

PROCEDURE

Effective Date: 6/7/07

Approved By: Vice President George Pierce

Authority: RCW 28B.15; SAAM 85.54

Cancels:

See Also: POL-U5352.02; PRO-U5352.02A; PRO-U5352.02B

PRO-U5352.02B**MAINTAINING BANNER FEE ASSESSMENT RULES****Definitions:**

Banner fee assessment rules, tables and detail codes – combine to tell the system how to charge tuition, how much to charge, and where to record the resulting revenue. The rules are a set of criteria established by the university that determine when and how to assess tuition. (For example, a rule tells the system when to charge non-resident rates or resident rates.)

Banner fee tables – contain the amounts to be charged based on the rules. They contain the rates per credit for tuition and the amounts of each mandatory fee.

Banner detail codes – tell the system to which budget code the revenue should be recorded.

Action by:**Action:**Student Accounting
Fiscal Analyst 2

1. **Reviews** rules prior to the beginning of registration for Fall Quarter
2. **Verifies** with the University Planning and Budgeting that there are no changes to how fee assessment processes work.
 - 2a. **If** no changes have been made in the fee assessment process, submits request to roll rules forward to Student Accounts Supervisor for approval. (Go to step17)
 - 2b. **If** the Board of Trustees has approved changes in the fee assessment process, works with Student Accounting Supervisor and SA System Support to revise rules and test processes in the test environment before making changes to the production fee assessment process. (Go to step 3)
3. **Modifies** fee assessment rules, in the test system, as required to change fee assessment process as directed by Board of Trustees minutes.
4. **Tests** fee assessment rules in the test system to verify that modifications work as expected.
5. **Reviews** rule set up and test results.
6. **Submits** results of test modifications to University Planning and Budgeting for approval.

Student Accounts
System SupportStudent Accounting
Supervisor

PROCEDURE

Action by:

Action:

University Budget Analyst

7. **Reviews** and approves results of rule modifications.
8. **Documents** review and approval with name and date.
9. **Submits** approved modification request to the Student Accounting Supervisor.

Student Accounting Supervisor

10. **Requests** Student Accounts System Support to set up tested modifications in the pre-production database.

Student Accounts System Support

11. **Modifies** fee assessment rules in the pre-production database.
12. **Tests** modified fee assessment rules in the pre-production database.
13. **Submits** results of testing to Student Accounting Supervisor for review.

Student Accounting Supervisor

14. **Reviews** test results of rule modifications against tested modifications for accuracy.
15. **Submits** rule modifications and test results to Bursar for final review.

Bursar

16. **Reviews** and approves test results of rule modifications. (Go to step 18)
17. **Reviews** request to roll rules forward.
18. **Documents** review with name and date.
19. **Sends** approved rule request to Student Account System Support to roll rules forward or move modified rules into production database.

Student Accounts System Support

7. **Rolls** rules forward or moves modified rules into production database.
8. **Documents** process with name and date.