

Agenda for CPoS (Course Program of Study)

March 31, 2021

# Banner Financial Aid Courses in Program of Study (CPoS)

## Engagement Description

Overview, configure, and test Course Program of Study (CPoS) functionality in Banner Student and Banner Financial Aid.

## Engagement Objectives

* To provide an overview of the functionality of Banner CPoS in the Banner Student and Financial Aid modules
* Document the detailed design specifications necessary to configure the business processes for the Financial Aid module to support CPoS

## Participants

### Recommended:

* Financial Aid
* Registrar Staff (with permissions to register students)
* IT representatives that support Financial Aid

## Pre-Requisites/Requirements

* Availability of IT staff to resolve any technical issues
* Provisioning of remote access to a Banner TEST environment
* Conference room or office with adequate space for attendees and equipment including:
  + Projector and screen for computer access to the Zoom session and Banner
  + Internet connectivity and Banner TEST access
  + Conference phone for audio

## Session Materials

### Materials (delivered by consultants):

* None

### Reference only materials (do not print for all participants):

* Digital copy of the Banner Financial Aid, Banner Student, and Banner General User Guides for reference

| **Documentation Name** | **Documentation** |
| --- | --- |
| Banner Student User Guide |  |
| Banner Financial Aid User Guide |  |
| Banner General User Guide |  |

#### Proposed Agenda

| Timeframe | Topic |
| --- | --- |
| 03/31/21- TBD | Introductions  Review CPoS Functionality and Setup (Banner General/ Banner Student) - Addendum below   * Validation/Rules/Control Set-Up * Program Configuration/ Maintenance * Other processes affecting CPoS     Review CPoS Setup (Banner Financial Aid) - Addendum below   * Rules/Control Set-Up * Configure CPoS in Banner Financial Aid * Course Program of Study Job Submission Processing * Course Program of Study Job Submission Output Review   Test CPoS in Banner Student/Financial Aid   * Adjust configuration as needed.   Discuss Organizational Readiness Planning  Wrap-up |

Addendum

**CPoS Validation Pages (Banner Student/Banner General)**

| **Page Description** | **Page Name** |
| --- | --- |
| External API Information Validation | STVREST |
| Business Rule Process Code Validation | GTVSQPR |
| Business Rule Code Validation | GTVSQRU |

**CPoS Control/Rule Pages (Banner Student/Banner General)**

|  |  |
| --- | --- |
| **Page Description** | **Page Name** |
| Business Rules Form | GORRSQL |
| Course program of Study Control Form | SFACPSC |

**CPoS Validation Page (Banner Financial Aid)**

| **Page Description** | **Page Name** |
| --- | --- |
| Enrollment Rule Validation | RTVENRR |

**CPoS Control/Rule Pages (Banner Financial Aid)**

|  |  |
| --- | --- |
| **Page Description** | **Page Name** |
| Miscellaneous Parameters | RORMPRM |
| Global Institution Financial Aid Options | ROAINST |
| Enrollment Rules | RORENRR |
| Fund Enrollment Rules | RFRENRR |
| Financial Aid Repeat Course Exclusion | RORRPCX |

**CPoS Process and audit review page (Banner Student)**

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| --- | --- |
| **Process/Page Description** | **Process/Page Name** |
| Course Program of Study Process | SFPCPOS |
| Student Course Evaluation Audit | SFASCRE |