

Banner Student Billing

Banner

1. Verify Financial Aid has finished running a full disbursement for the selected term.
2. Run Application of Payments.
3. Run the pop-sel for REG_NOT_PD_STDS using GLBDATA.
 - o The total number of students in the pop-sel should match the number Financial Aid is showing in their REG_NOT_PD_0.

Copy of PopSel used for Pre-Bill:

Definition

Select: SFBETRM_PIDM
 From: SFBETRM, SFRSTCR, ROVST12

Rules

('	Object	Data Element	Operator	Value	)	AND / OR
(	SFBETRM_AR_IND		<>	'Y'	)	AND
	SFBETRM_AR_IND		<>	'C'	)	AND
	SFRSTCR_TERM_CODE		=	&Quarter_code	)	AND
	SFRSTCR_CREDIT_HR		>	0	)	AND
	SFBETRM_TERM_CODE		=	SFRSTCR_TERM_CODE	)	AND
	ROVST12_LEVL_CODE		=	'50'	)	AND
	SFRSTCR_PIDM		=	SFBETRM_PIDM	)	AND
	SFRSTCR_PIDM		=	ROVST12_PIDM)	

- Depending on the aid year for financial aid, the last line (ROVST12) would need to be changed to match the fiscal year. Also, the “From” line at the top of the print screen under the “Definition” section may need to be changed.
 - If billing for Continuing Education, the “Level Code” would need to be edited. The above print screen only includes “Credit” students.
 - In the above print screen, students that have been “confirmed” (Y) or “accepted” (C) through the ZFRCOMT processes are excluded.
4. Review output and edit if necessary using GLAEXTR.

Copy of PopSel used for Cycle Billing:

Definition

Select: TBRACCD_PIDM
 From: TBRACCD, TB&DETC, SPRIDEN, SGBSTDN A

Rules

'('	Object	Data Element	Operator	Value	)'	AND / OR
{	TBRACCD_TERM_CODE		=	&TERM	}	AND
{	TBRACCD_BALANCE		>	0	}	AND
{	TBRACCD_DETAIL_CODE		=	TB&DETC_DETAIL_CODE	}	AND
{	TB&DETC_TYPE_IND		=	'C'	}	AND
{	SPRIDEN_CHANGE_IND		IS NULL		}	AND
{	SPRIDEN_ENTITY_IND		=	'P'	}	AND
{	SGBSTDN_STYP_CODE		<>	'H'	}	AND
{	A.SGBSTDN_TERM_CODE_EFF		=	(*SUB *STUDENT_MAX_TERM_SUBQUERY)	}	AND
{	TB&DETC_PAYT_CODE		<>	'E'	}	

- Run GLBLSEL
 - o BILLED_STUDENTS - letter code
 - o REG_NOT_PD_STDS - selection ID
 - o SYSDAT - address selection date (will populate with current date)
 - o 1MA - address type (may vary depending on college)

Parameters Used:

Parameter Values

Number	Parameters	Values
01	Application	AR
02	Process Pending Letters	N
03	Letter Code	BILLED_STUDENTS
04	Selection ID	REG_NOT_PD_STDS
05	Creator ID	KDONATO2
06	User ID	KDONATO2
07	Term Code	201214
08	Aid Year	
09	Address Selection Date	SYSDATE
10	Address Type	1MA
11	Detailed Error Report	Y
12	Detailed Execution Report	

- Y - Detailed Error Report (parameter 11) will provide a list of student ID numbers showing values not pulled for a specific ID. For example: Address 1 missing for 900000001.

- Run GLRLETR
 - o BILLED_STUDENTS – letter code
 - o *LASTNAME – sort variable (Although example shows sorting by last name, there are other methods to sort such as zip code.)
 - o Terms must be the same as the pop-sel
 - o Y – audit indicator
 - o Review data and confirm that all variables necessary to complete letter have been pulled.
 - o Then run the GLRLETR process again with the same parameters with exception of “N” in the audit indicator.
 - o Under OPTIONS click “Review Output”
 - The Internet browser may include a “pop up blocker”---“pop up blocker” will need to be disabled.
 - o Once data is brought into the open window, go into OPTIONS again and click “Save”.
 - o Save data as a .txt file in order for a merge to be possible within the document.
 - Save the .txt file (raw data file) on the desktop for easy access.

Parameters used:

01	Application Code	AR
02	Word Processor Extract Option	1
03	Print ALL Pending Letters	N
04	Letter Code	BILLED_STUDENTS
05	Sort Variable	*LASTNAME
06	Term Code	201214
07	Module Code	1
08	Audit Indicator	Y
09	Free Format Date 1	
10	Free Format Date 2	
11	Free Format Date 3	
12	Aid Year Code	

Letter Merging

- Open the document to be used for the merge.
- For Microsoft Word, go to Mailings and Select Recipients.
- Use existing list (find the data file saved above, .txt).
- Preview Results and make sure it looks correct.
- Finish Merge and Save/print your document.

Pre-term billing may be used for students registered during early registration. Letters are sent to students ten to fourteen days prior to the first fee payment deadline to allow students time to make payment.

Once all financial aid and third party contracts have been applied to the accounts, billing may be finalized at that point. Students are notified of outstanding balances and accounts are placed on hold prior to the registration period for the next term.

Cycle Billing is done at least once per semester. Although billing may take place once per month should the college choose to do so. Billing should continue to take place until due diligence has been satisfied.

Draft Completed:

Revised: 06/04/2012

Approved:

XYZ Technical College

Account Notice

«SNAME»
«ADDR1» «ADDR2»«ADDR3»
«CITY_ST_ZIP_AR»

November 9, 2011
ID: «SPRIDEN_ID»

«INTRO»

Our records show that you have an outstanding balance of «SBALANCE» for Fall Semester, 2011. Please be advised that a financial hold has been placed on your account which will prevent your ability to register, request and receive transcripts, etc. Registration for Spring Semester has started for returning students and will continue through January 5th, 2012.

Please submit your payment to the Cashier's Office at any campus. XYZ Technical College also offers our students the ability to pay via a check or credit card online. To access the online payment option, go to www.xyztech.edu and log into Banner Web. The navigation is "Student Services and Financial Aid", then "Student Records" then "Account Summary". The pay online link is at the bottom of the page after you select the appropriate term.

Spring Semester begins January 9, 2012. We look forward to having you in XYZ Technical College class(es).

The outstanding charges are as follows:

«AR_SAMT»

If you have any questions related to your bill, please call one of our cashiering offices (as listed below) or email cashier@xyztech.edu.

Sincerely,

Employee's Signature

Employee's Name

Employee's Title

A Unit of the Technical College System of Georgia

101 Main Street, Any Town, Georgia 12345

* Campus One xxx/xxx/xxxx * Campus Two xxx/xxx-xxxx * Campus Three xxx/xxx-xxxx * Campus Four xxx/xxx-xxxx

XYZ Technical College

Final Notice

«SNAME»
«ADDR1» «ADDR2»«ADDR3»
«CITY_ST_ZIP_AR»

February 15, 2012
ID: «SPRIDEN_ID»

«INTRO»

Our records show that you have an outstanding balance of «SBALANCE» for Fall Semester, 2011. Please be advised that a financial hold has been placed on your account which will prevent your ability to register, request and receive transcripts, etc.

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