Banner Training Workshop

University Call Center:
Using Banner for Answering Questions

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WS No. IA

Descriptive Information

Course Title: Providing Customer Service Via. Banner

General Description and Purpose:

This workshop explains/demonstrates how the staff in the University's Call Center can assist in providing effective customer service by answering questions via the use of Banner Forms.

The purpose is to assist heavily traffic areas such as Records, Admissions, Financial Aid, and Bursar officers with telephone calls during peak periods.

Prerequisite: Access to Internet Native Banner (INB) – Inquiry to specific Banner Forms Only.

Duration of Course: 1 Hour or less

Target Audience: Designated staff from the University's Call Center

What is Banner?

Banner Student brings together administrative and academic functions to make it easier to manage data while giving students and faculty secure online access to the information they need. This is a product of SunGard Higher Education.

**Logging into Internet Native Banner (INB)**

Access TSU homepage Go to: http://orbiter.tnstate.edu:9099

This is the Login menu: Click on Production Database [PROD]
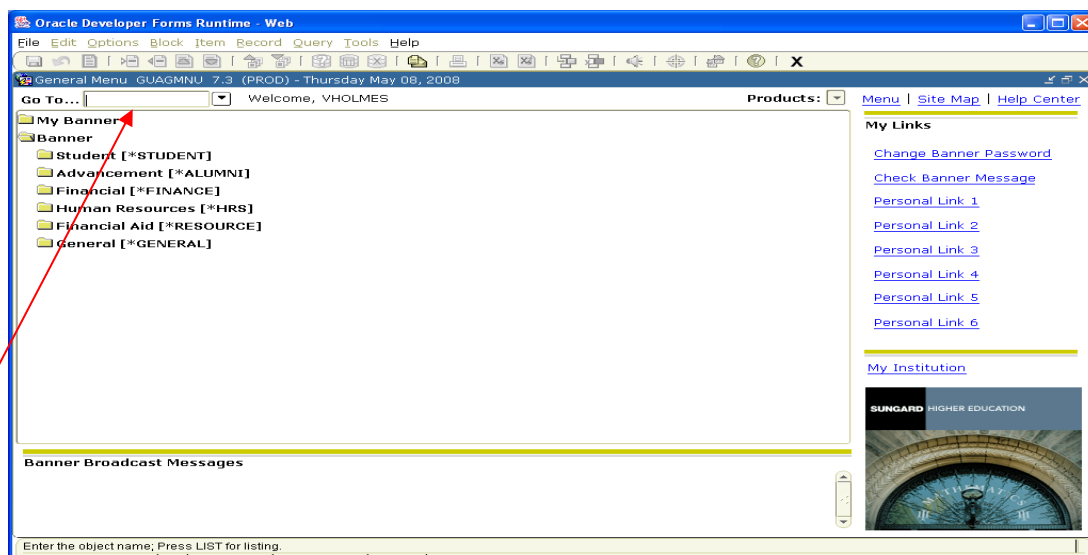

This is the logon dialog box. Enter the username and password. Click on Connect.

If this is your first time logging on, your password has been set to your T Number. Logon, change the password to something you can remember-six or more characters.
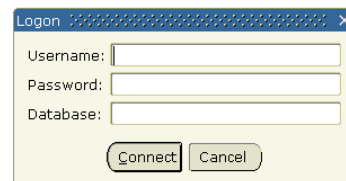
You have successfully entered <u>BANNER LAND</u>

Access Forms by entering your selection in the "GO TO" box and hit enter key

The Main Menu provides an overview of the menus, forms and jobs on Banner. Use the Main Menu to navigate through Banner.

Definitions of Banner Forms

SOAHOLD **Registration Holds and Clearances Form -** Holds may prevent registration or graduation, or prevent the production of transcripts, enrollment verification documents, and grade mailers.

SAAACKL **Admissions Checklist Summary -** The Application Checklist information is used to review and to verify receipt of items associated with an admissions application.

SZAADEF **High School Deficiencies and Developmental Studies Requirements** Displays remedial and developmental courses that students are required to take based on their ACT/SAT scores.

SFAREGQ **Student Registration Form -** The Registration Query Form (SFAREGQ) provides an online view of a student's schedule. The form is query-only and will display all registered courses and related information for the term.

TSAAREV **Account Detail Review Form –** Is used to enter and review charge and payment information a student's account. The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances.

ROARMAN **Financial Aid Record Maintenance Form -** This form is used to review a student's financial aid awards.
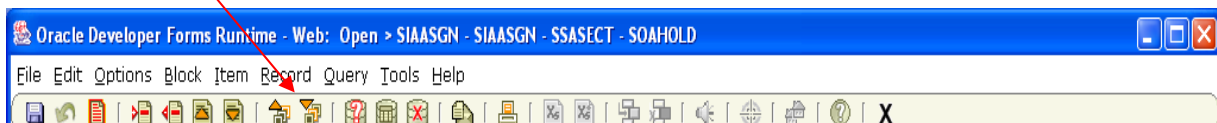
Banner Terms
Terms are defined as year/semester/code

Year	Semester	Code	Term
2008	Fall	80	200880
2009	Spring	10	200910
2009	Summer	50	200950

Accessing Information

1. Enter Form Name (see list of definitions) in the GO TO Field
2. Enter term if required
3. Enter the student's T# (T0016082) or SSN, which convert to T#, Name will appear
4. Hit next black, information will display

Inquiry to Various Forms

A. SOAHOLD   **Registration Holds and Clearances Form -** Holds may prevent registration or graduation, or prevent the production of transcripts, enrollment verification documents, and grade mailers.

B. SAAACKL   **Admissions Checklist Summary -** The Application Checklist information is used to review and verify receipt of items associated with an admissions application.

C. SZAADEF **High School Deficiencies and Developmental Studies Requirements -** Displays remedial and developmental courses that students are required to take based on their ACT/SAT scores.

D. SFAREGQ **Student Registration Form -** The Registration Query Form (SFAREGQ) provides an online view of a student's schedule. The form is query-only and will display all registered courses and related information for the term.

E. TSAAREV **Account Detail Review Form –** Is used to enter and review charge and payment information about a student's account. The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances.

Detail Code	Description	Term	Charge	Payment	Balance	Source Code	Effective Date
TUGM	Undergraduate Maintenance	200910	189.00		.00	R	12-JAN-2009
TUGM	Undergraduate Maintenance	200910	-189.00		.00	R	12-JAN-2009
A055	Federal Pell Grant	200910		1,991.00	-1,991.00	F	08-JAN-2009
A048	Unsub Loan Eft 1	200910		2,282.94	-1,841.44	F	08-JAN-2009
A046	Sub Loan Eft 1	200910		1,732.50	.00	F	08-JAN-2009
TUGM	Undergraduate Maintenance	200910	567.00		.00	R	15-DEC-2008
FGAC	General Access Fee	200910	22.00		.00	R	15-DEC-2008
FDBT	Debt Service	200910	9.00		.00	R	15-DEC-2008
TDSM	Developmental Studies Maintene	200910	321.00		.00	R	15-DEC-2008
FGAC	General Access Fee	200910	36.00		.00	R	15-DEC-2008
FDBT	Debt Service	200910	24.00		.00	R	15-DEC-2008
TUGM	Undergraduate Maintenance	200910	189.00		.00	R	15-DEC-2008

Query Balance	Account Balance	Amount Due	Memo Balance	Authorized Aid Balance	NSF	Receipt?
-3,832.44	-3,832.44	-3,832.44	.00	.00	0	N

Account Balance and Amount Due should be the same figure. This is the amount that the student owes.	If figures are listed in the fields above (Memo Balance, Authorized Aid Balance), refer the student to the Bursar's Office.
A minus (-) preceding the amount due/account balance denotes that the student registered/paid and will receive a refund in the amount listed.	

F. ROARMAN   **Financial Aid Record Maintenance Form -** This form is used to review a student's financial aid awards.

Offered	Accepted	Paid
The figures listed in the Offered column are the funds that the student is eligible to receive. The total amount is listed at the bottom of the column.	The figures listed in the Accepted column are the funds the student has accepted. These figures may differ from those listed in the Offered column. If there are figures listed in the Offered column and no figures are listed in the Accepted column, the student needs logon to myTSU, click Banner Services, Financial Aid, and following instructions to accept the awards offered.	Once the aid has been offered and accepted, it is posted to the student's account, which is displayed on TSAAREV.

If no information show on this form, the aid has not been processed; thus, the student should be referred to the Financial Aid Office.