

BANNER COMMITTEE PROCEDURE

WORKING THE REGISTERED NOT PAID PROCESS (PURGE)

It is recommended that the purge process be run to comply with the TCSG Tuition and Fee Policy. This process removes the registration information for each student that has an unpaid balance or has a balance over the amount of any pending financial aid or third party payment that is expected for the term. The SFAREGS screen for students who have been purged will no longer show any data for the term. Purged students should not be allowed to attend class, since they are no longer registered.

Before beginning this process, make sure that financial aid disbursements (RPEDISB) has been run.

To begin the purge process, first run the application of payments process (TGRAPPL).

Next, run TSRTBIL in the invoice mode. This process will update the Memo Balance on any students who have a Third Party.

Next, run TSRCBIL in the invoice mode. This process will update the Memo Balance on any students who have fee waivers.

Next, run the process ZFRCOMT. This process will cause the Acceptance flag on the student's SFAREGS screen to change to "Accepted" for all registered students who made payments resulting in a zero balance, or who have enough financial aid or third party payments to cover their charges. Students who are Accepted (or Committed) by this process will not be purged.

The screenshot displays the Banner SFAREGS 9.3.25 (PROD-PEL) interface. The top navigation bar includes the user 'ellucian' and the system name. Below the navigation bar, the 'ENROLLMENT INFORMATION' section is visible. The 'Status' is 'EL' (Eligible to Register) and the 'Status Date' is '08/19/2020'. The 'Acceptance' field is set to 'Accepted', indicated by a red arrow. The 'COURSE INFORMATION' section shows a table with columns for CRN, Subject, Course, Section, Grade Mode, Credit Hours, Bill Hours, Attempted Hours, Time Status Hours, Status, Level, Appr Read, Override, Part of Term, and Method of Instruction. The table contains one row for CRN 40001, Subject ACCT, Course 1100, Section 0, Grade Mode N, Credit Hours 4.000, Bill Hours 4.000, Attempted Hours 4.000, Time Status Hours 4.000, Status RE, Level 50, Appr Read, Override, Part of Term 1, and Method of Instruction. The 'ENROLLMENT TOTALS' section shows Fees (Y - Immediate assessment) 4.000, Credit Hours 4.000, CEU Hours 0.000, and Bill Hours 4.000.

To run the ZFRCOMT process, enter ZFRCOMT on the landing page, then press Go.

Parameter 01 - Enter the appropriate term

Parameter 02 - Enter Y if you do not want non-credit students (i.e. continuing ed) to be purged.

Parameter 03 - Enter Y if you would like to see the amount of outstanding fees for students who are not committed by this process.

Parameter 04 - Enter Y to delete any null registration records prior to running this process. (It is recommended that you do this).

Parameter 05-Enter Y if you would like to see the students who are committed during this process.

Parameter 06-Enter Y if you would like to create a text file during this process. Creating a text file will simplify the process of creating an excel spreadsheet and manipulating the data for further analysis.

Parameter 07 - Enter Y to run this process in Update mode. (N runs in audit mode).

Parameters 08 – 15 are for use with population selections (popsels) only. Leave these parameters blank unless using a popsel (Parameters 08-11) or creating a popsel (Parameters 12-15). If you wish to include those students on ZFRCOMT with a status of “Verify Student Balance” in your output popsel, enter a Y for Parameter 15. It is always wise to run in audit mode first when using a popsel.

Parameter 16-Enter Y to commit students for the current term who have an outstanding balance for a prior term.

Review the output from the ZFRCOMT process to ensure the correct students were committed. Make sure to run in update mode (Y on parameter 05) before running the purge process. Student with a status of “Verify Student Balance” will probably need to be analyzed. This typically means that the student has been previously committed; however the student now has more charges than pending payments.

Next, run the ZSPTERM report. This report shows all students with outstanding balances unpaid by the student, financial aid, or third parties. These are the students you would normally want purged. However, this report must be reviewed to ensure all third parties, scholarships, and other payments have been entered into Banner so that no student is purged in error.

To run the ZSPTERM report, enter ZSPTERM on the landing page, then press Go.
 Parameter 01 - Enter the term.
 Parameter 02 - Enter a date which will be early enough to capture all potential payments and charges for the term.

Process: ZSPTERM Create Term Balance Table Parameter Set:

PRINTER CONTROL

Printer: DATABASE Submit Time: []
 Special Print: [] MIME Type: None
 Lines: 55 PDF Font: []

PARAMETER VALUES

Number *	Parameters	Values
01	Term	202112
02	Process From Date	01-JAN-2000
03	Email Type	MA
04	Phone Type	MA
05	Selection Identifier	
06	Application Code	
07	Creator Id	
08	User Id	
09	Major Code	%
10	Address Type	MA

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
 Enter the Term Code

SUBMISSION

Save Parameter Set as
 Name: [] Description: []
 Hold / Submit Hold Submit

The ZSPTERM report will look like this when run:
 Students with balances (excluding Chg/Pymt E Pay-Types) for 202112 and dates >= 01-JAN-2000

Process: ZSPTERM Create Term Balance Table Number: 894614 File Name: zspterm_894614.lis Beginning Date Saved: Lines: 37

DATE: 14-SEP-2021 TCSG Pelican Group - PROD PAGE: 1

Students with balances (excluding Chg/Pymt E Pay-Types)
 for 202112 and dates >= 01-JAN-2000

ID	Last Name	First Name	MI	Charges	Payments	Flg	Type	Majr	SSN	Phone	CAMP	W	Std Bal
910116889	ADAMS	ELA	L	438.00	.00	N	R	MD13	733673235		1		438.00
910116866	ALIYEV	MARY	E	438.00	.00	N	R	ECC2	332916427		1		438.00
910072332	ALLEN	MAR	D	30.00	.00				802334686				30.00
910124234	BENNETT	PENNY	A	438.00	.00	N	B	TC31	520242004		2		438.00
910116882	BOOKER	ALEX	L	438.00	.00	N	R	WAJ2	726603228		4		438.00
910124547	Betjas	Rebecca		438.00	.00	N	B	AI02	274814801				438.00
910046113	Hale	Nancy		363.00	.00	N	B	CO12	222222222				363.00
910124556	Rubble	Lakesha	L	438.00	.00	N	B	RW21	418214282				438.00
910124559	Snows	Brittnee	K	438.00	.00	N	R	AC12	272988488				438.00
910124560	Sunup	Djuandra		438.00	.00	N	B	AC12	710179109				438.00
910124705	Tison	Chris		438.00	.00	N	B	CJ02					438.00
910124701	Zeppelin	Led	A	1,438.00	.00	N	R	CLT3	456123789				1,438.00

The column on the far right shows the student balance after all pending aid, third

party payments, and student payments are applied. You may want to check your list for special groups such as high school students or prisoners who you do not wish to purge.

If a student has been committed in error, the ZUNCOMMIT process must be used to reverse the flag.

Parameter 01 – Enter the term.

Parameter 02 – Enter the student ID number

Parameters 03 – 06 are for popsel use only. These should be left blank unless you have a specific popsel of students you want to un-commit.

Parameters 07 – Update (Y/N) – Always run in audit mode first, verify data and then run in Update Mode.

Process: ZUNCOMMIT Reverses the Accept Flag Parameter Set:

PRINTER CONTROL

Printer: DATABASE
 Special Print: 1
 Lines: 55
 Submit Time:
 MIME Type: None
 PDF Font:

PARAMETER VALUES

Number *	Parameters	Values
01	Term	
02	Student ID	
03	Selection Identifier	
04	Application Code	
05	Creator id	
06	User	
07	Update(Y/N)	N

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
 Enter Term Code

SUBMISSION

Save Parameter Set as
 Name: Description:

To ensure that all students with billing hours are committed, set up the following population selections for verification.

1. Make sure a current ZSPTERM has been run.
2. Run GLBDATA (see below, use your creator id).
3. Check in GLAEXTR ---- COMMIT_THESE. Verify.
4. Run ZCOMMIT with the popsel (COMMIT_THESE, AR, USERID, CREATOR).

Process Submission Controls GJAPCTL 9.3.21 (PROD-PEL)

Process: GLBDATA Population Selection Extract Parameter Set:

PRINTER CONTROL

Printer: DATABASE
 Special Print:
 Lines: 55
 Submit Time:
 MIME Type: Plain Text
 PDF Font:
 PDF Font Size:
 Delete After Days:
 Delete After Date:

PARAMETER VALUES

Number *	Parameters	Values
01	Selection Identifier 1	NOT_PAID
02	Selection Identifier 2	WITH_BALANCE
03	New Selection Identifier	COMMIT_THESE
04	Description for new selection	Run through ZCOMMIT
05	Union/Intersection/Minus	M
06	Application Code	AR
07	Creator ID of Selection ID	TMOORE
08	Detail Execution Report	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
 Population Selection Creator ID.

Process Submission Controls GJAPCTL 9.3.21 (PROD-PEL)

Process: ZCOMMIT Flips the Flag to C Parameter Set:

PRINTER CONTROL

Printer: DATABASE
 Special Print:
 Lines: 55
 Submit Time:
 MIME Type: None
 PDF Font:
 PDF Font Size:
 Delete After Days:
 Delete After Date:

PARAMETER VALUES

Number *	Parameters	Values
01	Term	202112
02	Student ID	
03	Selection Identifier	COMMIT_THESE
04	Application Code	AR
05	Creator Id	TMOORE
06	User	TMOORE
07	Update(Y/N)	N

LENGTH: 30 TYPE: Character O/R: Optional M/S: Single
 Enter USER ID

SUBMISSION

Save Parameter Set as
 Name: Description: Hold / Submit Hold Submit

Population selections for the above GLBDATA process (use your CREATOR id):

Population Selection Definition Rules GLRSLCT 9.3.18 (PROD-PEL)

Application: AR Selection ID: NOT_PAID Creator ID: TMOORE

SELECTION DESCRIPTION

Description: Students with an N flag
 Manual
 Locked
 Delete
 Application Level Rules Exist

DEFINITION

Select: SFBETRM_PIDM
 From: SFBETRM_SFRSTCR

RULES

T	Object or Data Element	Operator *	Value	T	AND / OR
	SFBETRM_TERM_CODE	=	&TERM		AND
	SFBETRM_AR_IND	=	'N'		AND
	SFBETRM_TERM_CODE	=	SFRSTCR_TERM_CODE		AND
	SFRSTCR_BILL_HR	>	0		

Record 1 of 4

ellucian Population Selection Definition Rules GLRSLCT 9 3 18 (PROD-PEL)
 ADD RETRIEVE RELATED TOOLS 1

Application: AR Selection ID: WITH_BALANCE Creator ID: TMOORE Start Over

SELECTION DESCRIPTION Insert Delete Copy Filter

Description:

Manual Delete
 Locked Application Level Rules Exist

DEFINITION Insert Delete Copy Filter

Select:
 From:

RULES Insert Delete Copy Filter

{	Object or Data Element	Operator *	Value	}	AND / OR
{	TBALANC_TERM_CODE	=	&TERM	}	

1 of 1 10 Per Page Record 1 of 1

Once you feel that you have the proper students committed, you should run the registered not paid (purge) process in Audit mode. This is done by running the SFRRNOP process.

Parameter 01 - Enter the term.

Parameter 02 - Enter N to run in Audit mode only (this does not purge the students. It only creates a report of the students to be purged).

Parameter 03 - Enter N to choose only students who are not committed.

Parameter 04 – Leave blank.

Parameter 05 - Enter the address selection.

Parameter 06 - Enter the Address Hierarchy.

Parameter 07 - Enter Y to keep students with pre-authorized 3rd party contracts from being purged, or enter N depending on what you want

Parameter 08 - Enter the effective date of the drop.

Process: SFRRNOP Registered, Not Paid Process Parameter Set:

PRINTER CONTROL

Printer: DATABASE Submit Time: [] PDF Font Size: []

Special Print: [] MIME Type: Plain Text Delete After Days: 999

Lines: 55 PDF Font: [] Delete After Date: 10/26/2024

PARAMETER VALUES

Number *	Parameters	Values
01	Processing Term	200704
02	Update Database	N
03	Type (C or N)	N
04	Run Date for Census Processing	04/06/2007
05	Address Selection Date	04/06/2007
06	Address Hierarchy	1MA
07	Third Party Exempt Indicator	N
08	Effective Date of Drop	04/06/2007

LENGTH: 11 TYPE: Date O/R: Optional M/S: Single
Format: DD-MON-YYYY

SUBMISSION

Save Parameter Set as

Name: [] Description: []

Hold / Submit Hold Submit

Compare the ZSPTERM report results to the SFRRNOP report results. The students on both reports should match.

The ZFRCOMT process, the ZSPTERM process, and the SFRRNOP (in audit mode) may be run as often as necessary to obtain the desired students. Once the correct students are showing on the audit mode SFRRNOP, the process may be run in Update mode.

You may optionally elect to print the schedules of the students that will be

purged. If so, the student schedules **MUST be printed PRIOR to running SFRRNOP in Update Mode.**

The following population selection is created to identify students that are not “committed.” Once the population selection is created, run GLBDATA on the population selection.

Application: AR Selection ID: STUDENTS_NOT_COMMITTED Creator ID: TMOORE

SELECTION DESCRIPTION

Description: Students not committed

DEFINITION

Select: SFRSTCR_PIDM
From: SFBETRM,SFRSTCR

RULES

'I'	Object or Data Element	Operator *	Value	'T'	AND / OR
	SFBETRM_TERM_CODE	=	&TERM		AND
	SFRSTCR_TERM_CODE	=	&TERM		AND
	SFRSTCR_BILL_HR	>	0		AND
	SFBETRM_AR_IND	=	'N'		

After GLBDATA is run identifying the students that have not been committed, SFRSCHD is run. See below for the parameters.

Process: SFRSCHD Student Schedule Parameter Set: NOT_COMMITTED

PRINTER CONTROL

Printer: DATABASE
Special Print:
Lines: 55

Submit Time:
MIME Type: Plain Text
PDF Font:

PDF Font Size:
Delete After Days: 999
Delete After Date: 10/26/2

PARAMETER VALUES

Number *	Parameters	Values
01	ID Number	
02	Process Term	202112
03	Start Range From Date	
04	Start Range To Date	
05	Schedule Type (% for all)	%
06	Instructional Method (%=all)	%
07	Address Selection Date	01/31/2099
08	Address Hierarchy	1MA
09	Printer	
10	Campus Processing Indicator	N
11	Campus	
12	Selection Identifier	STUDENTS_NOT_COMMITTED
13	Application Code	AR
14	Creator ID	TMOORE
15	Run in sleep/wake mode (Y/N)	N
16	Sleep interval	60
17	Print Long Section Title	N
18	Print Schedule Type	N
19	Print Instructional Method	N
20	Print Reg Start/End Dates	N
21	Print Control Report	Y

You may print the student schedules to a printer or you may print them to

database and then save them as a word document. Saving the schedules as a word document will allow the schedules to be emailed to appropriate staff. It will also allow for the use of the search function in Word.

Once you have completed printing the student schedules (**optional**), you can run SFRRNOP in the update mode. THIS WILL PURGE THE STUDENTS FROM REGISTRATION AND REVERSE ALL RELATED TUITION AND FEES FROM TSAAREV AND OTHER REVENUE SCREENS.