

HOW TO DISPLAY AND PROCESS WEB ADMISSIONS APPLICATIONS IN BANNER SIS Electronic Application Process Form (SZAEAPS)

General:

This form is used to display admissions applications received electronically (through the Web Admissions Application for Students and the Web Admissions Application used by staff for data entry of paper applications). It allows an admission office to perform required manual verification steps, performs system verification of data for matching suspense files, and can also be used to request that the information be moved from the holding tables to the permanent Banner tables.

This form allows you to perform a manual Admissions Push Process – normally applications are pushed into Banner with an overnight batch process (SZRETMT). Applicants whose identity cannot be resolved by the Batch Admissions Push Process are left in Suspense for manual identity verification. Examples of applicants who would be in suspense are ones that do not provide a SIN, Permanent Code or previous McGill ID and who match to more than one existing person in Banner on name (last name and first 3 characters of first name), birth date and gender. Also in suspense would be applicants who provide a SIN, Permanent Code or previous McGill ID, and who match to more than one existing person in Banner on these fields, or who match one existing person in Banner on these fields but have a discrepancy on name (last name and first 3 characters of first name), birth date or gender.

The form is entered in query mode and defaulted to Person Status 'S' (Suspense records). The user can specify the criteria to select electronic applications to be displayed and processed. Other special functions can be performed to navigate through the form using the Navigation Frame.

Related Documentation:

- ❖ Person Matching Form (SZQMTCH)
- ❖ Electronic Applicant Search Form (SZAEIDN)
- ❖ Web Application Submitted Form (SZAETBL).

Check List:

Before you proceed, you must have the following information:

- ❖ Minerva Web Suspense Report or Error Report (to fix unresolved applications)
- ❖ Web ID of applicant (to change Web PIN)

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

Accessing the "Electronic Application Process Form" (SZAEAPS)

Type the name of the form **SZAEAPS** in the Direct Access field.

The adjacent screen will appear:

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

In the table below, text inside {} brackets refer to Banner functions that are performed with buttons, menu items, or keystrokes.

Fields that have a red check mark (✓) in the **Req'd** column are required fields and need to be filled in with the appropriate data (see **Explanation/Description** column for details).

The screenshot shows the 'Electronic Application Process Form SZAEAPS 5.2 (QA)' window. It contains several input fields and checkboxes, each labeled with a number in a yellow circle:

- 1. Web ID
- 2. Record Type
- 3. Compl. Date
- 4. Admission Office
- 5. Person Status
- 6. Web ID (table header)
- 7. Applicant Name (table header)
- 8. Appl No. (table header)
- 9. Rec Typ (table header)
- 10. Appl Code (table header)
- 11. Status Pers App (table header)
- 12. Status (table header)
- 13. Banner ID
- 14. Term
- 15. Source
- 16. Compl. Date
- 17. Complete ?
- 18. Accepted
- 19. Process
- 20. Proc. Date
- 21. Admission Office

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	Web ID			The Web ID field can be used to specify the ID of an applicant for whom data is to be displayed. The value entered must be a valid electronic ID as stored in the application temporary tables. Use a List function to access the Electronic Applicant Search Form (SZAEIDN) where you can search	Electronic Applicant Search Form (SZAEIDN)

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					for valid electronic IDs using that name.	
	2.	Record Type			The Applicant's record type will display <i>N</i> or <i>S</i> depending upon application data associated with the entered ID. N - indicates applications submitted through unsecured Web processing (e.g. with a web ID that is NOT a McGill ID). S - indicates applications submitted through secured Web processing (e.g. Minerva).	
	3.	Compl Date			Date the application was completed.	
✓	4.	Admission Office	Select Admissions Office for which you want to view applications.	Applications attached to selected admissions office will be displayed when you block down and Execute Query (F8)	Admissions Office associated with the first program selected by the applicant. The first admissions office will be responsible for handling the suspense records even though 2 application records may be created for 2 different admissions offices. The admissions office should be selected so that only those applications under your jurisdiction will be selected for possible processing.	
	5.	Person Status			This will default to 'S' (suspense records). Possible values are: N : (not resolved). This means that there has been not yet been an attempt at a match. S : (suspense). A match has been attempted and the application is in suspense. Y : (resolved) A match has been	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					attempted and the application was either matched or determined to be new.	
			Proceed to the Next Block by clicking the icon , or by pressing Ctrl + Page Down on your keyboard.	Application data meeting the criteria set in the above fields will be displayed. All fields which are not searchable in the first block are searchable here.		
	6.	Web ID			The Electronic Application ID field displays ID used by the applicant when the application was submitted. For those who accessed the web application via Minerva this will be their McGill ID. For others it will be the web ID they created for themselves when they logged in to the web application. For paper applications entered via the staff application, the web ID will be the applicant's McGill ID if it was provided, or a system generated web ID.	
	7.	Applicant Name			Displays the name given by the applicant when the application was submitted, in the format "last, first".	
	8.	Appl No			The Web Application Sequence Number field displays the number of the application. Each application started by the applicant using the same web ID is given a one-up sequence number.	
	9.	Rec Type			The Record Type field is a display-only field, which will display N or S (see above).	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	10.	Appl Code			The Application Code displays the type of electronic application submitted by the person. UG- Undergrad, GR-Grad, CE-Cont Ed.	
	11.	Pers Status			The Person Status Indicator displays the status of the manual verification steps associated with the person. It will be set to 'S' if the record was placed in suspense when matched to existing Banner records, to 'E' if required matching data are missing (Error), and to 'Y' if all the person verification steps (e.g. identity resolution) have been completed.	
	12.	App Status			The Application Status Indicator displays the status of the manual application verification steps associated with the application. McGill currently has no such steps. It will automatically be set to 'Y' when suspense records have their identities resolved.	
	13.	Banner ID			Banner Identification number or McGill ID.	
	14.	Term			The application Term field displays the term for which the application was submitted.	
	15.	Source			The source Code field displays the source of the electronic application. It will be set to WEB if it is submitted by the applicant over the web and set to PAP if it is data entered on the web by admission staff from a paper application.	
	16.	Compl. Date			Date the applicant completed and submitted the application.	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	17.	Complete			The Application Complete checkbox indicates whether the application is complete (including payment of application fee). Checked (set to Y) and unchecked (set to N) are the two possible values.	
	18.	Accepted			The Accept Application Indicator is used to specify whether the University will accept the application for further processing, which can only occur if this flag is set to Y. U(ndetermined) Y(es), and N(o) are the only valid values. To manually continue with Verification and Loading, the application must first be accepted for processing (Y).	
	19.	Process			The Process Indicator displays the processing stage of the application. There are four possible values: N - No verification of the application data has yet been performed. E - Verification errors in required data which must be resolved or overridden before further action can be taken. V - Verified P - Pushed. The application data has been pushed or loaded into the permanent Banner tables.	
	20.	Proc. Date			The Process Date field is a display-only field. It displays the date on which the most recent processing took place, and it reflects the date on which the Process Indicator was set to its current value.	
	21.	Admission Office			The Admissions Office field is a display-only field. It displays the Admissions Office associated with	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					the first program selected by the applicant. To query on Admissions Office use the key block field #4.	

TO MANUALLY PUSH AN APPLICATION:

- ❖ Select the application to push by highlighting it on the first page of SZAEAPS. Only complete applications (field #17) that have not already been pushed (field #19) can be pushed.
- ❖ Choose “Manual Verification Steps” from the Navigation (Options) menu. See documentation in following sections. In this step you will resolve the identity of the applicant by matching them to an existing person in Banner or creating them as a new person. At the end of this step the person and application statuses should both be set to ‘Y’ (fields #11 and #12 above).
- ❖ Accept the application for processing. See field #18 above.
- ❖ Verify the application data by choosing “Verify Application” from the Navigation (Options) menu. Review the results by choosing “Review Results” from the Navigation (Options) menu. See documentation in following sections.
- ❖ Load the application data from the temporary tables to Banner permanent tables by choosing “Load Application” from the Navigation (Options) menu.

HANDLING SUSPENSE RECORDS:

Suspense records will have a person status of ‘S’ and their identity must be resolved manually. Select a suspense record and perform Step 2 from the Manual Push steps above. Once you have completed the IDVR step, you can stop there and the remaining steps will be completed by the next run of the Batch Admissions Push Process. If you choose you can continue with Steps 3-5 above to immediately complete the push process for that applicant.

Non-Student PIN Change Window

To access this window choose “Change PIN” from the navigation (Options) menu of the first page of SZAEAPS.

This window can be used to change the PIN associated with the WEB ID of a person who has started an admissions application. It also displays the applicant’s last login date and the **Web Access Locked** checkbox, and is where you would re-enable a Web login if it has been disabled due to excessive login failures.

Use a Count Query Hits function or the Return button to return to the application section of the main window.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✓	1.	ID			Web ID. This is the ID the applicant assigned to himself when the application was started.	
	2.	Name			Name as it appears on temporary name table.	
			Proceed to the Next Block by clicking the icon , or by pressing Ctrl + Page Down on			

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
			your keyboard.			
	3.	Identifier			This field displays the ID used to access non-student (unsecured) Web admissions application processing (i.e. applicants who do not come through Minerva). Display only.	
	4.	Transaction Packet			This field displays the transaction packet reference number assigned to an application received via EDI. Will always be blank.	
✓	5.	PIN			The PIN used by a non-student to submit and/or review application information through unsecured Banner Web admissions application processing. It can also be used to update the PIN. Must be a six-digit numeric value.	
	6.	Web Access Locked			The Web Access Locked checkbox is checked (set to Y) if the applicant's login has been disabled due to excessive login failures. If disabled, this field can be unchecked (set to N) to allow the applicant to access application processing in the unsecured web application.	
	7.	Activity Date			Displays the system-maintained date on which the record was added or last updated. Display-only field.	
	8.	Web Last Accessed Date			Displays the date on which the applicant last accessed the Web Admissions application. Display-only field.	
	9.	Return			Return to the Application section of the main window.	

Applicant and Application Manual Verification Window

To access this window choose “Manual Verification Steps” from the navigation (Options) menu of the first page of SZAEAPS.

Used to display, add, or update data relative to manual verification steps for a person. Manual verification steps are defined on the Application Verification Steps Validation Form (STVASTA). Those steps with a checked **Load Indicator** (set to Y) will be automatically attached to each person’s record when an electronic application is received. You can also attach additional manual verification steps, if required.

Use the Return button or a Count Query Hits function to return to the Application section of the main window.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✓	1.	ID			Web ID of applicant selected on first page of SZAEAPS. Display only.	
✓	2.	Name			Name as it was entered on the web app. Display only.	
Applicant and Application Manual Verification						
	3.	Step			This field displays the code of a manual verification step attached	Application Verification Steps Validation Form

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					manual verification step attached to the person. If entered, values must be valid on the Application Verification Steps Validation Form (STVASTA), for step codes defined for people. Double-click on this field to display a list of valid codes. There will always be an ID Verification step (IDVR).	Steps Validation Form (STVASTA)
	4.	Step Description			When a valid code is entered, its description will also display.	
	5.	Add Date			Displays the date on which a manual verification step was attached to a person. Display-only field.	
✓	6.	Comp Ind			Complete Indicator checkbox. Displays the status of the manual verification step. It will be unchecked (set to N) when a new step is added, and must be checked (set to Y) manually when the step has been completed. When <i>all</i> manual steps for a person are complete, the Person Status Indicator in the Application section of the main window of this form will also be checked (set to Y). Note the ID Verification step (IDVR) cannot be checked manually. Instead it is automatically checked when the person is matched to an existing person, or created as a new person.	
	7.	Completion Date			This field displays the date on which the step was completed and the Complete Indicator checked (set to Y). It will default to	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					the current date when the Complete Indicator is checked (set to Y), but it can be changed to any other valid date.	
			Proceed to the Next Block by clicking the icon, or by pressing Ctrl + Page Down on your keyboard.			
Manual Application Verification Steps						
	8.	Step			This field displays the code of a manual verification step attached to the application. Double-click on this field to display a list of valid codes. There are currently no Manual Application Verification steps required so it will automatically be set to complete when the IDVR step is resolved.	
	9.	Step Description			See above	
	10.	Add Date			See above	
	11.	Comp Ind			See above	
	12.	Completion Date			See above	
	13.	Return	A window may display asking if you want to update person and application status.	If you choose No – no updates will be made and you will be returned to the first page of SZAEAPS. If you choose Yes – you will remain in this window and can press SAVE to update status.	Return to the Application section of the main window.	

RESOLVING THE ID – ID VERIFICATION:

If the IDVR step is not complete you must try to match the applicant to existing Banner records by choosing “Person Search” from the Navigation (Options) menu. This will take you to the Person Matching Form (SZQMTCH) – see the separate documentation on this form.

If a match is found when you return to this window from SZQMTCH, the IDVR step will now be checked as complete, and you must press SAVE to save this change.

If you do not find a match and have determined that the applicant is a new person then choose “Create Person” from the Navigation (Options) menu – see documentation below.

Create Person Window

To access this window choose “Create Person” from the navigation (Options) menu of the Applicant and Application Manual Verification window of SZAEAPS.

This window can be used to add a person to the permanent Banner tables, who has submitted an electronic application and does not match to any person in Banner. Adding a person here creates an identification (SPRIDEN) record, and assigns a McGill ID and Banner pidm. None of the application information can be loaded to the permanent tables until the spriden record is created.

To add a person to Banner using this form, specify that you want to have an ID generated, and **press SAVE to Create Person**. An identification record will be created using the first, middle, and last names displayed and the ID option that you have selected. Any changes or updates to the name must be made on the General Person Identification Form (SPAIDEN) after you have created the person.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✓	1.	ID			Web ID	
✓	2.	Name			Name from web application.	
	3.	Select an ID			This field is used to specify that the value in one of the four numbered ID fields will be used as the SCT Banner ID when the	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					identification record is created, or that you want to generate a Banner ID. Always use the last option 'Generate Banner ID' .	
	3a	Electronic ID			Displays what the applicant used as his/her ID when the application was submitted. DO NOT SELECT THIS OPTION.	
	3b.	Local ID			Displays what the applicant reported as a local reference ID (e.g. a generated ID at another institution), if any. No values will display here. DO NOT SELECT THIS OPTION.	
	3c.	SSN			Displays what the applicant reported as his/her social security number, if any. DO NOT SELECT THIS OPTION.	
	3d.	Banner ID			This is the option to force create a Banner ID. Enter the number for the Banner ID. DO NOT SELECT THIS OPTION.	
✓	3e.	Generate an ID			Click on Generate ID , and then click on the SAVE icon. A Banner ID will be created. This is the option we will use to create a new Banner ID when no match is found.	
	4.	First Name			Displays the first name exactly as submitted in the electronic application. If an identification (SPRIDEN) record is created using this page, the first name will be created using this information. Any changes, (for example: in case, spelling, or punctuation),	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					required for the submitted information must be made on the General Person Identification Form (SPAIDEN) after the identification record has been created.	
	5.	Middle name			As for first name.	
	6.	Last Name			As for first name.	
	7.	Username			The current ID of the current terminal session. It will be stored in the identification (SPRIDEN) record created by use of this form to audit the source of the identification record.	
	8.	Origin			The name of the form currently in use (SZAEAPS). It will be stored in the identification (SPRIDEN) record created by use of this form to audit the source of the identification record.	
✓		Create Person	Press SAVE to create the new ID.			
	9.	Return	Press Return to return to the previous window of SZAEAPS <u>without</u> creating a new person.			

Verification/Load Results

To access this window choose “Review Results” from the navigation (Options) menu of the first page of SZAEAPS.

The System Verification Procedures window displays the verification procedures and the status of each procedure. It is also where verification procedures must be overridden if an application with errors or missing data is to be processed further after system verification has identified errors.

Many procedures can be attached to a single application type. Use the Next Record and Previous Record functions to scroll through attached procedures.

After verification has been performed for an application, the verification status will display on the main window of the Electronic Application Process Form (SAAEAPS). If the verification status is *E* (errors), corrective action must be taken or some or all of the application's data will not be able to be loaded. The specific errors will be identified in the System Verification Routines section of the form.

The screenshot shows the 'Verification/Load Results' window in the SCT Banner - QA application. The window title is 'SCT Banner - QA' and the subtitle is 'Verification/Load Results SZAEAPS 5.2 (QA)'. The interface includes a menu bar (File, Options, Edit, Block, Field, Record, Query, Help, Window) and a toolbar with various icons. The main content area is divided into several sections:

- 1.** ID: [Field with value 'm3ak']
- 2.** Name: [Field with value 'Vennos, Alicia']
- 3.** Label: [Field with value 'M010']
- 4.** Procedure Description: [Field with value 'Verify basic Application data']
- 5.** Req: [Field with value '1']
- 6.** Comp: [Field with value '1']
- 7.** O/R: [Field with value '1']
- 8.** Activity Date: [Field with value '08-APR-2002']
- 9.** Dates: [Field with value '08-APR-2002']
- 10.** Verified: [Field with value '08-APR-2002']
- 11.** Completed: [Field with value '08-APR-2002']
- 12.** Req: [Field with value '1']
- 13.** Comp: [Field with value '1']
- 14.** O/R: [Field with value '1']
- 15.** System Verification Routines: [List of routines with checkboxes]
- 16.** Return: [Button]

The 'System Verification Routines' section contains the following items:

- Req Comp O/R ID is Resolved within Banner System
- Req Comp O/R App source = WEBAPP is valid.
- Req Comp O/R App Source Primary Ind = N is valid.
- Req Comp O/R Residence Code = C is valid.
- Req Comp O/R EDLV code = 045 for HLE is valid.
- Req Comp O/R No session code supplied in app.
- Req Comp O/R Location of HLE school = QC, 000 is valid.

The bottom status bar shows 'Procedure Label' and 'Record: 1/7'.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	ID			Web ID	
	2.	Name			Name from web application.	
	3.	Label			Procedure Label. The label or code of the procedure displayed. You may query a particular procedure such as P900 the load	

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					procedure. All verification procedures are of the form M####.	
	4.	Procedure Description			The description of the procedure. Display-only field.	
	5.	Req			Required Indicator. Displays as checked (Y) or unchecked (N) depending on whether the procedure is required to be performed for the application type, as specified on the Electronic Admissions Procedures/Routine Control Form (SAAECRL). All procedures attached to the application type will be displayed, but only those required will be performed.	Electronic Admissions Procedures/Routine Control Form (SAAECRL)
	6.	Comp			Complete Indicator. Displays the current status of the completion of the procedure. It will be checked (Y) if the procedure has been completed, or unchecked (N) if it has not been completed.	
	7.	O/R			Override Indicator. Used to override a verification procedure which has encountered an error but should be considered complete. You cannot request that application data be loaded to the permanent Banner tables until all verification procedures are complete. Overriding a procedure or routine controls verification <i>only</i> . The push process has separate edit checks that will prevent invalid data from being loaded. Y and N are the only valid values.	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	8.	Activity Date			The date on which the record was added or last updated. Display-only field.	
	9.	Dates/ Verified			The date on which verification was last performed for the procedure. Display-only field.	
	10.	Dates/ Completed			The date on which verification was completed for the procedure. Display-only field.	
	11.	Dates/ Load			The date on which the data associated with the procedure was loaded to the permanent Banner tables. Display-only field	
			Proceed to the Next Block by clicking the icon, or by pressing Ctrl + Page Down on your keyboard.			

System Verification Routines

	12.	Req			Required Indicator. Displays as checked (Y) if the routine is required for the application type, as specified on the Electronic Admissions Procedures/Routine Control Form (SZAECL). Display-only field.	
	13.	Comp			Complete Indicator. Displays the current status of the completion of the routine. It will be checked (Y) if the routine has been either completed or overridden. It will be unchecked (N) if it is not complete and has not been overridden.	
	14.	O/R			Override Indicator. Used to override a verification routine	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					which has encountered an error but should be considered complete. You cannot request that application data be loaded to the permanent Banner tables until all verification procedures are complete. Overriding a procedure or routine controls verification <i>only</i> . The push process has separate edit checks that will prevent invalid data from being loaded. Y and N are the only valid values.	
	15.	Verification Messages			Displays a message associated with each verification routine. Before verification is performed, the message will be a description of the routine. When verification has been performed, the message will state the result of the routine. When a procedure or routine has been overridden, the message will reflect the override.	
	16.	Return	Click Return.	Return to first page of SZAEAPS.		