SUNGARD SCT HIGHER EDUCATION

SCT Banner Student
Admissions Training Workbook
May 2005
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Confidential Business Information

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to create applicant records in SCT Banner Admissions module. This workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-day operations
- Reference

Intended audience

Admissions and recruiting office staff and administrators

Objectives

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

- create the rules to process the data
- set parameters used to process the data
- admit a student
- withdrawal a student
- assign a decision code
- perform a quick admit
- roll prospect information to Admissions.

Prerequisites

To complete this workbook, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7.x Fundamentals," or have equivalent experience navigating in the SCT Banner system
- completed the Curriculum, Advising, and Program Planning (CAPP) training workbook.

Section A: Introduction

Lesson: Overview (Continued)

Section contents

Introduction

The Admissions office is responsible for developing the validation tables and control forms for applications, creating and maintaining application records, applying decisions, and maintaining checklist items.

Flow diagram

This diagram highlights where the admissions process occurs within the overall Student process.

About the process

The process involves these steps:

- Validation forms are set up on the SCT Banner system.
- Rule forms are set up for specific student types and terms.
- The applicant applies to the institution.
- The applicant's data is entered into SCT Banner by Admissions.
- Admissions review application and supporting documents.
- Admissions makes a decision.
- Admissions notifies applicant of decision.
- Applicant accepts offer and becomes a student.

Cohort

A member of a group of students who have similar characteristics such as starting a program at the same time.

Communication Plan

A set of rules designed to implement an institution's preferences regarding who should receive which materials and when those materials should be sent. Materials can be generated (letter or label) or published (department brochures).

Example: All accepted high school students who apply for admissions into the Education program receive a letter acknowledging acceptance into both the university and the Education program. However, all accepted high school students who apply for admissions into the Nursing program receive a letter acknowledging acceptance into just the university and instructions for next steps on how to apply at a later time to the Nursing program. Prospective nursing students also receive a Nursing program brochure along with their acceptance letter into the university.

Prospect

A prospective student such as an applicant or recruit

Quick Admit

A process for adding a student to the SCT Banner system with the minimum amount of data

Student

A person becomes a student when they accept the offer of admissions

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set-up your SCT Banner Student Admissions system.

Intended audience

The staff of the Admissions office and the Recruitment office who maintain biographic, demographic, and applicant data for applicants

Objectives

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

• create the rules
• set parameters used to process the data.

Prerequisites

To complete this workbook section, you should have

• completed the SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7.x Fundamentals," or have equivalent experience navigating in the SCT Banner system
• completed the Curriculum, Advising, and Program Planning (CAPP) training workbook.

Section contents

Introduction

The SCT Banner Student system works in conjunction with other SCT Banner systems. Certain processes in SCT Banner Student are associated with specific values in validation forms. If the forms do not contain these values, processes associated with these forms will not run correctly. You can tailor some of the forms by adding or deleting values, but certain forms must remain as delivered.

Validation forms enable you to tailor the Student System to your needs by providing the system with lists of coded values that can be entered at specific prompts.

Note: When tailoring these codes, be mindful of the impact on other modules, i.e. Human Resources or Alumni. Refer to your institution's data standards policy and procedures as well to ensure compliance.

Shared validation forms

Some of the validation forms that need to be set-up will be tables that are maintained by other areas of SCT Banner. Validation forms beginning with STV are shared with the SCT Banner Human Resources System. Those beginning with GTV are SCT Banner General System forms. Some of these forms can be viewed but not changed without proper security access.

Introduction

Before SCT Banner can process an applicant or student, there are several validation codes and rule forms that need to be set up. The Validation forms ensure data is entered consistently by providing drop-down list to choose from. The values in the drop-down lists are created on the validation forms.

Example: The following procedure uses the Admission Type Code Validation Form (STVADMT) which allows you to create or update an admission type code. The validation forms listed in the table follow these same procedures.

SCT Banner form

The Admission Type Code Validation Form (STVADMT).

Type	Description	Activity Date
EA	Early Admission	03-JAN-1995
ED	Early Decision	03-JAN-1995
GT	Gifted Program	17-AUG-2004
SP	Special Program	03-JAN-1995
ST	Standard	03-JAN-1995

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admission Type Code Validation Form (STVADMT).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Click the **Save** icon.
5	Click the **Exit** icon.
6	Repeat this process to ensure all the validation forms listed in Table 1 are set up.

Table 1

The forms listed in Table 1 follow the same format as the example. Follow the steps listed above to set the rules and parameters in SCT Banner for new or prospective students.

Form Description	SCT Banner Name
Admission Type Code Validation	STVADMT
Student Attribute Validation	STVATTS
Communication Group Code Validation	STVCGRP
County Code Validation	STVCNTY
Communication Plan Code Validation	STVCPLN
Contact Type Code Validation	STVCTYP
Diploma Type Validation	STVDPLM
Duplicate Material Code Validation	STVDPMR
Education Level Code Validation	STVEDLV
Education Goal Validation	STVEGOL
IPEDS Ethnic Code Validation	STVETCT
Outside Interest Code Validation	STVINTS
Interview Code Validation	STVINTV
Legacy Code Validation	STVLGCY
Material Code Validation	STVMATL
Student Fee Assessment Code Validation	STVRATE
Recruit Type Validation	STVRTYP
Source/Background Institution Code Validation	STVSBGI
High School Subject Validation	STVSBJC
Session Code Validation	STVSESS
Test Score Administration Type Code Validation	STVTADM
Test Accommodation Validation	STVTEAC
Test Form Validation	STVTEFR
Test Instrument Validation	STVTEIN
Telephone Type Validation	STVTELE
Test Purpose Validation	STVTEPR
Admission Test Score Source Code Validation	STVTSRC

Next Steps

Once you have set up all the validation forms listed in Table 1, you will need to set up additional validation and rule forms. Since these forms have additional fields, the procedure for each is listed separately in the following pages.

Note: If your institution is currently using the SCT Banner Human Resources systems, you do not need to set up Address Type Code, Citizen Type Code, State/Province Code, or Ethnic Code Validation Forms. You can skip these and go directly to Letter Code Validation on page B-10.

Introduction

The Address Type Code Validation Form (STVATYP) is used to create and maintain Address Type codes.

Example: Billing, Permanent, and Mailing.

Warning: All SCT Banner Systems share this validation form. Coordinate with other SCT Banner System users at your organization when deciding what codes are used on this form.

SCT Banner form

Address Type Code Validation STVATYP 7.0 (s4b70)

Address Type	Description	Telephone Type	Description	System Required	Activity Date
AP	API Test Code			☐	16-JUN-2004
B2	Bill's address type	BI	Billing	☐	02-JUL-2004
BI	Billing	BI	Billing	☑	03-MAY-1991
BU	Business	BU	Business or work	☑	03-MAY-1991
CM	CMAPITEST	APIS	API TESTS	☐	26-FEB-2004
DA	Dormitory Address	RH	Residence Hall	☐	01-JUL-2004
EM	Emergency Contact	EMER	Emergency Contact	☐	30-MAR-1995
FA	Firm Address	FA	Firm Address	☐	01-AUG-1991
FO	Faculty Office	FO	Faculty Office	☐	14-SEP-2004
FR	1042 Foreign Address			☐	31-AUG-2004
HO	Home Address			☐	25-JAN-2005
HQ	Corporate Headquarters	HQ	Corporate Headquarters	☐	03-JUN-1990
KM	KM's address type	PR	Permanent	☐	02-AUG-2004
MA	Mailing	MA	Mailing	☑	26-JAN-2005
MG	Matching Gift Address	MG	Matching Gift	☐	07-JAN-1991
P1	Parent 1	P1	Parent 1	☐	03-JAN-1995
P2	Parent 2	P2	Parent 2	☐	03-JAN-1995
P3	Parent 3	P3	Parent 3	☐	03-JAN-1995
P4	Parent 4	P4	Parent 4	☐	03-JAN-1995
PA	Parents	PA	Parents	☑	03-MAY-1991
PL	pl	WWWW	test type	☐	09-JUN-2004
PR	Permanent	PR	Permanent	☐	09-JUN-2004

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Address Type Code Validation Form (STVATYP).
2	Perform an **Insert Record** function.
3	Enter a two-character code in the **Address Type** field.
4	Enter a description of the code in the **Description** field.

Procedure, continued

Step	Action
5	Enter a default telephone type that corresponds to the address type in the **Telephone Type** field if appropriate.
6	Click the **System Required** checkbox if this code is required by the system.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Introduction

The Citizen Type Code Validation Form (STVCITZ) is used to create and maintain Citizen Type codes.

Examples: US Citizen, Canadian Citizen, or Not a Citizen and Student Visa.

Warning: All SCT Banner Systems share this validation form. You should coordinate with other SCT Banner System users at your organization when deciding what codes are used on this form.

SCT Banner form

Code	Description	Citizen Indicator	EDI Equivalent	Activity Date
AA	Test aa	☐		08-JUL-2004
N	Non-Citizen	☐		22-JAN-1992
NR	Non-resident Alien	☐		08-JUL-2004
RA	Resident Alien	☐		31-AUG-2004
Y	Citizen	☑		22-JAN-1992
		☐		
		☐		

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Citizen Type Code Validation Form (STVCITZ).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Click the Citizen Indicator checkbox if this code indicates that the person is a citizen.
5	Enter the corresponding EDI equivalent value in the **EDI Equivalent** field.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Introduction

The State/Province Code Validation Form (STVSTAT) is used to create, update, and delete state and province codes.

Examples: Delaware (DE), British Columbia (BC), and Pennsylvania (PA).

Warning: All SCT Banner Systems share this validation form. You should coordinate with other SCT Banner System users at your organization when deciding what codes are used on this form.

SCT Banner form

State/Province Code Validation STVSTAT 7.0 (s4b70)

Code	Description	EDI Equivalent	IPEDS State Code	Canadian Statistics Code	Activity Date
123	Test 123				24-JUN-2004
456	Test 456				24-JUN-2004
AA	Military - Americas				08-DEC-1995
AB	Alberta	AB			28-JAN-2005
ACT	Australian Capitol Territory				26-JUL-1994
AE	Military - Europe				08-DEC-1995
AK	Alaska	AK			31-AUG-2004
AL	Alabama	AL			31-AUG-2004
AP	Military - Pacific				08-DEC-1995
AR	Arkansas	AR			31-AUG-2004
AS	American Samoa				18-AUG-1987
AZ	Arizona	AZ			31-AUG-2004
BC	British Columbia	BC			31-AUG-2004
CA	California	CA			31-AUG-2004
CM	Northern Mariana Islands				18-AUG-1987
CO	Colorado	CO			31-AUG-2004
CT	Connecticut	CT			31-AUG-2004
CZ	Canal Zone				18-AUG-1987
DC	District of Columbia	DC			31-AUG-2004
DE	Delaware	DE			31-AUG-2004

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the State/Province Code Validation Form (STVSTAT).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Enter the corresponding EDI equivalent value in the **EDI Equivalent** field.
5	Enter the IPEDS reporting state code in the **IPEDS State Code** field.
6	Enter a code in the Canadian Statistics Code field for Canadian provinces.

Procedure, continued

Step	Action
7	Click the **Save** icon.
8	Click the **Exit** icon.

Jump to TOC

Introduction

The Ethnic Code Validation Form (STVETHN) is used to create and maintain Ethnic codes. The ethnic codes are validated against the IPEDS Ethnic Code Validation Form (STVETCT) that is used to correlate the institution's ethnic codes with the required IPEDS codes.

Warning: All SCT Banner Systems share this validation form. You should coordinate with other SCT Banner System users at your organization when deciding what codes are used on this form.

SCT Banner form

Ethnic Code	Description	IPEDS Code	EDI Equivalent	LMS Equivalent	Activity Date
1	Caucasian	5			30-JAN-1991
2	African-American	1			24-JUN-1993
3	Hispanic-Other	4			31-MAR-1995
3C	Cuban				31-MAR-1995
3M	Mexican				31-MAR-1995
3P	Puerto Rican				31-MAR-1995
4	Asian Pacific Islander	3			03-MAR-1992
5	Sioux	2			03-MAR-1992
6	Other	6			03-MAR-1992

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Ethnic Code Validation Form (STVETHN).
2	Enter a code in the **Ethnic Code** field.
3	Enter a description of the code in the **Description** field.
4	Select a corresponding IPEDS reporting code in the **IPEDS Code** field.
5	Enter the corresponding value in the **EDI Equivalent** field if required.
6	Enter the corresponding value in the **LMS Equivalent** field if required to link to your Learning Management System.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Jump to TOC

Introduction

The Letter Code Validation Form (GTVLETR) is used to enter and maintain the Letter codes used in the Letter Generation Process. These codes are used to validate the selected letters.

Note: Use the Letter Process Form (GUALETR) to create the actual contents of a letter.

SCT Banner form

Letter Code Validation GTVLETR 7.0 (s4b70)

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_APPL_ACKN	Admissions Application Ackn	✔			18-AUG-2004
ADM_CHKL	Admissions Checklist Letter	☐			17-MAY-1995
ADM_FA_INTEREST	Financial Aid Interest Letter	☐			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	☐			23-MAY-1995
AD_ACK_GIFTS	Gift Acknowledgement Letter	✔			10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif	☐	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	✔			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	✔			10-MAY-1995
AMCAS_LETTER	AMCAS Letter	☐			06-JUL-2004
ANNUAL_FND_ACKN	Annual Fund Gift Ackn Letter	✔			29-AUG-1991
BILLS_TEST	Bill Zimmer's second test lett	☐			18-OCT-2004
BILLZ_TEST	Bill Zimmer's test letter	✔			17-FEB-2004
CKB	test	☐			10-JAN-2005
CKB1	test	☐	TEST		10-JAN-2005
COB_PCRLTRS_ENR	Cobra Enrollment End Notices	✔			12-JAN-2005
COB_PCRLTRS_LAT	Cobra Late Notices	✔			12-JAN-2005
COB_PCRLTRS_PEX	Cobra Pre-Expiration Notices	✔			12-JAN-2005
COB_PCRLTRS_TER	Cobra Termination Notices	✔			12-JAN-2005
COB_PCRNOTF_18M	Cobra 18 Month Notification	✔			12-JAN-2005
COB_PCRNOTF_36M	Cobra 36 Month Notification	✔			12-JAN-2005
CORP_GIFT_ACKN	Corporate Gift Acknowledgement	✔			29-AUG-1991
DAYNA'S_TEST	Dayna's test of 'copy'	☐			17-JUN-2004

Procedure

Follow the steps on the following page to complete the process.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Letter Code Validation Form (GTVLETR).
2	Enter a letter code in the **Letter Code** field.
3	Enter a description of the code in the **Description** field.

IF	THEN
a letter can be sent more than once to the same ID within a term	click the **Allow Duplicates** checkbox.
duplicates are not permitted and you want to send an alternate letter	Enter a letter code in the **Alternate Letter** field.
duplicates are not permitted and you do not want to send an alternate letter	leave the **Alternate Letter** field blank.

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

Introduction

The Paragraph Code Validation Form (GTVPARA) is used to enter and maintain the paragraph codes that are used to construct letters. The paragraph name and description are entered on this form. The paragraph text is then built on the Paragraph Form (GUAPARA).

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Paragraph Code Validation Form (GTVPARA).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Enter the paragraph text in the **Comment** field.
5	Repeat steps 2-4 to add all paragraphs needed for the letter.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Section B: Set Up

Lesson: Admission Request Checklist Code Validation

Introduction

The Admission Request Checklist Code Validation Form (STVADMR) is used to create and maintain Admission Request Checklist codes.

Examples: High School Transcript, College Transcript, Portfolio, Application Fee and SAT Scores.

SCT Banner form

Request Code	Description	Cross Reference Table Name	Web Indicator	Voice Response Eligibility Indicator	Voice Response Message Number	Activity Date
AGEP	Proof of Age		☐	☐		03-JAN-1995
AP25	$25 Application Fee		☐	☐		03-JAN-1995
ARTP	Art Portfolio		☐	☐		03-JAN-1995
BZIM	Bill Zimmer's test code	STVVTYP	☐	☐		06-JUL-2004
CLT1	College Transcript	STVSBGI	☐	☐		03-JAN-1995
CLT2	College Transcript	STVSBGI	☐	☐		03-JAN-1995
CLT3	College Transcript	STVSBGI	☐	☐		03-JAN-1995
ESSY	Personal Essay		☐	☐		03-JAN-1995
GCOL	Graduate Prior College	STVSBGI	☐	☐		08-OCT-2004
HST1	High School Transcript	STVSBGI	☐	☐		03-JAN-1995
HST2	High School Transcript	STVSBGI	☐	☐		03-JAN-1995
HST3	High School Transcript	STVSBGI	☐	☐		03-JAN-1995
HSTF	Final High School Transcript	STVSBGI	☐	☐		03-JAN-1995
MCAT	MCAT Scores	STVTESC	☐	☐		06-JUL-2004
MDAP	Medical School Appl Fee		☐	☐		06-JUL-2004
MHRC	Medical History Record		☐	☐		03-JAN-1995
MUAU	Music Audition		☐	☐		03-JAN-1995
PICS	Driver's License		☐	☐		03-JAN-1995
PRSU	Proof of Support		☐	☐		03-JAN-1995
REF1	Reference Letter		☐	☐		03-JAN-1995
REF2	Reference Letter		☐	☐		03-JAN-1995
RESD	Proff of residency		☐	☐		10-AUG-2004
RESP	Residence Papers		☐	☐		03-JAN-1995

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admission Request Checklist Code Validation Form (STVADMR).
2	Perform an **Insert Record** function.
3	Enter a four-character code in the **Request Code** field.
4	Enter a description of the code in the **Description** field.

Procedure, continued

Step	Action
5	Enter the name of the validation table to receive specific item codes and descriptions in the **Cross Reference Table Name** field. Note: Other forms use this form to validate admission request checklist codes. Cross-referenced table names and descriptions can be entered on the following forms to provide further validation: • Residence Code Validation Form (STVRESD) • Source/Background Institution Code Validation Form (STVSBGI) • Test Code Validation Form (STVTESC) • Visa Type Code Validation Form (STVVTYP).
6	Click the **Web Indicator** checkbox to display the item in SCT Banner Web admissions application processing. Note: This option allows an institution to limit the checklist items which will be displayed to a subset of all valid items.
7	Click the **Voice Response Eligibility Indicator** checkbox to have a request code spoken to the student for telephone applications.
8	Enter a number in the **Voice Response Message Number** field to indicate the recorded message that describes the admission request code for telephone applications.
9	Click the **Save** icon.
10	Click the **Exit** icon.

Introduction

The Admission Application Decision Code Validation Form (STVAPDC) is used to create and maintain Admission Application Decision codes.

Examples: Accept, Refuse, Pending Decision, Quick Admit, and Application Withdrawal.

Note: Other forms use this form to validate the Admission Application Decision codes. You may only create or maintain these codes on this form.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admission Application Decision Code Validation Form (STVAPDC).
2	Perform an **Insert Record** function.
3	Enter a two-digit code in the **Decision Code** field.
4	Enter a description of the code in the **Description** field.

Procedure, continued

Step	Action
5	Click the **Significant Decision** checkbox to signify that this code is a significant decision. Examples: Institution Acceptance, Application Rejected, or Applicant Declines Offer.
6	Click the **Institution Acceptance** checkbox if this code indicates that the applicant has been accepted into the institution.
7	Click the **Applicant Acceptance** checkbox if this code indicates that the applicant has been accepted the offer.
8	Click the **Applicant Acceptance** checkbox if this code indicates that the applicant has been accepted the offer.
9	Click the **Inactive Application** checkbox if this code indicates that the application is now inactive. Examples: Institution Rejection or Applicant Rejects Offer.
10	Click the **Institution Rejection** checkbox if this code indicates that the applicant has been rejected by the institution.
11	Click the **Display on Web** checkbox to display the item in SCT Banner Web admissions application processing.
12	Click the **Voice Response Eligible** checkbox to have a request code spoken to the student for telephone applications.
13	Enter a number in the **Voice Response Message** field to indicate the recorded message that describes the admission request code for telephone applications.
14	Click the **Save** icon.
15	Click the **Exit** icon.

Section B: Set Up

Lesson: Admission Application Status Code Validation

Introduction

The Admission Application Status Code Validation Form (STVAPST) is used to create and maintain Admission Application Status codes.

Examples: Incomplete, Complete, and Decision Made.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admission Application Status Code Validation Form (STVAPST).
2	Enter a one-character code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Enter a number in the **VR Msg** (Voice Response Message) field to indicate the recorded message that describes the admission request code for telephone applications.
5	Click the **System Required** checkbox if this code is required by the system.
6	Click the **Web Ind** checkbox to display the item in SCT Banner Web admissions application processing.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Introduction

The Cohort Code Validation Form (STVCHRT) is used to create and maintain Cohort codes used in the Recruiting, Admissions, General Student, and Academic History modules. These codes represent a cohort grouping assigned to students based on user-defined criteria. These codes provide a tracking mechanism for Student Right to Know reporting. Additional institutional cohort codes may also be added for internal tracking and reporting purposes.

SCT Banner form

Cohort Code Validation STVCHRT 7.0 (s4b70)

Cohort Code	Description	Start Term	End Term	Degree Level	Print Indicator	Activity Date
0310FRUG	Unit test gen 0310FRUG				☐	21-JAN-2004
9510UGFR	199510 New Undergrad Freshmen	199510	200020	BA	☑	29-JAN-1995
9510UGTR	199510 New Undergrad Transfers	199510	200020	BA	☑	29-JAN-1995
9810UGFR	199810 New Undergrad Freshmen	199810	200220	BA	☑	06-MAY-2004
0610UGFR	200610 New Undergrad Freshman	200610	200889	AS	☑	31-JAN-2005
					☐	
					☐	

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Cohort Code Validation Form (STVCHRT).
2	Enter a code in the **Cohort Code** field.
3	Enter a description of the code in the **Description** field.
4	Select a term in the **Start Term** field.
5	Select an expected graduation term for this cohort in the **End Term** field.
6	Select the expected degree level for this cohort in the **Degree Level** field.
7	Click the **Print Indicator** checkbox to have data about this cohort included in printed reports.
8	Click the **Save** icon.
9	Click the **Exit** icon.

Introduction

The Institutional Honors Code Validation Form (STVHONR) is used to create and maintain Institutional Honor codes.

Examples: Cum Laude, Magna Cum Laude, and Summa Cum Laude.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Institutional Honors Code Validation Form (STVHONR).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Click the **Transcript Print Ind** checkbox if you want to print this institutional honor on the student's transcript.
5	Click the **Commencement Print Ind** checkbox if you want to print this institutional honor to print on the commencement report.
6	Enter the corresponding EDI honor code value in the **EDI Equiv** field.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Introduction

The Initials Code Validation Form (STVINIT) is used to create and maintain initials codes of institution personnel including Full Name, E-Mail Address and up to two titles.

Note: This form is used by the Material Form (SOAMATL) and the Letter Generation process to validate names in signature blocks of letters generated.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Initials Code Validation Form (STVINIT).
2	Perform an **Insert Record** function.
3	Enter the person's initials in the **Initials** field. Note: For people who share the same initials, you may want to use a sequence number as well. Example: Tom S. Smith and Terry S. Smith both have the initials TSS so you could assign Tom the initials TSS1 and Terry the initials TSS2.
4	Enter the person's full name in the **Full Name** field.

Procedure, continued

Step	Action
5	Enter the person's title in the **Title Line 1** field.
6	Enter the person's other title in the **Title Line 2** field if needed.
7	Enter the person's e-mail address in the **E-Mail** field.
8	Click the **Save** icon.
9	Click the **Exit** icon.

Section B: Set Up

Lesson: Level Code Validation

Introduction

The Level Code Validation Form (STVLEVL) is used to create and maintain Level codes.

Examples: No Level Declared, Undergraduate, and Non-Matriculated, Graduate, Non-Credit.

SCT Banner form

Level Code	Description	CEU Ind	Voice Msg	EDI Equiv	Sys Req	Activity Date
00	Undeclared	☐			☑	24-JUN-1991
CE	Continuing Education	☑			☐	03-JAN-1995
CR	Credit	☐			☐	26-JUL-1994
GR	Graduate	☐			☐	03-JAN-1995
LW	Law	☐			☐	04-JAN-1995
NC	Non Credit	☐			☐	04-JAN-1995
PR	Professional	☐			☐	03-JAN-1995
UG	Undergraduate	☐			☐	03-JAN-1995
		☐			☐	
		☐			☐	

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Level Code Validation Form (STVLEVL).
2	Enter the level code in the **Level Code** field.
3	Enter a description in the **Description** field.
4	Enter a voice message response number in the **Voice Msg** field.
5	Enter a code in the **EDI Equiv** field, if required.
6	Click the **System Required** checkbox.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Introduction

The Relation Code Validation Form (STVRELT) is used to create and maintain Relation codes.

Examples: Guardian, Brother, Mother, and Spouse.

Note: The Emergency Contact Form (SPAEMRG) and the Guardian Information Form (SOAFOLK) use this form to validate the Relation codes.

SCT Banner form

Relation Code Validation STVRELT 7.0 (s4b70)

Code	Description	SEVIS Equiv	Activity Date
B	Brother		31-MAR-1987
C	Child	02	22-JUN-2004
F	Father		31-MAR-1987
G	Grandparent		24-JUN-1991
M	Mother		31-MAR-1987
N	Neighbor		15-JUL-1993
O	Relative		24-JUN-1991
P	Spouse	01	09-AUG-1991
R	Friend		15-JUL-1993
S	Sister		31-MAR-1987
U	Guardian		01-MAY-1987

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Relation Code Validation Form (STVRELT).
2	Enter a code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Enter the corresponding SEVIS code in the **SEVIS Equiv** field.
5	Click the **Save** icon.
6	Click the **Exit** icon.

Introduction

The Residence Code Validation Form (STVRESD) is used to create and maintain codes for residency or domicile.

Examples: Foreign, Out of State Resident, and In-State Resident.

SCT Banner form

Code	Description	In State/ Prov	EDI Equiv	VR Msg	Sys Req	Activity Date
0	Undeclared	✔			✔	31-MAY-1994
A	Reciprocity Out of State	☐			☐	07-JAN-1991
F	Foreign	☐			☐	01-MAY-1987
M	Military Out of State	☐			☐	07-JAN-1991
O	Out of state Resident	☐			☐	07-JAN-1991
R	In state Resident	✔			☐	07-JAN-1991
		☐			☐	

Residence Code Validation STVRESD 7.0 (s4b70)

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Residence Code Validation Form (STVRESD).
2	Enter a one-character code in the **Code** field.
3	Enter a description of the code in the **Description** field.
4	Click the **In State/Prov** checkbox if this code indicates the person has in-state or in-providence status.
5	Enter the corresponding EDI code in the **EDI Equiv** field if required.
6	Enter the voice response message number in the **VR Msg** field.
7	Click the **Sys Req** checkbox if this code is system required.
8	Click the **Save** icon.
9	Click the **Exit** icon.

Introduction

The Site Code Validation Form (STVSITE) is used to create and maintain information for sites, including name of the site and the address.

When a valid ZIP/Postal code is selected from the ZIP/Postal Code Validation Form (GTVZIPC) and entered in the **ZIP/PC** field, the combination of City, State/Province, and Nation information that exists on GTVZIPC will populate the appropriate fields. This information will not automatically be populated if the ZIP/Postal code is entered manually.

SCT Banner form

Site Code Validation STVSITE 7.0 (s4b70)

Site Code:	BU1	Description:	Banner University Main Campus	Activity Date:	
		Street Line 1:	4 Country View Road		
		Street Line 2:			
		Street Line 3:			
		City:	Malvern	State or Province:	PA ▾ Pennsylvania
		ZIP or Postal Code:	19355 ▾		
		Nation:	157 ▾ United States of America	Other Description:	

Site Code:	100	Description:	Malvern Office	Activity Date:	28-OCT-2004
		Street Line 1:	3 Country View Rd		
		Street Line 2:			
		Street Line 3:			
		City:	Malvern	State or Province:	PA ▾ Pennsylvania
		ZIP or Postal Code:	19355 ▾		
		Nation:	▾	Other Description:	

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Site Code Validation Form (STVSITE).
2	Perform an **Insert Record** function.
3	Enter a three-character site code in the **Site Code** field.
4	Enter a description of the code in the **Description** field.
5	Enter the street address in the **Street Line 1** field.
6	Enter the city in the **City** field.
7	Select the state or province code in the **State or Province** field.
8	Enter the ZIP or postal code in the **ZIP or Postal Code** field.
9	Select a nation code in the **Nation** field. Note: Enter *157* for the United States.

Procedure, continued

Step	Action
10	Click the **Save** icon.
11	Click the **Exit** icon.

Introduction

The Student Status Code Validation Form (STVSTST) is used to create and maintain Student Status codes.

Examples: Active, Withdrawn, and Inactive due to Graduation.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Student Status Code Validation Form (STVSTST).
2	Enter a two-character code in the **Status Code** field.
3	Enter a description of the status code in the **Description** field.
4	Click the **Allow Registration** checkbox if registration is allowed with the associated student status.
5	Click the **System Required** checkbox if this value is system required. Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.
6	Select a status in the **Curriculum Status** field.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Introduction

Use the Student Type Code Validation Form (STVSTYP) to create, update, insert, and delete student type codes (i.e., Returning Freshman, Continuing, Transfer, etc.). Several forms in various modules use this form to validate the student type codes. You can only create and update these codes from this form.

The following student type codes should be created for IPEDS reporting:

- Freshman
- First Time Freshman
- Unclassified
- Continuing
- First Time Graduate
- First Time Professional

SCT Banner form

Student Type Code Validation Form (STVSTYP)

Code	Description	Next Student Type	System Required	Activity Date
0	Undeclared	0	✔	31-MAY-1994
A	1st Time Freshman	C	☐	23-MAR-2004
C	Continuing	C	☐	06-MAY-1987
E	Adult/Continuing Education	E	☐	04-JAN-1995
N	New First Time	C	☐	04-JAN-1995
R	Returning	C	☐	04-JAN-1995
S	Special	S	☐	06-MAY-1987
T	Transfer	C	☐	04-JAN-1995
W	0123456789012345678901234567 8X	X	☐	19-FEB-2004
X	Transient	X	☐	04-JAN-1995
			☐	
			☐	

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Student Type Code Validation Form (STVSTYP).
2	Enter a one-character code in the **Code** field.
3	Enter a description of the code in the **Description** field.

Procedure, continued

Step	Action
4	Enter a code in the **Next Student Type** field to identify the student type to be assigned when the Student Type Update Report (SHRTYPE) is run. Example: The Next Student Type for *A - First Time Freshman* would be *C - Continuing*. The Next Student Type for an *E - Adult Continuing Education* Code would be *E - Adult Continuing Education* since the status for this type of student would not change from year to year.
5	Click the **System Required** checkbox if this validation table record is required. Examples: First Time Freshman, Continuing. Note: The **System Required** checkbox is used to set up a default when residency is not entered in the Recruiting module, and the prospect record is pulled to the Admissions module to build the application. If the **System Required** checkbox is checked, the validation table record cannot be deleted.
6	Repeat steps 2-5 until all codes are set up.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Jump to TOC

Introduction

The Visa Type Code Validation Form (STVVTYP) is used to create and maintain Visa Type codes. The **Admission (Checklist) Request Code** field identifies required admission request checklist items associated with a Visa type.

Examples: Tourist, Student Visa, and Exchange Scholar.

SCT Banner form

Visa Type	Description	Admissions Checklist Request Item	Description	Non-Resident	Voice Response Message Number	Canadian Statistics Code	SEVIS Code	Activity Date
B2	Tourist			☐				07-FEB-2005
E2	Dependent of Foreign Investor			☐				30-JUN-1987
F1	Student Visa	VISA	Visa Papers	☑			01	25-OCT-2004
F2	Dependent of Student			☐			04	01-MAR-2004
H1	Special			☐				18-AUG-1987
H2	Dependent of Special			☐				18-AUG-1987
J1	Exchange Scholar			☐			03	06-JUL-2004
J2	Dependent of Exchange Scholar			☐			06	22-JUN-2004
M1	Vocational Student			☐			02	07-FEB-2005
M2	Dependent of Vocational Studen			☐			05	07-FEB-2005
OT	Other			☐				18-AUG-1987
PR	Permanent Resident			☐				18-AUG-1987
RA	Resident Alien			☐				18-AUG-1987

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Visa Type Code Validation Form (STVVTYP).
2	Enter a code in the **Visa Type** field.
3	Enter a description of the code in the **Description** field.
4	Select an item in the **Admissions Checklist Request Item** field. Example: Visa papers are an additional admissions checklist item for students who have a student Visa.
5	Click the **Non-Resident** checkbox if this code indicates the person is a resident of another country.
6	Enter a number in the **Voice Response Message Number** field.
7	Enter a code in the **Canadian Statistics Code** field if required.
8	Enter the corresponding code in the **SEVIS Code** field.
9	Click the **Save** icon.
10	Click the **Exit** icon.

Introduction

The Admissions Checklist Rules Form (SAACHKB) is used to build admissions request checklist items that will automatically be generated as an application is entered into the S0ystem. If the data that is entered in the Options Selection Criteria section of the form matches the information on the application, the checklist item appearing in the Admission Request Codes section of the form will be added to the applicant's checklist. These rules should be entered prior to applications being entered into the System.

Note: Only select codes in a field if it applies to just one code, otherwise leave the field blank.

Example: If the rule applies to all campuses and all degrees, then you would leave the **Campus** and **Degree** fields blank.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admissions Checklist Rules Form (SAACHKB).

IF the rule applies to	THEN
all terms	leave the **Term** field blank.
one specific term	select the term in the **Term** field.

Step	Action
2	Perform a **Next Block** function.
3	Perform an **Insert Record** function.
4	Select a term code in the **Term** field.
6	Select a level code in the **Level** field.
7	Select a college code in the **College** field.
8	Select a campus code in the **Campus** field.
9	Select a major code in the **Major** field.
10	Select a degree code in the **Degree** field.
11	Select a student type code in the **Student Type** field.
12	Select an admissions type code in the **Admissions Type** field.
13	Select a residence code in the **Residence** field.
14	Click the **Mandatory Indicator** checkbox if the item is required for a decision.
15	Check the **Inactive Indicator** in the Admission Request Codes section if the criteria and/or item is not active.
16	Select an item in the **Item** field.
17	Click the **Save** icon.
18	Click the **Exit** icon.

Introduction

The Admissions Decision Rules Form (SAADCSN) is used to enter criteria for System-calculated decisions. All student information entered is compared to admission application data. Other areas of the form are used to enter, high school subject(s), test score information, and ratings to be compared to the applicant's data. Rules should be entered on this form prior to calculating any admission decision.

Note: You can create a separate record for each new set of rules for each decision. In other words, multiple records can exist with the same decision code but with a different set of rules.

Example: You can create an acceptance rule for high school students and another acceptance rule for returning adults and a third for transfer students. Although the rules are different, the same decision code (acceptance) would be used.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admissions Decision Rules Form (SAADCSN). Note: When you first access this form it is in query mode. You must perform an Execute Query function to display data or perform a Cancel Query function to define new rules.
2	Perform a **Cancel Query** function.
3	Select a term in the **Term** field.
4	Select a decision code in the **Decision** field.
5	Select a level code in the **Level** field.
6	Select a student type code in the **Student Type** field.
7	Select an admission type code in the **Admission Type** field.
8	Select a residence type field in the **Residence** field. Note: Leave this field blank if it applies to all residence types.
9	Select a high school diploma type in the **High School Diploma** field.
10	Enter the minimum high school grade point average in the **High School GPA** field.
11	Click the **College Preparatory** checkbox if the student was in a college preparatory track in high school.
12	Perform a **Next Block** function.
13	Select a subject in the **Subject** field. Example: Select *LATIN* if your institution requires that applicants receive a minimum grade in Latin for admissions.
14	Enter the minimum letter grade required for that subject in the **Grade** field.
15	Enter the number of years required in the **Years** field. Example: If your institution requires applicants to have completed 2 years of Latin prior to admissions, you would enter *2* in the **Years** field.
16	Enter the minimum grade point required for the subject in the **GPA** field.
17	Click the **Save** icon.

Procedure, continued

Step	Action
18	Select <u>Decision Rules/Test Scores</u> from the **Options** menu. Result: The Test Scores window opens.
19	Enter a connector code in the **A/O** (and/or connector) field. Notes: Code that determines how the test score is used with other test scores during the decision process. Options: • A (and)--Each test score must meet certain criteria. Example: The score from test A must equal 900, and the score from test B must equal 750. • O (or)--One of the test scores must meet certain criteria. Example: The score from test A must equal 900, or the score from test B must equal 750.
20	Enter a left parenthesis in the **"("** field to group your test requirements.
21	Select a test in the **Test** field. Examples: SAT Verbal, SAT Math, GMAT.
22	Enter a minimum score in the **Minimum Score** field. Note: SCT Banner will display valid test score character type and range based on the test selected.

Procedure, continued

Step	Action
23	Enter a maximum score in the **Maximum Score** field.
24	Enter a right parenthesis in the **")"** field to group your test requirements.
25	Enter the order of conditions in the **Order** field starting with *1*.
26	Repeat steps 19-25 for each additional test requirement.
27	Click the **Save** icon.
28	Click the **Exit** icon.

Introduction

The Quick Entry Rules Form (SAAQKER) is used to build and maintain values by term/level that will automatically populate the Quick Entry Form (SAAQUIK) to speed the process. Validation code forms referenced by the Quick Entry rules must be complete prior to using this form.

Note: As you are completing the form, if your rule applies to all values, leave the field blank.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Quick Entry Rules Form (SAAQKER).
2	Perform an **Insert Record** function.
3	Select a term code in the **Term** field.
4	Select a level code in the **Level** field.
5	Select a student type code in the **Student Type** field.
6	Select a residency code in the **Residency** field.
7	Select a student status code in the **Student Status** field.

Procedure, continued

Step	Action
8	Select a campus code in the **Campus** field.
9	Select a college code in the **College** field.
10	Select a major code in the **Major** field.
11	Select a fee rate code in the **Fee Rate** field.
12	Select an education level code in the **Education Level** field.
13	Click the **Create Recruit?** checkbox if a recruiting record is to be created by the system for the applicant associated with the quick entry rule.
14	Select the recruiting department in the **Recruit Department** field.
15	Click the **Create Application?** checkbox if an application record is to be created by the system for the applicant associated with the quick entry rule.
16	Click the **Save** icon.
17	Click the **Exit** icon.

Directions

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

Question 1

On which form would you indicate that a duplicate letter should not go to the same student in the same term?

Question 2

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

Question 3

Where would you enter the institution's admissions policies to be used by the System when calculating a decision on an applicant?

Question 1

On which form would you indicate that a duplicate letter should not go to the same student in the same term?

The Letter Code Validation Form (GTVLETR).

Question 2

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

The following student type codes should be created for IPEDS reporting:

Freshman
First Time Freshman
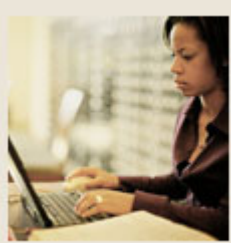**Unclassified**
Continuing
First Time Graduate
First Time Professional

Question 3

Where would you enter the institution's admissions policies to be used by the System when calculating a decision on an applicant?

The Admissions Decision Rules Form (SAADCSN) is used to enter the organization's admissions policies.

Purpose

The purpose of this section is to explain the regular process and detail the procedures to handle admissions procedures at your institution.

Intended audience

The audience intended for this workbook is the staff of the Admissions office and the Recruitment office who maintain biographic, demographic and applicant data for prospects and applicants.

Objectives

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

- run the Admissions Decision Criteria Report
- admit a student
- withdrawal a student
- assign a decision code
- run the Admissions Decision Calculation Report
- perform a quick admit
- roll prospect information to Admissions.

Prerequisites

To complete this workbook section, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7.x Fundamentals," or have equivalent experience navigating in the SCT Banner system
- completed the Curriculum, Advising, and Program Planning (CAPP) training workbook.

Section contents

Introduction

The Admissions Decision Criteria Report (SARDCSN) may be used to review the rules on the Admissions Decision Rules Form (SAADCSN).

Note: You should review the admission decision criteria report before any students are admitted. That way if you need to make changes to the admission decision criteria, the changes are applied consistently to all applicants.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admissions Decision Criteria Report (SARDCSN).
2	Enter the desired printer name in the **Printer** field. Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Enter these parameter values.

Procedure, continued

Parameter	Value
01: Term (% for all)	Enter the term to roll from or enter *%* for all terms.
02: New term for decision roll	Enter new term for decision to roll to.
03: Delete old term after decision roll	Defaults to *N* for no. You can change to *Y* for yes.

Step	Action
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.
7	Click the **Save** icon to execute the report. Result: The Auto hint line displays the job submission number for the report log and list file.
8	Select **Review Output** on the Options menu to review the report.
9	Click the **Exit** icon.

Introduction
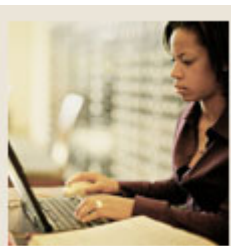
The Admissions Application Form (SAAADMS) is used to create and update admissions applications submitted to your institution.

SCT Banner form

Procedure

Follow these steps to enter an applicant.

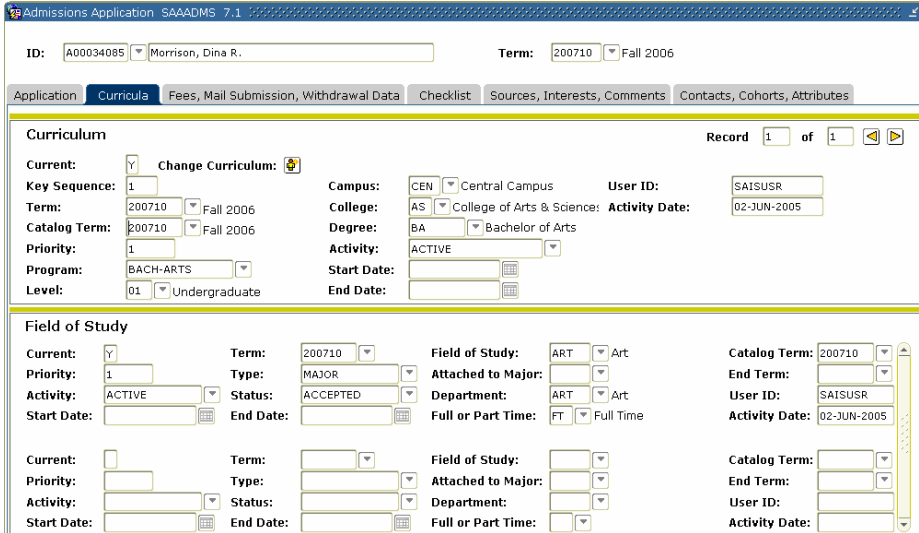| Step	Action
1	Access the Admissions Application Form (SAAADMS).
2	Enter the student's ID in the **ID** field.
3	Enter a term in the **Term** field.
4	Perform a **Next Block** function. Result: The term defaults in the **Entry Term** field.
5	Enter the application date in the **Application Date** field. Note: SCT Banner will insert the system date if this field is left blank.
6	Select an admissions type code in the **Admissions Type** field.
7	Select a student type code in the **Student Type** field.

Procedure, continued

Step	Action
8	Select a residence type code in the **Residence** field.
9	Select the site the student wants to attend in the **Site** field.
10	Enter *F* for Full Time or *P* for Part Time in the **Full or Part Time** field.
11	Enter the application status in the **Application Status** field. Result: The **Applicant Status Date** and **Maintained by** fields will be filled in by SCT Banner.
12	Perform a **Next Block** function to access the Curricula tab. ![Admissions Application SAAADMS 7.1 screen]
13	Select a catalog term in the **Catalog Term** field.
14	Enter *1* in the **Priority** field.

Procedure, continued

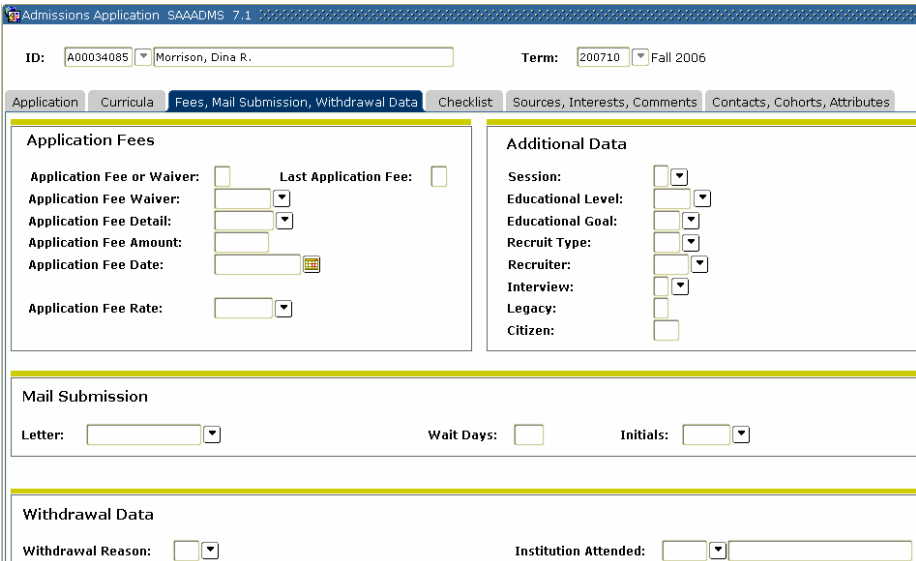| Step	Action
15	Select a program code in the **Program** field and select Base Curriculum Rules by Program. Result: By double-clicking and choosing this option, the information that is built in the curriculum rules will default and fill in the SCT Banner fields. This saves on data entry and ensures that the appropriate data is entered by the Admissions staff. Note: If you select Base Curriculum Rules by Program, **go to Step 24**. Example: If you select *BA-History* in the Program field, all the data for a History Major is automatically entered.
16	Select a level code in the **Level** field.
17	Select a campus code in the **Campus** field.
18	Select a college code in the **College** field.
19	Select a degree code in the **Degree** field.
20	Enter a *1* in the **Field of Study Priority** field. Note: To enter a minor, repeat steps 20-25 And enter *2* in the **Field of Study Priority** field.
21	Select *Major* in the **Type** field. Notes: You must enter at least one major. If you were entering a minor, you would select *Minor* in the **Type** field.
22	Select a field of study in the **Field of Study** field.
23	Select a department code in the **Department** field.
24	Click the **Save** icon.
25	Click the **OK** button.
26	Click the **Save** icon to accept the Communication Plan.
27	Click the **Return** button to close the Communication Plan Change window.

Procedure, continued

Step	Action
28	Select the <u>Fees, Mail Submission, Withdrawal Data</u> tab. ![Admissions Application SAAADMS 7.1 screenshot showing ID: A00034085 Morrison, Dina R., Term: 200710 Fall 2006, with tabs Application, Curricula, Fees Mail Submission Withdrawal Data, Checklist, Sources Interests Comments, Contacts Cohorts Attributes. Application Fees section with Application Fee or Waiver, Last Application Fee, Application Fee Waiver, Application Fee Detail, Application Fee Amount, Application Fee Date, Application Fee Rate. Additional Data section with Session, Educational Level, Educational Goal, Recruit Type, Recruiter, Interview, Legacy, Citizen. Mail Submission section with Letter, Wait Days, Initials. Withdrawal Data section with Withdrawal Reason, Institution Attended.]
29	Enter *Y* for fee or *W* for waiver in the **Application Fee or Waiver** field.

IF you entered	THEN
Y in the **Application Fee or Waiver** field	skip this step.
W in the **Application Fee or Waiver** field	select a reason code in the **Application Fee Waiver** field.

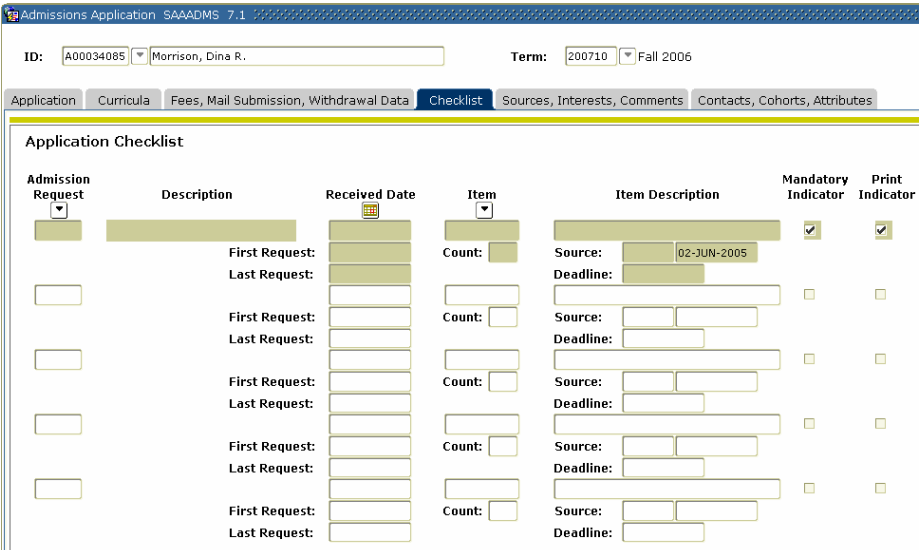| Step	Action
31	Select a letter code in the **Letter** field.
32	Enter a number of days you would like to wait before mailing the letter in the **Wait Days** field.
33	Enter your initials in the **Initials** field.

Procedure, continued

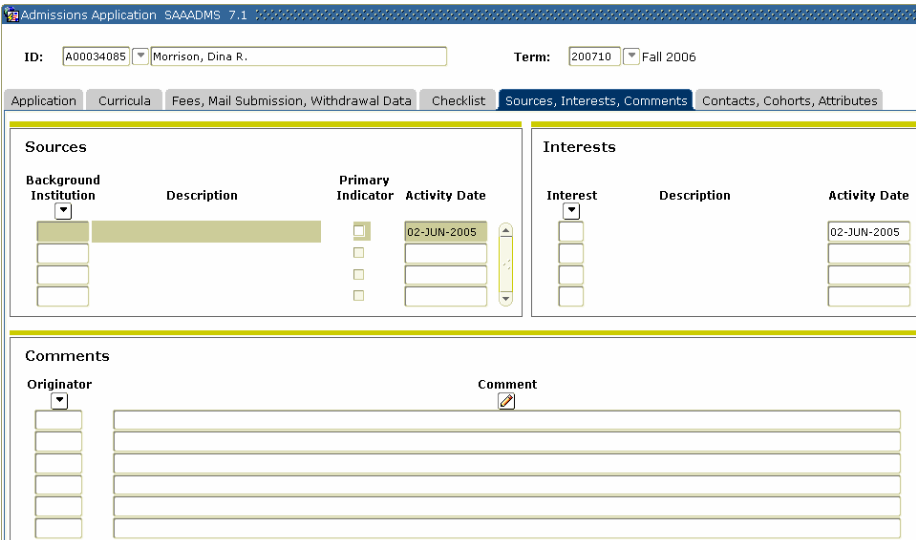| Step	Action
34	Select the <u>Checklist</u> tab. **Admissions Application SAAADMS 7.1** ID: A00034085 Morrison, Dina R. Term: 200710 Fall 2006 Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes **Application Checklist** Admission Request — Description — Received Date — Item — Item Description — Mandatory Indicator — Print Indicator First Request: Count: Source: 02-JUN-2005 Last Request: Deadline:
35	Enter a received date in the **Received** field, if appropriate. <u>Note</u>: If mandatory is checked, and a received date is entered, SCT Banner will automatically update the **Status** field on SAAADMS.
36	Select the item received in the **Item** field. <u>Example</u>: Select *GMAT* in the **Item** field corresponding to the Test Score Equivalent or a High School name in the **Item** field corresponding to the **High School Transcript** field. <u>Note</u>: The other fields on this form will be filled in based on the item selected.

Procedure, continued

Step	Action
37	Select the <u>Sources, Interests, Comments</u> tab.

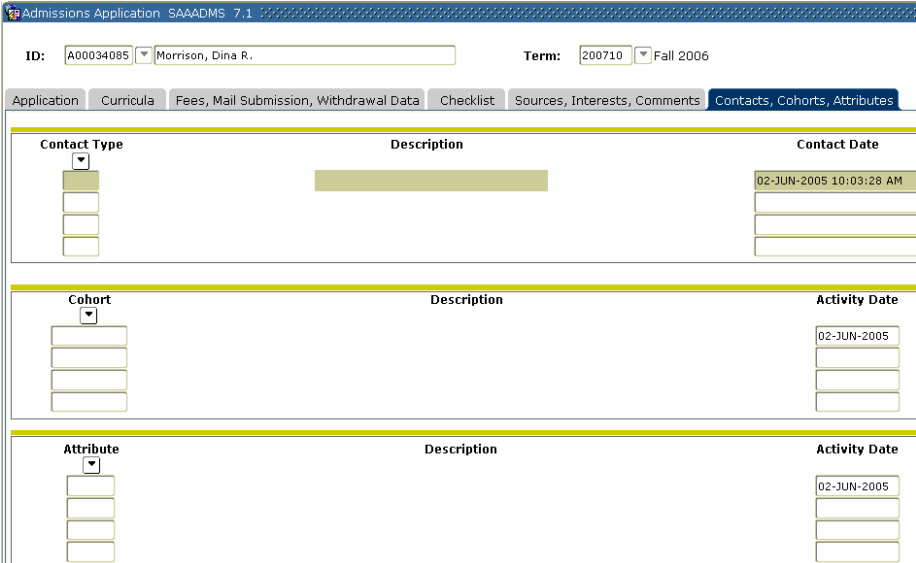| Step	Action
38	Select an interest code in the **Interest** field.
39	Perform a **Next Block** function to access the Comments block.
40	Select a comment originator in the **Originator** field.
41	Enter a comment in the **Comment** field.

Procedure, continued

Step	Action
42	Select the <u>Contacts, Cohorts, Attributes</u> tab. <u>Note</u>: Use this window if you want to track where the data about the applicant came from, whether this is the first contact with the applicant, etc. This is not required. ![Admissions Application SAAADMS 7.1 screen] ID: A00034085 ▼ Morrison, Dina R. Term: 200710 ▼ Fall 2006 Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments **Contacts, Cohorts, Attributes** **Contact Type** **Description** **Contact Date** ▼ 02-JUN-2005 10:03:28 AM **Cohort** **Description** **Activity Date** ▼ 02-JUN-2005 **Attribute** **Description** **Activity Date** ▼ 02-JUN-2005
43	Select a contact type code in the **Contact Type** field.
44	Select a cohort code in the **Cohort** field to be used in Student Right-to-Know (SGRKNOW) reporting. <u>Note</u>: SCT Banner does not require this field; however, federal law requires that institutions track their graduation rates.
45	Select an attribute code in the **Attributes** field to attach an attribute to the student.
46	Click the **Save** icon.
47	Click the **Exit** icon.

Section C: Day-to-Day Operations

Lesson: Withdrawing an Applicant

Introduction

The Fees, Mail Submission, Withdrawal Data tab on the Admissions Application Form (SAAADMS) is used to track applicants who are withdrawing from the application process, and to track the institutions the applicants have decided to attend.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Admissions Application Form (SAAADMS).
2	Enter the student's ID in the **ID** field.
3	Enter a term in the **Term** field.
4	Perform a **Next Block** function. Result: The term defaults in the **Entry Term** field.
5	Select the Fees, Mail Submission, Withdrawal Data tab.
6	Enter the reason the applicant is withdrawing in the **Withdrawal Reason** field.

Procedure, continued

IF the applicant declined	THEN
because they are attending another institution	select the other institution the applicant is attending in the **Institution Attended** field.
for any other reason	leave the **Institution Attended** field blank.

Step	Action
8	Click the **Save** icon.
9	Click the **OK** button.
10	Click the **Exit** icon.

Introduction

The Admissions Decision Form (SAADCRV) is used to assign a decision code to an application.

Note: You can also run the Admit Decision Calc Report (SARBDSN) to assign a decision code to an application.

SCT Banner form

Procedure

Follow these steps to assign a decision code to an application.

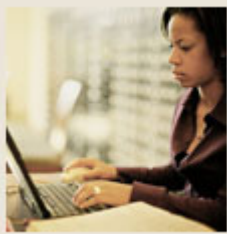| Step	Action
1	Access the Admissions Application Form (SAAADMS).
2	Enter the student's ID in the **ID** field.
3	Enter a term in the **Term** field.
4	Perform a **Next Block** function. Result: The term defaults in the **Entry Term** field.
5	Select <u>Assign Decisions to Application</u> from the **Options** menu. Result: The Admissions Decision Form (SAADCRV) opens.
6	Enter a decision code in the **Decision Code** field.

Procedure, continued

Step	Action
7	Click the **Significant Decision** checkbox if this is a significant decision. Note: Once you enter a significant decision (e.g., *Applicant Acceptance*) and save, this will create a General Student Record. Warning: After the General student record is created, changes made in the Admissions module do not go forward to General Student record. Changes going forward need to be made on either the Registration Form (SFAREGS) or the General Student record itself.
8	Click the **Save** icon.
9	Click the **Exit** icon to return to the Admissions Application Form (SAAADMS).
10	Click the **Exit** icon.

Introduction

The Admissions Decision Calculation Report (SARBDSN) is used to calculate automated decisions based on the user-defined rules on the Admissions Decision Rules Form (SAADSCN).

SCT Banner form

Procedure

Follow these steps to complete the report.

Step	Action
1	Access the Admissions Decision Calculation Report (SARBDSN).
2	Enter the desired printer name in the **Printer** field. Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

Procedure, continued

Step	Action
3	Enter these parameter values to specify populations to assign a decision code to or leave the **Value** fields blank to process all.

Parameter	Value
01: Applicant Entry Term	Enter the applicant entry term to process or *%* for all terms.
02: Admission Type	Enter the admission type code(s) to process.
03: Student Type	Enter the student type code(s) to process.
04: Major Codes	Enter the primary major code(s) to process.
05: Degree Code One	Enter the primary degree code(s) to process.
06: College Code One	Enter the primary college code(s) to process.
07: Level Code	Enter the level code(s) to process.
08: Residence Code	Enter the residence code(s) to process.
09: Application status code	Scroll and enter the application status code(s) to process.
10: Application decision code	Enter the application decision code(s) to process.
11: Apply decisions (Y=yes, N=No)	Enter *Y* to apply decisions or enter *N* to run in audit mode.
12: Program Code	Enter the program code to process.
13: Campus Code	Enter the campus code to process.
14: Citizen Code	Enter the citizen code to process.
15: Exclude Decision Code	Enter decision code to exclude. Note: Students with this decision code will not be processed.

Step	Action
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.

Procedure, continued

Step	Action
7	Click the **Save** icon to execute the report. Result: The Auto hint line displays the job submission number for the report log and list file.
8	Select **Review Output** on the Options menu to review the report.
9	Click the **Exit** icon.

◀ Jump to TOC

Introduction

The Prospect Information Summary option is used to roll information from a Prospect record to Admissions if you've collected that information. Once the information has been rolled, you can make any necessary changes on the Admissions Application Form (SAAADMS).

Note: This is a standalone query form used to display a summary of recruiting records for a prospect whether the records are active or inactive. A record is considered to be inactive if an institution attending or withdrawal reason code has been entered. Only active recruiting records are carried forward into admissions to create new admissions applications. The records are displayed in descending order by term or for the term entered in the Key Information. If neither the term nor level are entered, all records will display. If Term is entered, all records for that term and prior terms will be queried, and if Level is entered, only those records with an equal level will be displayed.

SCT Banner form

Procedure

Follow these steps to roll prospect information to the Admissions Application Form (SAAADMS).

Note: Each participant in the class must create a different Applicant record.

Procedure, continued

Step	Action
1	Access the Admissions Application Form (SAAADMS).
2	Enter the student's ID in the **ID** field.
3	Enter a term in the **Term** field.
4	Perform a **Next Block** function. Result: The term defaults in the **Entry Term** field.
5	Select Prospect Information Summary from the **Options** menu. Result: The Prospect Summary Form (SRASUMI) opens.
6	Double-click in the untitled field to return the Prospect record to SAAADMS. Note: You can also click the **Select** icon.
7	Review the prospect record and make any updates or changes as necessary. Note: If necessary, refer back to the *Entering an Applicant* exercise for specific guidelines on how to complete the fields on SAAADMS.
8	Click the **Save** icon. Result: The Communication Plan Change window opens.

IF	THEN
a Recruit Plan exists	click the **Active** indicator to delete this plan.
Pending Mail exists	enter *Y* in the **Delete mail** indicator.

10	Click the **Return** button to return to SAAADMS.
11	Click the **Exit** icon.

Introduction

The Quick Entry Form (SAAQUIK) is used to add a student to the system as quickly as possible by entering only the necessary information needed.

Example: On the day before classes are to begin, a student accepts an offer of admissions and requests to be scheduled for the term. The student needs to be added to the system as quickly as possible in order to be scheduled for classes. The institution may elect to set up Quick Entry Rules (SAAQKER) in order to expedite data entry, based on a term and the student's level.

SCT Banner form

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Quick Entry Form (SAAQUIK).
2	Select *Generate ID* in the **Options** menu, or enter *GENERATED* in the **ID** field and press Enter to open the Current Identification window. Result: The Current Identification window opens. Current Identification SAAQUIK 7.1 ID: GENERATED Last Name: First Name: Middle Name: Note: Generated ID Being Used for Addition of New Person Press or Select SAVE to Create ID. Cancel
3	Enter values in the **Last Name**, **First Name**, and **Middle Name** fields. Note: Each participant must create a unique student. Make a note of the student's name and ID because they will be used in future lessons.
4	Click the **Save** icon.
5	Double-click in the **Term** field to select a term.
6	Double-click in the **Level** field and select *Undergraduate*.
7	Perform a **Next Block** function.
8	Click the **Enter Address** checkbox. Result: The Address tab opens.
9	Enter a date in the **From Date** field.
10	Select an address type in the **Address Type** field.
11	Enter a street address in the **Street Line 1** field.
12	Enter a city in the **City** field.

Procedure, continued

Step	Action
13	Enter a state or province code in the **State or Province** field.
14	Enter a zip or postal code in the **Zip or Postal Code** field.
15	Select a telephone type in the **Telephone Type** field.
16	Enter a telephone number in the **Telephone Number** field.
17	Click the **Save** icon.
18	Select the Quick Admit tab.
19	Click either the **Male** or **Female Gender** radio button.
20	Enter a date in DD-MM-YYYY format in the **Date of Birth** field.
21	Select an ethnicity code in the **Ethnic** field. Note: Your institution may not request this information. If it does not, the field can be left blank.
17	Select a citizenship code in the **Citizenship** field. Note: Your institution may not request this information. If it does not, the field can be left blank.
18	Select a student type in the **Student Type** field. Example: New First Time
19	Select *Active* in the **Student Status** field.
20	Select a residency code in the **Residence** field.
21	Enter *F* if the student is full time or *P* if the student is part time in the **Full or Part Time** field.
22	Select a rate code in the **Rate** field.
23	Select an education goal in the **Education Goal** field.
24	Select an education level in the **Education Level** field.
25	Click the **Create Application Record** checkbox.
26	Select the type of admissions in the **Admissions Type** field.
27	Select an application status code in the **Application Status** field.
28	Select an admissions decision in the **Admissions Decision** field.
29	Perform a **Next Block** function.
30	Select a catalog term in the **Catalog Term** field.
31	Enter a priority number that identifies curriculum rank in the **Priority** field.

Procedure, continued

Step	Action
32	Select a program from the <u>All Programs</u> option in the **Program** field. Note: The **College**, **Level**, and **Degree** fields may be filled in for you based on the program selected. If not, select values for these fields.
33	Select a campus code in the **Campus** field.
34	Enter a field of study priority number in the **Priority** field.
35	Select *Major* in the **Type** field.
36	Select a major, minor, or concentration code in the **Field of Study** field.
37	Click the **Save** icon.
38	Click the **OK** button to acknowledge that the records have been saved. Result: The Communication Plan window opens.
39	Click the **Save** icon to save the communication plan.
40	Click the **Return** button.
41	Click the **Exit** icon.

Let's review

As a result of completing this workbook, you have

- run the Admissions Decision Criteria Report
- admitted an applicant
- withdrawn a student
- assigned a decision code
- run the Admissions Decision Calculation Report
- rolled prospect information to Admissions
- performed a quick admit.

Directions

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

Question 1

What form do you use to add a student to the system as quickly as possible in order to be scheduled for classes?

Question 2

How do you roll default prospect data to the Admissions module?

Question 1

What form do you use to add a student to the system as quickly as possible in order to be scheduled for classes?

The Quick Entry Form (SAAQUIK).

Question 2

How do you roll default prospect data to the Admissions module?

Prospect data is rolled to the Admission module on the Admissions Application Form (SAAADMS) using the Prospect Information Summary option.

Jump to TOC

Introduction

The purpose of this section is to provide reference materials related to the workbook.

Section contents

Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Letter Code Validation	GTVLETR	All of the validations forms are needed to use the Admissions Application Form and Quick Entry Form (SAAQUIK).	
Paragraph Code Validation	GTVPARA		
Admissions Checklist Rules	SAACHKB		
Admissions Decision Rules	SAADCSN		
Admissions Decision Criteria Report	SARDCSN		
Admissions Decision Calculation Report	SARBDSN		
Quick Entry Rules	SAAQKER		
Admission Request Checklist Code Validation	STVADMR		
Admission Type Code Validation	STVADMT		
Admission Application Decision Code Validation	STVAPDC		
Admission Application Status Code Validation	STVAPST		
Student Attribute Validation	STVATTS		
Address Type Code Validation	STVATYP		
Campus Code Validation	STVCAMP		
Communication Group Code Validation	STVCGRP		
Cohort Code Validation	STVCHRT		
Citizen Type Code Validation	STVCITZ		
County Code Validation	STVCNTY		
College Code Validation	STVCOLL		
Communication Plan Code Validation	STVCPLN		
State/Province Code Validation	STVSTAT		
Contact Type Code Validation	STVCTYP		

Procedure, continued

Set Up Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Degree Code Validation	STVDEGC	All of the validations forms are needed to use the Admissions Application Form and Quick Entry Form (SAAQUIK).	
Department Code Validation	STVDEPT		
Diploma Type Validation	STVDPLM		
Duplicate Material Code Validation	STVDPMR		
Education Level Code Validation	STVEDLV		
Education Goal Validation	STVEGOL		
IPEDS Ethnic Code Validation	STVETCT		
Ethnic Code Validation	STVETHN		
Institutional Honors Code Validation	STVHONR		
Initials Code Validation	STVINIT		
Outside Interest Code Validation	STVINTS		
Interview Code Validation	STVINTV		
Level Code Validation	STVLEVL		
Legacy Code Validation	STVLGCY		
Major, Minor, Concentration Code Validation	STVMAJR		
Material Code Validation	STVMATL		
Nation Code Validation	STVNATN		
Student Fee Assessment Code Validation	STVRATE		
Relation Code Validation	STVRELT		
Residence Code Validation	STVRESD		
Recruit Type Validation	STVRTYP		
Source/Background Institution Code Validation	STVSBGI		
High School Subject Validation	STVSBJC		

Procedure, continued

Set Up Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Session Code Validation	STVSESS	All of the validations forms are needed to use the Admissions Application Form and Quick Entry Form (SAAQUIK).	
Site Code Validation	STVSITE		
Student Status Code Validation	STVSTST		
Student Type Code Validation	STVSTYP		
Test Score Administration Type Code Validation	STVTADM		
Test Accommodation Validation	STVTEAC		
Test Form Validation	STVTEFR		
Test Instrument Validation	STVTEIN		
Telephone Type Validation	STVTELE		
Term Code Validation	STVTERM		
Test Purpose Validation	STVTEPR		
Test Code Validation	STVTESC		
Admission Test Score Source Code Validation	STVTSRC		
Visa Type Code Validation	STVVTYP		

Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Admissions Application Form (SAAADMS) Quick Entry Form (SAAQUIK)	• All of the validations forms are needed to use the Admissions Application Form and Quick Entry Form (SAAQUIK).

Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
STVATYP	Address Type Code Validation	
STVCITZ	Citizen Type Code Validation	
STVCNTY	County Code Validation	
STVSTAT	State/Province Code Validation	
GTVLETR	Letter Code Validation	
GTVPARA	Paragraph Code Validation	
STVADMR	Admission Request Checklist Code Validation	
STVADMT	Admission Type Code Validation	
STVAPDC	Admission Application Decision Code Validation	
STVAPST	Admission Application Status Code Validation	
STVATTS	Student Attribute Validation	
STVCGRP	Communication Group Code Validation	
STVCHRT	Cohort Code Validation	
STVCPLN	Communication Plan Code Validation	
STVCTYP	Contact Type Code Validation	
STVDPLM	Diploma Type Validation	
STVDPMR	Duplicate Material Code Validation	
STVEDLV	Education Level Code Validation	
STVEGOL	Education Goal Validation	
STVETCT	IPEDS Ethnic Code Validation	
STVETHN	Ethnic Code Validation	
STVHONR	Institutional Honors Code Validation	
STVINIT	Initials Code Validation	
STVINTS	Outside Interest Code Validation	
STVINTV	Interview Code Validation	
STVLEVL	Level Code Validation	
STVLGCY	Legacy Code Validation	

Guide, continued

Form Name	Form Description	Owner
STVMATL	Material Code Validation	
STVRATE	Student Fee Assessment Code Validation	
STVRELT	Relation Code Validation	
STVRESD	Residence Code Validation	
STVRTYP	Recruit Type Validation	
STVSBGI	Source/Background Institution Code Validation	
STVSBJC	High School Subject Validation	
STVSESS	Session Code Validation	
STVSITE	Site Code Validation	
STVSTST	Student Status Code Validation	
STVSTYP	Student Type Code Validation	
STVTADM	Test Score Administration Type Code Validation	
STVTEAC	Test Accommodation Validation	
STVTEFR	Test Form Validation	
STVTEIN	Test Instrument Validation	
STVTELE	Telephone Type Validation	
STVTERM	Term Code Validation	
STVTEPR	Test Purpose Validation	
STVTESC	Test Code Validation	
STVTSRC	Admission Test Score Source Code Validation	
STVVTYP	Visa Type Code Validation	
SAACHKB	Admissions Checklist Rules	
SAADCSN	Admissions Decision Rules	
SAAQKER	Quick Entry Rules	

Release Date

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