF_DAYS).

Example:

Difference between April 1, 2005, and April 22, 2005 = 21 days

Translate to duration unit of week = 21 days / 7 days = 3.00 weeks

The elapsed duration units would be compared to the duration-complete rule defined for the registration code (defined in the SSRRFND table) to determine the refund percentage to be used in the calculation of the refund amount.

If the student has extension records where the extension start date is in the future, the extension percentage associated with the applicable drop/withdrawal status code is used. Each future-dated extension is processed separately from the drop of the overall registration. See the following examples for more detail.

Examples of Simple Section-Level Refunding

Section Setup

CRN 10001 characteristics:

- Open learning course
- 10 week duration

#	Reg Code	% Complete	Duration Complete	Duration	Tuition Refund	Fee Refund	Extn Refund
1	DC	10			100%	100%	
	DC	20			90	90	
	DC	30			70	70	
	DC	40			50	0	
2	DC		1	WEEK	100	100	
	DC		3	WEEK	75	75	
	DC		5	WEEK	50	0	
3	DD	30			100	0	
4	DD		5	WEEK	75	0	

The following represents the TBRACCD entries that would be placed on the learner's account.

Scenario 1

Learner A started course on April 1 paying $100.00 tuition (no fees) and drops on April 5. The learner was active in the course for 5 days, which constitutes 7% complete - between 0 and 10% complete [5 days / (10 weeks * 7 days) * 100].

T100 - 100.00

Learner B started course on April 1 paying $100.00 tuition (no fees) and drops on April 15. The learner was active in the course for 15 days, which constitutes 21% complete - between 20 and 30% [15 days / (10 weeks * 7 days) * 100].

T100 - 70.00

Scenario 2

Learner A started course on April 1 paying $100.00 tuition (no fees) and drops on April 5. The learner is in the first week of the course - between 0 and 1 week complete.

T100 - 100.00

Learner B started course on April 1 paying $100.00 tuition (no fees) and drops on April 22. The learner is in the fourth week of the course - between 3 and 5 weeks complete.

T100 - 50.00

Scenario 3

Learner A started course on April 1 paying $100.00 tuition (no fees) and drops on April 5. The learner was active in the course for 5 days, which constitutes 7% complete - between 0 and 50% complete [5 days / (10 weeks * 7 days) * 100].

T100	- 100.00

Learner B started course on April 1 paying $100.00 tuition (no fees) and drops on May 15. The learner was active in the course for 45 days, which constitutes 64% complete - more than 50% complete [31 days / (10 weeks * 7 days) * 100].

No refund processed.

Scenario 4

Learner A started course on April 1 paying $100.00 tuition (no fees) and drops on April 5. The learner is in the first week of the course - between 0 and 5 weeks complete.

T100	- 75.00

Learner B started course on April 1 paying $100.00 tuition (no fees) and drops on May 6. The learner is in the sixth week of the course – more than 5 weeks complete.

No refund processed.

Examples of Section-Level Refunding for Traditional Courses

The following is an example of how a traditional course, defined as an open learning course, can be structured to use open learning refunding rules.

For example, a continuing education course meets every Tuesday between August 21 and October 16, or 9 classroom meetings.

- The refund deadline date is August 23.
- The withdrawal deadline date is October 2.

The Banner setup would be as follows.

- Registration from and to dates could be structured to allow students to register in any timeframe that is convenient prior to first classroom meeting date of August 21.
- Start from and to dates could be defined as the same date of August 21, thereby ensuring that all students have the same start date.

- Refunding rules could be established for the section defining a duration complete or percent complete as follows.

	Reg Code	Percent Complete	Duration Complete	Duration	Tuition Refund %	Fee Refund %	Extn Refund %
Refunding Rules by % Complete	DC	10			100	100	
	DC	75			50	50	
	DC	100			0	0	
Refunding Rules by Duration Complete	DC		1	WEEK	100	100	
	DC		7	WEEK	50	50	
	DC		9	WEEK	0	0	

Scenario 1

A student drops the class on August 23 after the first class.

If determined by duration, the student would receive a full refund as he or she falls within the range of 0 to 1 week.

By percentage, he or she would also get a 100% refund ((3 days completed / 56 days in total period) * 100 = 5.35714 or 5% which is between 0% and 10%).

Scenario 2

A student drops the class on September 25.

If determined by duration, the student would receive a 50% refund as he or she falls within the range of 2 to 7 weeks.

By percentage, he or she would also get a 100% refund ((35 days completed / 56 days in total period) * 100 = 62.5 or 62% which is between 10% and 75%).

Scenario 3

A student drops the class on October 9.

If determined by duration, the student would not receive a refund as he or she falls within the range of 8 to 9 weeks.

By percentage, he or she would also get no refund ((49 days completed / 56 days in total period) * 100 = 87.5 or 87% which is between 75% and 100%).

Registration Extension Fee Refunding Rules

Extension refunding processing is similar to that for open learning registration records. Rules are attached to the status code and subsequently assigned to the extension that has been deemed as a withdrawal (`STVRSTS_WITHDRAW_IND`) and has been allocated to extension processing (`STVRSTS_EXTENSION_IND`). The drop or withdrawal of an extension is processed through the Student Registration History and Extension Form (SFARHST).

Processing Algorithms

In the following example, a student was granted a 5-week extension, and on January 28, 2005, wants to drop the extension. The extension start date is January 15, 2005, with an expected completion date of February 19, 2005.

Percent Complete Calculation

Number of days elapsed in the registration:

Calculate the number of days between the start date of the extension being processed (`SFRAREG_START_DATE`) and the transaction processing date.

Example:

Difference between January 15, 2005, and January 27, 2005 = 13 days

Number of days available in the registration:

Calculate the number of days between the start date of the extension being processed (`SFRAREG_START_DATE`) and the associated expected completion date (`SFRAREG_END_DATE`).

Example:

Difference between January 15, 2003, and February 19, 2005 = 35 days

Calculate the percent complete:

(Number of days elapsed in registration / number of days available in the registration) * 100

Example:

(13 / 35) * 100 = 37.14285%

This percentage would be compared to the percent complete rule defined for the drop/withdrawal extension status code (defined in the SSRRFND table) to determine the fee refund percentage to be used in the calculation of the refund amount.

Duration Complete Calculation

Number of duration units elapsed in the registration:

Calculate the number of days between the start date of the extension being processed (SFRAREG_START_DATE) and the current date, and divide by the number of calendar days defined for the duration code (SFRAREG_DUNT_CODE) assigned to the extension (GTVDUNT_NUMBER_OF_DAYS).

Example:

Difference between January 15, 2005 and January 27, 2005 = 13 days

Translate to duration unit of week = 13 days / 7 days = 1.8571428 weeks

The elapsed duration units would be compared to the duration complete rule defined for the drop/withdrawal extension status code (rules defined in the SSRRFND table) to ascertain the refund percentage to be used in the calculation of the refund amount.

Examples of Extension Refunding

Extensions are granted for an open learning course as follows:

- Original duration: 10 weeks
- Extension: 5 weeks
- Extension fee: $150.00

	Reg Code	Percent Complete	Duration Complete	Duration	Tuition Refund %	Fee Refund %	Extn Refund %
Refunding Rules by % Complete	WX	50					50
	WX	100					0
Refunding Rules by Duration Complete	WX		2	WEEK			50
	WX		5	WEEK			0

Scenario 1

A student has been granted a 5-week extension, and on January 27, 2005, wants to withdraw. The extension start date is January 15, 2005, with an expected completion date of February 18, 2005.

If the refund is processed by the duration complete method, the student would receive a 50% refund, as he or she falls within the range of 0 to 2 weeks.

Difference between January 15, 2005 and January 27, 2005 = 13 days

Translate to duration unit of week = 13 days / 7 days = 1.8571428 weeks

Using the percentage complete method, the student would also receive a 50% refund (13 days completed / 35 days in total period) * 100 = 37.1429 or 37% which is between 0% and 50%).

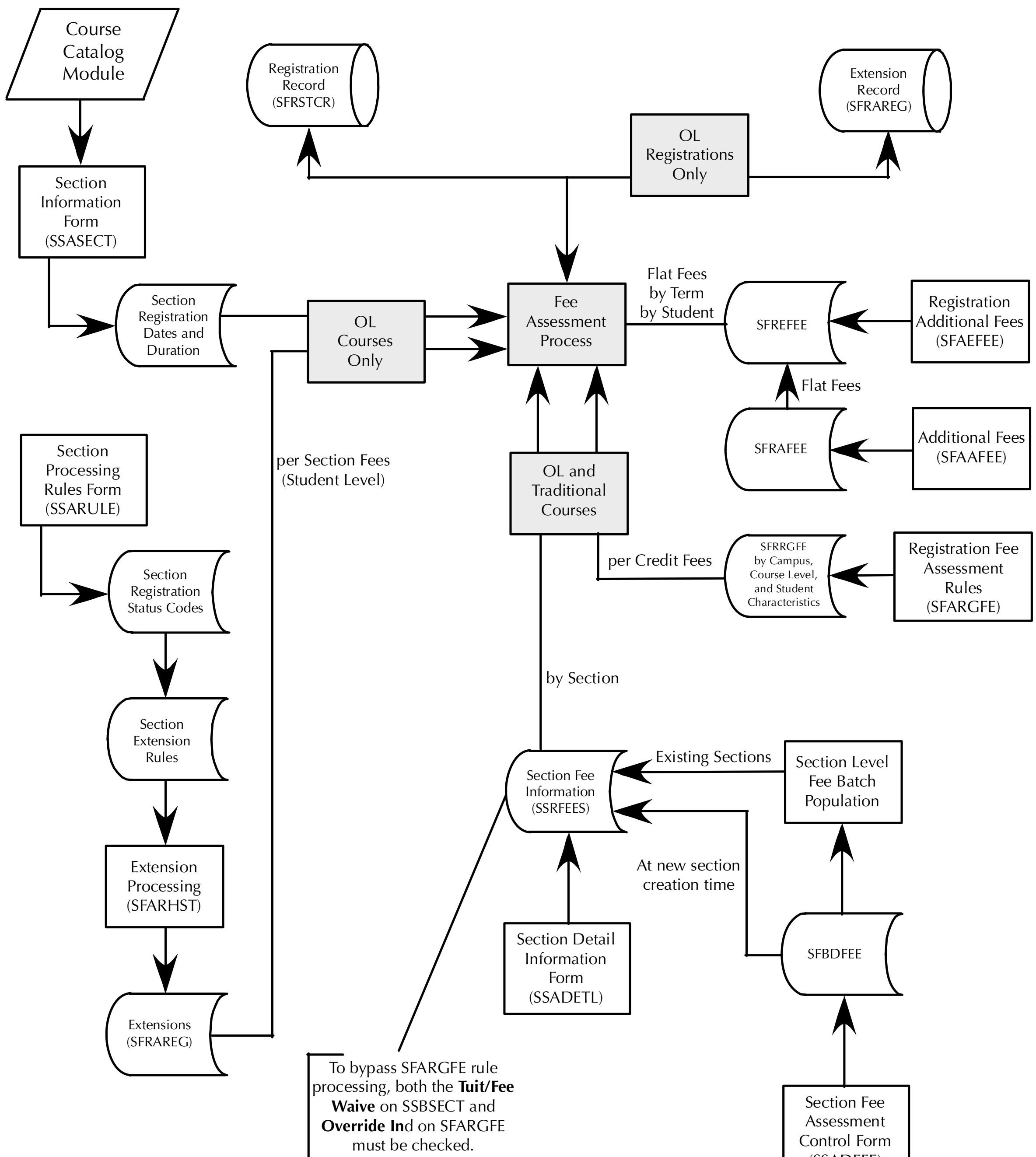
Scenario 2

A student has been granted a 5-week extension, and on February 2, 2005, wants to withdraw. The original extension date is January 15, 2005, and their expected completion date is February 18, 2005.

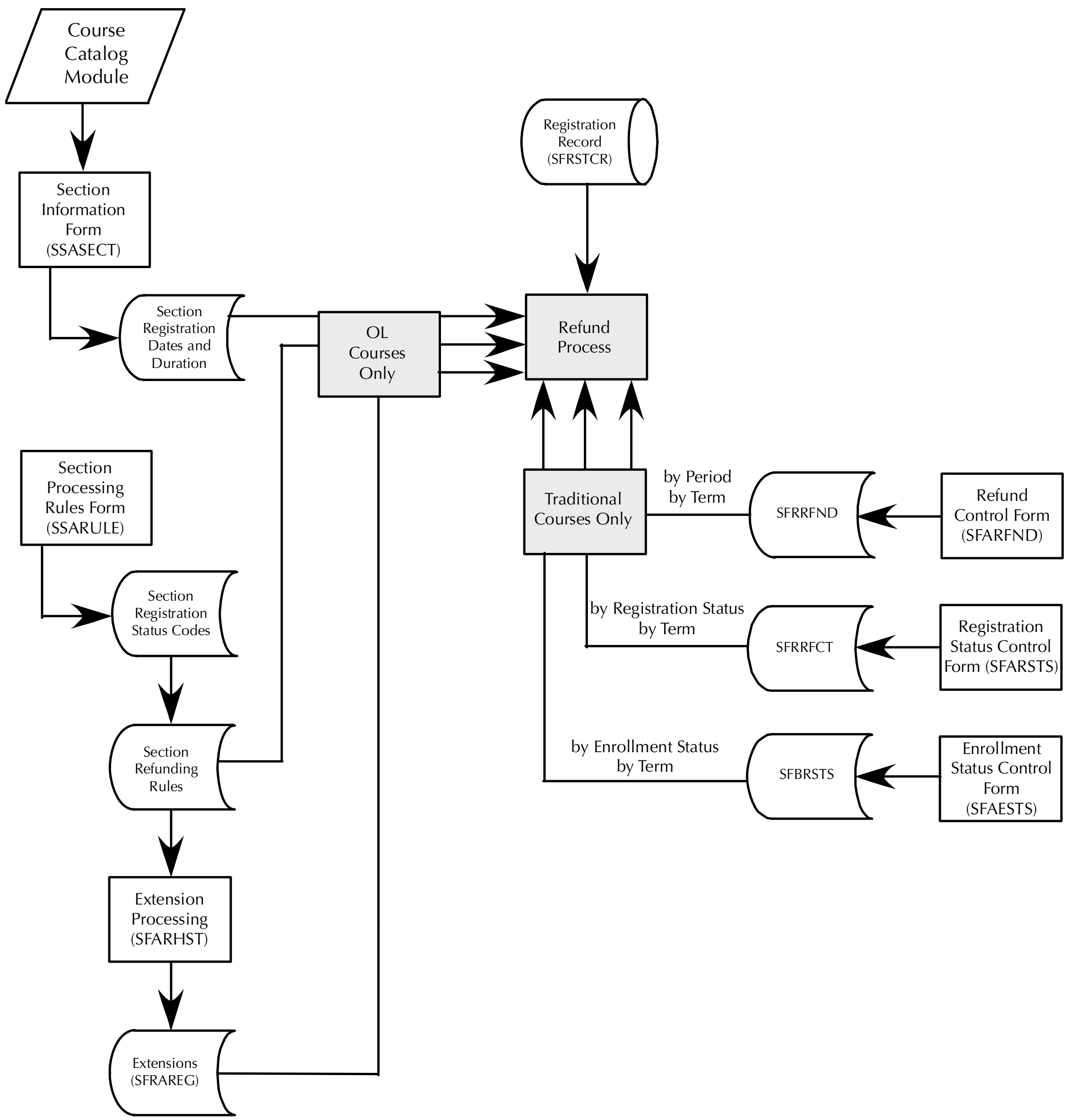
If the refund is processed by the duration complete method, the student would receive no refund, as he or she falls within the range of 2 to 5 weeks.

Using the percentage complete method, the student would also receive a 50% refund (19 days completed / 35 days in total period) * 100 = 54.28571 or 54% which is between 50% and 100%).

Charge Rules Process Flow



Refund Rules Process Flow



Open Learning Fee Assessment and Refunding Examples

#	Example Processing	Fee Assessment Results
1	*Initial Open Learning Registration* Charges defined in SSRFEES and for the section have been defined so that no SFARGFE rules are used in calculation. Online Fee Assessment On • $100 per bill hour • Section defined as 3 weeks in duration	Charges are calculated for specified fee type. Audit and TBRACCD record created: TUIT - $300.00.
2	*Extension Processed* Online Fee Assessment On Original registration charges created • $50 per week • Extension granted for 50% of original duration or 5 weeks • Section assigned duration of 10 weeks	No charges are created at time of registration. Batch Fee Assessment run. • Charges are calculated for specified fee type. Audit and TBRACCD record created: TUIT - $300.00. Assessment Date populated.
3	*Extension Processed* Online Fee Assessment On Original registration charges created • $50 per week • Extension granted for 50% of original duration or 5 weeks • Section assigned duration of 10 weeks	Extension fees are assessed in the Student Registration History and Extension Form (SFARHST). Audit and TBRACCD record created: TUIT - $250.00.

#	Example Processing	Fee Assessment Results
4	*Extension Processed* Online Fee Assessment Off Original registration charges created • $50 per week • Extension granted for 50% of original duration or 5 weeks • Section assigned duration of 10 weeks	Extension fees are assessed in the Student Registration History and Extension Form (SFARHST) and stored on the SFRAREG record. The Assessment Date is blank. SFRBTCH record generated. Batch Fee Assessment run. Audit and TBRACCD record created: TUIT - $250.00. Assessment Date populated.
5	*Extension Processed* Online Fee Assessment Off Original registration charges not assessed • $50 per week • Extension granted for 50% of original duration or 5 weeks • Section assigned duration of 10 weeks	Extension fees are assessed in the Student Registration History and Extension (SFARHST) Form and stored on the SFRAREG record. The Assessment Date is blank. SFRBTCH record already exists for the original registration. Batch Fee Assessment run. • Charges for original registration are calculated for specified fee type. Registration: • Audit and TBRACCD record created: TUIT - $300.00 Extension: • Audit and TBRACCD record created: TUIT - $250.00 Assessment Date populated.
6	*Open Learning Registration is dropped or withdrawn from.* Percentage of the course completed is 10%. No extensions processed Online Fee Assessment On Refund by Total Off SSRRFND Rules: • Percentage - 10 • Tuition - 80 • Fee - 80 • Extension - 80	Original Charge: TUIT - $300.00 Refund calculated: TUIT - $270.00

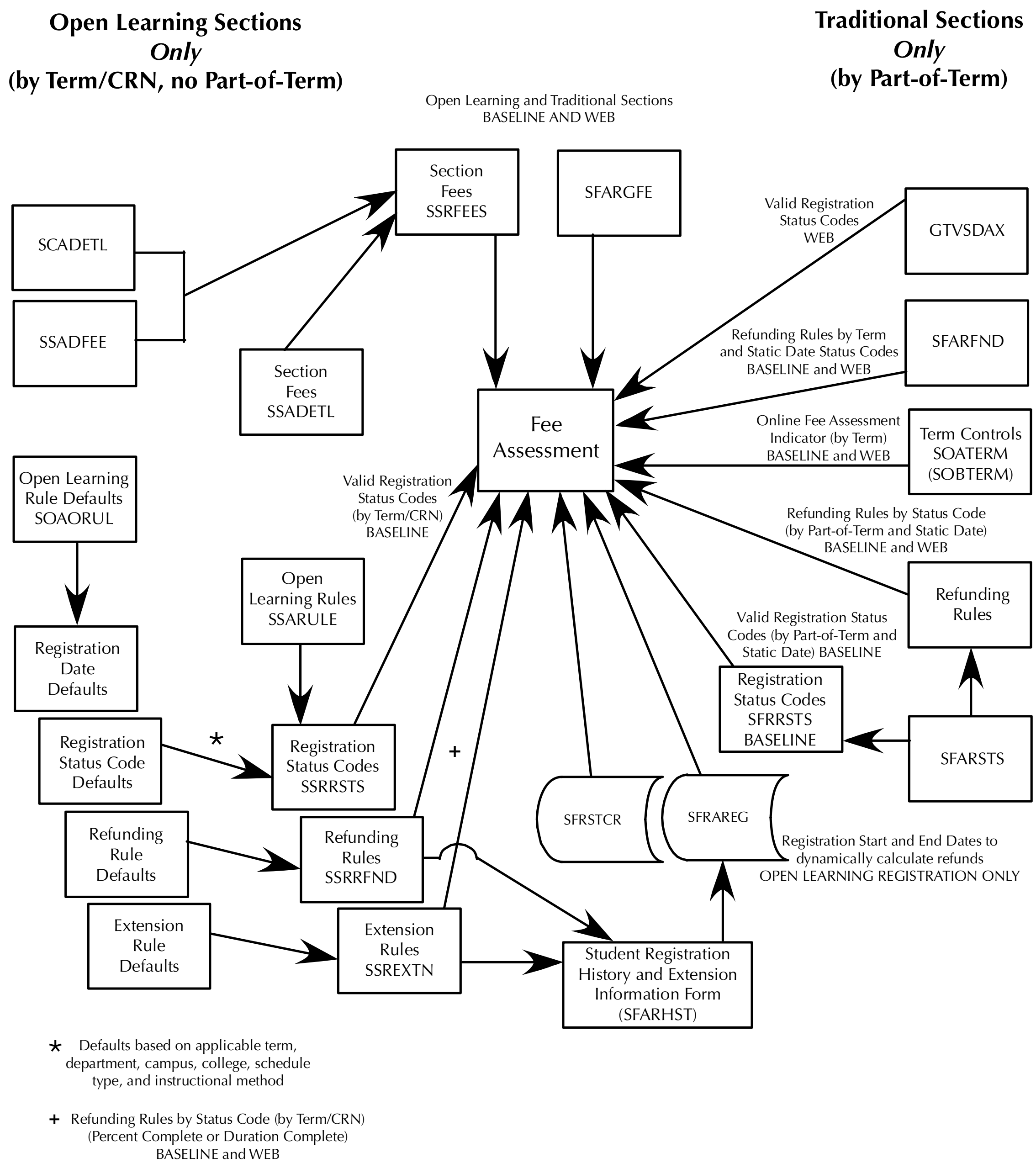
#	Example Processing	Fee Assessment Results
7	*Open Learning Registration is dropped or withdrawn from.* Percentage of the course completed is 10%. Extension is not yet in effect (processing is not past the start date in SFRAREG). Online Fee Assessment On Refund by Total Off SSRRFND Rules: • Percentage - 10 • Tuition - 80 • Fee - 80 • Extension - 80 **Note:** If a 100% refund was required for all future-dated extensions, yet an 80% refund was required for current extensions, the future-dated extensions should be processed individually in SFARHST.	Refund of Original Registration Processed: • Original Charge: TUIT - $300.00 • Refund calculated: TUIT - $270.00 Refund of Extension Processed: • Original Charge: TUIT - $250.00 • Refund calculated: TUIT - $200.00

#	Example Processing	Fee Assessment Results
8	*Open Learning Registration is dropped or withdrawn from.* Extension is in progress (is past the current start date in SFRAREG but is not past the current expected completion date). Percentage of the extension completed is 10% Online Fee Assessment On Refund by Total Off Charge defined in SSRFEES (by course) SSRRFND Rules Result 1: • Percentage - 10 • Tuition - 80 • Fee - 80 • Extension - 80 SSRRFND Rules Result 2: • Percentage - 100 • Tuition - 0 • Fee - 0 • Extension - 0	No Refund of Original Registration Processed (100% complete) Refund of Extension Processed: • Original Charge: TUIT - $250.00 • Refund calculated: TUIT - $200.00

#	Example Processing	Fee Assessment Results
9	*Open Learning Registration is dropped or withdrawn from.* Two extensions have been processed. • First extension is in progress (is past the current start date in SFRAREG but not is past the current expected completion date). • Percentage of the extension completed is 10%. • Second extension has been bought and paid for but is not in effect. Online Fee Assessment On Charge defined in SSRFEES (by course) SSRRFND Rules Result 1: • Percentage - 0 • Tuition - 100 • Fee - 100 • Extension - 100 SSRRFND Rules Result 2: • Percentage - 10 • Tuition - 80 • Fee - 80 • Extension - 80 SSRRFND Rules Result 3: • Percentage - 100 • Tuition - 0 • Fee - 0 • Extension - 0	No Refund of Original Registration Processed (100% complete) Refund of Current Extension Processed: • Original Charge: TUIT - $250.00 • Refund calculated: TUIT - $200.00 Refund of Unused Extension Processed: • Original Charge: TUIT - $250.00 • Refund calculated: TUIT - $250.00

#	Example Processing	Fee Assessment Results
10	*Open Learning Registration is dropped (DD status code).* Two extensions have been processed. • First extension is in progress (is past the current start date in SFRAREG but is not past the current expected completion date). Percentage of the extension completed is 10%. • Second extension has been bought and paid for but is not in effect. Online Fee Assessment Off SSRRFND Rules Result 1: • Percentage - 0 • Tuition - 100 • Fee - 100 • Extension - 100 SSRRFND Rules Result 2: • Percentage - 10 • Tuition - 80 • Fee - 80 • Extension - 80 SSRRFND Rules Result 3: • Percentage - 100 • Tuition - 0 • Fee - 0 • Extension - 0	Refund of Original Registration Processed: Original Charge: TUIT - $300.00 Refund calculated: TUIT - $300.00 Refund of Current Extension Processed: Original Charge: TUIT - $250.00 Refund calculated: TUIT - $250.00 Refund of Unused Extension Processed: Original Charge: TUIT - $250.00 Refund calculated: TUIT - $250.00 **Note:** When the *DD* status code is applied, a 100% refund is automatically processed, regardless of the refunding rules.

Online Fee Assessment Controls Process Flow



7 Self-Service Information

This chapter includes procedures for the following tasks users can perform in Student Self-Service and Faculty and Advisor Self-Service:

- "View a Student's Active Registrations on the Web" on page 7-2
- "View a Student's Registration History on the Web" on page 7-4
- "View Active Faculty Assignments on the Web" on page 7-5
- "View Faculty Assignment History on the Web" on page 7-6
- "Enter Office Hours for Display on the Web" on page 7-7
- "View Office Hours on the Web" on page 7-8
- "Enter Syllabus Information for Display on the Web" on page 7-9
- "View Schedules on the Web" on page 7-11
- "View Faculty Class Lists and Wait Lists on the Web" on page 7-15

The following procedures related to self-service can be found in other chapters of this manual:

- "Set Up Course Catalog Displays for Self-Service" on page 3-4
- "Search for Courses in Self-Service" on page 3-6
- "Set Up Class Schedule Displays for Self-Service" on page 3-19
- "Set Up Section Level Self-Service Display Controls" on page 3-21
- "Search for Classes in Self-Service" on page 3-24
- "Search for Classes and Registering Using Self-Service" on page 4-13
- "Register for a Known CRN Using Self-Service" on page 4-17

View a Student's Active Registrations on the Web

A student can view active registrations (those that have not been graded and rolled to Academic History). Faculty members and advisors access can also view a student's active registrations.

1. The user selects the **Active Registrations** link from one of the following menus:
   - Registration menu in Student Self-Service
   - Student Information menu in Faculty and Advisor Self-Service
2. If the user is a faculty member or advisor, he or she must take the following steps.

   2.1. If the user has not selected a term, the Select Term page is displayed. The user selects the desired term from the **Select a Term** pull-down list and selects the **Submit** button.

   2.2. If the user has not selected a student, the Student and Advisee ID Selection page is displayed, on which the user selects the student.

   The system displays the Student Verification page, on which the user verifies that the correct student was selected.
3. The Active Registrations page displays all registration activity, in summary, that has not yet been graded and rolled to Academic History. These classes may span multiple terms and are therefore displayed with the most recent activity first, with the registrations sorted in course sequence.
4. From this page, the user can choose to do any of the following:
   - View additional information about the class on the Class Schedule Listing page
   - View additional information about the registration on the Student Detail Schedule page (for Student Self-Service) or the View Student Schedule page (for Faculty and Advisor Self-Service)
   - Go to the Change Class Options page to change the credits, grade mode, or level of a course

   Note

   When changing class options, if the user is a faculty member or advisor and has not had the student enter his or her PIN, the Faculty Student PIN page is displayed, on which the student enters the PIN to authorize the changes to be made.

   - View grade detail for the registration, if available, on the Component Grade Detail page

- Display the instructor's contact or office hours, if available, on the Office Hours page
- Go to the course URL, if available

For more information about registration-related Web pages, including complete page descriptions, see Chapter 6, “Registration”, in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Active Registrations	`bwsksreg.p_active_regs`
Class Schedule Listing	`bwckschd.p_disp_listcrse`
Student Detail Schedule	`bwskfshd.P_CrseSchdDetl`
Change Class Options	`bwskfreg.P_ChangeCrseOpt`
Component Grade Detail	`bwsksmrk.p_write_grade_detail`
Office Hours	`bwskoffh.p_display_office_hours`
For Faculty and Advisor Self-Service	
Select Term	`bwlkostm.P_FacSelTerm`
Student and Advisee ID Selection	`bwckgens.p_sel_term_date`
Student Verification	`bwlkoids.P_FacVerifyID`
Active Registrations	`bwlksreg.p_fac_active_regs`
Class Schedule Listing	`bwckschd.p_disp_listcrse`
View Student Schedule	`bwlkfstu.P_FacStuSchd`
Change Class Options	`bwlkfrad.P_FacChangeCrseOpt`
Faculty Student PIN	`bwlkilib.P_FacStuPIN`
Component Grade Detail	`bwsksmrk.p_write_grade_detail`
Office Hours	`bwlkoffh.p_fac_office_hours`

View a Student’s Registration History on the Web

A student can view his or her registration history. Faculty members and advisors can also view a student’s registration history.

1. The user selects the **Registration History** link from one of the following menus:
    - Registration menu in Student Self-Service
    - Student Information menu in Faculty and Advisor Self-Service
2. If the user is a faculty member or advisor, he or she must take the following steps.

    2.1. If the user has not selected a term, the Select Term page is displayed. The user selects the desired term from the **Select a Term** pull-down list and selects the **Submit** button.

    2.2. If the user has not selected a student, the Student and Advisee ID Selection page is displayed, on which the user selects the student.

    The system displays the Student Verification page, on which the user verifies that the correct student was selected.
3. The Registration History page displays all of the student’s registration activity, regardless of status or term. Since there is no term requirement, registration information displayed may cross various terms. Therefore, the information is presented by course within term.
4. From this page, the user can choose to do any of the following:
    - Go to the Student Detail Schedule page (for Student Self-Service) or the View Student Schedule page (for Faculty and Advisor Self-Service)
    - Go to the Class Schedule Listing page

For more information about registration-related Web pages, including complete page descriptions, see Chapter 6, “Registration”, in the *Student Self-Service User Guide* or the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Registration History	`bwskhreg.p_reg_hist`
Student Detail Schedule	`bwskfshd.P_CrseSchdDetl`

Page Name	Package/Procedure
Class Schedule Listing	`bwckschd.p_disp_listcrse`
For Faculty and Advisor Self-Service	
Select Term	`bwlkostm.P_FacSelTerm`
Student and Advisee ID Selection	`bwckgens.p_sel_term_date`
Student Verification	`bwlkoids.P_FacVerifyID`
Registration History	`bwlkhreg.p_fac_reg_hist`
View Student Schedule	`bwlkfstu.P_FacStuSchd`
Class Schedule Listing	`bwckschd.p_disp_listcrse`

View Active Faculty Assignments on the Web

The View Active Assignments page in Faculty and Advisor Self-Service lists all of a faculty member’s class assignments that are considered active. The system searches the faculty member's instructional assignments on the SIRASGN table and uses the following criteria to determine which sections should be displayed.

- The **Voice Response and Self-Service Available** check box on the Schedule Form (SSASECT) must be selected for the section.
- The **Master Web Term Control** check box in the Web Processing Controls window of the Term Control Form (SOATERM) must be selected for the term.
- There must be registrations for the section that have not been rolled to Academic History, regardless of having been graded, with an active registration status (that is, the **Withdrawal Indicator** and **Waitlist Indicator** checkboxes on the Course Status Registration Form [STVRSTS] are *not* selected).

There is no term-selection requirement, and the displayed registration information may cross multiple terms.

Links on this page allow the user to do the following:

- View details about the class on the Class Schedule Listing page
- View the Faculty Detail Schedule page
- Add or maintain syllabus information on the Syllabus Information page
- Add or maintain office hours information on the Office Hours page
- View the class list (if one exists) on the Summary Class List page
- View the wait list (if one exists) on the Summary Wait List page

For more information about the View Active Assignments page, see Chapter 4, “Faculty Information”, in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
View Active Assignments	`bwlkasgn.P_FacActAssign`
Class Schedule Listing	`bwckctlg.p_disp_listcrse`
Faculty Detail Schedule	`bwlkifac.P_FacSched`
Syllabus Information	`bwlksybs.p_fac_syllabus`
Office Hours	`bwlkoffh.p_fac_office_hours`
Summary Class List	`bwlkfcwl.P_FacClaListSum`
Summary Wait List	`bwlkfcwl.P_FacWaitListSum`

View Faculty Assignment History on the Web

The View Assignment History page in Faculty and Advisor Self-Service displays a list of instructor’s class assignments, both past and present, regardless of status or term. The system searches the faculty member's instructional assignments on the SIRASGN table and uses the following criteria to determine which sections should be displayed.

- The **Voice Response and Self-Service Available** checkbox on the Schedule Form (SSASECT) must be selected for the section.
- The **Master Web Term Control** check box in the Web Processing Controls window of the Term Control Form (SOATERM) must be selected for the term.

For more information about the View Assignment History page, see Chapter 4, “Faculty Information”, in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
View Assignment History	`bwlkasgn.P_FacAssignHist`

Enter Office Hours for Display on the Web

The Office Hours page in Faculty and Advisor Self-Service is used to view or maintain the instructor's office hours for a class. Instructors can enter the following:

- Times
- Days
- Phone number
- Physical location
- E-mail address
- Dates for which this information is valid

To allow students to view a classes office hours on the Web, the instructor must select the **Display** checkbox on this page.

If the instructor has several classes and the same information applies to all of them, he or she can copy this data to those classes rather than reenter it. Using the **Copy To** pull-down list, the instructor can also populate the office hours for his or her other sections.

The following procedure assumes that sections have been created for the class and that the instructor has been assigned to the section.

To enter or modify office hours information:

1. The user selects the **Office Hours** link from the Faculty Services menu.

Note

Other Web pages in Faculty and Advisor Self-Service also include links to this page. Wherever an **Add** or **Maintain** link is displayed in the **Officer Hours field** on a Web page, it can be selected to go to the Office Hours page.

If a term has not been selected, the system displays the Select Term page, on which the user must select the desired term.

If a CRN has not been selected, the system displays the Select a CRN page, on which the user must select the desired CRN.

The Office Hours page is displayed.

2. The user enters data in as many of the following fields as desired:
   - **From Time**
   - **To Time**
   - **Day of Week**

- **Contact Number**
- **Location**
- **From Date**
- **To Date**

3. The user selects the **Display** checkbox if he or she wants the office hours to be available to be viewed on the Web.

   The user clears the **Display** checkbox if her or she does not want the office hours to be viewed.

   For example, if the term hasn't started and the instructor is not yet certain of his or her office number, he or she might not want the information to be displayed yet. The user can return to this page later to modify it and make it available for viewing on the Web.

4. To copy the data to another class, the user selects the class from the **Copy To** pull-down list.

5. The user selects the **Submit** button to save the changes.

For more information about the Office Hours page, including complete page descriptions, see Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Select Term	bwlkostm.P_FacSelTerm
Select a CRN	bwlkocrn.P_FacCrnSel
Office Hours	bwlkoffh.P_Fac_Office_Hours

View Office Hours on the Web

If a faculty member has selected the **Display** checkbox on the faculty Office Hours page for the office hours for a term or section, other users can view the information. This is the case even if the current date is not within the effective date range on the Office Hour record.

This page is accessed when a user selects the instructor's name, if it is displayed as a hyperlink, on appropriate pages.

Students can view a faculty member's office hours from the following pages:

- Active Registrations
- Student Detail Schedule

Faculty members can view other faculty members' office hours from the following pages:

- Faculty Detail Schedule
- View Active Assignments
- Active Registrations

For more information about the Office Hours pages, including complete page descriptions, see Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide* and Chapter 6, "Registration", in the *Student Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Active Registrations	`bwskreg.p_active_regs`
Student Detail Schedule	`bwskfshd.P_CrseSchdDetl`
For Faculty and Advisor Self-Service	
Office Hours	`bwlkoffh.P_Fac_Office_Hours`
Faculty Detail Schedule	`bwlkifac.P_FacSched`
View Active Assignments	`bwlkasgn.P_FacActAssign`
Active Registrations	`bwlksreg.p_fac_active_regs`

Enter Syllabus Information for Display on the Web

The Syllabus Information page in Faculty and Advisor Self-Service is used to maintain syllabus information, learning objectives, required materials, and technical requirements for the course. The information can be either typed in or copied from another source and pasted in.

If desired, administrative staff can use the Section Syllabus Form (SSASYLB) to enter this information. The Term Roll process (SSRROLL) will then permit the advancement of this information from term to term.

To enter or modify syllabus information:

1. The user selects the **Syllabus Information** link on the Faculty Services menu.

Note

Other Web pages in Faculty and Advisor Self-Service also include links to this page. Wherever an **Add** or **Maintain** link is displayed in the **Syllabus** field on a Web page, it can be selected to go to the Syllabus Information page. ■

If a term has not been selected, the system displays the Select Term page (`bwlkostm.P_FacSelTerm`), on which the user must select the desired term.

If a CRN has not been selected, the system displays the Select a CRN page (`bwlkocrn.P_FacCrnSel`), on which the user must select the desired CRN.

The Syllabus Information page is displayed.

2. The user enters data in as many of the following fields as desired:

- **Long Section Title**
- **Course URL**
- **Learning Objectives**
- **Required Materials**
- **Technical Materials**

3. The user selects the **Submit** button to save the changes.

For more information about the Syllabus Information page, including complete page descriptions, see Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Select Term	`bwlkostm.P_FacSelTerm`
Select a CRN	`bwlkocrn.P_FacCrnSel`
Syllabus Information	`bwlksybs.p_fac_syllabus`

View Schedules on the Web

The following pages display schedules:

Type of Schedule	Page in Student Self-Service	Page in Faculty and Advisor Self-Service
Student's schedule	Student Detail Schedule Week at a Glance	View Student Schedule
Faculty member's schedule	none	Faculty Detail Schedule Week at a Glance

Student Detail Schedule

The following pages display the details of all sections in which a student is currently enrolled for the selected term:

- Student Detail Schedule page
- View Student Schedule page

The display of registered courses is controlled by the **Print On Schedule** checkbox on the Course Registration Status Code Validation Form (STVRSTS). Only courses with statuses for which the **Print On Schedule** checkbox selected are included when the schedule is displayed.

If the user has not selected a term during the current Web session, the term selection page is displayed first; if a term has been selected, that term is used.

1. The user selects one of the following links:
   - **Student Detail Schedule** on the Registration menu in Student Self-Service
   - **Student Schedule** on the Student Information menu in Faculty and Advisor Self-Service
2. If the user has not selected a term, one of the following pages is displayed:
   - Registration Term page is Student Self-Service
   - Select Term page in Faculty and Advisor Self-Service

   The user selects the desired term from the **Select a Term** pull-down list and selects the Submit button.

3. If the user is a faculty member or advisor, the Student and Advisee ID Selection page is displayed, on which the user selects the student.

   The system displays the Student Verification page, on which the user verifies that the correct student was selected.

4. The student's schedule is displayed. The user can choose to do any of the following:

   - Go to the Change Class Options page to change the credits, grade mode, or level of a course

Note

When changing class options, if the user is a faculty member or advisor and has not had the student enter his or her PIN, the Faculty Student PIN page is displayed, on which the student enters the PIN to authorize the changes to be made.

   - Display the instructor's contact or office hours, if available, on the Office Hours page

   - Go to the course URL, if available

For more information about student schedule-related Web pages, including complete page descriptions, see Chapter 6, "Registration", in the *Student Self-Service User Guide* or Chapter 7, "Student Information", the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Registration Term	bwskflib.P_SelDefTerm
Student Detail Schedule	bwskfshd.P_CrseSchdDetl
Change Class Options	bwskfreg.P_ChangeCrseOpt
Office Hours	bwskoffh.p_display_office_hours
For Faculty and Advisor Self-Service	
Select Term	bwlkostm.P_FacSelTerm
Student and Advisee ID Selection	bwlkoids.P_FacIDSel
Student Verification	bwlkoids.P_FacVerifyID
View Student Schedule	bwlkfstu.P_FacStuSchd
Change Class Options	bwlkfrad.P_FacChangeCrseOpt
Faculty Student PIN	bwlkilib.P_FacStuPIN
Office Hours	bwlkoffh.p_fac_office_hours

Faculty Detail Schedule

The Faculty Detail Schedule page in Faculty and Advisor Self-Service displays the faculty member's schedule for the selected term. The information displayed on this page is similar to that on the Instructor Schedule Report (SIRASGQ).

Both primary and non-primary instructors with instructional assignments can access this page.

If the user has not selected a term during the current Web session, the Select Term page is displayed first; if a term has been selected, that term is used.

Links on this page allow the user to do the following:

- View class information on the Class Schedule Listing page
- Add or maintain syllabus information on the Syllabus Information page
- Add or maintain office hours information on the Office Hours page
- View the class list (if one exists) on the Summary Class List page
- View the wait list (if one exists) on the Summary Wait List page

For more information about the View Detail Schedule page, see Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Select Term	bwlkostm.P_FacSelTerm
Faculty Detail Schedule	bwlkifac.P_FacSched
Class Schedule Listing	bwckctlg.p_disp_listcrse
Syllabus Information	bwlksybs.p_fac_syllabus
Office Hours	bwlkoffh.p_fac_office_hours
Summary Class List	bwlkfcwl.P_FacClaListSum
Summary Wait List	bwlkfcwl.P_FacWaitListSum

Week at a Glance

The Week at a Glance page displays a student's or faculty member's schedule in a weekly "calendar" format. This page is accessed via the **Week at a Glance** link on either of the following menus:

- Registration menu in Student Self-Service
- Faculty Services menu in Faculty and Advisor Self-Service

All classes for which a student is registered (for Student Self-Service) or an instructor is assigned (for Faculty and Advisor Self-Service) are displayed for terms for which the **Master Web Term Control** checkbox in the Web Processing Controls window of the Term Control Form (SOATERM) has been selected. Therefore, it is not necessary to select a term before accessing this page. This page displays a week's actual schedule based on the new Additional Registration record (SFRAREG) that is created at the point of registration. All classes for the selected week are displayed, both traditional and open learning.

If a user enters in the **Go to** field a date that is past the last date for which there is information, the system displays the last existing week. For example, if there are 30 weeks from January to August 2003, and a user enters September 30, 2003, the system displays the week including August 31. Likewise, if the user enters a date that falls before the first week, the first week is displayed.

Determining the Week for which an Assignment should be Slotted

The system first checks for dates defined in the Meeting Time window of the Schedule Form (SSASECT).

- For open learning classes, if meeting times do not exist in SSASECT, the start date comes from SSASECT and the system calculates the end date based on the last start date and duration.
- For traditional classes, if meeting times do not exist in SSASECT, the part-of-term dates determine in which weeks the class should be displayed.

Courses without Assigned Meeting Times

In this section of the Web page, all assignments for sections with no SSRMEET records are displayed.

The schedule type is displayed to the right of the course information as a partial explanation as to why the class is listed under this heading.

Courses with Time Conflicts

The schedule cannot display multiple records, so courses that are displayed under this heading are those for which meeting times overlap.

For more information about the Week at a Glance pages, see Chapter 6, "Registration", in the *Student Self-Service User Guide or* Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
For Student Self-Service	
Week at a Glance	bwskfshd.P_CrseSchd
For Faculty and Advisor Self-Service	
Week at a Glance	bwlkifac.P_FacDaySched

View Faculty Class Lists and Wait Lists on the Web

Faculty and Advisor Self-Service includes the following pages that instructors can use to view their class lists and wait lists:

- Detail Class List (bwlkfcwl.P_FacClaList), which displays an alphabetical listing of students in the selected class and detail information about each student
- Summary Class List (bwlkfcwl.P_FacClaListSum), which displays an alphabetical listing of students in the selected class and summary information about each student
- Detail Wait List (bwlkfcwl.P_FacWaitList), which displays an alphabetical listing of students waitlisted for the selected class and detail information about each student
- Summary Wait List (bwlkfcwl.P_FacWaitListSum), which displays an alphabetical listing of waitlisted students in the selected class and summary information about each student

The information displayed on these pages is similar to that on the Class Roster Report (SFRSLST).

A user can view only class lists or courses to which he or she is assigned as an instructor (either primary or non-primary) for the selected term.

To keep these pages from being too long, they display only a few student records at a time. To navigate to a different set of student records, the user must select one of the record-number links. The words *Current Record Set* are displayed next to the record numbers currently displayed.

To add a waitlisted students to a class, the instructor can use the Add or Drop Classes page (bwlkfrad.P_FacAddDropCrse).

Each of these pages includes a link that can be used to send an e-mail to all students on the class list or waitlist (as applicable) for whom an e-mail address has been entered on the E-mail Address Form (GOAEMAL).

Other Web pages in Faculty and Advisor Self-Service also include links to the Summary Class List page and the Summary Wait List page. Wherever a **Classlist** or **Waitlist** link is displayed in the **Rosters** field on a Web page, it can be selected to go to the applicable summary list page.

For more information about the class list and wait list pages, see Chapter 4, "Faculty Information", in the *Faculty and Advisor Self-Service User Guide*.

Package/Procedure Names in this Procedure

Page Name	Package/Procedure
Detail Class List	bwlkfcwl.P_FacClaList
Summary Class List	bwlkfcwl.P_FacClaListSum
Detail Wait List	bwlkfcwl.P_FacWaitList
Summary Wait List	bwlkfcwl.P_FacWaitListSum
Add or Drop Classes	bwlkfrad.P_FacAddDropCrse

8 Financial Aid

Banner Financial Aid supports open learning registration processing as an optional feature. The functionality for open learning in Financial Aid can be used to enhance part-of-term processing. The first disbursement date in a term can be scheduled based on a student's earliest part-of-term start date.

The procedures in this chapter cover Financial Aid tasks that are affected by open learning registration, such as defining disbursement dates in relation to a start date that is different from the beginning of a traditional term.

For more information on Financial Aid forms, reports, and processing, refer to the *Banner Financial Aid User Guide*.

The Transfer Monitoring process allows you to use the earliest course start date for the first term in the aid period. It calculates the earliest course from the student's registration for term. You can select to use the earliest course start date from the student's term registration on the following:

- NSLDS Transfer Monitoring Form (RNATMNT)
- Transfer Monitoring Application Process (RNRTMAC)

A Return of Title IV indicator identifying students who have open learning courses is included on the following:

- Return of Title IV Calculation Form (RPATIVC)
- Return of Title IV Calculation Inquiry Form (RPITIVC)
- Return of Title IV Calculation Process (RPRTIVC)
- Return of Title IV Funds Withdrawal Calculation Report (RPRTIVI)

This indicator alerts Financial Aid personnel to review the enrollment period and period of attendance determined on the Student Withdrawal Form (SFAWDRL).

The rest of this chapter covers the following:

- “Access a Student’s Current Enrollment by Course” on page 8-6
- “Release FFEL Loan Disbursements” on page 8-7
- “Schedule Disbursements Based on a Student’s Schedule” on page 8-7
- “Disburse Aid for Classes In Progress” on page 8-11
- “Reports and Processes” on page 8-19

Exclude Course Levels from Enrollment Load Calculation

This procedure explains how to exclude course levels from student levels for enrollment load calculation.

When enrollment load is calculated, all processes and forms use the same procedure for enrollment calculations to provide consistency.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Access the Exclude Course Levels window.
3. In the **Student Level** field, enter the code of the student level for which you are defining a course-level exclusion.
4. In the **Course Level** field, enter the code of the course level to be excluded from the associated student level when enrollment load is calculated.
5. Save your changes.

The data entered rolls to the next aid year with the Financial Aid New Year Roll Process (ROPROLL).

Any hours in a student's registration with an excluded course level are not considered when determining enrollment load or the earliest course start date. This affects disbursement processing and loan enrollment.

Window Information

Use the Exclude Course Levels window of the Institutional Financial Aid Options Form (ROAINST) to associate a student level with a course levels to be excluded from the enrollment calculation for the aid year. Courses with the levels inserted/updated from this window are excluded for the student level when enrollment is calculated.

Field	Description
Student Level	Code of the student level for which a course level is excluded.
Description	Description of the student level.
Course Level	Course level code to be excluded for the student's educational level when calculating enrollment. The course levels entered here are excluded from the student's registration record.
Description	Description of the course level.

Exclude Course Sections from Enrollment Load Calculation

Use the Section Unavailable for Aid Form (ROASECT) to add or remove sections, such as remedial and/or correspondence courses, from the Unavailable for Financial Aid Table (RORSECT). This allows you to specify criteria for determining course eligibility.

Any sections that exist in the RORSECT table are excluded from the calculation of enrollment for financial aid.

Any sections in a student's registration that have been excluded on ROASECT are not considered when the enrollment load or the earliest course start date for open learning classes is determined. This affects both disbursement processing and loan enrollment.

When enrollment load is calculated, all processes and forms use the same procedure for enrollment calculations to provide consistency.

1. Access the Section Unavailable for Aid Form (ROASECT).
2. Enter the term in the **Term Code** field, then perform a Next Block function. If aid has been authorized or paid for the term, the system displays a warning message.
3. The form opens in query mode. Use the List of Values available from the fields to specify criteria for selecting course sections. Use Execute Query to view sections.
4. Select the **Unavailable for Aid** checkbox to exclude a section from the enrollment calculation.
5. Save your changes.

6. When the system displays the Section to Be Excluded window, insert additional course sections to be excluded, if desired.

Note

To add a section to count in enrollment after it has been excluded, delete the record in the Sections to be Excluded window.

Calculate Enrollment

The enrollment calculation is performed by packaged functions for consistency in all processes. Any course with a course level excluded from a student level is not included when calculating enrollment for financial aid. Also, any course sections that have been excluded are not included in the calculation.

The following processes and forms use the packaged functions to determine the enrollment load of the student:

- Disbursement Process (RPEDISB)
- Financial Aid Enrollment Hours Process (RSRENRL)
- Enrollment load for loan processing
    - Electronic Loan Application Process (RPRELAP)
    - Electronic Loan Application Form (RPAELAP)
    - Loan Application Form (RPALAPP)
- Enrollment load for Exit Interview Requirements Process (RRREXIT)
- Enrollment load for Applicant Requirements Report (RRRAREQ)

Excluding Course Levels Example

Let's say that your institution does not want to include any courses with undergraduate level (level code of *UG*) in the calculation for enrollment for graduate-level students (level code of *GR*). You have also stipulated that courses that are delivered by video (instructional method of *VIDEO*) are not to be included in the calculation for enrollment for any student.

1. In the Exclude Course Levels window of the Institution Financial Aid Options Form (ROAINST), enter a student level code of *GR* in the **Student Level** field and enter a course level of *UG* in the **Course Level** field.

2. On the Section Unavailable for Aid Form (ROASECT), enter the term to exclude the specific sections associated with the **Instructional Method** of *VIDEO*.

3. The form opens in query mode. In the **Instructional Method** field, enter *VIDEO* and query for all sections.

4. Once the results for the query are returned, select the **Unavailable for Aid** checkbox for all sections.

5. Save your changes.

View a Student's Attending Hours

1. Access the Financial Aid Enrollment Form (ROAENRL).

2. Complete the key block and perform a Next Block function.

Note

To view information for all aid years, leave the **Aid Year** field blank.

3. Select the **Attending** button.

   The Financial Aid Enrollment by Date window is displayed showing data from the Financial Aid Attending Hours Table (RORATND) for the term selected in the main window. This table is populated by the Financial Aid Enrollment Hours (RSRENRL) process or by inserting records manually in this window.

   If no records exist in the RORATND table, the message *No records for the term exist* is displayed.

   The eligible financial aid hours are displayed by the date for which the hours have started. This provides the enrollment level as of a specific date. If you have chosen to use attending hours for disbursement of a fund, the attending hours as of the date disbursement is run are used to determine the student's enrollment load.

Note

If you are using the RSRENRL process to freeze hours and have chosen to use attending hours for disbursement of funds, you must also update the **Attending Hours** field in this form to correctly calculate the student's enrollment load.

4. Select the **Close** button to return to the main window.

Access a Student’s Current Enrollment by Date

1. Access the Financial Aid Enrollment Form (ROAENRL).

2. Complete the key block and perform a Next Block function.

Note

To view information for all aid years, leave the **Aid Year** field blank. ■

3. Select the **Current Attending** button in the Current Hours block.

   The Current Enrollment by Date window is displayed showing the student’s credit, billing, and adjusted hours by date for the term selected in the Current Hours block.

   The hours from the student's registration are displayed by the date for which the hours have started. This provides the enrollment level as of a specific date.

4. Select the **Close** button to return to the main window.

Access a Student’s Current Enrollment by Course

1. Access the Financial Aid Enrollment Form (ROAENRL).

2. Complete the key block and perform a Next Block function.

Note

To view information for all aid years, leave the **Aid Year** field blank. ■

3. Select the **Schedule** button.

   The Enrollment by Course window is displayed showing the student’s registration using the ROVSTCR view for the term selected in the Current Hours block.

   This window displays the current view of the student's registration, the course start and end dates, and the current registration hours and status. This window also contains an indicator showing whether the course is excluded from financial aid enrollment calculation.

4. Select the **Close** button to return to the main window.

Release FFEL Loan Disbursements

You can submit to release FFEL loan disbursements that are scheduled later in a term (for example, after a student has begun an open learning class partway through a term) using the Hold/Release Process (RPRHDRL).

Use the Days Prior to Disbursement parameter to enter the number of days prior to the scheduled disbursement to request the release of funds. This allows disbursements scheduled later in term to be released at an appropriate time.

Schedule Disbursements Based on a Student’s Schedule

You can schedule disbursements based on a student's schedule. This functionality includes the ability to schedule disbursement based on a student's earliest class start for non-loan funds. When the system determines the earliest course, only courses that have not been excluded from financial aid enrollment are used.

You can define the number of days before or after the earliest course start date to schedule disbursement. You schedule disbursement dates to assist with part-of-term processing as well as for open learning courses.

This section covers the following:

- “Define Scheduled Disbursement Dates” on page 8-7
- “Reschedule Disbursement Dates” on page 8-8
- “Auto-Schedule Disbursement Dates” on page 8-10

Define Scheduled Disbursement Dates

1. Define the **Disbursement Date** in the Default Award and Disbursement Schedule Rules Form (RFRDEFA).

2. To establish fund- specific disbursement dates for the aid period, define the **Disbursement Date** in the Fund Award and Disbursement Schedule Rules Form (RFRASCH).

Note

Dates can be different for each aid period or fund.

3. Enter the following values in the **+/- Days** field of RFRDEFA and RFRASCH:

   - Enter the number of days prior to earliest class start to disburse as minus; for example, *-10* means 10 days before the earliest class start.
   - Enter the number of days after earliest class start to disburse as positive; for example, *15* means 15 days after earliest class start.
   - For multiple disbursements, enter the number of days in the **-/+ Days** from the earliest class start for each disbursement. For example, to schedule the first disbursement 5 days after the earliest class start and a second disbursement 60 days after the earliest class start, for the first disbursement, enter *5*, and for the second disbursement, enter *60*.

Note

If the student is not registered, the disbursement date defined on RFRASCH or RFRDEFA is used.

4. Save your changes.

Reschedule Disbursement Dates

Before funds are paid to a student's account, the scheduled disbursement date must be reevaluated to reflect any changes to the student's registration.

The Institutional Financial Aid Options Form (ROAINST) includes an indicator to automatically calculate the student's scheduled disbursement date. This date is based on value entered in the **+/- Days** field on the following forms:

- Fund Award and Disbursement Schedule Rules Form (RFRASCH)
- Default Award and Disbursement Schedule Rules Form (RFRDEFA)

The disbursement date is recalculated:

- When the Award Form (RPAAWRD) is entered
- When an award is accepted
- When an award is posted using batch
- Prior to the disbursement process
- When a student views awards in Financial Aid Self-Service

The Disburse Schedule Date Update Process (RPRDDUP) is automatically run as part of the Disbursement Process (RPEDISB) for a group of student or when the **Disbursement Date Update** checkbox is selected on the Applicant Immediate Process Form (ROAIMP) for an individual student.

The **Rescheduled Disbbursement Date** checkbox on ROAINST must be selected when scheduling non-loan fund disbursements based on when the student's earliest course starts for the term. Courses that are excluded due to course level or section are not used in determining the earliest class start date.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. In the Institutional Parameters block, select the **Rescheduled Disbursement Date** checkbox. This indicator must be selected to reschedule dates using the following forms and processes:
   - Forms (RPAAWRD, RPAAPMT, ROARMAN), when a form is entered
   - Financial Aid Self-Service, when student enters the award payment schedule
   - Disbursement Schedule Date Update Process (RPRDDUP), when run online or in batch
   - Disbursement Process (RPEDISB), executes prior to disbursement as part of process

   This uses the **+/- Days** field from the following forms:
   - Default Award and Disbursement Schedule Rules Form (RFRDEFA)
   - Fund Award and Disbursement Schedule Rules Form (RFRASCH)
3. Save your changes.

Reschedule Disbursement Dates Example

Let’s say that your institution wants to disburse aid five days before the student begins classes. Your institution has both open learning and traditional courses. For the Fall/Spring 2005 aid period, the term start dates are 15-AUG-2005 and 15-JAN-2006.

1. On the Default Award and Disbursement Schedule Rules Form (RFRDEFA), set up the aid period using a default disbursement date for Fall of 10-AUG-2005 and Spring of 10-JAN-2006.
2. Enter -*5* in the **+/- Days** field for each term.
3. On the Institution Financial Aid Options Form (ROAINST), select the **Rescheduled Disbbursement Date** checkbox for the aid year.
4. Save your changes.

Student 1 is in traditional full term courses for Fall, all beginning 15-AUG-2005. The student is packaged, and the scheduled disbursement dates are assigned as 10-AUG-2005 for Fall and 10-JAN-2006 for Spring.

Student 2 is registered in two part-of-term mini-sessions. The first part of-term begins a week later than the traditional full-term courses, 22-AUG-2005. The subsequent part-of-term begins 22-OCT-2005. The student is packaged, and the scheduled disbursement dates are assigned as 17-AUG-2005 for Fall and, since no registration exists for Spring, 10-JAN-2006.

Student 3 is not registered, but is packaged for Fall/Spring. The default disbursement dates are assigned as 10-AUG-2005 for Fall and 10-JAN-2006 for Spring.

Student 3 later registers for open learning courses. The earliest course begins 30-AUG-2005 for the Fall term. Student 3 goes to the Financial Aid office to check on their aid. When the Financial Aid person enters the Financial Aid Record Maintenance Form (ROARMAN), the scheduled disbursement date for Fall is automatically updated to 25-AUG-2006 based on -5 days for the Fall on RFRDEFA and student's earliest class start of 30-AUG-2005.

Student 3 later changes their mind and decides to join Student 2 in the two mini-sessions. Student 3 drops the courses, and Admissions deletes the records since the fall term has not begun. Student 3 now registers in the mini-session, which begins 22-AUG-2004 but does not notify the Financial Aid office.

The Disbursement Process (RPEDISB) is run on 17-AUG-2005 to disburse the funds to students who will begin the first mini-session in five days. Since the indicator is selected to reschedule disbursements on ROAINST, the Disbursement Scheduled Date Update Process (RPRDDUP) is automatically executed as part of the (RPEDISB) process. Since Student 3's registration has changed, the scheduled disbursement date for the Fall term will be updated to 17-AUG-2005 using the new registration information, and the funds will be disbursed.

Note

Student's schedule can be viewed from the Financial Aid Enrollment Form (ROAENRL).

Auto-Schedule Disbursement Dates

You can auto-schedule the disbursement date for a student based on when his or her earliest class begins using the **+/- Days** field on the following forms:

- Default Award and Disbursement Schedule Rules Form (RFRDEFA)
- Fund Award and Disbursement Schedule Rules Form (RFRASCH)

The **+/- Days** field displays the number of days before (+) or after (-) the first class start date to schedule the disbursement. Courses that have been excluded in the calculation for financial aid due to course level or section exclusions are not used in determining the earliest class start date for scheduling of disbursements.

If no enrollment for the student exists, the disbursement date for the term(s) entered in the Disbursement Schedule Rules block of RFRDEFA will be used. Once the student has registered for courses, the scheduled disbursement date is recalculated if the **Rescheduled Disbbursement Date** checkbox has been selected on the Institution Financial Aid Options Form (ROAINST) and a value has been entered in the **+/- Days** field for the student's aid period.

Note

A value in the **+/- Day**s field must exist for the aid period when the aid is accepted for the scheduled disbursement date to be recalculated. The **+/- Days** value is updated in the student's disbursement record for the fund and used for the calculation when rescheduling disbursement dates.

Disburse Aid for Classes In Progress

You can disburse aid based on enrollment for classes that have begun.

This functionality allows you to disburse financial aid using an enrollment calculation based on the eligible financial aid hours that have begun, that is attending hours. The ability to use attending hours is fund-specific, so you can select specific funds to use the attending hours calculation.

You can freeze the attending hours as part of the Financial Aid Enrollment Hours Process (RSRENRL). This allows you to freeze the hours by date for which the course(s) begins. The student's enrollment of attending hours is viewable by date on the Financial Aid Enrollment Form (ROAENRL).

The Disbursement Process (RPEDISB) uses the attending hours calculation in determining the student's enrollment load if indicated for the fund.

Use of the attending hours calculation for the Disbursement Process (RPEDISB) is valid only if you have chosen to use either the billing or adjusted hours option for disbursement.

This section covers the following:

- "Attend Hours and the Disbursement Process (RPEDISB)" on page 8-12
- "Include Attending Hours" on page 8-16
- "Freeze Financial Aid Hours" on page 8-17

Attend Hours and the Disbursement Process (RPEDISB)

The Disbursement Process (RPEDISB) allows funds to authorize when using Attending Hours in those cases where all other disbursement program checks have passed, and the

Attending Hours at the time of disbursement is *0*. The amount authorized for the fund is based on the term enrollment. For non-loan funds, if you have chosen to use Billing or Adjusted Hours for determining enrollment for disbursement, the Financial Aid hours for the term (RORENRL) are used if they exist, otherwise the term enrollment is calculated from the student's registration hours for the term. For Stafford and PLUS loans, term enrollment is always determined from the student's current registration. If the student is in a consortium agreement, the Financial Aid hours for the term (RORENRL) are used for all funds. The attending hours indicator for a fund is ignored when using the consortium indicator. Also, when the fund is set to prorate based on enrollment, if the first disbursement is made based on Attending Hours which are less than the term hours, the remaining amount can be authorized.

Rescheduling of the disbursement date for non-loan funds is an option for the school. The functionality to reschedule the disbursement date based on the student's earliest course start date is currently not supported for loan funds.

The Disbursement Process calculates both the actual term enrollment and the Attending Hours based on the current date. If the fund is flagged to Use Attending Hours, the routine also checks the Attending Hours for these 3 edits. If all other disbursement edits are passed but the Attending Hours have not reached the appropriate load to allow actual disbursement, informational messages are inserted into the RPRRSLT table and the funds are authorized instead of disbursed. If any disbursement edits fail, an appropriate Reject message is inserted, and the fund memos as it did in the past.

- If the fund is using Attending Hours and it is prior to the disbursement date, authorize the term amount.
- If the fund is using Attending Hours and the scheduled disbursement date is prior to or equal to the date disbursement is run, determine the enrollment load at the time of disbursement and disburse appropriately.
- The total term authorized amount minus the amount disbursed remains as authorized.

Informational reject codes allow funds to authorize, but are strictly used as a reject to disburse funds to the student account.

059 – No hours currently attending

060 – Attending hours invalid for Federal Fund ID.

061 – Attending hours < packaging hours

Example

The funds are set to Memo. The disbursement schedule date is 01-SEP-05.

Fund	D - Disburse 100%, P - Prorate, N - No Disbursement	Attending Hours
Pell	Not Applicable	Y
SEOG	P (75/50/25)	Y
Subsidized	D	Y
State	N	Y
Merit	P (75/50/0)	N
Institutional	P (75/50/25)	Y

The student is awarded funds using a default of full-time and accepts all (all requirements completed, etc.) The student record exists, but the student has not registered.

Awards for the term

Pell	2000
SEOG	1000
Sub	1313
State	500
Merit	250
Institutional	1000

Disbursement runs, all funds memo with disbursement error *012 - Applicant is not enrolled*.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00	2000.00			012
SEOG	1000.00	1000.00			012
Subsidized	1313.00	1263.50			012
State	500.00	500.00			012
Merit	250.00	250.00			012
Institutional	1000.00	1000.00			012

The student registers for 12 hours for the term.

Attend Date	Hours as of Attend date
15-SEP-05	3
01-OCT-05	6
15-OCT-05	12

Disbursement is run on 15-AUG-05 and no check has been received for the Subsidized fund. This is prior to the scheduled disbursement date.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00		2000.00		059
SEOG	1000.00		1000.00		059
Subsidized	1313.00	1263.50			059
State	500.00		500.00		061
Merit	250.00		250.00		
Institutional	1000.00		1000.00		059

On September 9th, a Financial Aid hold (which prevents disbursement) is placed on the student.

Disbursement is run on 10-SEP-2005. No check is received for the Subsidized loan. This is after the scheduled disbursement date.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00	2000.00			002
SEOG	1000.00	1000.00			002
Subsidized	1313.00	1263.50			002
State	500.00	500.00			002
Merit	250.00	250.00			002
Institutional	1000.00	1000.00			002

The student clears the hold. Disbursement is run on 13-SEP-2005.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00		2000.00		059
SEOG	1000.00		1000.00		059
Subsidized	1313.00	1263.50			059
State	500.00		500.00		061
Merit	250.00			250.00	
Institutional	1000.00		1000.00		059

Disbursement is run on 15-SEP-2005. The student is attending 3 hours. The term total is 12. The subsidized loan check is received. (Note that the Merit payment of $250.00 was previously paid.)

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00		1500.00	500.00	
SEOG	1000.00		750.00	250.00	
Subsidized	1313.00		1263.50		060
State	500.00		500.00		061
Merit	250.00			250.00	
Institutional	1000.00		750.00	250.00	

Disbursement is run on 01-OCT-2005. The student is attending 6 hours. The term total is 12. The subsidized loan check is received.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00		1000.00	1000.00	
SEOG	1000.00		500.00	500.00	
Subsidized	1313.00			1263.50	
State	500.00		500.00		061

Fund	Award	Memo	Authorize	Paid	Error Msg
Merit	250.00			250.00	
Institutional	1000.00		500.00	500.00	

Disbursement is run on 15-OCT-2005. The student is in 12 hours.

Fund	Award	Memo	Authorize	Paid	Error Msg
Pell	2000.00			2000.00	
SEOG	1000.00			1000.00	
Subsidized	1313.00			1263.50	
State	500.00			500.00	
Merit	250.00			250.00	
Institutional	1000.00			1000.00	

Include Attending Hours

1. Select the **Use Attending Hours** checkbox in the Disbursement Options window on the Fund Management Form (RFRMGMT). Save your changes.

2. Select the **Use Attending Hours** checkbox in the Additional Disbursement Options window on the Funds Management Form (ROAMGMT). Save your changes.

The enrollment calculation will then:

- Determine if billing or adjusted hours are used
- Determine number of hours currently attending from the Financial Aid Attending Hours Table, based on date

If there are no frozen financial aid attending hours, the calculation determines the number of hours that have begun from the current registration, using the course start date.

If no hours exist for financial aid attending hours or the student attending hours, the applicant is not enrolled.

Form Information

You can disburse funds based on the hours a student is actually attending using the **Use Attending Hours** checkbox on the following forms:

- Fund Management Form (RFRMGMT)
- Manage Funds Form (ROAMGMT)

When the indicator is selected, the student's enrollment is calculated based on the number of billing/adjusted hours that have a class start date less than or equal to the date disbursement is run.

The **Attending Hours** value is calculated for either adjusted or billing hours based on the options defined on the Packaging Options Form (RPROPTS) for the disbursement options. If **Expected Hours** is chosen for the disbursement option, the **Attending Hours** value is not used.

If the **Use Attending Hours** checkbox is selected on RFRMGMT or ROAMGMT, the system does the following to calculate the enrollment load:

- Determine if hours are adjusted hours or billing hours
- Determine the number of hours the student is currently attending from the Financial Aid Attending Hours Table (RORATND) based on the date

If no hours exist in the RORATND table, determine the number of hours the student is currently attending based on the current student registration for hours which have begun based on the course section start date.

If neither the financial aid attending hours nor the student attending hours (from ROVSATD view) exist, the *Applicant is not enrolled* error is displayed.

Freeze Financial Aid Hours

On the Financial Aid Enrollment Hours Process (RSRENRL), you can freeze attending hours using the Load Attend Enrollment parameter. You may select to update existing records and add new records, or only add new records.

You must freeze attending hours if funds are defined to use attending hours.

The process calculates the number of hours as of the effective date (date course(s) begins).

The financial aid attending hours are viewable and updatable on the Financial Aid Enrollment by Date window of the Financial Aid Enrollment Form (ROAENRL).

Note

If the **Consortium** checkbox is selected, the financial aid hours for the term are used.

Attending Hours Example

Let’s say that your institution has several parts-of-term established and wants to disburse Pell based on the hours the student is attending. However, you want your Merit scholarship to be disbursed at the beginning of the term, regardless of the student's enrollment load or when courses begin.

1. For the Pell Fund Code, select the **Use Attending Hours** checkbox on the Funds Management Form (RFRMGMT).

2. For the Merit Scholarship, clear the **Use Attending Hours** checkbox.

Student 1 is registered as full time (12 hours) for the term, but is in three parts-of-term that begin at different dates. The part-of-term dates have the following course start dates:

- Part-of-term A = 15-AUG-2005
- Part-of-term B = 15-OCT-2005
- Part-of-term C = 20-NOV-2005

Student 1’s registration consists of:

- Two courses for a total of 6 credit hours in part-of-term A
- One course for 3 credit hours in part-of-term B
- One course for 3 credit hours in part-of-term C

Your institution runs the Financial Aid Enrollment Hours Process (RSRENRL) and freezes the student's attending hours. The calculated attending hours are:

15-AUG-2005 = 6
15-OCT-2005 = 9
20-NOV-2005 = 12

The student's term enrollment would therefore be 12 hours. The student is awarded aid based on his or her full-time enrollment for the term.

When the Disbursement Process (RPEDISB) is run, each fund is checked to determine whether to use the term enrollment load or the student's attending hours. Therefore, the RPEDISB process would determine the following and pay accordingly.

- 15-AUG-2005: Student is full-time for term for the Merit scholarship and half-time for Pell as of 15-AUG-2005. Half-time amount for Pell is disbursed.
- 15-OCT-2005: Student is three-quarter-time for Pell so additional Pell is disbursed to now equal three-quarter Pell disbursement.
- 20-NOV-2005: Student is full-time for Pell. Additional Pell is disbursed to now equal full-time disbursement for Pell.

Reports and Processes

The following reports and processes support open learning registration:

- Financial Aid Registration Report (RORREGS)
- Grade Exception Report (RORGRDE)
- Disbursement Schedule Date Update Process (RPRDDUP)

Financial Aid Registration Report (RORREGS)

Use this report to provide information on a student's registration for the term. You can select all term registrations, specific parts-of-term, and/or open learning classes. You can also use a population selection within the combination of term, part-of-term, or open learning.

The following parameters are used with this report:

- *Aid Year.* Single. Required. This is the valid aid year.
- *Term Code.* Single. Required. This is the term code.
- *Registration Report Type.* Single. Required. This is the type of registration report to be produced. Valid values:
  - (*A*)ll Courses: Term, Part-of-Term, Open Learning (default)
  - (*B*): Part-of-Term and Open Learning
  - (*O*) Open Learning Courses only
  - (*P*) Part-of-Term Courses Only
- *Select Part-of-Term Code.* Multiple. Optional. This is the part-of-term code to select. This parameter is required if the Registration Report Type parameter contains a value of (*B*) or (*P*). This parameter is not required if the Registration Report Type parameter contains a value of (*A*) or (*O*).
- *Sort Sequence Indicator.* Single. Required. Sort by (I)D or (N)ame (default).
- *Application ID.* Single. Optional. This is the general area for which the selection ID was defined.
- *Selection ID.* Single. Optional. This is the code that identifies the population with which to work.
- *Creator ID.* Single. Optional. This is the ID of the person who created the population rules.
- *User ID.* Single. Optional. This is the ID of the person who used the population rules.

Financial Aid Registration Report Example

Let's say that your institution wants to review the registrations for students in parts-of-term A and B, which represent a program with two mini-sessions for the term.

1. Enter the appropriate aid year value in the Aid Year parameter.
2. Enter the appropriate term code in the Term Code parameter.
3. Enter a value of *P* (Part-of-Term Courses Only) in the Registration Report Type parameter.
4. Enter the specific part-of-term codes you want to view, *A* and *B*, for the Select Part-of-Term Code parameter. Population selection parameters can also be used to further define the students to report.

The Financial Aid Registration Report selects the students who have registration records for parts-of-term A and/or B and were selected in the population if population selection has been stipulated.

Grade Exception Report (RORGRDE)

This report provides a list of a student's courses that are gradable, based on the registration status, but have not been rolled to Academic History. This assists in identifying courses that have not been completed due to an extension request for an open learning course or courses extending past normal term grade roll processing when determining Satisfactory Academic Progress (SAP).

There are two types of courses which are identified by this report:

- Courses for which no grade has been assigned
- Courses that have been graded but have not been rolled to Academic History

The following parameters are used with this report:

- *Aid Year.* Single. Required. This is the valid aid year.
- *Term Code.* Single. Required. This is the term code.
- *Grade Exceptions to Report.* Single. Required. This is the courses to select. Valid values:
  - (*B*)oth - not rolled and not graded (default)
  - (*N*) Courses with no grade
  - (*R*) Graded not in Academic History

- *Courses to Report.* Single. Optional. This is courses to report. Valid values:
  - (*A*)ll Courses (default)
  - (*F*)inancial Aid eligible courses only
- *Sort Sequence Indicator.* Single. Required. Sort by (*I*)D or (*N*)ame (default).
- *Application ID***.** Single. Optional. This is the general area for which the Selection ID was defined.
- *Selection ID.* Single. Optional. This is the code that identifies the population with which to work.
- *Creator ID.* Single. Optional. This is the ID of the person who created the population rules.
- *User ID.* Single. Optional. This is the ID of the person who used the population rules.

Grade Exception Report Example

Let's say that your institution has a program consisting of two mini-sessions for the term, identified as part-of-term A and part-of-term B. Grades for the first mini-session are recorded but are not rolled to Academic History until the normal end of term processing.

The Financial Aid office wishes to use the Grade Exception Report to identify any students who received a failing grade in the first mini-session in order to confirm the students' actual attendance or last day of attendance prior to making future disbursements.

1. Using a population selection to identify financial aid recipients registered in part-of-term A, enter the appropriate aid year in the Aid Year parameter.
2. Enter the appropriate term code in the Term Code parameter.
3. For the Grade Exceptions to Report parameter, your institution chooses to select only courses that have been graded but not rolled to Academic History, so enter a value of *R* (Graded not in Academic History).
4. You have decided to list all courses on the report, so enter a value of *A* (All Courses) in the Courses to Report parameter.
5. Choose the sort order for the report.
6. Enter the appropriate values for the population selection.

The Grade Exception Report list all students in part-of-term A who have been issued a grade.

Disbursement Schedule Date Update Process (RPRDDUP)

This process updates the scheduled disbursement date for non-loan funds based on the value entered in the **+/- Days** field on the Default Award and Disbursement Rules Form (RFRDEFA) and/or the Fund Award and Disbursement Rules form (RFRASCH). The process determines the student's earliest course start date. Courses that have been excluded due to course level or specific sections are not used in determining the earliest course start date.

Scheduled disbursement dates for disbursements that have been paid or updated manually or by batch posting a disbursement date are not updated.

If the **Rescheduled Disbbursement Date** checkbox has been selected on the Institutional Financial Aid Options Form (ROAINST), this process is run as part of the Disbursement Process (RPEDISB). When run as part of the RPEDISB process, the parameters for Aid Year, Term Code, Fund Code, and population selection (Application ID, Selection ID, Creator ID, and User ID) entered for the RPEDISB process are used.

Warning

The **Rescheduled Disbursement Date** checkbox *must* be selected on the ROAINST form for this process to reschedule the disbursement dates whether run as RPRDDUP or as part of RPEDISB.

The following parameters are used with this process:

- *Aid Year Code.* Single. Required. This is the valid aid year.
- *Process Indicator.* Single. Required. This is the process indicator: Must be *B* when run in batch mode.
- *Applicant ID.* Single. Optional. This is the Applicant ID. This parameter is used when the process is run online.
- *Term Code.* Multiple. Required. This is the term code.
- *Fund Code.* Multiple. Optional. This is the fund code.
- *Application ID.* Single. Optional. This is the general area for which the selection ID was defined.
- *Selection ID.* Single. Optional. This is the code that identifies the population with which to work.
- *Creator ID.* Single. Optional. This is the ID of the person who created the population rules.
- *User ID.* Single. Optional. This is the ID of the person who used the population rules.

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