

Banner Code Set Up Request Form Instructions

This form is used to create codes in Banner for posting to a student's account and attaching the account number to the codes that will feed to FAMIS.

1. Type of Code/Award:
 - a. Select the appropriate type of award, multiple codes can be selected
 - b. Codes will be set up for each type that is selected and if the type of award can be awarded to both Undergraduate and Graduate students there may be two codes created for the same type of award
2. Account Information
 - a. Enter in the 6-digit account number and 5-digit support account
 - b. Enter in the name of the account as it is found in FAMIS
 - c. Grant Accounts must be approved by the Research Office
 - d. Non-Grant Account request received by the Bursar's Office will be validated by the Accounting Office if the account can be used to pay Stipends, Scholarships and Tuition/Fee Payments. Fee accounts cannot be used for these types of payments with the exception of Scholarships if the account was specifically budgeted for scholarships and approved through the budget process to cover this expense.
3. Proposed Name of Stipend, Scholarship and/or Tuition/Fee Payment code
 - a. The max number of characters for the proposed name is 24
 - b. If you are requesting multiple types of codes and want their names to vary then the requests will need to be separate forms.
 - c. Tuition and Fees is not an acceptable name for Tuition/Fee Payment codes. This is too generic. The name should reflect the name of the FAMIS account in order to distinguish all of the different codes.
 - d. The name of the Stipend, Scholarship and Tuition/Fee Payment codes that is entered in Banner will be something that the student can view on their billing statement or financial aid awards on SAIL.
4. Recipients of Funds/Award
 - a. Select either Undergraduate Students, Graduate Students or both (Undergraduate and Graduate Students) based on who can receive the awarded funds.
 - b. The recipients of the funds will determine what object code is use with the Account Information from step 2.
 - i. Scholarships and Tuition/Fee Payments
 1. Undergraduate Students – Object Code 5910
 2. Graduate Students – Object Code 5915
 - ii. Stipends
 1. Grant Accounts – Object code 6030
 2. Non-Grant Accounts
 - a. Undergraduate Students – Object Code 5910
 - b. Graduate Students – Object Code 5915

Banner Code Set Up Request Form Instructions

5. Departmental Contact – please enter in the name and extension of the person that will be contacted if there are questions about the Banner Code Set Up Request Form
6. Special Notes – This is primarily used by the Bursar's Office for setting up rules on Tuition/Fee Payment rules. (e.g. Paying Tuition only no Fees, Paying 50% of Tuition and Fees, etc...)

Additional Information:

- A. Once the form is completed submit it to the appropriate office to begin processing
 - a. Grant Accounts should be submitted to the Research Office and then they will submit it to the Office of Student Financial Aid (OSFA) and Bursar's (BUR) Office.
 - b. Non-Grant Accounts should be submitted directly to the OSFA and BUR Offices.
 - c. Currently the contacts for setting up the codes are the Bursar (christina.holzheuser@tamucc.edu) and Associate Director Financial Assistance (cecilia.delagarza@tamucc.edu).
- B. Once the FA Fund Code (aka FA Banner Code) and the Detail Code (aka BO Detailed Code) are created, OSFA and BUR will respond to the email to notify the departments of the codes that were created for the account number and type. Please record these codes somewhere; they will be needed on the TAMUCC Request Form for processing the students.
 - a. A FA Fund Code will be created for Stipend and Scholarship codes only. Tuition/Fee Payment codes do not have a FA Fund Code.
 - b. A Detail Code is created for Stipend, Scholarship and Tuition/Fee Payment codes.
- C. If you are unsure if a code has already been created for an account number you can send an email to those listed under A with the account number. One of the recipients will respond to the email with the codes if they are set up.