

SUNGARD SCT HIGHER EDUCATION

SCT Banner Student Fee Assessment Training Workbook October 2005 Release 7.2

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately assess fees for registered students. This workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-Day Operations
- Reference.

Intended audience

The staff of the Registrar's office and selected personnel from the business office.

Prerequisites

To complete this workbook, you should have

- completed the SunGard SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7 Fundamentals," or have equivalent experience navigating in the SCT Banner system
- completed the General Person and Registration training workbooks
- administrative rights to create the rules and set the validation codes in SCT Banner.

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The bursar's office, in conjunction with the registrar's office is responsible for setting up the fee assessment control forms as they pertain to registration and billing.

Flow diagram

This diagram highlights where the Fee Assessment process occurs within the overall Student process.



About the process

- In the Fee Assessment process, bursars and registrars define rules for Fee Assessment and develop refunding tables for a term.
- The student registers for classes and an on-line Fee Assessment will immediately generate charges.
- The bursar then assesses fees in batch and generates a bill.
- Finally, a student receives the bill.



Query only

A report mode that lets you look up and view information but not change the data.

Rules form

A type of form in which you define how data is processed in SCT Banner.

Validation form

A type of set up form in which you define choices for other forms. This helps to ensure consistency of data entry.



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

Before developing Fee Assessment rules and processing data, several forms and rules need to be set or created. These rules and validation forms are used frequently in the Fee Assessment module.

Intended audience

The staff of the Registrar's office and Business office that is responsible for student bills, registration, and refunds

Objectives

At the end of this section, you will be able to create the rules and set parameters used to process the data and develop the Fee Assessment control forms.

Prerequisites

To complete this section, you should have

- completed the SunGard SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7 Fundamentals," or have equivalent experience navigating in the SCT Banner system
- completed the General Person and Registration training workbooks
- administrative rights to create the rules and set the validation codes in SCT Banner.

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The Enrollment Status Control Form (SFAESTS) is used to set up enrollment codes, and refund rules for a term.

SCT Banner form

Term:	trol Form SFAESTS 7.0 (s4b70)				aaaaadd <u>y</u> x
	Description		Start Date Image: Control of the second s	End Date	
Enrollment Status	s Refund Rules		Percentage	Percentage	
	Start Date Image: Control of the start of the star	End Date	Tuition Refund	Fees Refund	

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Enrollment Status Form (SFAESTS).
2	Select a term in the Term field.
3	Select an enrollment status code in the Status field in the Enrollment Status Dates block.
	Note: The Description , Start Date , and End Date fields are populated by SCT Banner
	based on the status code selected.
4	Perform a Next Block function.
5	Enter the refund start date in the Start Date field.
6	Enter the refund end date in the End Date field.
7	Enter a percentage in the Percentage Tuition Refund field for the date range.
8	Enter a percentage in the Percentage Fees Refund field for the date range.
9	Click in the Status field to start another date range for the enrollment status code.



Procedure, continued

Step	Action
10	Repeat steps 5-9 to enter additional date ranges and their associated refund percentages.
11	Click the Save icon.
12	Click the Exit icon.



The Course Registration Status Form (SFARSTS) is used to define course status codes, and refund rules for courses.

<u>Note</u>: Status values are user-defined, with the exception of the "RE" (Register Course) status, which must be used as the default for a student's course registration. While the "RE" status is required, its attributes may be defined according to your institution's policy.

Prior to entering the data on this form, the status codes must have been entered on the Course Registration Status Code Validation Form (STVRSTS). While the validation form spans time, the Course Registration Status Form is specific for a term. This allows you to modify status information from one term to the next.

SCT Banner form

Course Registratio	n Status Form SFARSTS 7.0 (s4b70)	Part of Term:		0000000000000000000000 ⊻ >
Course Registr	ation Status Dates			
Status ▼ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	Description	Affected By Student Status	Start Date End Date	Voice Response Indicator
Course Registr Status	ration Status Refund Rules Start Date	End Date	Percentage Tuition Refund	Percentage Fees Refund



Section B: Set Up

Lesson: Defining Course Registration Status (Continued)

🜒 Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Course Registration Status Form (SFARSTS).
2	Enter a term code in the Term field.
3	Select an overall term code in the Part of Term field.
	Example: Select Fall II 2006 in the Term field and Fall 2006 in the Part of Term
	field. This is used by institutions that have two seven week courses as well as 14 week
	courses in the same semester. The Fall I courses would begin in September while the
	Fall II courses would begin in mid-October. The withdraw dates for the Fall II courses
	would be different from the dates for the Fall I courses.
4	Select an enrollment status code in the Status field in the Enrollment Status Dates
	block.
	Note: The Description , Start Date , and End Date fields are populated by SCT Banner
	based on the status code selected.
5	Click the Affected by Student Status checkbox if you want this code to be affected by
	the registration status of the student.
6	Click the Voice Response Indicator checkbox if your institution uses telephone
	registration.
7	Perform a Next Block function.
8	Enter the refund start date in the Start Date field.
9	Enter the refund end date in the End Date field.
10	Enter a percentage in the Percentage Tuition Refund field for the date range.
11	Enter a percentage in the Percentage Fees Refund field for the date range.
12	Click in the Status field to start another date range for the enrollment status code.
13	Repeat steps 8-12 to enter additional date ranges and their associated refund
	percentages.
14	Click the Save icon.
15	Click the Exit icon.



Before assessing any fees, the Fee Assessment Control Form must be set up, one time per semester. Rules may be copied from one term to another, future or past.

The Registration Fee Assessment Rules Form (SFARGFE) allows you to define basic tuition and fees for your students. Your instructor will discuss the various options you have based on how you currently assess tuition and fees at your enterprise.

Your instructor will review each window with you. Based on how you assess tuition and fees, you will use one or more of these windows.

SCT Banner form

gistration Fee Assessment Rules	SFARGFE 7.0 (s4b70) NOC	***************************************	↔↔↔↔↔↔↔↔↔↔↔↔↔↔↔↔↔↔↔<
rm: 200610 💌 by Rules to New Term 😰		Rule Type: 🗾 💌	Entry Type: 🗾 🗸 📕 Process Copy Indicator Setting
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hedule Type:	Degree:	 Course Overload Start Hours: 	Activity
P A Assess by Course John Type: V John Attribute: V John Attribute	Admission Term: Program: Residency: Degree:	Liable Billing Hours From: Total Student Liable Hours From: V Registration Dates From: Flat Charge Hours Range From: Flat Charge Amount: Course Overload Start Hours:	To: To: To: To: User: Activity Date:

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Registration Fee Assessment Rules Form (SFARGFE).
	Note: The following procedures will establish Fee Assessment rules based on <i>Charges</i> by <i>Student Characteristics Option</i> .



Section B: Set Up

Lesson: Defining Fee Assessment Rules (Continued)

d Jump to TOC

Procedure, continued

Step	Action
2	Enter a term in the Term field.
3	Select Student in the Rule Type field.
4	Select <i>Regular</i> in the Entry Type field.
5	Click the Set Copy Indicator checkbox if the rule can be copied to another term.
6	Perform a Next Block function.
	Note: To create a new Fee Assessment rule you may need to perform an Insert Record
	function, or move your cursor to a blank line.
7	Select a tuition detail code in the Tuition Detail field.
8	Enter an amount in the Per Credit Charge field.
9	Enter amounts in both of the Min/Max Charge fields.
	Note: These fields are the minimum and maximum amount that can be associated with
	this Detail code.
10	Leave the Override checkbox unchecked.
11	Enter UG in the Course Level field to make this charge applicable to undergraduates
	only.
12	Enter a code in the Part of Term field to apply this charge only to courses that match
	that term code.
	<u>Note</u> : When creating Fee Assessment rules for Open Learning Courses leave the Part
	of Term field blank.
13	Enter the lowest number of student hours for this charge to be effective in the Liable
	Billing Hours From field.
14	Enter the highest number of student hours for this charge to be effective in the Liable
	Billing Hours To field.
15	Click the Save icon.
16	Select Charges by Course Level Rules from the Options menu.
	<u>Note</u> : Here tees are related to the level of the course rather than the level of the student.



Section B: Set Up

Lesson: Defining Fee Assessment Rules (Continued)

🚽 Jump to TOC

Procedure, continued

Step	Action
17	Select Charges by Course Campus Rules from the Options menu.
	Note: Here fees are based on the campus that is associated with a particular course.
18	Select Charges by Course Attribute Rules from the Options menu.
	Note: Here fees are based on the course attributes that are associated with a particular
	course.
19	Click the Exit icon.



Now that the Fee Assessment rules have been defined, you may assess fees in one of two ways: online fee assessment at the time of registration, or batch assessment after registration and after drop/add. The following will establish rules for online Fee Assessment.

SCT Banner form

Use the Term Control Form (SOATERM) to establish controls for a specific term, such as registration fee assessment rules, registration error checking, and part-of-term information.

<u>Note</u>: Values and options related to fee assessment reside solely on the Term Control Form (SOATERM). In previous SCT Banner releases, some of these values and options resided on the Crosswalk Validation Form (GTVSDAX).

Term: Schedule CRN Starting Sequence Number:			
Schedule CRN Starting Sequence Number:			
Registration Fee Assessment			
In Progress Hold Password: On-line Assessment Reverse Non Tuition/Fee Charges Descript Track by CPN			
Calculate Time Status Refund by Total Effective Date:			
Include Attempted Hours Set Registration Error Checking Allow Swapping Original Charge Cutoff Date:			
Gradebook Parameters Title IV Date Source			
Process Gradebook Controls OTerm Date Part-of-Term Dates			
Web Self-Service, Voice Response and Partner Systems			
Fee Assessment Control Settings			
On-line Assessment OBatch Update OPrint Bill Master Web Term Control			
OBatch Only Image: Not Available Image: Synchronize Partner Systems Process Web Controls			



Section B: Set Up

Online vs. batch fee assessment

If you do not want to use online fee assessment, but do all assessment by batch, make sure the **On-line Assessment** checkbox on the Term Control Form (SOATERM) is not checked. This prevents Fee Assessment from taking place online and will not put any collector records in the Registration Batch Fee Assessment Collector table (SFRBTCH) when using the Student Course Registration Form (SFAREGS).

Note: To perform batch assessment, run the Batch Fee Assessment Process (SFRFASC).

Swapping processing

You have the ability to use optional swapping processing with refund by course refund processing. Swapping can be defined as the exchange (dropping and adding) of billing hours within the same day with no additional liability. This functionally is optional; an institution can choose to invoke this functionally or use the current processing with liability for dropped hours.

The **Allow Swapping** checkbox allows you to turn on swapping on a term-by-term basis if desired.

<u>Note</u>: Open learning courses are not considered in the swapping algorithm, as they carry their own refund method. Section fees are not considered as part of swapping processing. If section fees are attached to a course that later is used for swapping, the section fee liability remains.

Reversing non-tuition charges

The new **Reverse Non Tuition/Fee Charges** checkbox enables you to allow registration fee assessment to reverse non-tuition or non-fee charges for detail codes with a category code other than *TUI* or *FEE*.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Term Control Form (SOATERM).
2	Enter the term code (same one that was used in SFARGFE) in the Term field.
3	Perform a Next Block function.
4	Click the On-line Assessment checkbox in the Registration Fee Assessment block.
5	Click the Allow Swapping checkbox, if appropriate.
6	Click the Reverse Non Tuition/Fee Charges checkbox, if appropriate.



Procedure, continued

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



Institutions have the option to develop additional, term-based fees. These fees must be set up one time per semester.

The Registration Additional Fees Form (SFAAFEE) is part of the Registration menu and enables you to add specific (optional) fees to the account of a particular student. This should be used only when the fees are not general enough to be assigned to specific course sections using the Schedule Detail form (SSADETL) or from the Registration Fee Assessment Rules Form (SFARGFE).

SCT Banner form

The Registration Additional Fees Form (SFAAFEE)

🙀 Registration Ad	ditional Fees Control SFAAFE	EE 7.1 00000000000000000000
Term:		
Detail	Description	Amount

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Registration Additional Fees Form (SFAAFEE).
	Note: This is a rules form that is term-specific.
2	Enter a term in the Term field.
3	Perform a Next Block function or click in the Detail field.



Procedure, continued

Step	Action
4	Select term-specific detail codes in the Detail field for additional charges that you may
	want to add to students' accounts on an ad-hoc basis.
5	Click the Save icon.
6	Click the Exit icon.



Directions

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

Question 1

Which form is used to define Fee Assessment rules?



Question 1

Which form is used to define Fee Assessment rules?

The Registration Fee Assessment Rules Form (SFARGFE) is used to define Fee Assessment Rules.



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

Intended audience

The staff of the registrar's office and selected personnel from the business office.

Objectives

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

- assess fees on-line
- assign fees to a student for a term.

Prerequisites

To complete this section, you should have completed

- the SunGard SCT Education Practices computer-based training (CBT) tutorial "SCT Banner 7 Fundamentals," or have equivalent experience navigating in the SCT Banner system
- the General Person and Registration training workbooks.

You will also need to ensure that the rules and validation codes in SCT Banner needed for the Fee Assessment module have been set up for you.

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This course is intended to teach you about setting up and running the Fee Assessment process.

Flow diagram

This flow chart highlights specifically what the Fee Assessment process would look like on a day to day basis.



What happens

The stages of the process are described in this table.

Stage	Description	
Bursar and Registrar		
1a	Define Fee Assessment rules	
1b	Develop refunding tables for a term	
Student		
2	Registers for classes	
Bursar		
3a	Assess fees in batch	
3b	Generates a bill	
Student		
4	Receives bill (on-line or paper)	



Students must be registered prior to assessing fees.

The first time (each day) that you access the Student Course Registration form (SFAREGS), the system automatically displays the Student System Distribution Initialization Info form (SOADEST). Double-click in the appropriate field in order to select the appropriate printer you will use for each process, or exit if no printer needs to be selected.

Additional fees, as defined on the Registration Additional Fees Form (SFAAFEE), will be applied to students through the Course Registration Form.

SCT Banner form

Student Course Registration Form (SFAREGS)

Eprollment Information				
Status: V Reason: V	Status Date: 🗌 🗆 Delete A	Acceptanc II CRNs Pro	e: Maximum Hou cess Block:	ırs: 💽 🔻
Course Information	Grade Credit	Bill Approval	Part of Method of	Error Status
	Section Mode Hours Image: Section Mode Image: Section Mode Image: Section Mode Image: Section Mode			



Section C: Day--Day Operations

Lesson: Assessing Fees Online (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action	
1	Access the Student Course Registration Form (SFAREGS).	
2	Enter the term code in the Term field.	
3	Select the student's ID in the ID field.	
4	Perform a Next Block function.	
5	Complete the Registration Information block, if appropriate.	
	<u>Note</u> : The values in the Status , Status Date , Acceptance , and Maximum Hours fields are entered by SCT Banner.	
6	Perform a Next Block function.	
7	Select a course registration number in the CRN field to assign courses to a student.	
8	Repeat step 7 as needed to assign additional courses.	
9	Click the Save icon to save the registration.	
	<u>Result</u> : The fees window at the bottom of the screen is now highlighted. <i>Y</i> - <i>Immediate</i> is automatically displayed in the Fee field. <u>Note</u> : For the Batch Fee Assessment process, the indicator should be $N - Create$ collector record in the Fee field.	
10	Click the Save icon.	
11	Click OK to acknowledge the transaction.	
12	Select Charge Optional Registration Fees in the Options menu.	
	Term: 200610 ID: A00029554 Student, Alex P. Code Description Charge Activity Date Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code	
13	Perform a Next Block function.	
14	Select a registration fee code in the Code field.	
	<u>Note</u> : The only fees that may be added on this form are fees that have been defined on SFAAFEE.	



Procedure, continued

Step	Action
15	Click the Save icon.
16	Click the Exit icon.
	<u>Note</u> : You are returned to the key block of the Student Course Registration Form (SFAREGS). The Optional Registration Fees may be assessed immediately:
17	Perform a Next Block function.
18	Perform another Next Block function.
19	Click the Save icon to access the Process Fees option ('Y' should be the default).
20	Click the Save icon to process the charges.
21	Click the OK button.



Procedure

Follow the steps below to review the assessment/account process.

<u>Notes</u>: Proceed with Reviewing the Assessment as outlined below and the Optional Registration Fees will be displayed.

Using the Batch Fee Assessment Process (SFRFASC) will assess The Optional Registration Fees.

No additional action is required in the Course Registration Form SFAREGS.

biep	Action						
22	You should still be in the key block of the Student Course Registration Form						
	(SFAREGS). If	(SFAREGS). If not, access the form and verify or enter the appropriate Term code and					
	ID number.		-				
23	Select Review St	udent's Classes	s and Charges fro	m the Opti	ons menu to ac	cess the	
	Student Course/F	ee Assessment	Query Form (SF	AREGF).			
				,			
	🙀 Student Course/Fee Assess	ment Query SFAREGF 7.2	000000000000000000000000000000000000000		000000000000000000000000000000000000000	000000000000000 🗹 🗙	
	Term: 200610	Refund By Total Refund D	ate: ID:	A00019687 💌 Mullia	an, Barbara		
	Torm Enrollmont Sun	202254					
	rerm Enrollment Sun	imary	P	ercentage Pe	rcentage		
	Status Descripti	on Status Date	e Tuit	ion Refund Fee	e Refund		
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	Term Degistration Summary						
	Term Registration S	ummary			Dercent Dercent		
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	CRN Subject Cour	Credit se Section Hours	Bill Hours Level Campus	Status Status Date	Percent Percent Tuition Fee Refund Refund	Message	
	CRN Subject Cour	ummary Credit rse Section Hours	Bill Hours Level Campus	Status Status Date	Percent Percent Tuition Fee Refund Refund	Message	
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Section C: Day--Day Operations

Lesson: Assessing Fees Online (Continued)

Jump to TOC

Reviewing the assessment/ account, continued

Step	Action						
24	Select either Fee Assessment Without Min/Max Applied or the Fee Assessment With						
	Min/Max Applied from the Options menu according to your institutions Fee						
	Assessment policy.						
	Options Block Item Record Query Tools Wi						
	Eee Assessment Without Min/Max Applied						
	Eee Assessment With Min/Max Applied						
	Detailed Student Information						
	Registration Fee Assessment Rules						
	Registration Fees Min/Max Charge Control						
	Registration Fee Assessment Audit [SFAFAUD]						
	Note: If you attempt to navigate in the Student Course Fee Assessment Query Form the						
	fees will not remain visible. You need to exit the form (SFAREGF), return to the						
	Student Course Registration form (SFAREGS), then select the Review Student's Classes						
	and Charges in the Options menu and proceed with the query as outlined above.						



Section C: Day--Day Operations

Lesson: Assessing Fees Online (Continued)

Jump to TOC

Reviewing the assessment/ account, continued

Ste				Action					
р									
25	Click the	he Exit icon to retu	rn to the	Student Cours	e Registration	Form.			
26	Select	Review Account De	<u>etail</u> in th	ne Options me	nu to access th	e Account D	etail R	leview	
	Form (TSAAREV).								
	Result:	This will bring up	another	Printer Destin	ation screen, T	OADEST. I	Exit fro	om this	
	screen	to review the accou	ınt.						
	100								
	🗑 Account	Detail Review Form - Student T	ISAAREV 7.2 :	*******************				***************	
	ID: A	00019687 💌 Barbara Mulligan			Credit Limit:				
		Us	ser: SAISUS	R	Holds:				
	•	nt Dataila							
	Detail	nt Details					Source	Effective	
	Code	Description	Term	Charge	Payment	Balance	Code	Date	
	T102	Graduate Tuition	200310	8,888,888,888.88		8,888,888,888.88	R	29-JUL-2004	
	T101	Undergraduate Tuition	200310	15.00		15.00	R	29-JUL-2004	
							П		
							ğ		
							Ŭ		
							U		
	Quer	y Balance Account Ba	alance	Amount Due	Memo Balance	Authoriz Aid Balan	ed ice	NSF Rei	
	8,88	8,888,903.88 8,888,888	8,903.88	8,888,888,903.88	.00		.00	•	
27	Review	the account							
$\frac{27}{28}$	Click t	he Exit icon to retu	rn to the	Student Cours	e Registration	Form (SFAF	REGS		



The Student Course/Fee Assessment Query Form (SFAREGF) is a query only form, accessed through the Student Course Registration Form (SFAREGS), or through direct access and displays a student's registration and associated fees.

<u>Note</u>: These instructions are provided for those who wish to go back and review a record. The process was covered in the previous procedure.

SCT Banner form

🙀 Student	Course/Fee .	Assessmei	nt Query und By To	SFAREGF 7.2	000000000			A00019	687 T Mullig	90000000000	 a		xx ⊻×
Term Eprollment Summary													
Percentage Percentage Status Description Status Date Tuition Refund													
Term F	Registrati Subject	on Sum Course	mary Section	Credit Hours	Bill Hours	Level	Campus	Status	Status Date	Percent Tuition Refund	Percent Fee Refund	Message	
Total Cr	edit Hours:				Tota	l Bill Hou	irs:				CE	U Hours:	



Section C: Day--Day Operations

Lesson: Reviewing the Student Course/Fee Assessment Query (Continued)

🚽 Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Student Course Registration Form (SFAREGS).
2	Enter a term in the Term field.
3	Enter a student ID in the ID field.
4	Select Review Student's Classes and Charges from the Options menu to access the
	Student Course/Fee Assessment Query Form (SFAREGF).
5	Perform a Next Block function.
6	Click the Exit icon to return to the Student Course Registration Form (SFAREGS).



The Account Detail Review Form (TSAAREV) is used for viewing and updating charges to a student's account.

SCT Banner form

🙀 Account	: Detail Review Form - Studen	t TSAAREV 7.2 🕻	000000000000000000000000000000000000000		000000000000000000000000000000000000000		20000000 <u>≤</u> ×
ID: A	00019687) 💌 Barbara Mulligan	User: SAISUS	٦	Credit Lin Holds:	nit:		
Accou Detail Code	nt Details Description	Term	Charge	Payment	Balance	Source Effec Code Dat	tive e
102	Graduate Tuition	200310	8,888,888,888.88		8,888,888,888.88	R 29-JUL-	2004
	Undergraduate Tuition						
Quer 8,88	y Balance Accoun 88,888,903.88 8,888	t Balance ,888,903.88	Amount Due 8,888,888,903.88	Memo Balance	Authoriz e Aid Balar .00	ed nce NSF .00 0	Receipt?



Section C: Day--Day Operations

Lesson: Reviewing the Account Detail (Continued)

🚽 Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Student Course Registration Form (SFAREGS).
2	Enter a term in the Term field.
3	Enter a student ID in the ID field.
4	Select Review Account Detail in the Options menu to access the Account Detail Review
	Form (TSAAREV).
	<u>Result</u> : This will bring up another Printer Destination screen, TOADEST. Exit from
	this screen to review the account.
5	Perform a Next Block function.
6	Select a registration fee in the Detail Code field.
7	Click the Save icon.
8	Click the Exit icon to return to the Student Course Registration Form (SFAREGS).
9	Click the Exit icon.



The Fee Assessment Report (SFRFEES) is used to assist in troubleshooting and debugging fee assessment processing. It is intended to be an efficient way to gather needed information when a question arises on fee assessment.

This report lists various data values stored for a student that have the potential to meet registration assessment rule criteria. The values displayed are for enrollment data, student data, curriculum data, course registration data, optional mock fee assessment data, previous and current fee assessment, and accounts receivable records. The report processes a single ID or a population selection for a term. This report may be used for assessment verification and can be helpful when troubleshooting assessment results.

Other uses

This report can also be used as a tool for institutions to evaluate their processing rules or check on a specific group of students.

<u>Example 1</u>: An institution may want to update a rule. They could take a sample population selection, and then compare the current assessment with a mock assessment to determine if this change would be appropriate.

<u>Example 2</u>: A user may want to review assessment results for students who have a specific drop registration status (i.e., *DD*). The user would create a population selection containing these students, and run the report. This allows an easy comparison between the current assessment and the previous one, in order to determine if the refund was performed correctly.



SCT Banner process

Process Process	Submission Controls GJAPCTL 7.2 20000000000000000000000000000000000	Parameter Set:
Printer Printer:	r Control	Lines: 55 Submit Time:
Param Number	neter Values Parameters V	Values 🔽
01	Term	
02	Student ID	
03	Application Code	
04	Selection ID	
05	Creator ID	
06	User ID	
07	Mock assessment indicator	Ν
08	Mock assessment effective date	
LENGTH: Registra	: 6 TYPE: Character O/R: Required M/S: Single ition term.	
Submi:	SSION Parameter Set as Name: Description:	Generation Hold Submit



Section C: Day--Day Operations

Lesson: Using the Fee Assessment Report (Continued)

🜒 Jump to TOC

Procedure

Follow these steps to use the report.

Step	Action						
1	Access the Fee Assessment Report (SFRFEES).						
2	Perform a	a Next Block function.					
3	Enter the	appropriate printer or type DATABASE in the Printer field.					
4	Perform a	a Next Block function.					
5	Enter the	parameters as appropriate.					
	<u>Note</u> : Us	e the table as a guide to the parameters.					
Para	ameter	Description	Req?				
Term		Registration term for which fee assessment is to be reported.	Х				
Student	ID	ID of the student for which fee assessment is to be reported.					
Applica	ation	Code that identifies the general area for which the selection					
Code		identifier was defined.					
		<u>Note</u> : All or none of the population selection parameters must					
		be entered					
Selection	on ID	The code that identifies the population with which you wish to					
		work.					
Creator	· ID	Enter the user ID of the person who created the population rules.					
User II)	Enter the user ID for the population selection.					
		<u>Note</u> : This is the ID of the user who selected the population of					
		people. This may or may not be the same as the Creator ID.					
Mock F	Fee	Enter <i>Y</i> to process mock fee assessment or <i>N</i> to not process	Х				
Assessi	nent	mock fee assessment.					
Indicate	or						



Section C: Day--Day Operations

Lesson: Using the Fee Assessment Report (Continued)

Jump to TOC

Procedure, continued

Para	ameter	Description	Req?		
Mock		Enter the date for the mock fee assessment in DD-MON-YYYY			
Assess	nent	format			
Effectiv	ve Date				
		Note: This parameter was created for future use and will be			
		used to expand on the details of accounting transactions.			
Assess	nent	Enter a value to select the level of report detail. Enter <i>C</i> for	х		
Detail I	ndicator	current detail, P for previous detail, or B for both kinds of			
		information.			
Sort Or	der	Enter a value to select the sort order for the output. Enter <i>N</i> for	Х		
name o		name order or <i>I</i> for student ID order.			
Step	Action				
6	Perform a Next Block function.				
7	Click the Save icon.				
8	Click the	Exit icon.			



Let's review

As a result of completing this workbook, you have

- developed a fee assessment control form
- set up the term control form for online fee assessment
- assessed fees online
- assigned and assessed optional fees to a student for a term
- reviewed the assessment account for a student.



Directions

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

Question 1

How do you control that Fee Assessment is done in batch only?

Question 2 How do you perform online Fee Assessment?

Question 3 What form is used to review a student's account?

Question 4

Once enterprise fee rules are defined and assessed, fees can be assigned to each student for the semester.

True or False



Question 1

How do you control that Fee Assessment is done in batch only?

The Term Control Form (SOATERM) is used to insure that Fee Assessment is done in batch only.

Question 2

How do you perform online Fee Assessment?

Online Fee Assessment is performed through a process that includes the Term Control Form (SOATERM), the Registration Additional Fees Form (SFAAFEE), the Student Course Registration Form (SFAREGS), the Student Course/Fee Assessment Query Form (SFAREGF) and the Account Detail Review Form (TSAAREV).

Question 3

What form is used to review a student's account?

Account Detail Review Form (TSAAREV)

Question 4

Once enterprise fee rules are defined and assessed, fees can be assigned to each student for the semester.(True or False)

True



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

Section contents

Overview	3
Setup Forms and Where Used)
Day-to-Day Forms and Setup Needed)
Forms Job Aid	L



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		
Enrollment Status Form	SFAESTS	Student Course Registration	SFAREGS		
		Form			
Course Registration Status	SFARSTS				
Form					
Registration Fee Assessment	SFARGFE				
Rules Form					
Term Control Form	SOATERM				
Registration Additional Fees	SFAAFEE				
Form					



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	
Student Course Registration Form	• Enrollment Status Form (SFAESTS)	
(SFAREGS)	Course Registration Status Form	
	(SFARSTS)	
	Registration Fee Assessment Rules Form	
	(SFARGFE)	
	• Term Control Form (SOATERM)	
	Registration Additional Fees Form	
	(SFAAFEE)	



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
SFAESTS	Enrollment Status Form	
SFARSTS	Course Registration Status Form	
SFARGFE	Registration Fee Assessment Rules Form	
SOATERM	Term Control Form	
SFAAFEE	Registration Additional Fees Form	



This workbook was last updated on 1/17/2006.