STUDENT EXEMPTIONS

TABLE OF CONTENTS

REVISION HISTORY

Version	Date	Name	Description
1.0	1/12/2016	Josh Hoerger	Initial Release

INTRODUCTION AND PURPOSE

Banner Student Exemptions are account credits applied toward specific charges on a Student account. These Exemptions can be applied to any Student billing area, but are currently only proposed for use for Tuition and Fee charges, as well as some Housing Charges, for various reasons.

The goal of this training is instruct users how to add and/or remove a Student to a previously-established Exemption in Banner. Some additional information is provided for a broader understanding of the process.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Family Educational Rights and Privacy Act (FERPA) - http://registrar.ucr.edu/registrar/privacy-ferpa/default.aspx

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Student Core Offices
2. Departments that are authorized to provide students with discounts.

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.ucr.edu) to follow along.

FORMS

Clicking on the **Banner Form** name will take you to the first time the form is discussed in this document.

Form	Form Name	Description
TSAEXPP	Exemption Person Authorization Form	Add an Exemption to a student

PROCEDURES

GENERAL NAVIGATION & TIPS

1. Screen names can be entered in the **Go To…** box when Banner first opens.
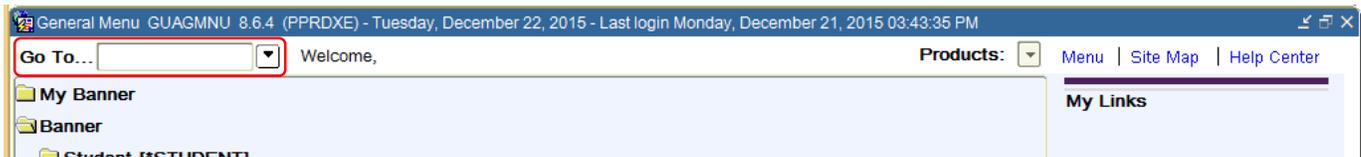
2. **Querying in Banner Forms**

As with most Banner Forms, users can query for specific records to save time searching. For example, in the single screen listed in this training, once a user has Next-Blocked to the list of students, users can enter Query Mode (key 'F7' or [icon]). This allows a specific **Student ID**, **Name** or other value to filter the data. The '%' or '_' symbols are used for multi or single character wild card values, respectively, and key 'F8' or [icon] can be used to execute the query. Also note that alpha characters are case sensitive, so searching for 'A' is different than 'a'. For more information on querying in Banner, please consult UCRLearning LMS Training "Banner Navigation Training".

3. **Correctly Identifying Student vs. Non-Student Accounts**

In Banner, Student Account IDs are numeric (typically starting with an 8), while those that begin with a "C" or "N" are Non-Student Accounts. Only Student Accounts should be used for Exemptions, and an Account ID that begins with a "C" or "N" should not added to this TSAEXPP screen.

ADDING A STUDENT TO AN EXEMPTION

Students can be assigned to the Exemption on the **Exemption Person Authorization** form **TSAEXPP**. In order to add the student to an Exemption, the Exemption Code must be defined within Banner.

1. **TSAEXPP** – Exemption Person Authorization form

2. Enter the Exemption code in the **Exemption Code** field. Enter the term in the **Term** field.

3. If you do not know the **Exemption Code** clicking on the search button ⬛ will open the Exemption Query page with all available Exemption Codes.
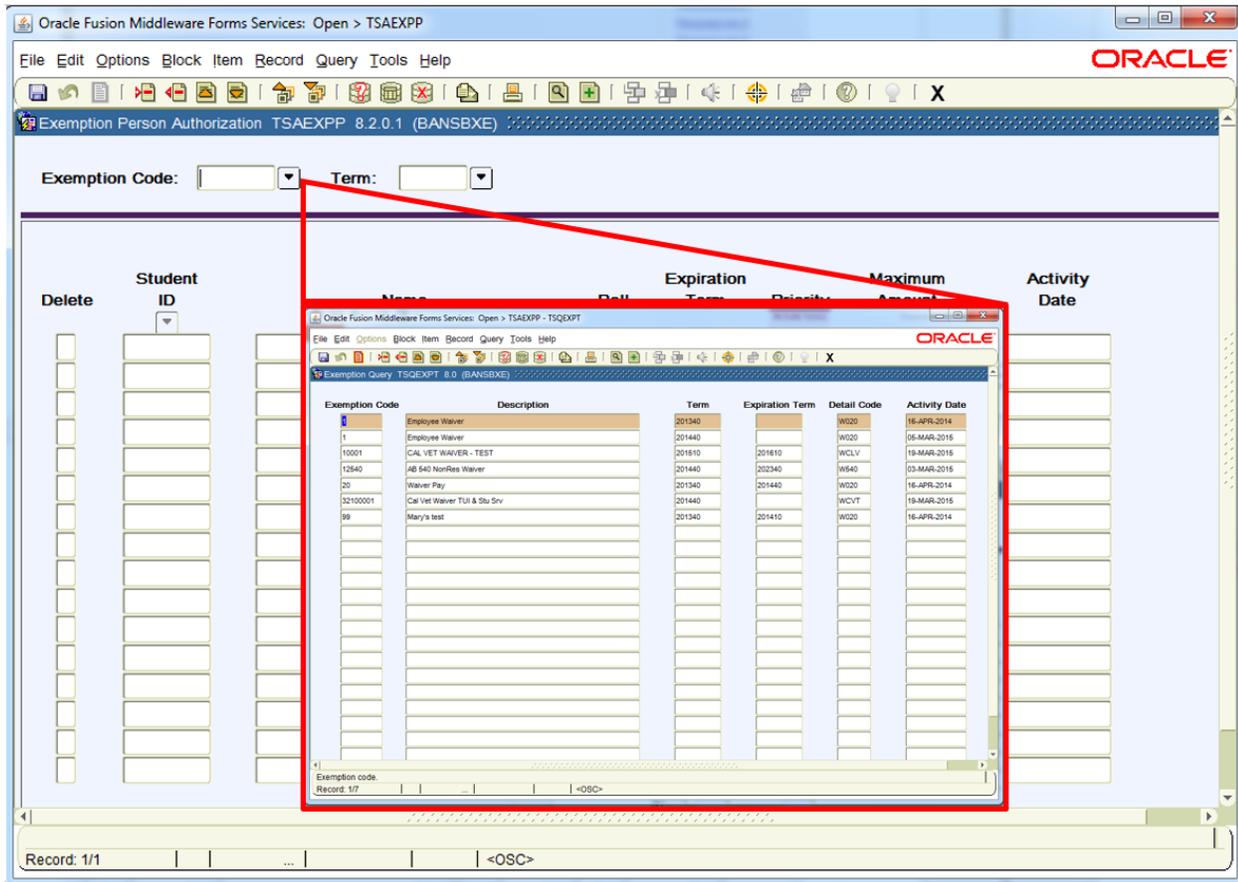
4. Find the **Exemption Code**, highlight it and click the **Select** button 📄.
5. Click the **Next Block** icon 🔲 or **Ctrl+PgDn** to enter the student Exemption info section.
6. Add a new record by clicking key 'F6', or menu **Record** > **Insert**. A new highlighted row will appear.
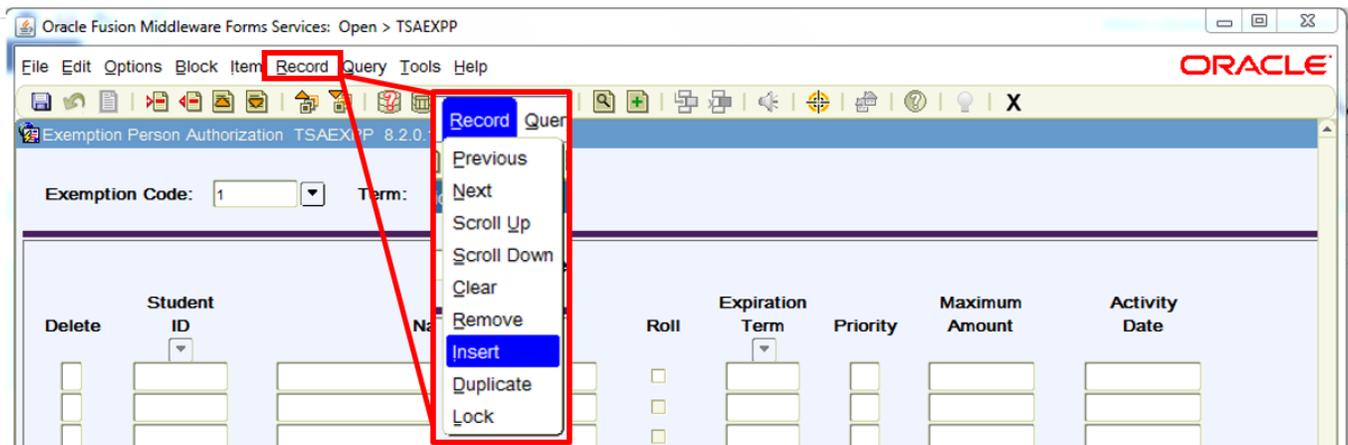
7. Add the Student ID in the **Student ID** field. The **Name** field will be auto-populated. If the Student ID is not known, it can searched for by clicking on the search button (▼) directly below the Student ID column header.
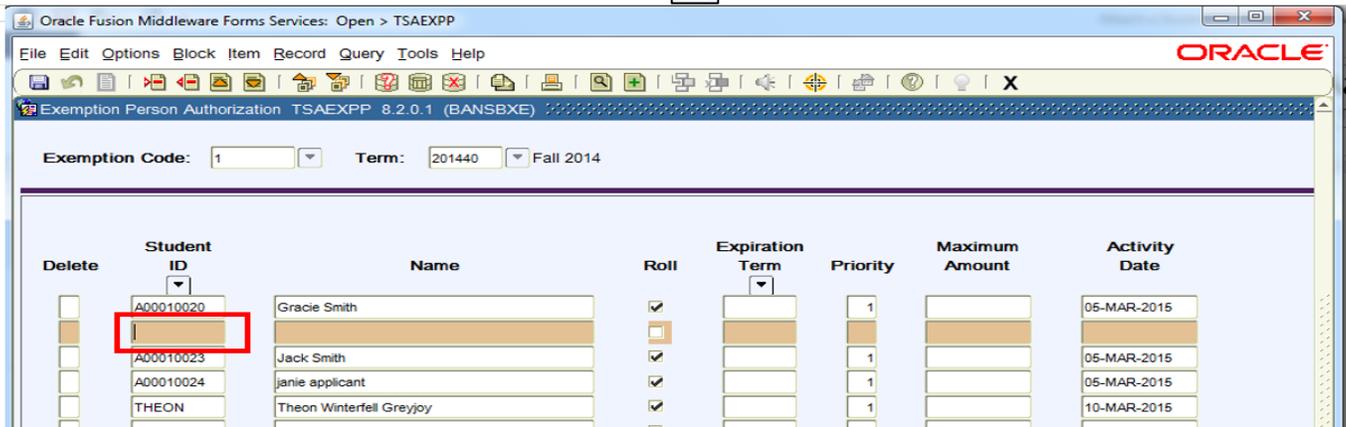
8. If the student should be rolled over into the next term, check the **Roll** field.
   - **IMPORTANT**: If a specific Exemption has already been established for a future term, checking the **Roll** field will not add the respective student to those previously-established, future-termed Exemptions. Users should manually add Students to future-term Exemptions in the case that they are already established and viewable in the **Exemption Code** search in step #3.
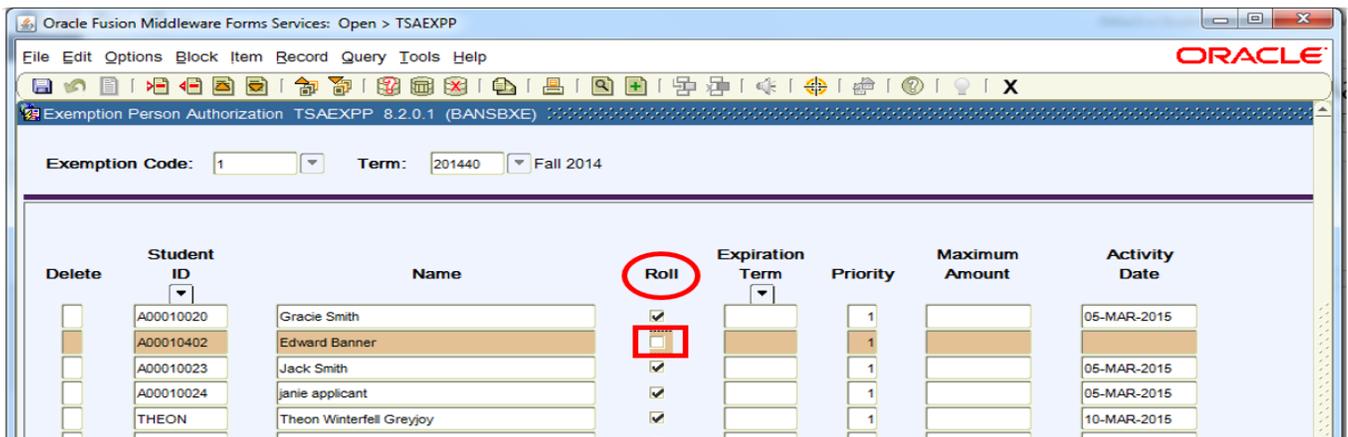
9. If the Exemption has an expiration for the student, enter the *last term* for which the Exemption should be valid in the **Expiration Term** field.
    - The student will not roll past this expiration term, and will have to be added to the Exemption again in order to receive the Exemption in any future terms.
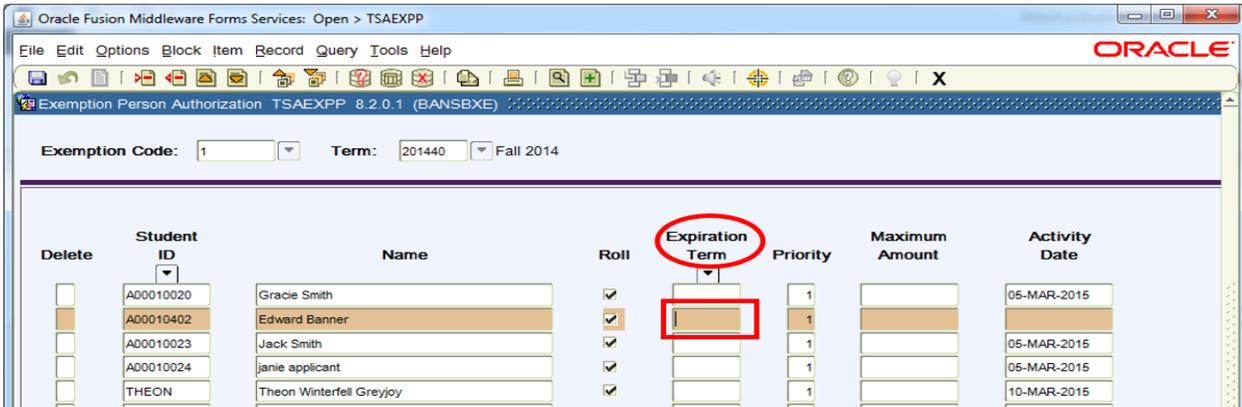
10. Click **F10** or **Save** 💾.
11. You should now see the newly added student on this page and note the bottom of the window for conformation that the recorded has been applied and saved.
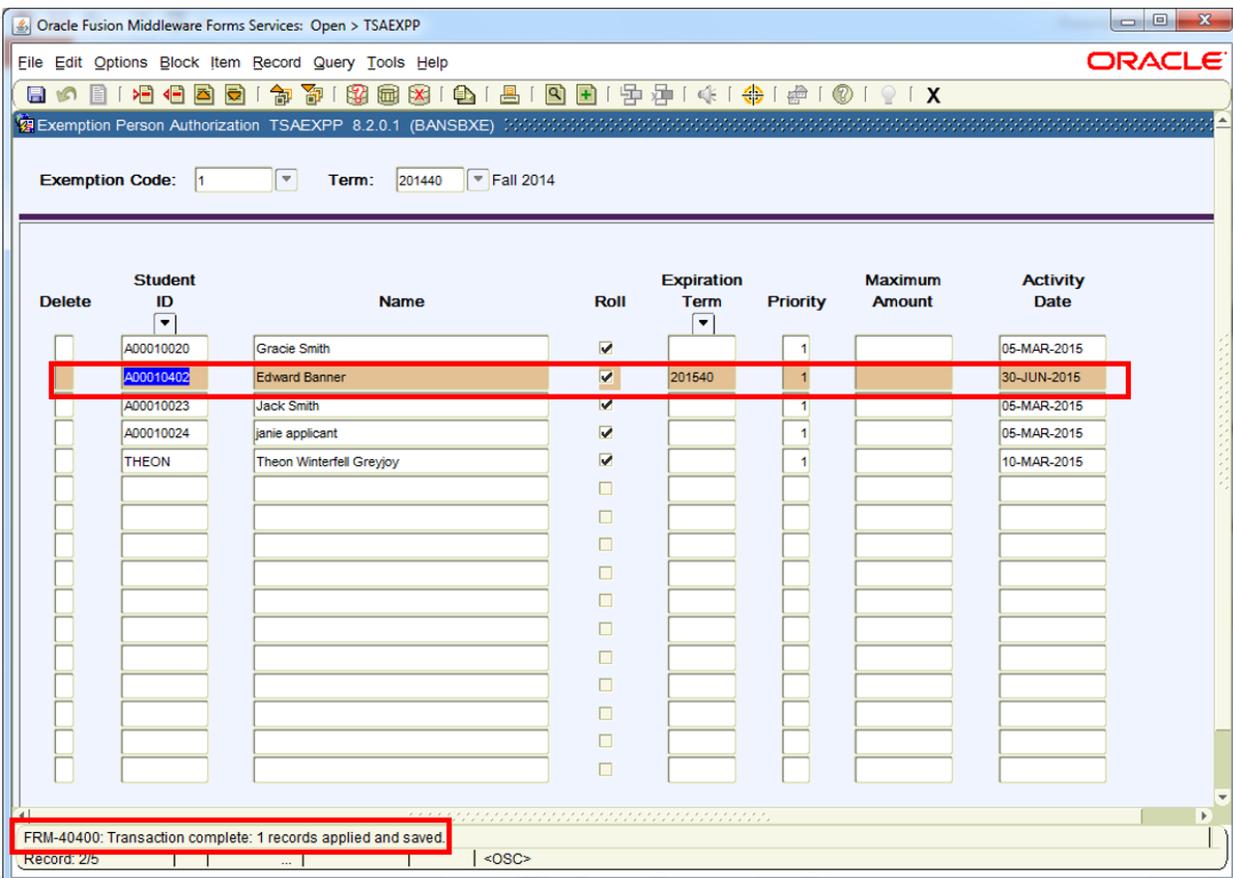
REMOVING A STUDENT FROM AN EXEMPTION

Students can be removed from an Exemption on the same **Exemption Person Authorization** form, **TSAEXPP**.

- **NOTE**: Students should be notified in a timely manner if they will be removed from an Exemption, as it may cause them to be lapsed from classes. Also, if removing them retroactively from previous terms, it will create a bill for the reversed Exemption amount.

1. Follow steps #1-6 for Adding a Student to an Exemption.
2. Identify the student you wish to remove from the Exemption.
3. Add a 'D' to the left-most column titled **Delete** on the page.
4. Change the **Expiration Term** to the *last term* for which the student should receive the Exemption and uncheck the **Roll** box.
5. Click **F10** or **Save** 🖫.

Delete	Student ID ▼	Name	Roll	Expiration Term ▼	Priority	Maximum Amount	Activity Date
	A00010020	Gracie Smith	✔		1		05-JAN-2016
	A00010023	Jack Smith	✔		1		05-JAN-2016
D	A00010024	janie applicant	☐	201720	1		05-JAN-2016
	THEON	Theon MY NAME IS REEK Winterfell Greyjoy	✔		1		05-JAN-2016
			☐				
			☐				
			☐				
			☐				
			☐				
			☐				
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FRM-40400: Transaction complete: 1 records applied and saved.

6. You will still see the student on this page, but with a 'D' in the **Delete** column, and the bottom status confirming that the record has been *applied and saved*.
7. **IMPORTANT**: If future terms exist for this same Exemption, it is likely that this student was assigned to those future Exemptions already, and users will need to repeat steps # 1-6 for each future-term Exemption in order to fully remove the student from that Exemption.
   a. **For example**: If the student became ineligible for the Exemption in Fall 2016 (201640), but the same Exemption had already been rolled to Winter 2017 (201710) and Spring 2017 (201720), the user would need to delete ('D') the student from each term's Exemption, as described in steps #1-6 above.

EXEMPTION PROCESSING AND RULES

Exemptions in Banner only process if the rules are met for respective Student Accounts, namely that a specific Detail Code charge has posted to the Student Account (reviewable via TSAAREV – see **Banner Accounts Receivable** training for details) that corresponds to the associated Exemption.

- If a Student Account is assigned to an Exemption, but specific Detail Codes have not posted to the respective Student Account in the appropriate term, an Exemption "credit" will not be processed.
- Exemptions are not immediate. Once appropriate charges are posted to the account, it may take up to 1-business day for the related Exemption credit to post (though most will process on the same business day).
- Exemption rules can be viewed in the **TSAEXPT** – *Exemption Authorization* screen. An **Exemption Code** and **Term** are entered in the key block, and users can Next-Block (Ctrl+PgDn or [icon]) to the "Detail Code Level Authorization" section of the form (see below) for specific Detail Codes that are being exempted, as well as their corresponding Exemption percentage.
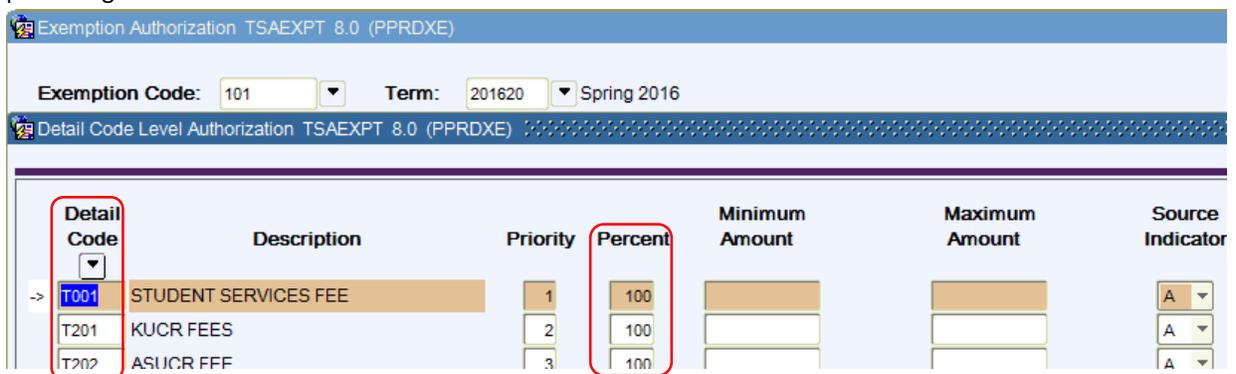
QUESTIONS ON EXEMPTIONS

Policy and rule questions regarding Exemptions can be directed to the Office of the Registrar for Tuition and Fee Exemptions, while to the Housing office for Housing exemptions. Questions on Exemption functionality can be directed to Student Business Services (SBS).