Strata Information Group (SIG)

Trip Report

Banner Student Consulting

For

Imperial Valley College

Week of
September 19, 2011

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Overview / Background

This report summarizes activities and progress during an on-site visit the week of September 19th. The visit focused on several topics including setting up and testing wait listing, testing the final grades and registration pre-check bolt-ons that Terry Loftus has worked on remotely as well as the Argos Profile report. Additionally we spent time on CALB Instructor Drops and baseline drop for non-payment as well as a few other topics.

Findings / Notes

Wait Listing – Wait listing is IVC's priority project for the Spring 2012 semester. They were hoping that Banner wait listing would auto-register students who cleared the wait list. Jeff confirmed with Mike Reid that the process to auto-register students was not available or on their calendar.

Administrative decisions made included:
- The wait list notification period will be 24 hours.
- All settings for Waitlist Error Checking will be fatal. A student will not be allowed to register in one class and wait list for another. Neither will they be allowed to wait list for a class with a time conflict.
- The wait list period will be from the start or registration to the class start date. It will not overlap the add authorization period, which begins with the start of the class.
- A wait list roster is needed for instructors.
    - *Bettsie turned on the summary wait list roster in web tailor, showing on the Faculty tab in TEST8.*
    - *Terry added a wait list roster to the current bolt-on roster.*
    - *Waitlisted courses are showing on the student schedule bill. IVC may ask to have the waitlist priority added to the schedule bill.*
- On the Banner schedule of classes, if a class is closed and there are seats available that can be wait-listed, the "Select" option is blank, without an option for the student to select the class. Something needs to be developed to explain how a student knows that the class can be wait-listed.
- Banner / CALB is using the 1st class meeting for turning off wait-list as well as turning on add authorization codes.

Wait list Set is as follows:
1. Notification letter for students and advisors are configured on
    a. **STVELMT –** define the module of "F" and the associated view to be used for the waitlist letter. (already defined in Banner as AS_STUDENT_REGISTRATION).
    b. **GTVLETR –** define the waitlist email "letter"
    c. **SOAELTL –** letter rules with new module code of "F"
    d. **SOAELTR –** build the letter. I shared SBCC's letter as an example.
    e. Automatic notification is performed either online as seats become available or through the **SFRBWLP** batch process.
    f. I shared Santa Barbara CC's wait list letter as an example.
2. **STVRSTS –** needed to have the waitlist and web indicators checked as well as the status set to "waitlist".
3. **SFARSTS –** needs to have the "WL" waitlist status and periods defined.
4. **SFARMSG –** Customize error messages as needed.

5. **SOAWLTC** – Automated Wait List Control Form that provides error checking, verification control, and establishes waitlist rules and priorities as well as to set the automatic notification deadline, letter, and mail host.
   a. Email server for IVC ismail.imperial.edu.
   b. Registrar Banner ID is the "From" address for the email.
6. **SFRBWLP** – Batch Waitlist Notification Process – Runs in sleep/wake mode. Must be running in order for notifications to be issued. IVC will need to make sure that this job is running at regularly scheduled intervals.
7. **SFAWLPR** – Waitlist Priority Management Form – used to view and manage the priorities of waitlisted students by term and CRN who have not yet been notified of available seats in individual courses
8. **SFIWLNT** - Waitlist Notification Query Form - used to view waitlisted students who have received notification, to check on notification of available seats, assignment of deadlines for registration, and waitlist status.
9. **SFAXWLP** – Cross List Waitlist Priority Management Form – used to process CRNs that are part of a cross-listed group
10. **SFARWLP** – Reserved Seats Waitlist Priority Management Form – used to process CRNs with reserved seats
11. **SFPWLRO** – Waitlist Priority Reorder Process–used to reorder waitlists in batch for all sections that meet institutionally configured selection criteria and specified rules that have been defined on SOAWLTC. Can be launched from any priority management form.
12. **SOATERM** – In part of term, Must check Faculty Web Waitlist for Faculty to see Waitlisted students using SSB.

Considerations:
- Is there a way to display the student's position on the waitlist on the add/drop page? We also talked about adding the student's wait list position to the schedule bill.
- If a student drops the class, they are still holding the seat thru the notification period.
- If a student clears the waitlist, they are not auto-registered into the section.
- Discussed how nice it would be to issue a text message to students when they clear the waitlist.
- Instructor Rosters – Optimally, the wait list would be a separate option for the instructor to select. In the interest of expediency and cost, we integrated the wait list roster with the regular roster.
- We are looking for more options to display the wait list position to the student.
- Need to set up a "donotreply" to be used for the registrar ID on SOAWLTC.

- Testing scenarios
  - Student going from wait list to eligible to register, confirm email was sent.
  - Student going from eligible to register to expired, next student taking the registration
  - Student expired from the waitlist is "DD" Deleted from SFAREGS and self-service. The DD is noted in SFASTCA.
  - Student can waitlist and drop themselves (DD Delete) from the wait list.
  - Co-requisites are checked at the CRN and course level
    - Student could not waitlist for one section without the other
    - Student must wait list for both, student must register for both
  - Section – double-check the wait list counts
  - Cross-listed classes
  - Student able to re-wait list for a section
  - Test the no notification period
  - Do the registration / error messages make sense? If not, use SFARMSG to adjust

- ○ Test the period where wait list stops and add auth begins
- ○ Instructor Rosters
  - ▪ Confirm that expired wait listed students to do not show
  - ▪ Confirm that eligible wait list students show
- ○ Schedule Bill – We confirmed that wait listed students show.
- ○ Letter – review the letter to make sure that the information is still current
- ○ Test wait list for cross listed courses. Make sure that the max wait list cap works.

Drop for Non-Payment – IVC is considering implementing drop for non-payment. Currently they put holds on students, requiring them to pay before they can get transcripts or re-register. SFRRNOP goes thru and drops a student from <u>all</u> classes based upon the SFBETRM_AR_IND. The AR Indicator can be set to the values of "N" (no payment received"), "C" (Conditional, typically used for Financial Aid and people you don't want to drop) and "Y" (People for whom payment has been received). SFRRNOP does not consider partial payments, a grace period, or the dollar amount of the balance owed. We ran the baseline Drop for non-payment process, SFRRNOP, in FA8 with the following findings:

- Financial aid, veterans, and BOGG are not flagged as paid or conditional and are showing on the report to be dropped.
- Partial payments do get the AR indicator set.
- Process does not have a grace period.
- Need program to go thru and correctly set the AR indicator prior to running SFRRNOP. I put Jeff in touch with Barry Gillaspie, Pima College Director of Application Development, where they are using SFRRNOP and have developed processes to insure that students do / don't get dropped as appropriate.

CALB Faculty Drop Rosters (SC_FAC_DROP_ROS) – We tested the setup of the CALB faculty drop rosters. Set-up includes:

- Web Tailor – activate the package, SC_FAC_DROP_ROS
- STVRSTS - Instructor drop statuses of DI and WI were built. The count in enrollment flag MUST be turned off in order for the process to work.
- SFARSTS – The statuses of DI and WI were added to SFARSTS with dates that covered the period needed.
- SVADROP – Instructor drop status column was completed.
- SVARORL – Census roster rules were built for opening day, Census Roster, and W-Grade roster. The settings were as follows:
  - ○ Attendance Type: All Traditional
  - ○ Opening day roster: 0 – 13 adjustment days
  - ○ No-Show cutoff – Last Date for Refund
  - ○ Census day roster: 0 – 7 adjustment days
  - ○ W-Grade roster: -60 to- 0 adjustment days
- SVRROST – Job that can produce a list of un-submitted rosters by drop roster type, part of term
- SVISECH – Section Drop Roster History Form

Considerations:
- IVC has the "count in enrollment" flag set for withdrawals. The W-grade roster will not work if the count in enrollment flag is set. However, unsetting this flag means that students who are withdrawn will be subtracted from the section headcount. Comparisons between the semester we begin this and historical data will be catawampus.
- We discovered was that the "W" grade roster is not auto-assigning a "W" grade when the class is completed. I worked with IVC to prepare a defect report, for submission to SunGard. SunGard was able to replicate the problem and Defect 1-ZEAX56 has been created for it.

Bolt-Ons and Modifications:
Final Grades – Terry changed the final grades enhancement from a modification to the baseline final grades into a bolt-on, thus eliminating problems with having to retrofit the mods into any upgrades. We tested the Final Grades Bolt-on with the following findings:
- For POSATT classes, Matthew provided direction to use the sum of the ssrmeet_hrs_total field to determine maximum contact hours.
- Should not allow a "W" grade to be changed.

Terry is continuing to work on this.

Prereg Edit page – We tested the pre-reg edit page with the following findings:
- Address Update - if you select "Type of Address to Insert", you get an error message when changing the address, related to from and to dates. I recommend removing the "Type of Address to Insert" as an address update option.
- SORLFOS record is not getting changed when the Major / Curriculum (SORLCUR) is changed.

Terry is continuing to work on this.

Wait List Roster – Terry added a waitlist roster to the existing self-service rosters that were installed by SIG as part of the original implementation
- Modify roster to only show waitlist if there are students on it. (Done!)
- Replace Other Daily Census" with "WAIT LIST", remove tags Week, Date, Drop Date, Last Attend, Total Hrs, Fin Grade. (DONE!)
- As time permits, Add wait list sequence number, if cross-listed, need cross-list sequence number.

SYOSPROFILE
- Remove the level from the admissions records.
- Add the display of academic, progress and combined standing from SHATERM,
- On transfer institutions line, transcript received, from and to dates are not showing.
- If they exist, add academic, progress, and/or combined standing overrides from SGASTDN.
- New Financial Aid GPA – similar to "TOTAL IVC" cumulative line except:
  - Add transfer units to attempted only.
  - Add excluded (A, B, C, D) grades to Earned units. F grades do not count toward earned.
  - Transfer coursework only - Units attempted for "W" and "NC" grades should be excluded from Units Attempted. (W and NC grades do not count as acceptable grades for transfer work.)
  - Can the FinAid GPA be in the view?
- Patti will complete this in October.

Other Topics:

Equivalents – Decision made to push out the end-term to 999999. If there are still problems, we will look at adjusting the begin term.
- There has been some re-use of the subject and course number done in the 1990's.
- Jose has been scribing equivalents but not by term.
- Some discussion of moving the start term to Fall 2000, where the course numbering was clean. We will look at this as a 2nd step, if there is still a problem.

SMAPRLE and SOACURR – We reviewed the setup of SMAPRLE, STVMAJR, and SOACURR
- The intent of the SOACURR lock indicator is to enable you to set up a program in advance of its approval. If the record is unlocked, you are not supposed to be able to

assign it to a student. This being said, on custom applications, you would need to confirm how the lock indicator works. The lock indicator on SMAPRLE is supposed to synch up with the lock indicator on SOACURR.
- CIPC Code used for IPEDS
- To inactivate a program, uncheck the web indicator on SMAPRLE. On SOACURR, all modules except academic history should be turned off from the Module Control tab.

Academic Calendar trigger – We tested the trigger for TBA classes. The trigger will not determine the academic calendar days if the attendance method is W or D and there are no meeting days checked. A "TBA" will only compute days for the other attendance accounting methods. The trigger is working as desired.

SVRCALX – confirmed that attendance accounting method IA (Independent Study – Actual Hours of Attendance) was being treated as positive attendance.

Student Goal Data has been collected on SARS. Bettsie has written a program to migrate the SARS data into Banner. The counselors will be entering the matriculation data directly into Banner.

Summer session as one versus 3 terms – Discussed setting up parts of term for additional summer sessions. Determined that Financial Aid would not be impacted but faculty load and MIS reporting definitely would be. Lisa Seals indicated that it was her understanding that the discussion was one term with multiple sessions, not multiple summer terms.

Academic Standing (SHAACST / SHRASTD) – We confirmed that Banner does not put students on academic probation who have withdrawn from all of their classes. It does put them on progress probation and combined standing probation.

Action Items / Follow-up

Next Visit – Nov 7th, 2011

Topics:
- Continue to shake out Wait lists, Faculty Drops, bolt-ons, drop for non-payment.
- Finalize bolt-ons for Final Grades, Pre-reg Edit, and student profile report.
- Spring 2011 Registration begins November 15th
- Equivalents – review status
- Work with David Poor on Academic Standing including testing SZPSTDN, from Mt. Sac
- Test the baseline Race / Ethnicity survey functionality
- Look into custom self-service messages for student, similar to Financial Aid (ROAMESG).