



## Transfer Articulation Using Banner 7

### Job Aid: Associating an Institution to a Student

◀ Jump to TOC

#### Purpose

Information about each transfer institution and attendance period is captured using a two-position short hand notation to identify each entry. The attendance periods entered must pertain to a specific student level (e.g., undergraduate, graduate). If a student had taken graduate and undergraduate course work at the same institution, and you wished to capture this information, it would be necessary to identify two attendance periods: one for the undergraduate work and one for the graduate work. Optionally, you may define multiple attendance periods relating to the same level if the need arises.

The student must have been added to the system via the General Person Identification Form (SPAIDEN).

The Transfer Course Form (SHATRNS) is used to capture and maintain information relating to transfer institutions for a student.

#### Banner form

The screenshot shows a web browser window titled "Transfer Course Information SHATRNS 7.0 (s4b70)". The form contains the following fields:

- ID:** 210009502 (dropdown), Cuspin, Lorie (text)
- Transfer Institution Number:** 1 (dropdown)
- Attendance Period Number:** 1 (dropdown)

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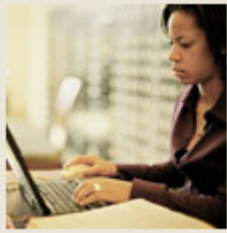
**Transfer Institution**

- Institution:** 2125 (dropdown), Delaware County Cmty College (text)
- Transcript Receipt Date:** (calendar icon)
- Official

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**Transfer Attendance Period**

- Attendance Period:** Fall 1993 (dropdown)
- Acceptance Date:** 05-FEB-1995 (calendar icon)
- Effective Term:** 199510 (dropdown), Fall 1994 (199510) (text)
- Term Type:** (text)
- Apply to Level:** CR (dropdown), Credit (text)
- Transfer Degree:** (dropdown)
- Attendance Begin Date:** (calendar icon)
- Attendance End Date:** (calendar icon)



## Transfer Articulation Using Banner 7

### Job Aid: Associating an Institution to a Student (Continued)

◀ Jump to TOC

#### Procedure

Now that you have created all the necessary Transfer Articulation organization information, you are ready to associate this information with a student.

Follow these steps to complete the evaluation process.

Step	Action
1	Access the Transfer Course Form (SHATRNS).
2	Enter a student's ID in the <b>ID</b> field or click the <b>Search</b> icon to search for a student.
3	Enter the transfer organization number in the <b>Transfer Institution Number</b> field.
4	Enter an attendance period number in the <b>Attendance Period Number</b> field.
5	Perform a <b>Next Block</b> function.
6	Enter the institution you have been working with in the <b>Institution</b> field of the Transfer Institution block.
7	Click the <b>Official</b> checkbox if the transcript is official.
8	Click the <b>Save</b> icon.
9	Access the Transfer Attendance Period block.
10	Enter a value in the <b>Attendance Period</b> field.
11	The <b>Acceptance Date</b> field defaults to today's date.
12	Select an appropriate term in the <b>Effective Term</b> field.
13	Enter a term type in the <b>Term Type</b> field.  <u>Example:</u> Semester or quarter.
14	Select a value in the <b>Apply to Level</b> field.  <u>Example:</u> Undergraduate.
15	Select a value in the <b>Transfer Degree</b> field if the student has received a degree from the transfer institution.
16	Enter the dates the student began attending the previous institution in the <b>Attendance Begin Date</b> field.
17	Enter the dates the student finished attending the previous institution in the <b>Attendance End Date</b> field.
18	Click the <b>Save</b> icon.
19	Click the <b>Exit</b> icon.