GENERAL STUDENT NAVIGATION

TABLE OF CONTENTS

REVISION HISTORY

Version	Date	Name	Description
2	Aug 2018	Kari	Updates for Banner 9; remove references to lapse
	Dec 2023	Cindy	Name information resulting from GRLN

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how various portions of the student record are recorded and viewed in Banner. This navigation is not intended to instruct a user how to make changes on these forms, but to provide an understanding of the data they contain.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Student information is updated by various offices across campus. The following components are discussed in this navigation document:

When viewing any student record information, please be mindful of FERPA policies. For more information, please read http://registrar.ucr.edu/registrar/privacy-ferpa/ucr-employees.aspx. Access to the Student Information System – Banner is based on your "educational need to know" for your specific job function on campus. Not all staff will have access to all data provided below.

The expectation is that departments utilizing email to communicate to students will utilize the UCR email account. Students are expected to check their R'mail account on a regular basis.

1. Deceased Students and FERPA Restrictions
2. Personal Identification (name, address, phone, email, etc.)
3. Holds
4. Comments
5. Cohorts and Attributes
6. Athletes
7. International Students
8. Special Programs
9. Advisors Assigned to Students
10. Student Class Schedule
11. Key Reasons a Student is Inactive (cancellation, withdrawal, dismissal, ELWR lapse, disciplinary suspension and dismissals, leave of absence)

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. General users of Banner

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.
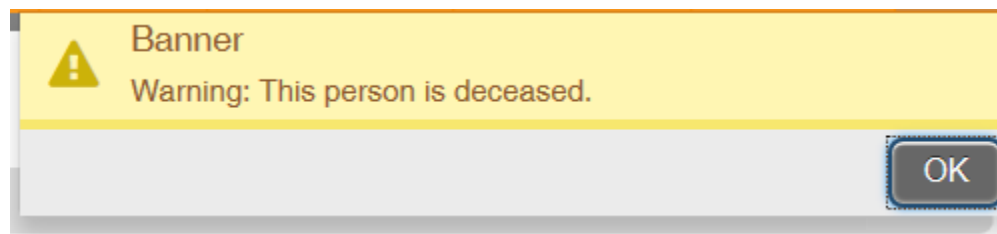
PAGES

The pages listed below are covered in this training.

Page	Page Name	Description

PROCEDURES TO VIEW GENERAL INFORMATION

DECEASED STUDENTS AND FERPA RESTRICTIONS

When you first bring up a student's account from any page within Banner, if the student has passed away you will receive a warning message.   Click OK to acknowledge the message.

When a student has restricted at least one item within Directory Information, you will receive a warning message.   Click OK to acknowledge the message.
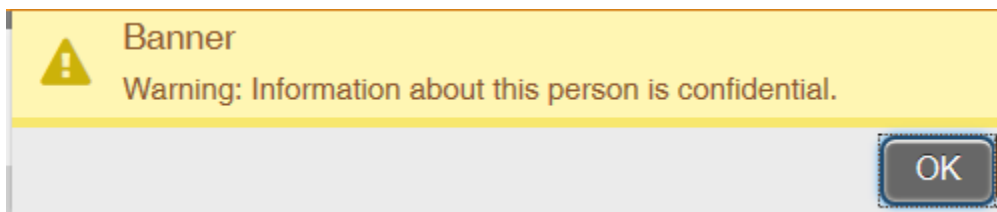
If you are not speaking with anyone you can move through the warning and continue with your work. If you are speaking with someone you MUST check what restrictions have been put in place.

1. **GOADPRF**.
2. Input the **Student ID** in the key block and **NEXT BLOCK**.
3. This page lists all items that students can restrict from Directory Information. If there is a check mark under **Display in Directory** you **CANNOT** release this information.
   a. *We are repurposing the use of this page in Banner for our Directory Information Restriction; therefore, the header "Display in Directory" can be misleading. If the item is checked it means that the student restricted the item through self-service.*

4. Any information outside of this list of student record items is **NON-Directory Information** and **CANNOT** be released without direct written consent by the student. Please see more detailed information about FERPA if you have questions.
5. The Confidential and Deceased indicators can be seen at the top left of each page in Banner.

PERSONAL IDENTIFICATION (NAME, ADDRESS, PHONE, EMAIL)

1. Go to **SPAIDEN**.
2. **Current Identification tab** – provides the student's lived name.

3. **Alternate Identification** – provides legal and previous names for the student. Only those with approved access will be able to view legal name.
   a. The **arrows on the bottom left** allow you to see historical names for the student.

4. **Address** – provides all addresses for the student.
   a. The student can have **multiple address types** but not more than one active address for each type.
   b. Address history is maintained with the **From and To dates**. If there is a To date provided then the address is no longer effective as of that date. We are not using the inactive address checkbox.
   c. The **arrows on the bottom left** allow you to view additional address records.
   d. Phone numbers are being stored separate from addresses and can be found under the telephone tab.

5. **Telephone** - provides all phone numbers for the student.
   a. Phone numbers have **Telephone Types** associated with them.
   b. There are no From and To dates for phone numbers so if it is no longer an active number it will have the **Inactivate box** checked.
   c. The **arrows on the bottom left** allow you to view additional phone records.

6. **E-Mail** – provides all email addresses for the student.
   a. Once a student has a UCR email account it is always primary.

b. Only UCR email addresses are marked to display on the web which means it will show in self-service for students and advisors.
c. There are no From and To dates for e-mail so if it is no longer an active address it will have the **Inactivate box** checked.
d. The **arrows on the bottom left** allow you to view additional email records.

7. **GUASYST** – can be used to view what module contains information about this person.
a. This page is just informational only, but can sometimes be helpful to determine high level information on what is in the system about a student.

HOLDS

1. View **SOAHOLD**.

2. The **Hold Type** and Description will tell you briefly want the hold is related to.
   a. The student receives a much longer description and information on how to resolve the hold through R'Web.
3. **From Date** – is the date the hold became or will become effective
4. **To Date** – is the date the hold was released or will be released.
   a. 31-DEC-2099 is the standard default date for the end of time.
5. **Origination Code** and **Description** – reflects the department who placed the hold and is visible to the student.
   a. **Tip**: You can click on the column headers to sort the holds. For example, click on "To" to have the current/recent holds come to the top; click on Hold Type or Originator Code to sort by those columns.
6. Holds can restrict a student from various actions to include registration, ordering transcripts, graduating, or receiving their diploma.
   a. You can see what is being held by looking up the Hold Type in STVHLDD. The validation table will appear, search for the hold that is currently assigned to the student, and you will see column headers associated with the different functions a hold can restrict a student. If the box is checked then a student is being prevented from that action based on that code.

   b. If you see a 99 in the VR MSG No field we are repurposing this field to indicate a student's diploma is being held. A value of 99 means a diploma will not be released and if the field is blank the diploma may be released.

COMMENTS

1. Go to **SPACMNT**.
2. Comments are provided by various offices around the campus in an effort to provide consistency in messaging to the student and a collaborative understanding of what has occurred with the student's academic record or information shared with the student.
   a. Notes specifically related to the student's degree audit, waivers/substitutions for requirements and information as to why they were not approved to graduate reside in the Degree Audit system, not in this page.
   b. All other comments related to academic advising are placed in the Student Profile.

3. Comments are expected to be factual, brief, and without subjective statements (i.e. the student is irresponsible).
4. **Comment Type** – is used to categorize the topic of the comment for easy searching.
5. **Originator** – captures the department in which the staff member who wrote the note is affiliated.
6. **Add Date** – is the date the comment was added.
7. **Last Update by** – this is the user ID of the last staff member who updated the note.
8. The remaining fields on this page are not being used. The contact date will default to the date the comment is initially entered like the activity date. The activity date however, will update to a new date if someone makes a modification to the comment and saves the page.

9. If there are a lot of notes for a student and you want to find a specific note or group of notes you can do searches on this page.
    a. Use the Filter to select the fields which you want to query from, such as **Comment Type** or **Originator**.
    b. If you want all notes that have a specific word in the comment, you can add the Comments field to your Filter and **search by a word or phrase** in the text
        i. Make sure you use the % wildcard in front of and behind your word, such as %petition%.

COHORTS AND ATTRIBUTES

1. Go to **SGASADD**.
2. Cohorts are a way to assign a student to a group that you want to track over time.
3. Some cohorts at UCR include Learning Communities and University Honors.
4. Cohorts are maintained by the department who oversees that population of students.
5. **Term** - you must provide a term in the key block.
6. **From Term** – the first term represented in the time period. It does not necessarily mean the first term the student has the cohort.
   a. The From Term is populated when a change or update (maintenance) occurs to the student's record for cohorts.
      i. If the student was placed into a Learning Community for Fall 2016. That would create a From Term of 201640 to show the Learning Community.

×	Additional Student Information SGASADD 9.3.5 (PPRDXE)		ADD	RETRIEVE	RELATED	TOOLS
ID: 860779577 Applicant, Jane A. **Term:** 201640 Confidential						Start Over

STUDENT COHORT — Insert Delete Copy Filter

	From Term	201640		Maintenance		To Term	999999		
Cohort Code *		**Description**						**Inactive**	**Reason**
LEENCS9CRN		ENCS MATH 9C						☐	

◄ ◄ 1 of 1 ► ►   10 ˅ Per Page   Record 1 of 1

      ii. If the student was then admitted to Honors in Spring 2017, the page would be maintenance for Spring 2017 to add the Honors cohort and the student would show having two cohorts with the From Term as Spring 2017.
      iii. Note that this is not the initial effective term for the Learning Community.

×	Additional Student Information SGASADD 9.3.5 (PPRDXE)		ADD	RETRIEVE	RELATED	TOOLS	1
ID: 860779577 Applicant, Jane A. **Term:** 201720 Confidential							Start Over

STUDENT COHORT — Insert Delete Copy Filter

	From Term	201720		Maintenance		To Term	999999		
Cohort Code *		**Description**						**Inactive**	**Reason**
LEENCS9CRN		ENCS MATH 9C						☐	
HON1		1st year Honors entrance						☐	

◄ ◄ 1 of 1 ► ►   10 ˅ Per Page   Record 2 of 2

7. **To Term** – if it is 999999 it means that this list of cohorts is effective for this student until the end of time.
   a. If there is a different term from 999999 the cohorts are effective to the term *before* the To Term (the To Term is not inclusive). Maintenance occurred on the record and you would want to put that new term in the key block to review what occurred on the student's record. A cohort may have ended or a new cohort might have been added.
8. **Inactive** – may be checked to signify that a student was made inactive for that cohort as of the To Term.
9. **Reason** – is the reason a student is no longer active in that cohort.

10. **Attributes** will be used to identify undergraduate students who have IGETC and therefore, are waived of all breadth requirements for graduation. This attribute feeds to Degree Works so that it can appropriately update in the student's degree audit. The **IGETC attribute** is assigned by the Colleges at the time they receive the certification.

11. You may see additional attributes on the student's account which are used in the business rules, such as, for assigning class level to a student in SGASTDN or to control asssessment of fees.

ATHLETES

1. Go to **SGISPRT**.
2. Most often you will query **by individual student** by entering the student ID.
   a. You can also query **by team** by entering the sport code with no student ID.
3. **Select a view**.
   a. **Current and Most Recent Records view (when searching by student) -** defaults and shows the most recent term and sport for the student.
      i. Be mindful of the term so you can determine how that relates to the question you are trying to answer.
      ii. Athletic procedures are to place a student on a team for an entire academic year (fall, winter, spring and summer), so you may see a future term available.
      iii. A status of A (Active) indicates an active student athlete who is part of the team.

b. **All Records view** - displays every term an athletic record was kept.
    i. A status of A (Active) indicates an active student athlete who is part of the team.

c. **Current and Most Recent Records per Athlete per Sport (when a sport code is entered in the key block) –** defaults and shows the most recent term a student was part of the team.
    i. Be very mindful of the term for the student. It could be a historical term meaning the student is no longer on the team.

✕ Athletic Compliance Inquiry SGISPRT 9.3 (PPRDXE)

ID: **Sport:** ACCW   Cross-Country - Womens

▾ ATHLETIC COMPLIANCE INQUIRY

Choose View	Current and Most Recent Records per Athlete per Sport	▾

Term	ID	Full Name	Status	Eligible	Academic Eligi...
201840	86077...	Applicant, Jane A.	A		
201840			A	PS	
201840			A	PR	
201840			A	PR	
201840			A	PS	
201840			A	PS	
201840			A		
201840		e S.	A		
201840			A		
201840			A		
201840			A		
201810			A		
201810			A		
201810			Q		
201810		M.	A		
201810		A.	A		
201810		e V.	A		
201810		a C.	A		
201810			A		
201810		th...	A		

Note: Compliance does not track competition in Banner therefore views related to competition are not used.

INTERNATIONAL STUDENTS

1. View **GOAINTL -**This page is for students with a non-immigrant visa.
2. **Visa Type –** provides you the type of visa the student has.

3. **The Certification of Eligibility tab –** provides the date of issue for the visa.

4. **Nationality tab –** provides the student's Nation of Birth and Citizenship.

SPECIAL PROGRAMS

We have several special programs offered to students that provide opportunities for them to extend their learning to other campuses.

1. **SGASTDN**.
2. **Fee Assessment Rate** – provides the program the student is participating in.
3. **Site** – provides the campus the special program is associated with if it is a UC campus.
4. Dates of participation in the program can be determined by reviewing the From Term and the To Term in combination with the existence of the Fee Assessment Rate code.

5. The Fee Assessment Rate is also used to track graduate students who are on Filing Fee status. These students would have a rate code of FIL, but they would not have a SITE code associated with their record.

ADVISORS ASSIGNED TO STUDENT

1. **SGAADVR**.
2. Input the **term**.
3. Students can have one to four advisors on their record per term depending on their college and if the student is part of a learning community.
4. **Primary Indicator –** identifies who the college considers to be the main academic advisor contact for that student.

STUDENT CLASS SCHEDULE

1. **SFARGRP –** This page provides you the registration dates for this student. Most students will have two time tickets for registration.

2. **SFAREGQ –** Provides a query of the student's registration by term or by date range.
   a. This page specifically pulls courses with the following registration statuses:
      i. **RE** – enrolled by a staff member.
      ii. **RW** – enrolled through self-service on the web.
      iii. **WC** – student withdrew from the course and earned a "W" grade.
      iv. **WL** – student is currently waitlisted for the course.
   Tip: Click on the Registration Status column header to sort the classes by this status.

Term	CRN	Subject	Course	Section	Registration Status	CEU	Cross List	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Begin Time	End Time	Part of Term
201840	15872	HIST	010	041	WL	N		☐	☐	☐	☐	✓	☐	☐	0910	1000	1
201840	18432	POSC	010	001	RE	N		✓	☐	✓	☐	✓	☐	☐	0810	0900	1
201840	18433	POSC	010	021	RE	N		☐	☐	✓	☐	☐	☐	☐	1310	1400	1

Registration Query SFAREGQ 9.3 (PPRDXE)   ADD   RETRIEVE   RELATED   TOOLS   Start Over

Term: 201840   Registration From Date: Registration To Date: ID: 862021852 Ayllon, Sandra V.

REGISTRATION QUERY   Insert   Delete   Copy   Filter

1 of 1   10 Per Page   Record 1 of 3

📄 Co-op Education

Total Credit Hours   5.000   Total CEU Hours   0.000

3. **SFARHST –** Provides a comprehensive list of all enrollment transactions to include grades for courses completed. Grade are initial grades reported and do not reflect any grade changes that have occurred in academic history.

   Note: Since this page has grades on it, you may not have access because you do not have a "need to know" under FERPA to see all student grades. Use the page discussed above to review registration.

   a. Course status lets you know if the student was enrolled, dropped or withdrew.
      i. **RE** – staff enrolled the student.
      ii. **RW** – student enrolled through R'Web.
      iii. **WL** – student is waitlisted for the course.
      iv. **WC** – student withdrew from the course and earned a "W" grade.
      v. **DD** – staff member dropped course due to the decision at the time they are attempting to register the student, not to resolve a registration error.
      vi. **DC** – staff member dropped course after student was enrolled or waitlisted.
      vii. **DR** – student dropped course through R'Web.
      viii. **CN** – student cancelled for the term and enrolled courses were dropped.
      ix. **WD** – student withdrew from the university and courses were dropped.
      x. **WW** – student withdrew from the university and earned "W" grade.
   b. You can use the Filter function in this page to narrow your results for specific information you are looking for or click on a column header to sort by A to Z or Z to A.

Term *	Part Of Term	CRN	Subject	Course	Level	Course Status	Start Date	Completion Date	Number Of Extensions	Midterm Grade	Final Grade	Grade Detail	Grade Rolled
201810	1	30828	BIEN	175B	U	RW							
201810	1	30829	BIEN	175B	U	RW							
201810	1	34812	ENGR	109	U	RW					B		✓
201810	1	35298	ETST	012	U	DR							
201810	1	35304	ETST	012	U	DR							
201810	1	41520	BIEN	142	U	RW					A		✓
201810	1	41521	BIEN	142	U	RW							
201810	1	42076	BIEN	175B	U	RW					IP		✓
201810	1	43485	ETST	140	U	DR							
201810	1	44198	PHIL	163	U	RW					S		✓
201740	1	10735	BIEN	135	U	RW					A-		✓
201740	1	10737	BIEN	135	U	RW							
201740	1	10742	BIEN	155	U	RW					A-		✓
201740	1	10745	BIEN	155	U	RW							
201740	1	10747	BIEN	167	U	RW					A+		✓
201740	1	10748	BIEN	175A	U	RW					IP		✓
201740	1	19978	BIEN	167	U	RW							
201740	1	19979	BIEN	175A	U	RW							
201740	1	20663	MUS	014	U	DR							
201740	1	22043	MUS	014	U	DR							

KEY REASONS A STUDENT IS INACTIVE

Students can become inactive for various reasons at UCR. The SGASTDN page will show that the student record is inactive, but to know why they are inactive you need to consider the following.

1. **SFAREGS** – the status in the Enrollment Information section will show if a student is **cancelled** or **withdrawn** for a term. The **Reason** field shows why the student cancelled or withdrew.

2. **SHAINST** – will show an **academic dismissal or an ELWR lapse** in **End of Term Academic Standing**. **Progress Evaluation** shows the standing that was earned prior to the dismissal or ELWR lapse.

3. **SHATCMT** – will show if a student was **disciplinarily dismissed** or is currently **disciplinarily suspended**.

4. **SGASTDN –** will show if a student is on a leave of absence.

5.   If the student is planning to return to UCR, you will see that in SGASTDN. The student will have an active status and a student type of R for Readmit/Returning.

You may also see a student with a **Student Status** of **RD (Ready to Enroll)**. This means the student is in the time period of 3 quarters, not including summer, where s/he can enroll without filing for readmission. After 3 quarters, the Student Status changes to IS (Inactive) and the student must file for readmission.