ASSIGNING STUDENTS TO AND REMOVING STUDENTS FROM COHORTS

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REVISION HISTORY

Version	Date	Name	Description
	09/20/2018	Liz Alday	Banner 9 Upgrades

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how students are placed into and removed from cohorts. Cohorts will be used to identify and maintain a group of students in Banner with one or more common characteristics.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Campus groups who use cohorts are responsible for maintaining them.
2. **Campus groups must not change cohorts belonging to other groups.**
3. As of the last update, the following groups will use cohorts in Banner:
    a. University Honors (Cohort code starts with H)
    b. Learning Communities (Cohort code starts with L; second letter references college)
    c. Undergraduate Admissions (Cohort code starts with U)
    d. HPAC (Cohort code starts with P)
    e. TRiO (Cohort code starts with T)
    f. CAMP (Cohort code starts with C)
    g. Education Abroad Program (Cohort starts with EA)
4. To minimize data entry errors, it is recommended that the mass update process be used whenever possible. Requests for mass updates should be coordinated with Information Technology Solutions (ITS) via a ticket.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. University Honors Department
2. Colleges and Learning Community Staff
3. Undergraduate Admissions
4. HPAC
5. TRiO
6. CAMP
7. Education Abroad Programs

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

The Pages listed below are covered in this training.

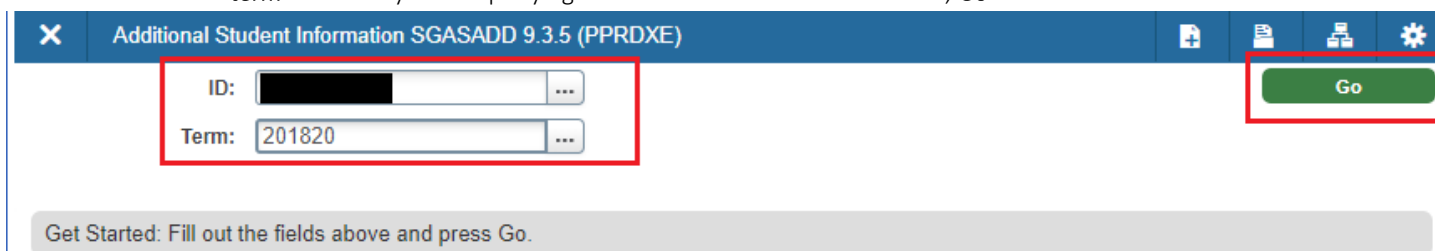| Page	Page Name	Description
SGASADD	SGASADD	Maintains cohort codes, as well as attributes, which are assigned to the student by effective term.

PROCEDURES

READING THE COHORT RECORD

Cohorts are viewable by term on the student record. So when you view the Page you are seeing what cohorts the student is currently in for that term and potentially what cohorts the student was in at one point. You may want to view several terms to get a full picture of the student's time within a cohort.

STEPS

1. Go to **SGASADD**.
2. Enter **SID**.
   Enter the **term** for which you are querying whether the student is in a cohort, **Go**.
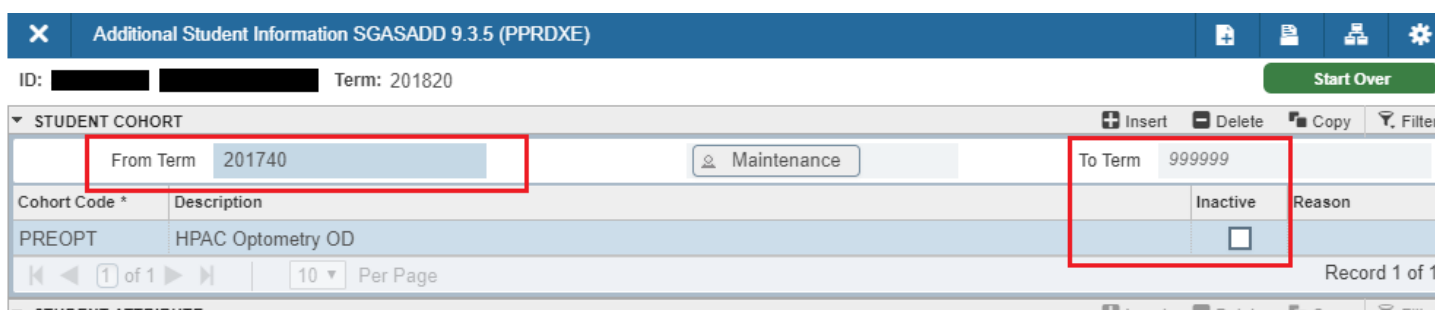
Example 1: View & Interpret Cohorts for Spring 2018; Find the First Term a Cohort Started

The student is actively in PREOPT and has been in PREOPT since at least 201740 (Fall 2017). You know this because the From Term is 201740 and there are no inactive indicators or reasons.

To determine if this is the starting term of the cohort you must determine if prior cohort records exist.

Start Over and enter the term prior to the last known From Term (i.e. 201730). If the PREOPT cohort does not display then Fall 2017 is the first term the student joined the cohort. If it does display, repeat the above step until you do not find an earlier PREOPT record.

If you find that you more often need to know when students started in a cohort than what cohorts they are part of for a term, it may be beneficial to request a data report that can show you that information in a single snapshot and does not require you to view multiple term based screens in SGASADD.

Example 2:   View & Interpret Cohorts for Fall 2017; View Future Terms the Cohort may Exist

The student is actively in PREOPT and has been in PREOPT since at least 201740 (Fall 2017). You know this because the From Term is 201740 and there are no inactive indicators or reasons.   Additionally, since the To Term does not equal 999999 (End of Time), you know a subsequent record exists for the student.

To see the next record, **Start Over** and enter 201820 in the key block (that's the To Term in this example above). The next picture shows the term at the top of the page. The student is actually in PREOPT and PREMED as of 201820 until 999999 (End of Time).

Example 3:   View & Interpret Cohorts for Fall 2016; Active and Inactive Cohorts

Since at least 201820 (Spring 2018) you know that the student is actively in PREMED. You know this because the From Term is 201820 and there are no inactive indicators or reasons. You also know that since at least 201820 the student is NO LONGER ACTIVE in PREOPT since the inactive indicator and reason code are not null.

MAINTAINING COHORTS IN A TERM

Cohorts are viewable by term on the student record. Therefore, when you are considering managing cohort(s) on the student's record you want to consider:

1. What term do you need to update?

   There are times when a student may start a term in a cohort; however, before completing the term, the student chooses to drop, or is administratively inactivated from the cohort. In these instances, you will inactivate the cohort in that final (single) term. In all other cases, you will inactivate the cohort in the following term.

   Example 1: Mary starts the cohort in 201640 (Fall 2016) and is administratively dropped in 201640 (Fall 2016). Inactivation term is 201640 (Fall 2016) and is the term you will update in the steps below.

   Example 2: Mary starts the cohort in 201640 (Fall 2016) and completes the cohort as expected in 201720 (Spring 2017). Inactivation term is 201730 (Summer 2017) and is the term you will update in the steps below.

2. Is the student assigned to other cohorts that you should not be updating?

   As a reminder, cohorts are updated by departments and you should only be adding or inactivating cohorts that are owned by your department.

3. What action(s) do you need to take? Are you adding; inactivating; or adding and inactivating cohorts?

   Knowing what you want to do and in which term (see Question 1 above), prepares you to view the cohorts by term and adjust the student record accordingly.

Note: Cohorts can only be added to students who have a General Student (SGASTDN) record for the term you entered. If you receive an error like the ones below, that is an indication that the student does not have a SGASTDN record.

STEPS

1. Go to **SGASADD**.
2. Enter **SID**.
3. Enter the **Effective term** for the term you want to update the cohort, Go to the Student Cohort section.

4. Check the **From Term** in the Student Cohort section and select the next step – 4a or 4b.

a. If the term **equals** your effective term from step 3, <u>move to step 6</u>.

b. If the term **does not equal** your effective term from step 3, you must **Maintenance** the Page (press the button) before you can make changes.

5. Select **Copy** Student Cohort so that all current cohorts are copied forward to your new effective term. <u>For Student Cohorts you will NEVER use the End function within Maintenance.</u> Instead, the use of the inactive check box ends the student's time in the specified cohort.
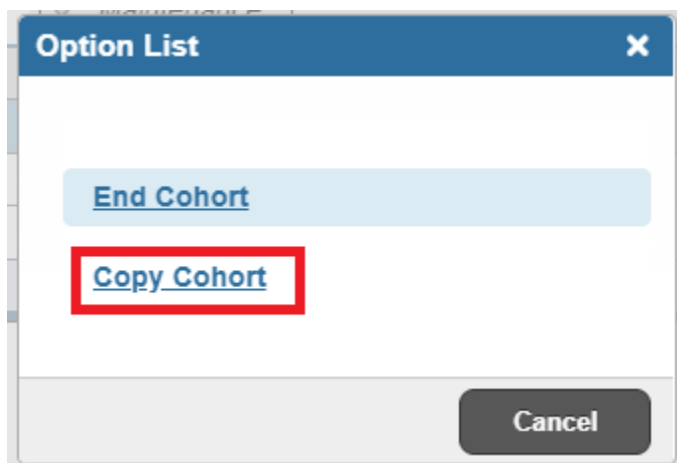
6. Your effective term now shows in the From Term and you can update YOUR cohort(s) for this term by:
   a. Adding a new cohort into a **blank row** and/or...
   b. Inactivating a cohort by **checking inactive** and **adding a reason**.
   c. You may need to do both actions in a single term and that is okay. <u>Do not alter anyone else's cohorts.</u>
7. **Save**.
8. Lastly, before closing out the Page, check the **To Term** and select your next step – 8a or 8b.
   a. If it says **999999**, the End of Time, you are done and can close out of the Page.

   b. If it says **any other term**, you will have to decide if you need to add the cohort to the other future terms. You may need to do this if there has already been a future maintenance to the cohorts Page or if you are going back to a historical term to correct the student record.

      i. Note the **To Term** you currently see in the Page. This will be used in step 3 as your new effective term.

ii. **Start Over**.

iii. Repeat Steps 3- 7.

FINAL QUIZ

1. Cohorts can only be added to students who have a General Student (SGASTDN) record for the term you entered. TRUE
2. When you are maintaining Cohorts will you ever use the End Cohorts Function? Yes or No
   a. Answer: No, you will never end the cohorts because we will always use the inactive check box and reason code. You will always use the Copy Student Cohort function under Maintenance.
3. After you have completed updating your effective term data, what is the final check you need to do?
   a. A) Check the To Term and determine if it is for the end of time (999999) or not. You may have to update additional terms.
   b. B) Go to the subsequent term and confirm the cohorts are showing appropriately.
   c. C) Exit Page and re-enter Page to confirm data is still present.
   d. Answer: A
4. If a student is leaving one cohort and joining a different cohort in the same effective term, you can complete both actions at the same time. TRUE
5. The Registrar's Office will maintain all cohorts. FALSE
   a. Answer: False, campus groups who use cohorts are responsible for maintaining them. If a mass update can be used, that can be requested through Information Technology Solutions (ITS).