Banner Financial Aid
Student Employment Training Workbook

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Revision History Log

Publication Date	Summary
4/30/2008	New version that supports Banner 8 software.
11/3/2008	Revised procedure for posting student loans manually.

Table of Contents

Introduction

Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately handle student employment at your institution. The workbook is divided into three sections:

1. Introduction
2. Set-up
3. Day-to-day operations

Intended audience

Financial Aid office administrators and staff

Prerequisites

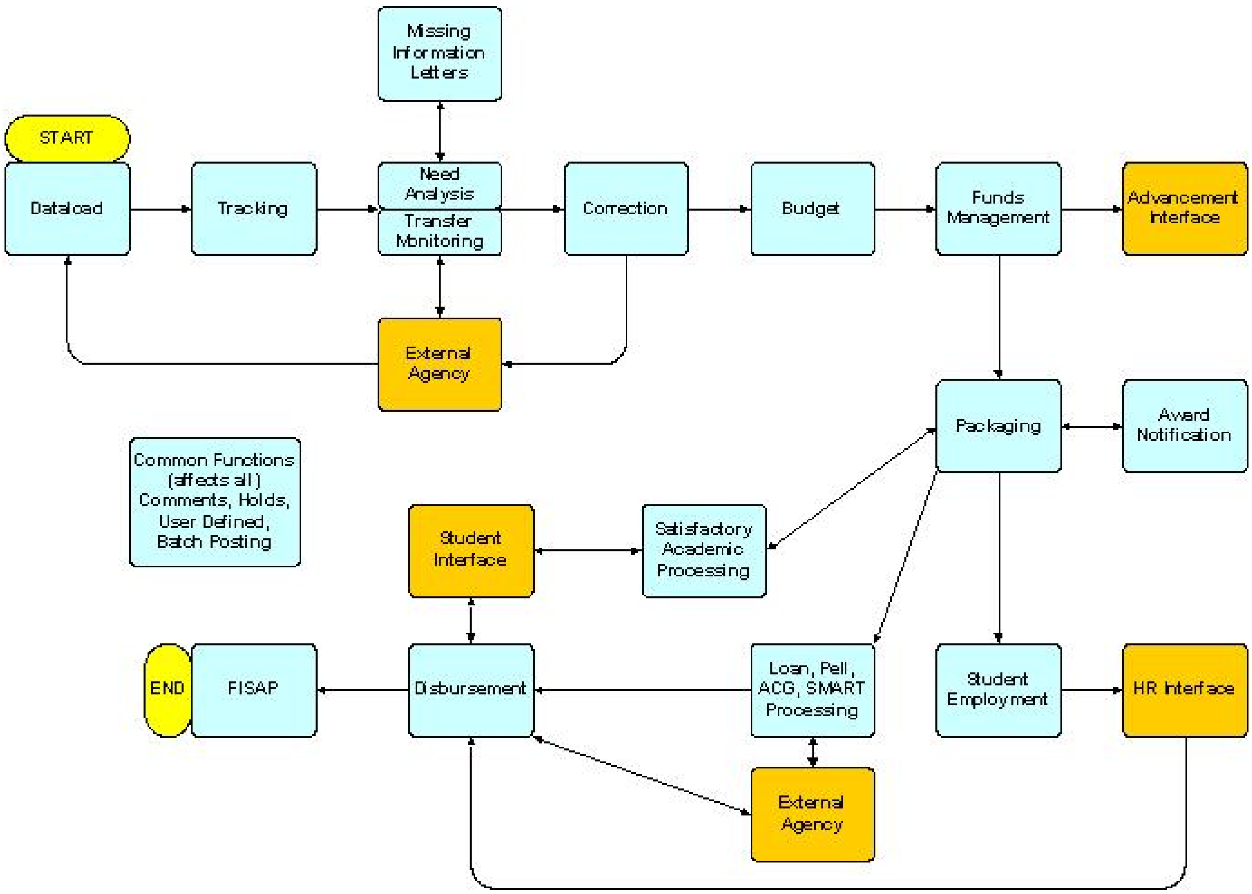
To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial "Banner 8 Fundamentals," or have equivalent experience navigating in the Banner system
- completed the Financial Aid Overview training workbooks
- a minimum working knowledge of SQL for building rules
- administrative rights to create the rules and set the validation codes in Banner.

Process Introduction

Flow diagram

This diagram highlights where student employment fits into the overall Financial Aid process. Student employment coincides with the packaging and budgeting processes.



What happens

The Financial Aid staff (FA) will oversee this process for the institution.

Stage	Description	Comments
The Financial Aid or Student Employment Manager…		
1	Creates status codes.	The Active Indicator shows which authorization statuses are active on RTVAUST.
2	Establishes codes to represent the origin of a student employment referral.	This is only required if the school will use the referral process for student employment. Codes established on RTVRFST.
3	Associates job titles and descriptions with pay ranges.	Set-up form RJRJOBT.
4	Identifies job skills necessary for each job.	Set-up form RJRJREQ.
5	Stores name, address, and supervisor information for each job location.	Set-up form RJAPLBD.
6	Associates an employment position with a placement code for a specific year.	Set-up form RJRPLRL.
7	Associates payroll periods from the Banner Human Resources system with an aid year.	Set-up form RJRPAYL. This form cannot be used without Banner HR.
8	Maintains default authorization start and end dates.	Set-up form RJRSEDR.

The Financial Aid Officer…		
9	Assigns an employment authorization to a student.	If the referral option has been used, the Authorizations section of RJASEAR will be filled in.
10	Makes a job referral for a student to a specific job.	RJASERF is optional and not frequently used.
11	Enters payroll data if the Banner HR system is not implemented at the school.	RJASEME is not required for schools using Banner HR unless adjustments or off-campus earnings need to be entered.
12	Reviews a student's employment hours by pay period for an aid year.	RJISEWH is useful for reviewing aid year earnings especially if the student is working more than one job.
13	Reviews related reports: displays a listing of current work authorizations based on activity data displays information for monitoring student earnings and/or the production of a depart-mental timesheet lists employees who have been paid but not authorized in Banner Financial Aid lists student hours worked by pay period.	Sample reports are found in the Bookshelf documentation. RJRAUTH for displaying work authorizations, RJRDPPR for monitoring student earnings and/or producing departmental timesheets, RJRPAYE to list employees lacking authorization or incorrect job numbers based upon position and suffix, and RJRSEEC to list hours worked by pay period.

Financial Aid Interfaces

The Student Employment module of Financial Aid interfaces with the Human Resources module (for payroll).

Setup

Overview

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to handle student employment at your institution.

The Student Employment module of Banner performs the referral, placement, hours submission, and tracking functions for student employees. This module provides you with these features:

- Work Authorization – allows processing of the student's work location, employment dates, rate of pay, and authorized hours and earnings.

- Departmental Time Reports – permits submission and monitoring of the student's hours worked.

Objectives

At the end of this section, you will be able to

- identify and describe all Banner Forms and processes that will be affected by the student employment process

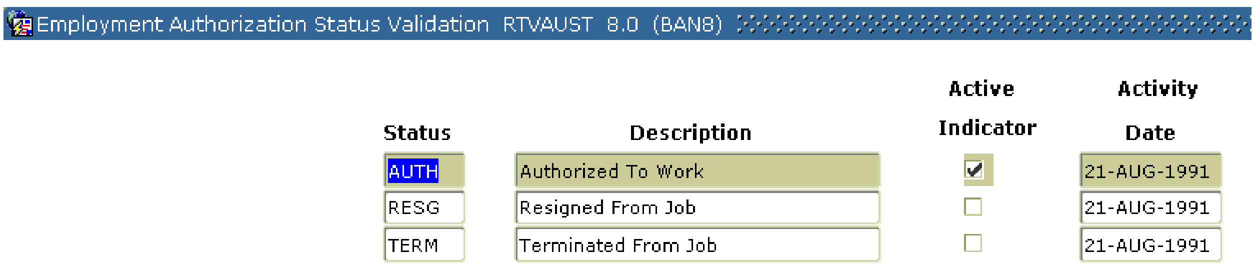
- create the rules and set parameters used to process student employment data.

Employment Authorization Status Validation Form

Purpose

The Employment Authorization Status Validation Form (RTVAUST) creates and maintains status codes that identify the status of a work authorization.

Banner Form



Employment Authorization Status Validation RTVAUST 8.0 (BAN8)

Status	Description	Active Indicator	Activity Date
AUTH	Authorized To Work	☑	21-AUG-1991
RESG	Resigned From Job	☐	21-AUG-1991
TERM	Terminated From Job	☐	21-AUG-1991

Steps

Students who are eligible to work using student employment work funds must be authorized by the Financial Aid office to work under these programs. In this procedure you will define student employment authorization statuses that will be associated to student records, indicating eligibility status for a specific period of time.

1. Access the Employment Authorization Status Validation Form (RTVAUST).

2. View the existing authorization status codes on this form, if any.

   Notes: When checked, the **Active Indicator** check box indicates that the status code authorizes a student to work. If this check box is not checked, the code prevents this authorization. At least one status code must have the **Active Indicator** checked, and at least one must have it unchecked.

3. The **Activity Date** field is system-generated and lists the date of creation for each status code.

4. Enter a **Status** code and **Description** for each possible authorization status that your institution will use. Some possible statuses include

   - AUTH (authorized)
   - CNCL (award canceled by FA Office)
   - RESG (student resigned from job)
   - TEMP (temporary work assignment)
   - TRM (terminated by employer).

5. Add additional codes as necessary, setting the **Active Indicator** check box appropriately for each.

6. Click the **Save** icon.

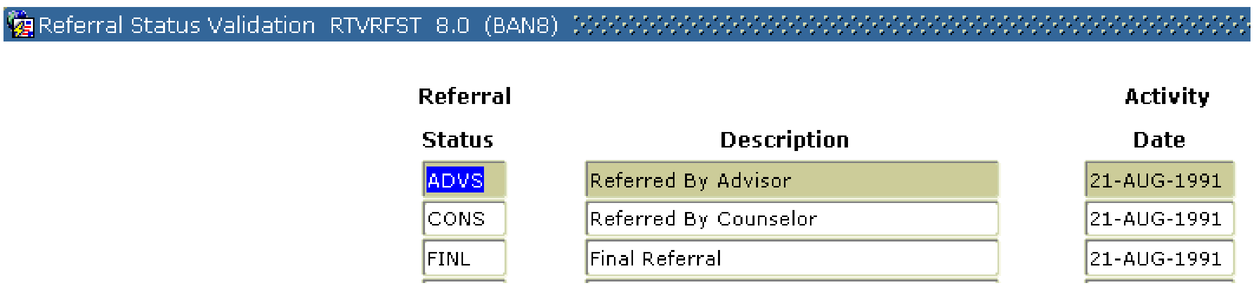
7. Click the **Exit** icon.

Referral Status Validation Form

Purpose

The Referral Status Validation Form (RTVRFST) creates and maintains codes that define the origins of a student employment referral.

Banner Form


Referral Status Validation RTVRFST 8.0 (BAN8)

Referral Status	Description	Activity Date
ADVS	Referred By Advisor	21-AUG-1991
CONS	Referred By Counselor	21-AUG-1991
FINL	Final Referral	21-AUG-1991

Steps

If your institution refers students to positions, you will need to define student employment referral statuses. These statuses will be associated to the student referral record and the student authorization record to indicate the origin of the referral.

Note: This is an optional form. If your institution does not refer students to positions, this procedure will not be necessary.

1. Access the Referral Status Validation Form (RTVRFST).
2. View the existing referral status codes, if any. Some typical statuses include
   - ADVS (advisor referral)
   - CONS (counselor referral)
   - DEPT (department head referral)
   - DFA (director of Financial Aid referral)
   - FINL (final referral)
   - JOBB (job board posting).

3. Insert additional **Referral Status** codes and **Descriptions** to define valid originations of job referrals at your institution.

Note: Some questions to ask when deciding what codes to use include

- Does it matter how the student finds out about the job?
- Should how the student found out about the job be tracked?
    a. If no, this form does not need to be completed.
    b. If yes, then how did the student first learn of the position (e.g., counselor, advisor, school newspaper, job posting)?

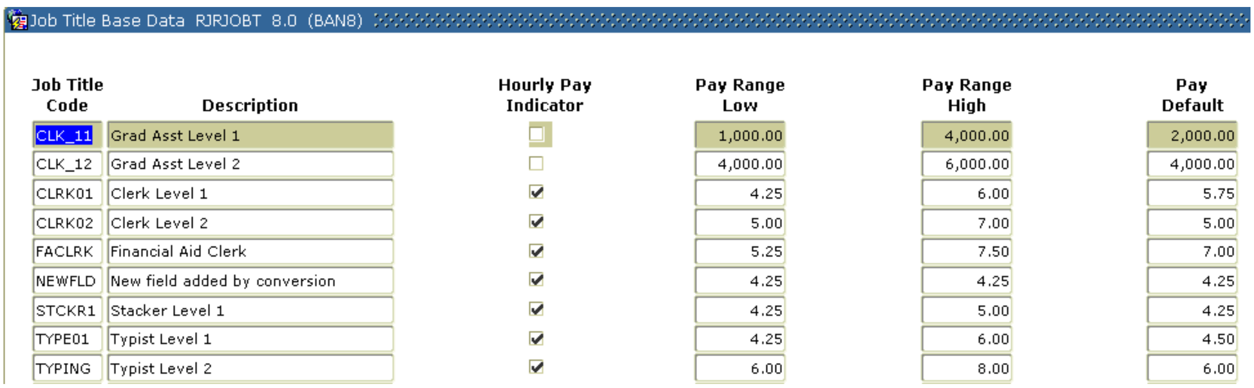
4. Click the **Save** icon.
5. Click the **Exit** icon.

Job Title Base Data Form

Purpose

The Job Title Base Data Form (RJRJOBT) enables you to associate job titles and descriptions with a range of valid pay rates.

Banner Form



Job Title Base Data RJRJOBT 8.0 (BAN8)

Job Title Code	Description	Hourly Pay Indicator	Pay Range Low	Pay Range High	Pay Default
CLK_11	Grad Asst Level 1	☐	1,000.00	4,000.00	2,000.00
CLK_12	Grad Asst Level 2	☐	4,000.00	6,000.00	4,000.00
CLRK01	Clerk Level 1	☑	4.25	6.00	5.75
CLRK02	Clerk Level 2	☑	5.00	7.00	5.00
FACLRK	Financial Aid Clerk	☑	5.25	7.50	7.00
NEWFLD	New field added by conversion	☑	4.25	4.25	4.25
STCKR1	Stacker Level 1	☑	4.25	5.00	4.25
TYPE01	Typist Level 1	☑	4.25	6.00	4.50
TYPING	Typist Level 2	☑	6.00	8.00	6.00

Steps

Your institution must define the job titles in which a student can be placed and a valid range of pay. When authorizing a student for employment, you will need to choose which job title to assign to the student. The institution will need to determine if there will be a number of global job titles, or if there will be a defined list of job titles in which students are employed.

1. Access the Job Title Base Data Form (RJRJOBT).
2. Create a **Job Title** code and a **Description** for a valid job at your institution.
3. Check the **Hourly Pay Indicator** check box if the pay range and default amounts are for hourly wages. Leave it unchecked if the wages are for stipend amounts.
4. Enter a **Pay Range Low**, **High** and **Default** wage amount for the job.

Note: The default wage amount must fall between the low and high values or be equal to one of those values.

5. The default value is the amount that will default onto the Student Employment Authorization form (RJASEAR). The default amount can be changed on a student-by-student basis on that form. When completing RJASEAR, you will not be able to enter a student wage that is either above or below these predefined amounts.

6. If the student is paid a stipend, the amount for the low, high, and default wages are the minimum, maximum, and default stipend, not an hourly wage.

7. Click on the **Save** icon.

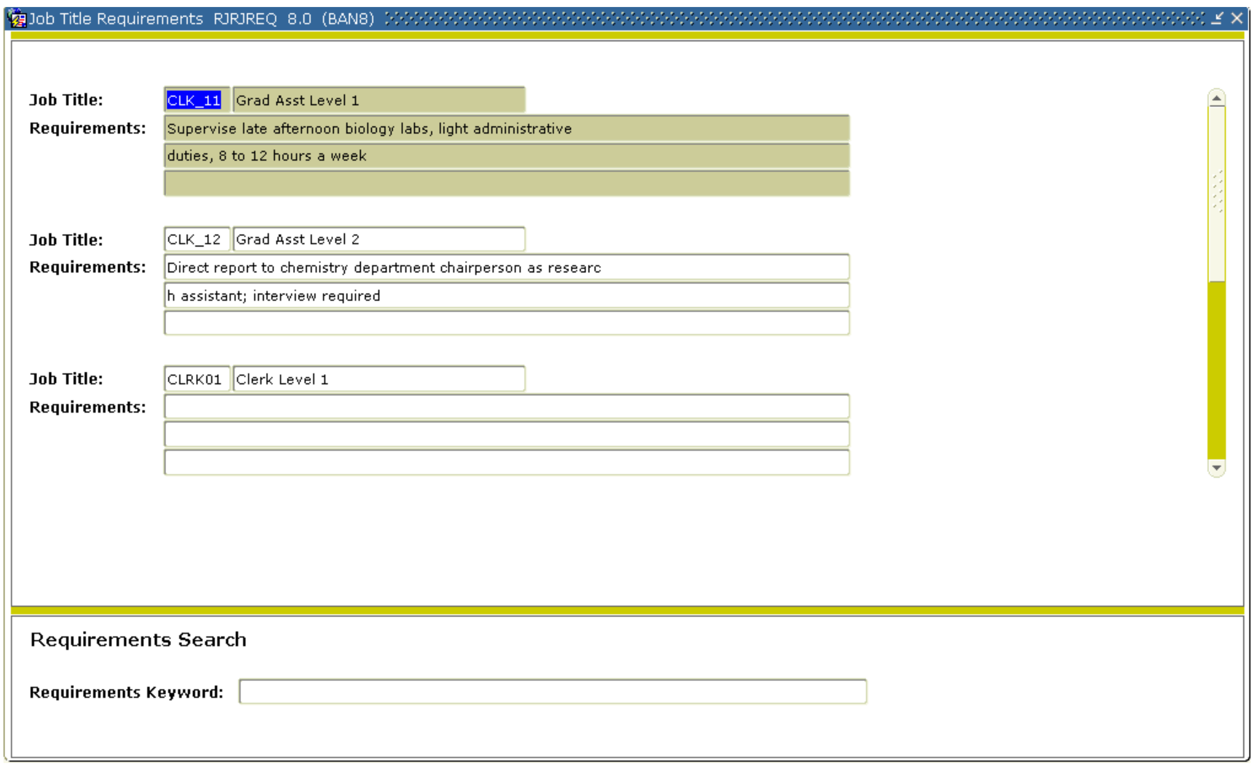
8. Click on the **Exit** icon.

Job Title Requirements Form

Purpose

The Job Title Requirements Form (RJRJREQ) stores information that you can use to identify the job skills/levels that are required for the job title codes created with the RJRJOBT form.

Banner Form



Steps

Your institution must define what the requirements are for its job titles. The Job Title Requirement form (RJRJREQ) does this, and can also be used to maintain job descriptions for the job titles.

Note: This is an optional form. It is used to help match student skills to jobs for placement purposes. The form can be used to search for a job title that requires specific skills. This can be helpful when assisting a student in locating a job that meets their skill level.

1. Access the Job Title Requirements Form (RJRJREQ).

   Result: All job titles created on the Job Title Base Data form (RJRJOBT) will appear on this form.

2. Enter any skills or requirements needed for the job title in the **Requirements** field.

   Example: The job may require a student from a specific major or that the student must have data entry and customer service skills. The field can also define a general job description.

3. Click on the **Save** icon.

4. Place the cursor in the **Requirements Keyword** block. Enter a keyword and perform a Previous Block function to execute a search for specific skills.

   Result: The system will search all requirements and display only those job titles that contain your key word.

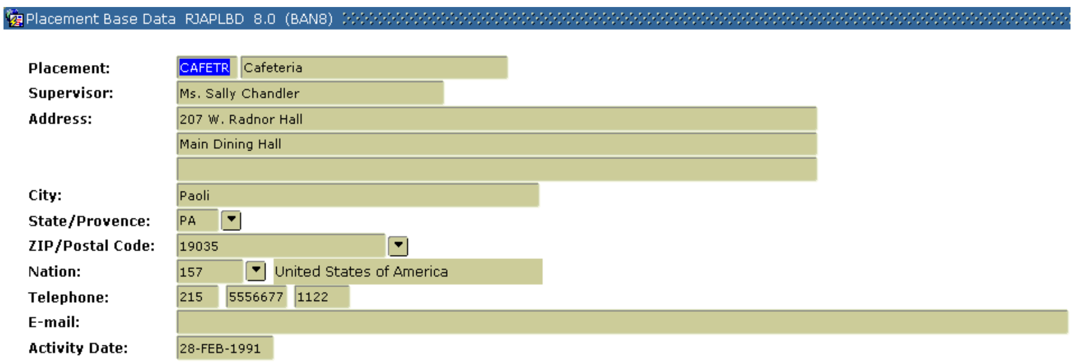
5. Click on the **Exit** icon.

Placement Base Data Form

Purpose

The Placement Base Data Form (RJAPLBD) stores location name, address, and supervisor information for all locations that employ students.

Banner Form


Placement Base Data RJAPLBD 8.0 (BAN8)

Placement:	CAFETR	Cafeteria	
Supervisor:	Ms. Sally Chandler		
Address:	207 W. Radnor Hall		
	Main Dining Hall		
City:	Paoli		
State/Provence:	PA		
ZIP/Postal Code:	19035		
Nation:	157	United States of America	
Telephone:	215	5556677	1122
E-mail:			
Activity Date:	28-FEB-1991		

Steps

Your institution will need to identify job placement and address information for all locations that employ students. You will need to determine if you will have a few global placements or a defined list of job placements.

1. Access the Placement Base Data Form (RJAPLBD).
2. Perform an **Insert Record** function to create a blank record.
3. Enter a **Placement** code and **Description** for a valid student job location.
4. Enter the **Supervisor** responsible for student employment at this job location.

Note: You may enter address and phone information in the subsequent fields. These optional fields can be especially useful for off-campus locations. Furthermore, you may want to run address labels to mail departments earnings reports. These fields can be queried in Population Selection/Letter Generation Variables.

5. Click on the **Save** icon.
6. Click on the **Exit** icon.

Placement Rules Form

Purpose

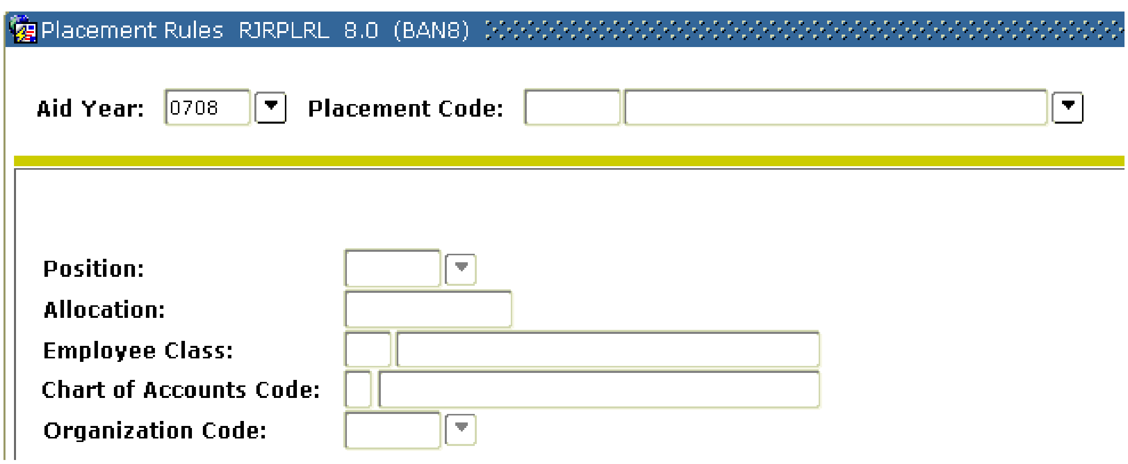
Use the Placement Rules Form (RJRPLRL) to associate an employment position with a placement code for a specified aid year.

Valid employment positions from the Position Definition form (NBAPOSN) in the Human Resources system must be associated to each placement code. This will allow you to enter budget allocations for the position and placement code. The employee class code, chart of accounts code, and organization code from Human Resources will default if the positions are completely built in the HR module. If Banner HR is not installed at the institution, these codes can be entered or changed by the user, but the system does not validate the information entered.

Placement codes may have more than one position code from Human Resources associated with them.

Position codes may be pooled: by department, by position type (FWS, Institutional), or by many other ways. 'Pooled' means that more than one person can be placed in a position. Each placement may have more than one position. Positions can also be single positions, meaning that only one person can be placed in that position.

Banner Form



Procedure 1

Complete this procedure if the Banner Human Resource system is installed.

1. Access the Position Definition Form (NBAPOSN).

2. Click the **Search** icon to view a list of positions.

3. Enter a query for *20* in the **Employee Class** field, then execute it to view all defined student worker positions. Make note of which positions you will wish to associate.

4. Access the Placement Rules form (RJRPLRL).

5. Double-click in the **Aid Year** field and select the appropriate year.

6. Enter a **Placement Code** for the job location that was created in the Placement Base Data form (RJAPLBD) procedure.

7. Double-click in the Position field and select a position code. Enter an Allocation amount.

   Note: The amount you enter should be the maximum amount of money allotted for the position for this particular placement code. When the Pay Period Report (RJRDPPR) is run, it will show the amount the department has been allocated. If the Student Employment Office is not assigning allocations to departments, an amount of $99,999.00 may be used.

   Result: When the position code is entered, the Employee Class Code and Chart of Accounts Code from Human Resources that were associated with to the position on NBAPOSN will default on this form.

8. Double-click in the **Organization Code** field to view a list of available organizations and select the organization to be associated to the position.

Note: You must first determine the correct organization code in order to perform this step. The information is coming from Organization Code Validation form (FTVORGN) in Finance or the Organization Code Validation form (PTVORGN) in Human Resources, if Finance is not installed.

9. When the Pay Period Report (RJRDPPR) is run, it will show the amount the department has been allocated. If the Student Employment Office is not assigning allocations to departments, an amount of $99,999.00 may be used.

10. The Allocation, Employee Class, Chart of Accounts Code and Organization Code do not control how Finance records and charges payment for work study positions. The control of money charged is done through the Human Resources module.

11. Click the **Save** icon.

12. Click the **Exit** icon.

Procedure 2

Complete this procedure if the Banner Human Resource system is **not** installed.

1. Access the Placement Rules Form (RJRPLRL).

2. Double-click in the **Aid Year** field and select the appropriate year.

3. Enter a **Placement Code** for the job location that was created in the Placement Base Data form (RJAPLBD) procedure.

4. Enter a position code in the **Position** field.

   Note: In this case, the **Position** field is a free-format field. Create valid position control codes to indicate the appropriate type of student employment positions available at this placement.

   Example: For example, you may want to enter codes for Federal College Work Study, Institutional Work Study, or Graduate Assistantships.

5. Enter an **Allocation** amount for the position code you have associated to this location.

   Note: The amount you enter should be the maximum amount of money allotted for the position associated with this work location. When the Pay Period Report (RJRDPPR) is run, it will show the amount the department has been allocated. If the Student Employment Office is not assigning allocations to departments, an amount of $99,999.00 may be used.

6. Enter the **Employee Class**, **COA Code** (Chart of Accounts code) and **Organization Code** in their respective fields.

   Note: These are also free-format. You may choose to enter an employee class code corresponding to "student worker." Chart of Accounts and organization codes may be used to help identify reporting and budgeting information at your institution. However, these values are not validated by the system.

7. Click the **Save** icon.

8. Click the **Exit** icon.

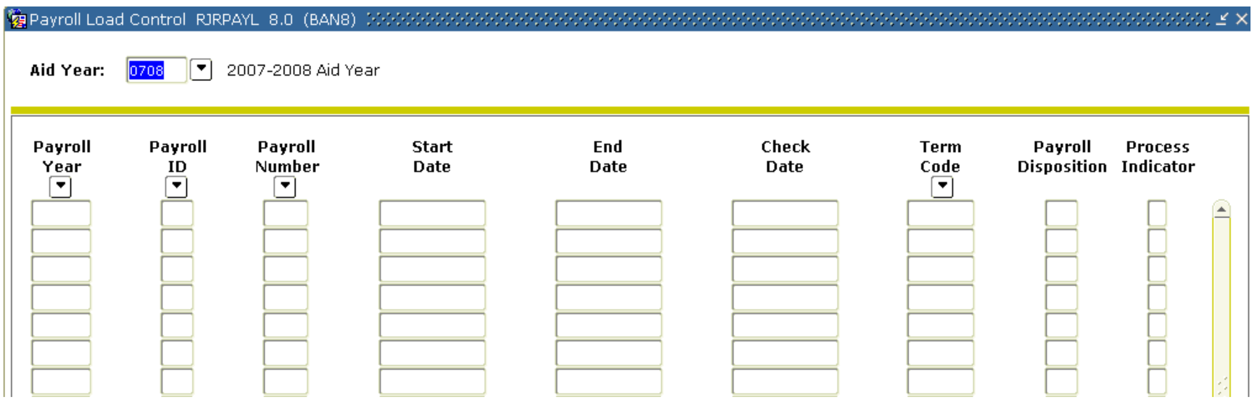
Payroll Load Control Form

Purpose

The Payroll Load Control Form (RJRPAYL) associates predefined payroll periods from the Banner Human Resources system with a specified aid year. You can only use this form if the Banner Human Resources system is installed at your institution.

Payroll load rules must be defined to associate payroll periods created in Human Resources on the Payroll Calendar Rule form (PTRCALN) to the specified financial aid year and term (STVTERM). These rules are needed once student payrolls are being processed for an aid year, in order to interface Human Resources and Financial Aid. The rules will ensure that student earnings are recorded to the correct aid year and term.

Banner Form



Steps

Follow these steps to complete the process.

1. Access Payroll Load Control Form (RJRPAYL).

2. Enter the combination of **Payroll Year**, **Payroll ID**, and **Payroll Number** to identify the payroll information you want to interface to Financial Aid.

Note: Click the **Search** icon for these fields to review all payrolls existing on the Payroll Calendar Rule form (PTRCALN).

Result: When valid payroll identification is selected, the payroll start and end dates and the check date will default in from Banner Human Resources.

3. Double-click the **Term Code** field and associate the correct term code to the payroll identification you have selected.

Result: Review all terms created in the Student System Term Code Validation form (STVTERM). This will be used in the Payroll Load Process (RJRLOAD) to populate term paid amounts for the student and the fund.

Note: The **Pay Disp** (payroll disposition) field cannot be manually entered. This field is automatically populated with a *C* when the associated payroll in the Human Resource system is complete. This indicator informs you that the payroll paid amounts are ready to be loaded to Banner Financial Aid through the RJRLOAD process.

Note: The **Process Ind** field is also automatically populated with a *Y* after the RJRLOAD process has been run for the associated payroll. This indicator prevents you from running the RJRLOAD process twice for the same payroll.

4. Click the **Save** icon.

5. Click the **Exit** icon.

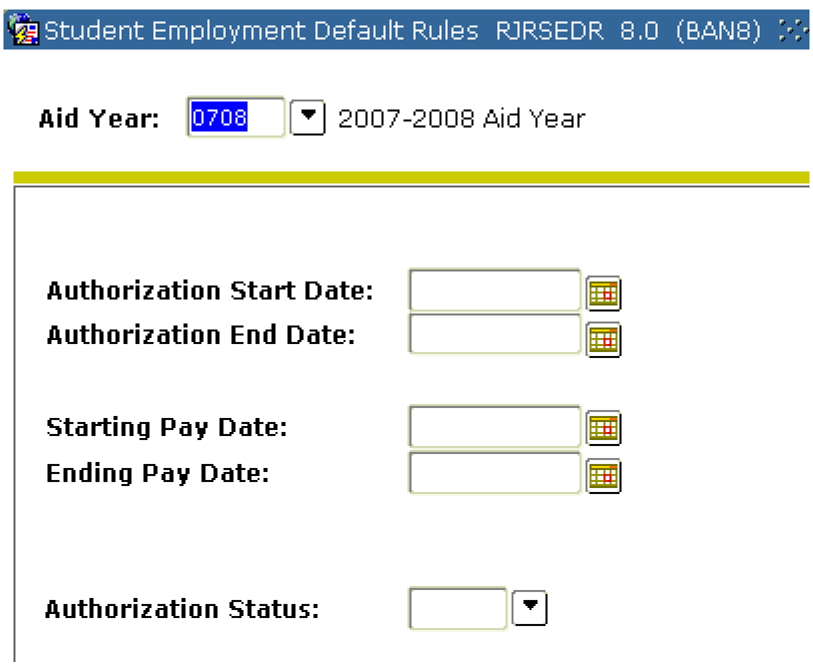
Student Employment Default Rules

Purpose

The Student Employment Rules Form (RJRSEDR) maintains default authorization start/end dates, start/end pay dates, and an authorization status code for a specified aid year.

Default Authorization Rules are defined for an aid year to assist in creating authorization records for students each aid year. These will automatically populate a student's authorization record when it is created. The rules are used to quickly create records without having to repeatedly enter the same information for each student regarding authorization start and end dates, payroll start and end dates, and authorization status when initially approving students to work for an aid year.

Banner form



Steps

Follow these steps to complete the process.

1. Access the Student Employment Default Rules Form (RJRSEDR).
2. Select the **Aid Year** for which you wish to define your default rules.
3. Perform a **Next Block** function.
4. Enter the appropriate **Authorization Start** and **End Dates** on which the majority of your students will be authorized to work.
5. Enter the appropriate **Starting** and **Ending Pay Dates** on which the majority of your students will be paid.
6. Double-click the **Authorization Status** field and select the appropriate authorization status in which the majority of your students will be placed.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

Only one authorization status code may have its **Active Indicator** check box selected (i.e. authorize a student for work) on the Employment Authorization Status Validation form.

True or False

Question 2

If your institution has some positions paying stipends and others paying hourly wages, you set up the Job Title Base Data form (RJRJOBT) by

a. checking the Hourly Pay Ind box for positions paying hourly wages, and leaving it unchecked for positions paying a stipend.

b. checking both the Hourly Pay Ind box and the Stipend Ind box.

c. doing no set up on the Job Title Base Data form (RJRJOBT).

d. checking the Stipend Ind box for positions paying stipends and leaving the Hourly Pay Ind box unchecked for positions paying hourly wages.

e. listing the postions first that pay hourly wages and then the positions paying stipends

Question 3

You perform a search for jobs requiring specific skills using the RJRJREQ form by

a. entering a keyword and perform a query to execute a search.

b. entering a keyword and perform a Previous Block function to execute a search.

c. entering a Keyword and Save the record.

d. entering a Keyword and Duplicating the record

e. entering a Keyword and Removing the record.

Question 4

The function to be performed in order to create a blank record on the Placement Base Data form (RJAPLBD) is

a. Duplicate a Record.

b. Delete the Record.

c. Insert Record.

d. Remove Record.

e. Save the Record.

Question 5

The value that is populated in the Process Ind field on the Payroll Load Control form (RJRPAYL) when the Payroll Load Process (RJRLOAD) is run is

a. C.

b. Y.

c. P.

d. X.

e. S

Question 6

The institutional benefit of creating Student Employment Default Authorization Rules is

a. to quickly create records without having to repeatedly enter the same information for each student.

b. to make all the student’s start and end dates, payroll start and end dates, and authorization statuses be the same.

c. to make the Financial Aid office staff person responsible for Student Employment to have less work.

d. to quickly create job titles for student workers.

e. To slowly create records having to repeatedly enter information over and over.

Answer Key for Self Check

Question 1

Only one authorization status code may have its **Active Indicator** check box selected (i.e. authorize a student for work) on the Employment Authorization Status Validation form.

False; There must be at least one code with Active Indicator selected, but there can be more than one. Likewise, there can be more than one code with Active Indicator deselected.

Question 2

If your institution has some positions paying stipends and others paying hourly wages, you set up the Job Title Base Data form (RJRJOBT) by

a. checking the Hourly Pay Ind box for positions paying hourly wages, and leaving it unchecked for positions paying a stipend.

b. checking both the Hourly Pay Ind box and the Stipend Ind box.

c. doing no setup on the Job Title Base Data form (RJRJOBT).

d. checking the Stipend Ind box for positions paying stipends and leaving the Hourly Pay Ind box unchecked for positions paying hourly wages.

e. listing the postions first that pay hourly wages and then the positions paying stipends

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You perform a search for jobs requiring specific skills using the RJRJREQ form by

a. entering a keyword and perform a query to execute a search.

b. entering a keyword and perform a Previous Block function to execute a search.

c. entering a Keyword and Save the record.

d. entering a Keyword and Duplicating the record.

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c. to make the Financial Aid office staff person responsible for Student Employment to have less work.

d. to quickly create job titles for student workers.

e. to slowly create records having to repeatedly enter information over and over.

Day-to-Day Operations

Overview

Introduction

The purpose of this section is to explain the day-to-day or operational procedures to handle student employment at your institution.

Objectives

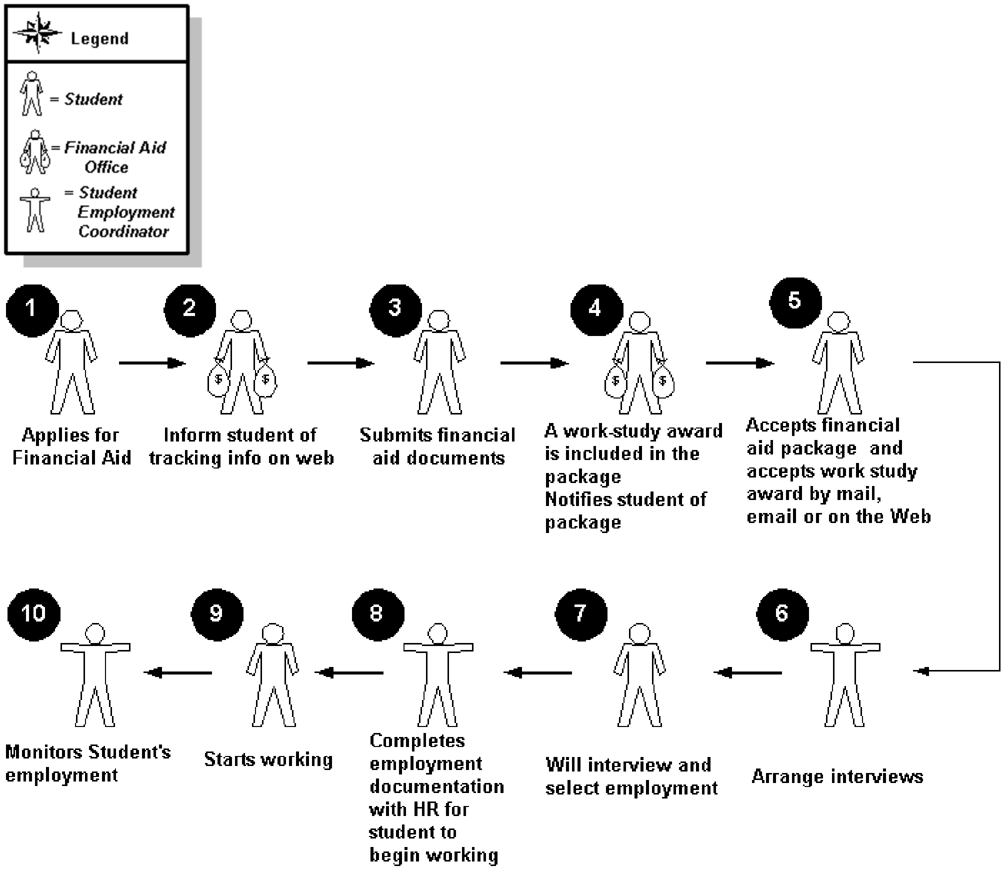
At the end of this section, you will be able to

- create student referrals
- create and modify student authorizations
- notify Human Resources of student placements
- electronically and manually load payroll information to the Banner Financial Aid module
- monitor and make adjustments to student earnings.

Process Introduction

Flow diagram

This diagram highlights the student employment process.



What happens

The stages of the process are described in this table.

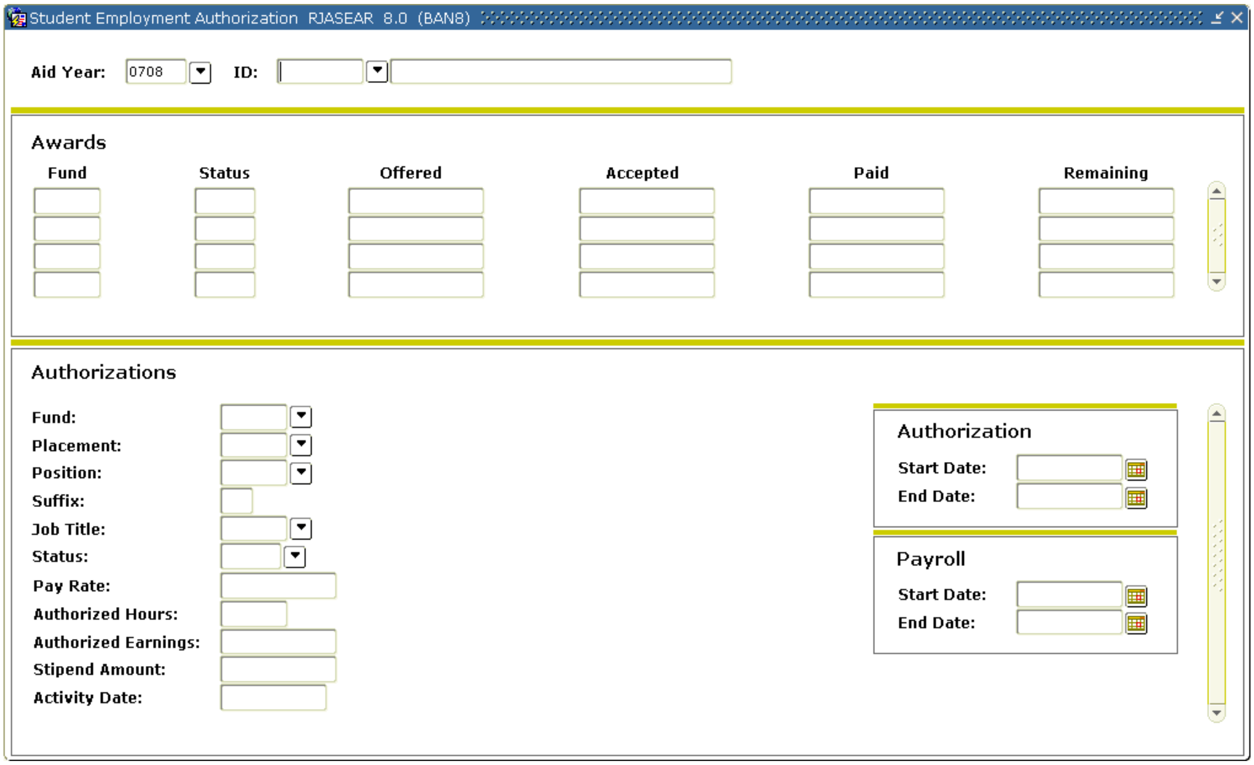
Stage	Description
1	Student applies for Financial Aid.
2	Financial Aid office informs student of the status of the items being tracked for a complete application on the Web.
3	Student submits needed financial aid documentation.
4	Financial Aid notifies the student about the financial aid package that includes the work study award.
5	Student accepts financial aid package and notifies school either by mail, e-mail, or on the Web of their acceptance of the work study award.
6	Student Employment Coordinator arranges several interviews at various placements/offices.
7	Student interviews for a student employment position, selects a place of employment, and submits payroll enrollment documents to Student Employment Coordinator.
8	Student Employment Coordinator and Human Resources will complete the necessary documentation for the student to begin work.
9	Student starts working at his/her student employment job.
10	Student Employment Coordinator monitors the student's employment performance.

Assigning an Employment Authorization to a Student

Purpose

The Student Employment Authorization Form (RJASEAR) is used to assign employment authorizations to a particular student for a specified aid year.

Banner form



Steps

Follow these steps to complete the process.

1. Access the Student Employment Authorization Form (RJASEAR).

2. Enter the **Aid Year** and **ID** number of your student.

   Note: Student must be awarded and have accepted a student work study award.

   Result: Notice that any funds the student has been awarded with the fund type of *W* will appear in the **Awards** block. The status is populated by the default information completed on the Student Employment Default Rules form (RJRSEDR).

3. Perform a **Next Block** function.

   Result: This will take you to the **Authorizations** block to view the defaulted information displayed. Note that the fund, placement, position and job title have defaulted from the Student Employment Referral form (RJASERF), if used. Also note that the status, authorized start and end dates, and payroll start and end dates have defaulted from the Student Employment Default Rules form (RJRSEDR).

   If the authorization is created prior to the authorized and pay start dates, the defaulted dates from RJRSEDR will populate the form. However, if the authorization is created after the authorized and pay start dates, the system will populate these fields with today's date.

   The pay rate has defaulted according to the job title from the Job Title Base Data form (RJRJOBT). The authorized hours are calculated by the system by dividing the authorized earnings by the pay rate.

4. Enter any changes to the **Start** and **End Dates**, **Pay Rate**, **Authorized Hours** and **Authorized Earnings**.

5. Click the **Save** icon.

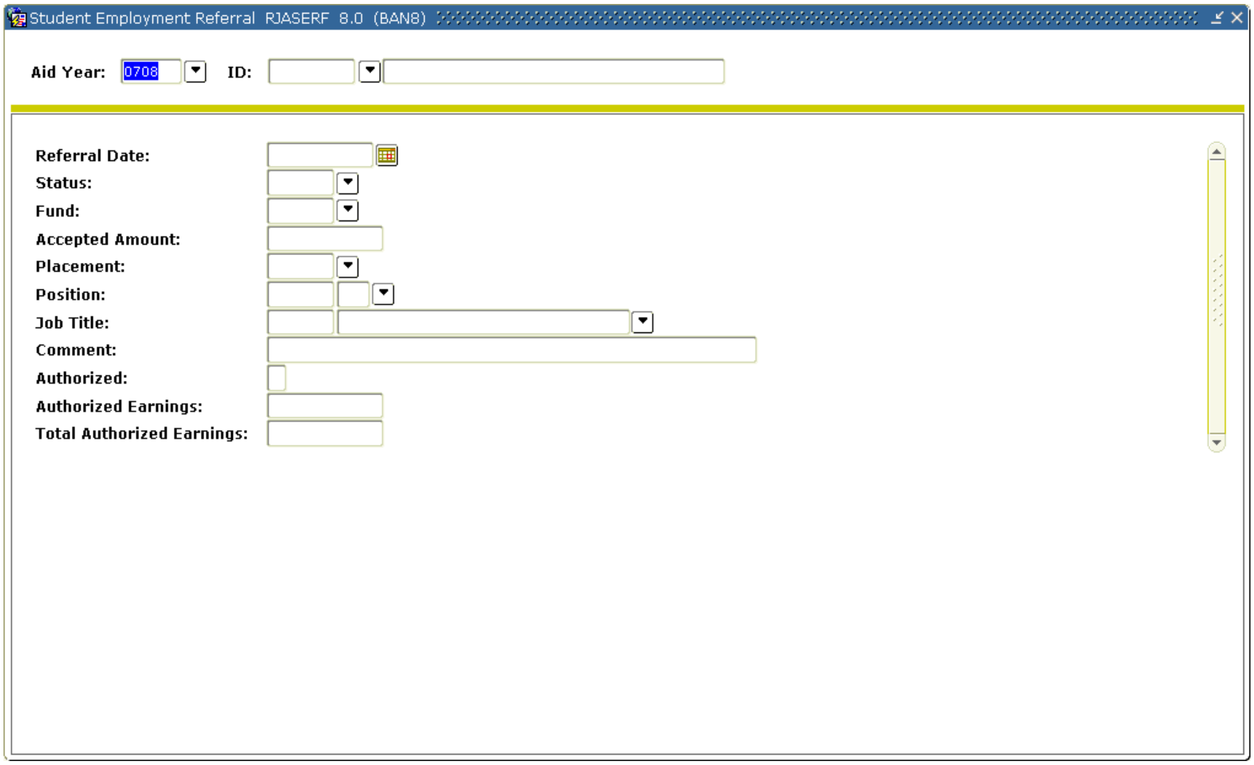
6. Click the **Exit** icon.

Creating a Job Referral for a Student for a Specific Job

Purpose

The Student Employment Referral Form (RJASERF) is used to assign referrals to a student for a specific aid year and to allow an authorization of a referral.

Banner form



Steps

A student has been awarded federal work study and needs to be placed in a job on campus. You will want to refer the student to a job that matches the student's skills.

Once an appropriate match is found, the student will be referred to those locations (placement code). Once the student has secured a position, he/she will return the appropriate payroll enrollment documents to the Financial Aid office or Payroll office so that you may create an authorization.

Note: Student must be awarded a student work study award.

1. Access the Award Form (RPAAWRD).

2. Award a federal work study award to an eligible person on the system.

   Note: The selected student should have an existing need analysis record and a budget for the selected aid year.

   Note: Some schools award their own work–study funds irrespective of need, and if the fund is set up to override need this, then the above note would not apply.

3. Access the Student Employment Referral form (RJASERF).

4. Enter the **Aid Year** and **ID** number of your student.

5. Enter the date in the **Referral Date** field on which the student was or will be referred to the position.

6. Enter the **Status** code, indicating the origin of the referral. Double-click the field to review the referral status codes, if necessary.

7. Enter the work type fund code in the **Fund** field that you awarded to your student and for which you are referring them to a job.

   Result: The **Accepted Amount** for this fund will come into view after the fund code has been selected if the student has accepted this award.

8. Enter the placement location in the **Placement** field to which you want to refer the student for an interview.

   Note: Click the field's **Search** icon to review codes built on the Placement Base Data form (RJAPLBD).

9. Enter the position code in the **Position** field associated to the placement code.

Note: Click the field's **Search** icon to review codes built on the Placement Rules form (RJRPLRL).

10. Enter the **Job Title** for this position.

Note: Click the field's **Search** icon to review codes built on the Job Title Base Data form (RJRJOBT).

11. Enter a free-form comment in the **Comment** field pertaining to the referral.

12. Set the **Authorized** field to "Y". (Optional)

13. Enter an amount in the **Authorized Earnings** field or accept the default value for the job title used. (Optional)

Note: The authorized earnings cannot exceed the accepted award amount. Information from this form will then populate the authorization block on RJASEAR.

14. Click the **Save** icon.

15. Click the **Exit** icon.

Paperwork suggestion

Before exiting, you can perform a print screen action on RJASERF, cut and paste the screen print into a formatted document, and give the form to the student to have the hiring department complete. This Banner Form can perform the same function of much of the hire paperwork that is generated in the office.

Authorizing a Student to Work without Referring the Student to a Job

Steps

Another student has been awarded federal work study, accepted the award and has found an on-campus job. You now want to authorize the student to work in order to notify the payroll office that the student is eligible to be paid through this program.

1. Access the Student Employment Authorization Form (RJASEAR).

2. Enter the **Aid Year** and **ID** number of another student who has been awarded and has accepted a federal work study award.

Result: Notice that any funds the student has been awarded with the fund type of *W* will appear in the **Awards** block. The status is populated by the default information completed on the Student Employment Default Rules form (RJRSEDR).

3. Perform a **Next Block** function.

Result: This will take you to the **Authorizations** block. The authorization end date and the pay end dates are also populated from this rule form.

4. Enter the fund code in the **Fund** field that is displayed in the Awards block.

Note: If there are two funds with a type of 'W', enter the fund for which the student has found a job.

5. Enter the placement location in the **Placement** field where the student is authorized to work.

Note: Click the **Search** icon to review the valid placement codes for the aid year.

6. Enter a valid position code in the **Position** field associated to the placement code.

Note: Click the **Search** icon to review the list of position codes.

Note: The **Suffix** field is system-generated and cannot be accessed manually on this form. It will be populated once the authorization is saved.

7. Enter the job title in the **Job Title** field for which the student has been hired.

Note: Click the **Search** icon to review valid job title codes at your institution.

Result: After you leave this field, the default pay amount for this job title will default from the Job Title Base Data form (RJRJOBT). If the student is not paid the default pay rate, click in the pay rate field and adjust the rate within the default values. The system will not allow you to assign a wage that is more or less than the amounts defined on RJRJOBT.

8. Enter the amount of the student's award in the **Authorized Earnings** field that is authorized for this placement.

Result: Notice that the amount divided by the pay rate will automatically populate the **Authorized Hours** field. A student cannot be assigned an authorized amount that is more than his/her accepted amount.

9. A stipend amount defaults in the stipend field if the job title is not associated to an hourly wage rate on RJRJOBT.

10. Click the **Save** icon.

11. Repeat these steps to authorize a second position for the same student in a non-fund related institutional work program. Do this by inserting a new record and leaving the fund code blank.

12. Click the **Exit** icon.

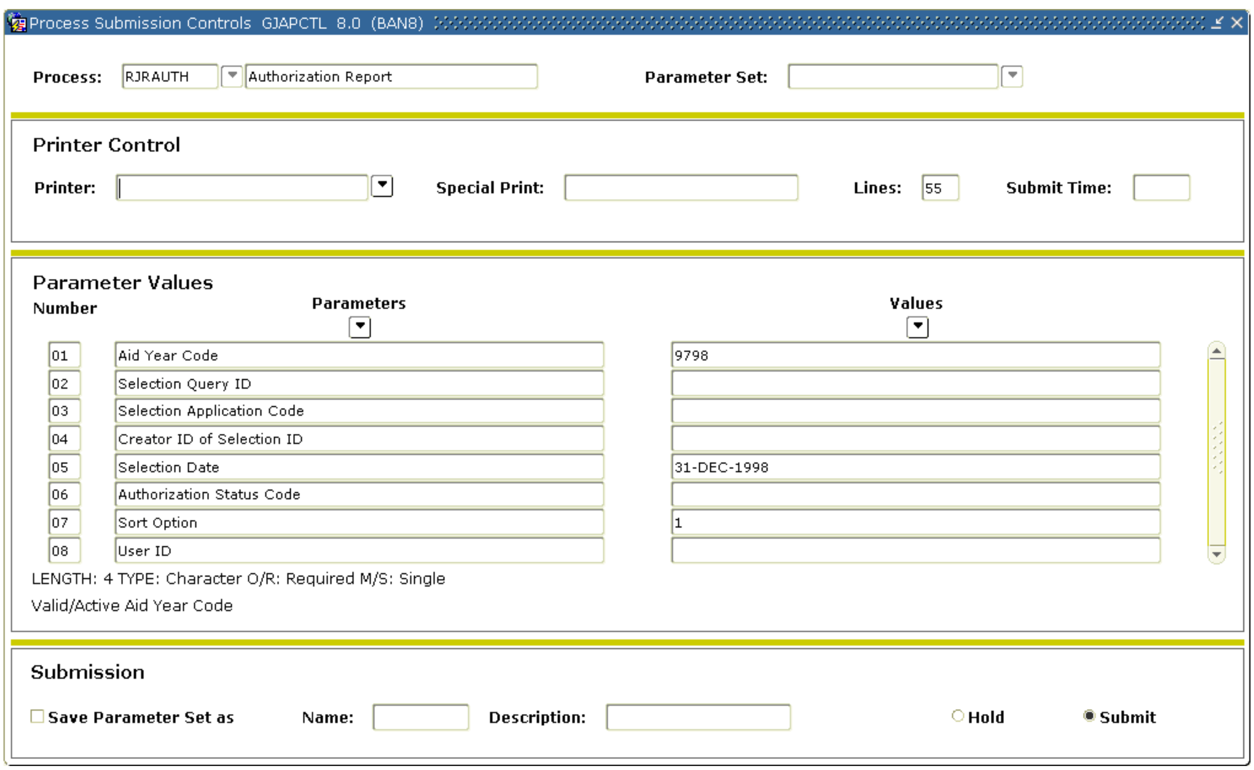
Notifying Human Resources of Student Authorizations

Purpose

When students have been placed in work study positions and the authorizations are complete, you will need to notify the Human Resources office. This process will allow the HR staff to place students in their proper positions in the Banner Human Resource module.

The Authorization Report (RJRAUTH) displays a listing of current work authorizations based on activity date. The report lists the student name, employee class, start and end pay date, position and suffix number, hourly rate of pay, authorized hours and amount, COA Code, Organization Code and their authorization status.

Banner Form


Process Submission Controls GJAPCTL 8.0 (BAN8)

Process: RJRAUTH Authorization Report Parameter Set:

Printer Control

Printer: Special Print: Lines: 55 Submit Time:

Parameter Values

Number	Parameters	Values
01	Aid Year Code	9798
02	Selection Query ID	
03	Selection Application Code	
04	Creator ID of Selection ID	
05	Selection Date	31-DEC-1998
06	Authorization Status Code	
07	Sort Option	1
08	User ID	

LENGTH: 4 TYPE: Character O/R: Required M/S: Single

Valid/Active Aid Year Code

Submission

Save Parameter Set as Name: Description: Hold Submit

Steps

Follow these steps to complete the process.

1. Access the Authorization Report (RJRAUTH).
2. Select a printer or enter DATABASE in the **Printer** field.
3. Use this table to enter the appropriate data for the various parameters.

Parameter	**Description**
01 Aid Year Code	Required. Enter the selected aid year. Example: 0203, 0304, etc
02 Selection Query ID	Skip. You use this parameter if you are using a population selection.
03 Selection Application Code	Skip. You use this parameter if you are using a population selection.
04 Creator ID of Selection ID	Skip. You use this parameter if you are using a population selection.
05 Selection Date	Required. Enter a selection date. The report will show only authorizations where the activity date on the authorization is greater than the parameter specified selection date. By using the selection date, you can run the report to only include authorizations made or changed since the last time the report was run.
06 Authorization Status Code	You can optionally restrict this report to only include those authorization status codes that are entered for this parameter. Example: If you only want to see students who are authorized to work, select only those codes from the Employment Authorization Status Validation form (RTVAUST) that mean authorized.

07 Sort Option	Allows you to choose in what order you want the students to be listed on the report. The valid values are "LOW: 1" = Student Name, Student ID "HIGHp: 2" = Authorization Status Code, Student Name, Student ID

4. Click the **Save Parameter Set as** checkbox.

5. Enter a name and description in the **Name** and **Description** fields.

6. Click the **Submit** radio button.

Result: This will execute the job and will generate a report of all students meeting the parameters you have selected.

7. Click the **Save** icon.

8. Click the **Exit** icon.

9. Forward this report to the Human Resources office so they may set up these students for employment.

Next step

After the Human Resource/Payroll office has run a payroll, the Financial Aid office can post the student earnings to the Banner Financial Aid module.

There are two ways to post the earnings. You can choose to post the earnings either electronically through the use of the Payroll Load Process (RJRLOAD), or by manually entering the data on the Student Employment Mass Entry form (RJASEME).

Posting Student Earnings Electronically

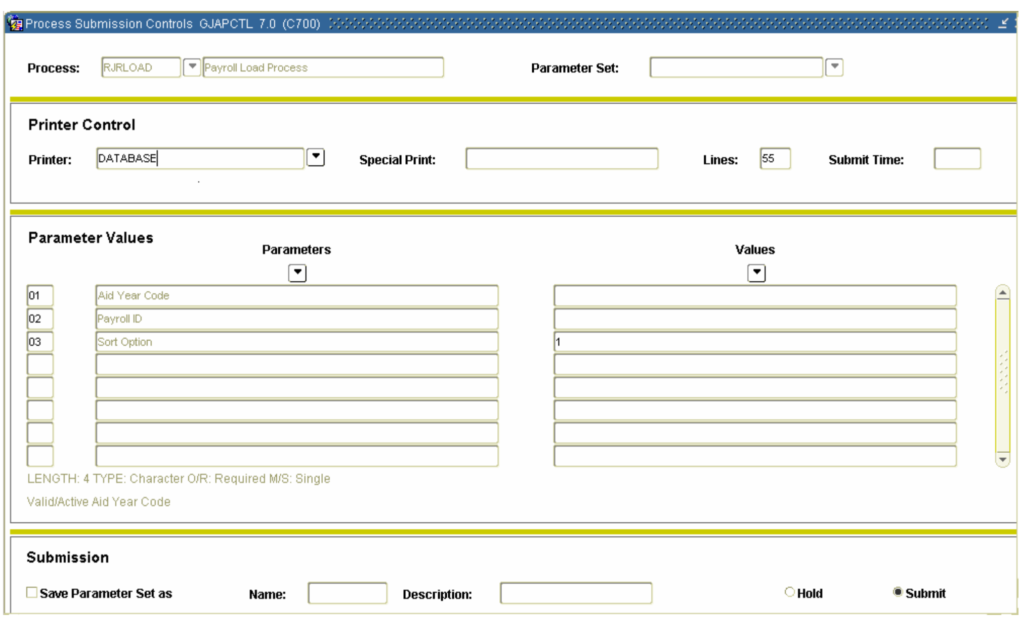
Purpose

The Payroll Load Process (RJRLOAD) serves as an interface between Human Resources and Financial Aid. The process updates the student employment information within the Banner Financial Aid system with actual payroll earnings. This process also produces the Payroll Load Result Report, which lists the payroll information for each student entered into the Student Employment module as a result of this process. This process cannot be used if Banner Human Resources is not installed.

The load process automatically updates the

- Financial Aid work history records with actual earnings on the Student Employment Work History form (RJISEWH)
- fund balances with actual earnings on the Fund Budget Inquiry form (RFIBUDG)
- award paid amounts and the term paid amounts on the student award record as represent on the Award form (RPAAWRD) and the Package Maintenance form (RPAAPMT).

Banner form



Processing results

The system places the correct earnings on a student's record through a matching process with the student PIDM. The position number and the suffix number on the Human Resource module is compared to the position number and the suffix number on the Student Employment module. If the values in both modules are the same, the payroll information will load.

Steps

Follow these steps to complete the process.

1. Access the Payroll Load Process (RJRLOAD).
2. Select a printer or enter *DATABASE* in the **Printer** field.
3. Use this table to enter the appropriate data for the various parameters.

Parameter	**Description**
01 Aid Year Code	Required. Enter the aid year that you have been working with. Example: 0708, 0809, etc
02 Payroll ID	Required. Clicking the Values Search icon displays the Payroll Load Control form (RJRPAYL). Select the payroll you wish to load. Keep in mind the only payrolls that you can load are those with a Pay Disposition of 'C' with the Process Indicator field blank. If the Pay Disposition field is • populated with a 'C' and the **Process Indicator** field is blank, you can proceed to load this payroll. • not populated with a 'C', the payroll office has not yet completed the payroll to the point where you can load the information. If the Process Indicator field is populated, you cannot load this payroll because it has already been loaded.

03 Sort Option	Allows you to choose in what order you want the students to be listed on the report. The valid values are “LOW: 1” = Pay Year, Pay ID, Pay Number, Name “LOW: 2” = Name, ID, Placement Code, End Pay Date.

4. Move your cursor to the **Submission** block and click the **Submit** radio button.
5. Click the **Save** icon.

Result: This will execute the job and will generate a report.

6. Click the **Exit** icon.

Posting Student Earnings Manually

Purpose

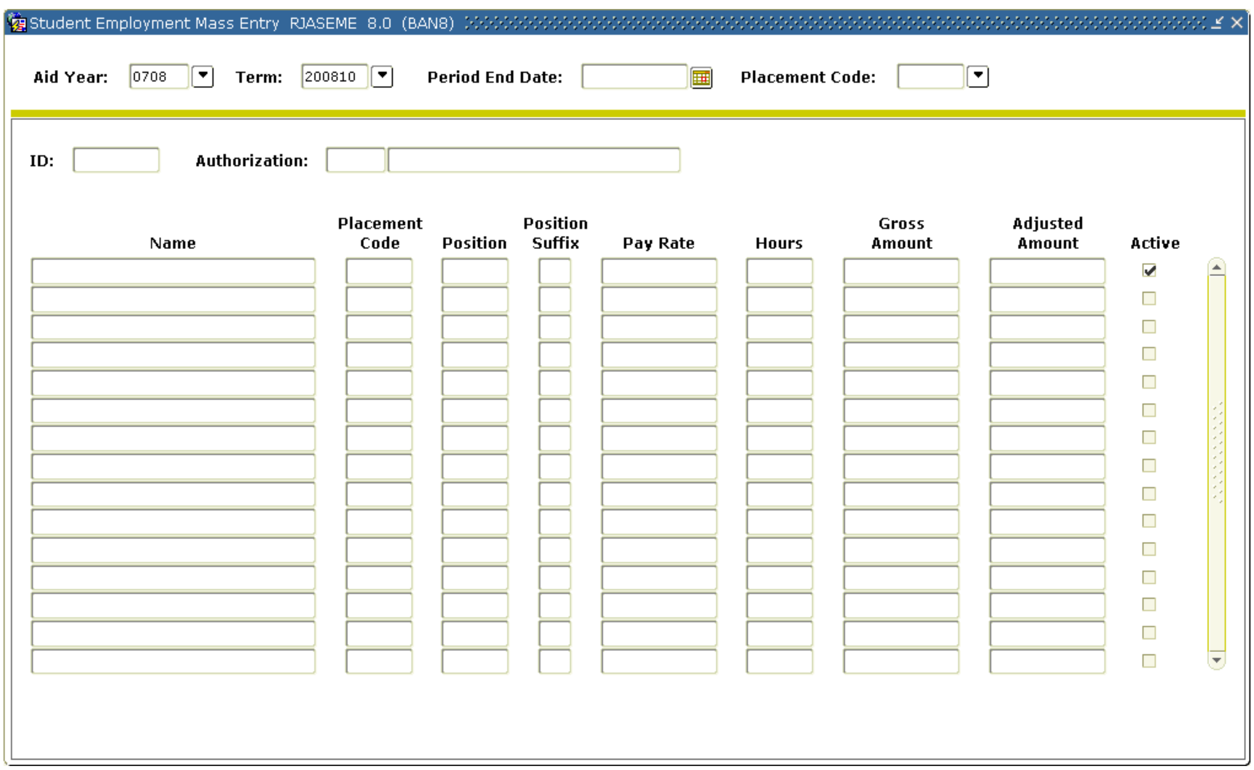
If you choose not to run the RJRLOAD process, or if your Human Resource module is not installed, you can post student earnings manually using the Student Employment Mass Entry form (RJASEME). This manual process will automatically update the

- Financial Aid work history records with actual earnings on the Student Employment Work History form (RJISEWH)

- fund balances with actual earnings on the Fund Budget Inquiry form (RFIBUDG)

- award paid amounts and the term paid amounts on the student award record as represented on the Award form (RPAAWRD) and the Package Maintenance form (RPAAPMT).

Banner form



Steps

Follow these steps to complete the process.

1. Access the Student Employment Mass Entry Form (RJASEME).

2. Enter the valid **Aid Year** and **Term** for which the student earnings will be posted.

3. Enter the **Period End Date**, which is the last day of the pay period.

Note: If you do not know this date, you can review the Payroll Load Control form (RJRPAYL) or request the information from the Payroll office.

4. Perform a **Next Block** function to begin entering payroll information for your selection criteria.

Result: The **ID** and **Authorization** fields will be populated with the ID and authorization status of the student that is highlighted. The **Active Indicator** shows you if the authorized status is considered to be active or inactive as listed on the Employment Authorization Status Validation form (RTVAUST).

5. Enter either the number of hours worked or the gross wages earned for the payroll period.

Note: The other amount will calculate automatically.

6. Click on the **Save** icon.

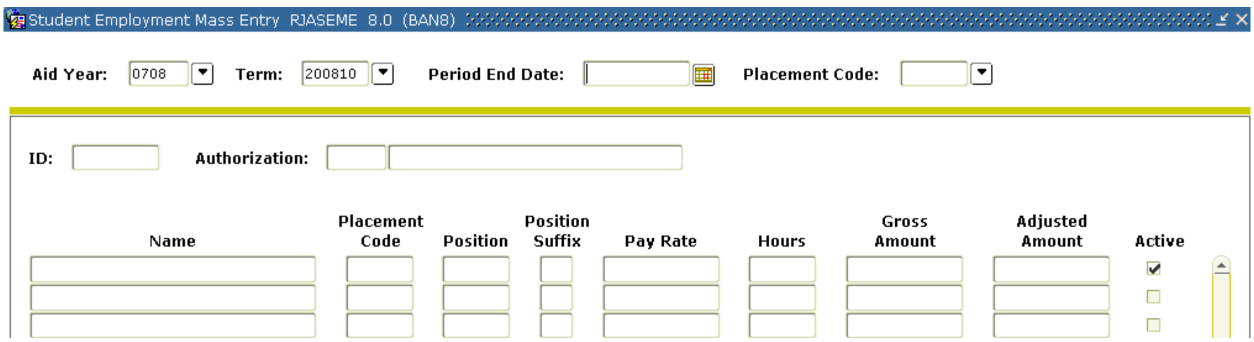
7. Click on the **Exit** icon.

Adjusting Student Earnings

Purpose

Often, student earnings must be adjusted due to a mistake in either the student reporting of their time or an error in the payroll process. You can make adjustments to the student's earnings through the Student Employment Mass Entry Form (RJASEME).

Banner form



Steps

Follow these steps to complete the process.

1. Access the Student Employment Mass Entry Form (RJASEME).
2. Enter the **Aid Year, Term**, and **Period End Date** in which the correction to the student earnings will be made.

   Note: If you are unsure of the pay period ending date, you can access the student's Student Employment Work History form (RJISEWH) for a listing of the specified student earnings and the corresponding pay period end date.

3. Enter the **Placement Code** of the student

   Note: If you do not know the placement, this field can be left blank and all students in all placements will be listed or you can access the the student's Student Employment Work History form (RJISEWH) for a listing of the specified student earnings and the corresponding placement code.

4. Perform a **Next Block** function.

5. Locate the desired student entry and enter a positive or negative amount in the **Adjusted Amount** field.

6. Click on the **Save** icon.

Result: The amount entered will be applied to the **Gross** field, which will then be divided by the **Pay Rate** value to compute a new **Hours** value**.**

7. Click on the **Exit** icon.

Result: Making adjustments to this form will update the same fields that the initial entry of the payroll updated.

Reviewing Student Earnings History

Banner reports

Earnings history can be viewed or monitored via many forms and reports within the Financial Aid module. Here is a sampling of the most common forms you can use.

Use this form...	**To review...**
Student Employment Work History (RJISEWH)	Employment history for a specific student.
Award (RPAAWRD)	Total paid for an academic year for a specific student.
Package Maintenance (RPAAPMT)	Total paid per term for an academic year for a specific student.
Student Employment Authorization (RJASEAR)	Total paid for an academic year for a specific student.
Fund Budget Inquiry (RFIBUDG)	Annual and term specific paid data for a specific or a series of funds.
Pay Period Report (RJRDPPR)	Information for the monitoring of student earnings by placement.
Payroll Exception Report (RJRPAYE)	A listing of those work study employees who have been paid, but not authorized within the Financial Aid Student Employment module.
Earnings Control Report (RJRSEEC)	A listing of hours worked by pay period.

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

You change the defaulted employment start and end employment dates for an individual student on

a. the Student Employment Authorization Form (RJASEAR).

b. the Student Employment Referral Form (RJASERF).

c. the Student Employment Default Rules Form (RJRSEDR).

d. the Student Employment Mass Entry Form (RJASEME).

e. the Student Employment Work History Inquiry Form (RJISEWH).

Question 2

You search for valid placement codes from the Student Employment Authorization form (RJASEAR) by

a. double clicking in the Placement field to review the valid placement codes for the aid year.

b. clicking the SEARCH icon next to the Placement field to review the valid placement codes for the aid year.

c. entering a query by using the F8 function key on your PC in the placement field to review the valid placement codes for the aid year.

d. inserting a record in the Placement field to review the valid placement codes for the aid year.

e. entering a Previous Block Function in the Placement field to review the valid placement codes for the aid year.

Question 3

The two methods an institution may use to post student earnings are

a. to post the earnings either electronically through the use of the Payroll Load Process (RJRLOAD), or by manually entering the data on the Student Employment Mass Entry form (RJASEME).

b. to post the earnings either electronically through the use of the Earnings Control Report (RJRSEEC), or by manually entering the data on the Student Employment Authorization form (RJASEAR).

c. only ones that Human Resources post the earnings either electronically through the use of the Human Resources Payroll Process (PHRLOAD), or by manually entering the data on the Human Resources Student Employment Mass Entry Form (PHSEME).

d. to post the earnings either electronically through the use of the Student Employment Departmental Pay Period Report (RJRDPPR), or by manually entering the data on the Student Employment Authorization form (RJASEAR).

e. to post the earnings either electronically through the use of the Student Employment Authorization Report (RJRAUTH), or by manually entering the data on the Student Employment Mass Entry form (RJASEME).

Question 4

The purpose of entering a selection date for parameter #5 of the Authorization Report (RJRAUTH) process is

a. to show only authorizations where the activity date on the authorization is greater than the parameter specified selection date.

b. to show the date that the authorization was created for the student to give to the hiring department.

c. to select all students who are authorized to work.

d. to show only authorizations where the activity date on the authorization is the same selection date.

e. to show all students who have been terminated from work.

Question 5

You alter the Hours value on RJASEME by

a. making the necessary changes on the Student Employment Authorization form (RJASEAR).

b. having Human Resources make the adjustments to the hours and the user will rerun the Payroll Load Process (RJRLOAD).

c. entering the adjusted amount.

d. making the necessary changes on the Student Employment Referral form (RJASERF).

e. by running the Authorization Report (RJRAUTH).

Answer Key for Self Check

Question 1

You change the defaulted employment start and end employment dates for an individual student on

a. the Student Employment Authorization Form (RJASEAR).

b. the Student Employment Referral Form (RJASERF).

c. the Student Employment Default Rules Form (RJRSEDR).

d. the Student Employment Mass Entry Form (RJASEME).

e. the Student Employment Work History Inquiry (RJISEWH).

Question 2

You search for valid placement codes from the Student Employment Authorization Form (RJASEAR) by

a. double clicking in the Placement field to review the valid placement codes for the aid year.

b. clicking the SEARCH icon next to the Placement field to review the valid placement codes for the aid year.

c. entering a query by using the F8 function key on your PC in the placement field to review the valid placement codes for the aid year.

d. inserting a record in the Placement field to review the valid placement codes for the aid year.

e. entering a Previous Block Function in the Placement field to review the valid placement codes for the aid year.

Question 3

The two methods an institution may use to post student earnings are

a. **to post the earnings either electronically through the use of the Payroll Load Process (RJRLOAD), or by manually entering the data on the Student Employment Mass Entry Form (RJASEME).**

b. to post the earnings either electronically through the use of the Earnings Control Report (RJRSEEC), or by manually entering the data on the Student Employment Authorization Form (RJASEAR).

c. only ones that Human Resources post the earnings either electronically through the use of the Human Resources Payroll Process (PHRLOAD), or by manually entering the data on the Human Resources Student Employment Mass Entry Form (PHSEME).

d. to post the earnings either electronically through the use of the Student Employment Departmental Pay Period Report (RJRDPPR), or by manually entering the data on the Student Employment Authorization Form (RJASEAR).

e. to post the earnings either electronically through the use of the Student Employment Authorization Report (RJRAUTH), or by manually entering the data on the Student Employment Mass Entry Form (RJASEME).

Question 4

The purpose of entering a selection date for parameter #5 of the Authorization Report (RJRAUTH) process is

a. **to show only authorizations where the activity date on the authorization is greater than the parameter specified selection date.**

b. to show the date that the authorization was created for the student to give to the hiring department.

c. to select all students who are authorized to work.

d. to show only authorizations where the activity date on the authorization

e. is the same selection date.

f. to show all students who have been terminated from work.

Question 5

You alter the Hours value on RJASEME by

a. making the necessary changes on the Student Employment Authorization Form (RJASEAR).

b. having Human Resources make the adjustments to the hours and the user will rerun the Payroll Load Process (RJRLOAD).

c. entering the adjusted amount.

d. making the necessary changes on the Student Employment Referral Form (RJASERF).

e. by running the Authorization Report (RJRAUTH).

Appendix

Forms Job Aid

Form	Full Name	Use this Form to...
RTVAUST	Employment Authorization Status Validation	Create and maintain status codes that identify the status of a work authorization.
RTVRFST	Referral Status Validation	Create and maintain codes that define the origins of a student employment referral.
RJRJOBT	Job Title Base Data	Associate job titles and descriptions with a range of valid pay rates.
RJRJREQ	Job Title Requirements	Store information that you can use to identify the job skills/levels that are required for the job title codes created with the RJRJOBT form.
RJAPLBD	Placement Base Data	Store location name, address, and supervisor information for all locations that employ students.
RJRPLRL	Placement Rules	Associate an employment position with a placement code for a specified aid year.
RJRPAYL	Payroll Load Control	Associate predefined payroll periods from the Banner Human Resources system with a specified aid year.
RJRSEDR	Student Employment Rules	Maintain default authorization start/end dates, start/end pay dates, and an authorization status code for a specified aid year.
RJASEAR	Student Employment Authorization	Assign employment authorizations to a particular student for a specified aid year.
RJASERF	Student Employment Referral	Assign referrals to a student for a specific aid year and to allow an authorization of a referral.

Form	Full Name	Use this Form to...
RJRAUTH	Authorization Report	Display a listing of current work authorizations based on activity date.
RJRLOAD	Payroll Load Process	Interface between Human Resources and Financial Aid.
RJASEME	Student Employment Mass Entry	Post student earnings manually.