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Connecticut Community Colleges  
Banner Financial Aid Team  
Banner Financial Aid New Year System Start-Up Checklist

### Introduction:

To assist you in your preparation for the 2001-2002 financial aid award year, the Banner Financial Aid Team crafted a multi-dimensional approach. Since December, we have carefully reviewed the SCT documentation, release guides, and upgrade guides – both from a functional and technical perspective – to ensure an orderly transition to the new award year. This has been especially important in this, our second year of a multi-year financial aid system, given our unique 12 college solution. In preparing the Banner Financial Aid System for the 2001-02 award year, we have systematically and methodically “rolled over” all system shared forms and tables to the new year. We have also “rolled over” all colleges’ unique tables, rules, letters, and processing options to the new 2001-02 year. We have also been careful to apply all our customized solutions to the program software. During our 2001-02 Award Year Kickoff on February 1, we shared with you the new options and processes available to you in the Banner Financial Aid System. Through your use of our customized guide, the *Banner Financial Aid New Year System Start-Up Checklist*, you should be well prepared to complete your financial aid system parameters. To assist you further in your efforts, we are offering 6 work sessions over the next 2 weeks. During these sessions, the Banner Financial Aid Team members will be available for consultation with you as you complete your system start-up checklist.

As we begin the 2001-02 award year, we are at version 4.8 of the Banner Financial Aid software. This version includes an early release of INAS, the need analysis software of The College Board. Since we do not perform need analysis upon data load, your student need analysis results are “official” CPS results. However, your invoking of need analysis will result in an “estimated FM” calculation. Consequently we suggest you do not invoke need analysis, either individually or in batch processing, until such time as we update the Banner system with the final release of INAS. We will do so immediately upon receipt from SCT/The College Board, hopefully later this month. Best wishes as you embark upon the 2001-02 financial aid award year!

### How To Use This Checklist:

The intent of this document is to ensure that all required tables are set up for new financial aid year processing. The relative order of the setup is not necessarily important. The checklist is organized by module for the systematic preparation of new aid year data. Since the Financial Aid Team has already “rolled over” your parameters and rules from the 2000-01 award year to the 2001-02 award year, you must carefully review and modify those items that are aid-year specific, such as dates and descriptions. Of course, you should also feel free to adjust any parameters and rules you determine important to your new year financial aid operations.

Common Functions Module
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\_\_\_\_ Step 1 ROAINST - Institution Financial Aid Options Form

Most of the data on ROAINST for the 0102 Aid Year was rolled from 0001. The Pivot Date has been set to March 1, 2001 as a system-wide date for 0102 processing to begin. Also, the # of Days for JI T is pre-set to 5.

On ROAINST there are a few fields that must be entered or modified. They are:

- Application Rcvd MDE (new field under Institutional parameters) - enter EDE in this field. By doing so, the Application Received Date on ROASTAT will not populate until an EDE record is received for a student.
- Current Term Code - Enter term code for Fall 2001.
- Credit Hours (third window) - Update with term codes for 0102.

Review all fields on ROAINST.

\_\_\_\_ Step 2 RORTPRD - Aid Period/Term Rules Form

Review RTVAPRD and add new aid periods if needed for 0102.

- On RORTPRD, enter the term codes you want to associate with every aid period for 0102.

Tracking Module
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\_\_\_\_ Step 1 RTVTGRP - Requirements Tracking Group Validation Form

The tracking groups that you used for 0001 have been rolled to the 0102 Aid Year. Review all tracking groups. **Please note:** Since RTVTGRP is not an aid year specific form and your existing tracking groups have been used for 0001 processing, you should not make changes to these current tracking groups. If desired, add new groups as needed for 0102.

- To add new tracking groups for 0102, enter new group code(s), description(s) and priority code(s).

\_\_\_\_ Step 2 RTVTREQ - Requirements Tracking Validation Form

All of your tracking requirements from 0001 have been rolled to the 0102 Aid Year. As with tracking groups, you should not make changes to those tracking requirements that were used for 0001. Review all tracking requirements.

- If needed for 0102 processing, add new codes and descriptions of tracking requirements. (Be sure to check, if desired: once, pkg, disb, memo for any new requirements you may add.)

\_\_\_\_ Step 3 RTVAPRD - Aid Period Validation Form

Review aid periods, descriptions and full year/EFC percents. If you want to add new aid periods for 0102, you would do so on RTVAPRD.

\_\_\_\_ Step 4 RRRGREQ - Requirements Tracking Group/Requirements Rules Form

All documents associated with each 0001 tracking group have been rolled into 0102. You should review each tracking group for 0102 and modify tracking requirements as needed. Also, be sure to review the "Pk", "Ds", "Mn" requirements and update as desired.

\_\_\_\_ Step 5 RORRULE - Requirements Tracking Group

All tracking RORRULES have been rolled from the 0001 Aid Year to 0102.

- If your 0102 tracking groups are the same as 0001, you do not have to update tracking rules for 0102. However, if any of your 0001 tracking rules refer to 0001 aid year specific data, you must create a new rules with 0102 data.
- If you added tracking groups for 0102, you must have a RORRULE assigned to these new groups.
- If you have tracking groups defined for 0001 that you do not want to use for 0102, you should remove the rule of that group.
- Use RRI TGRP (Requirements Tracking Inquiry Form) to verify that each of the tracking groups you will be using for 0102 have been assigned a RORRULE.

Budgeting Module
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\_\_\_\_\_ Step 1 RTVBGRP - Budget Group Validation Form

The budget groups that you used for 0001 have been rolled to the 0102 Aid Year. **Please note:** Since RTVBGRP is not an aid year specific form and your existing budget groups have been used for 0001 processing, you should not make changes to these current budget groups. If desired, add new groups as needed for 0102.

- To add new budget groups for 0102, enter new group code(s), description(s) and priority code(s).

\_\_\_\_\_ Step 2 RTVCOMP - Budget Component Validation Form

Review all budget components that have been rolled to 0102. As with budget groups, do not make changes to those budget components that were used for 0001.

- If you want to add budget components for the 0102 Aid Year, enter component code(s), description(s) and print order. Check the default indicator to automatically include this component on every budget.

\_\_\_\_\_ Step 3 RBRGTYP - Budget Group/Type Rules Form

- Review all budget group codes to be sure each group is assigned both a campus-based and a Pell budget.

\_\_\_\_\_ Step 4 RBRCOMP - Budget Component Rules Form

All budget components and amounts that were part of your 0001 Aid Year have been rolled to the 0102 Aid Year.

Review budget components and amounts associated with each budget group code. Be sure you have both a campus budget and Pell budget defined for your Fall/Spring period code (100% of Full Year). (Banner will automatically adjust budgets for other than full-time aid periods based upon the percents on RTVAPRD.)

\_\_\_\_\_ Step 5 RORRULE - Budget Group Assignment

All budget rules from 0001 have been rolled to 0102. You should review the rule of each budget group for 0102.

As you review your budget group assignment rules, you may notice part of each rule refers to "rovst01\_resd\_code= Y, N or B". Rovst01 is a view of data stored in the Banner Student system and "rovst\_resd\_code" is used to determine a student's residence. Since rovst01 is used for the 0001 year, you must update these rules as follows:

- Change rovst01 to rovst02 on each of your budget rules for 0102 Aid Year.
- If you have budget groups defined for 0001 that you do not want to use for 0102, you should remove the rules of those groups.
- Use RBI BGRP (Budget Group Inquiry Form) to verify that each of the budget groups you will be using for 0102 have been assigned a RORRULE.

Funds Management Module
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\_\_\_\_ Step 1 RTVARSC - Resource Code Validation Form

- Review and add resources, if needed, for 0102.

\_\_\_\_ Step 2 RFRBASE - Fund Base Data Form

- Review all funds.
- Verify A/R details codes with your Business Office.

\_\_\_\_ Step 3 RFRMGMT - Funds Management Form

All fund data on RFRMGMT has been brought into 0102. Review all screens for each fund, and update the following:

- Aid Year Specific Information - Enter applicable amounts for each of your fund for 0102.

\_\_\_\_ Step 4 RFRDEFA - Default Award & Disbursement Schedule Rules Form

Enter award and disbursement schedules for terms within each aid period for 0102. Consult with your Registrar/Business Office regarding your college's Disbursement/Refunding/Return of Funds Calendar for Fall 2001.

- Award Schedule block - Enter term codes, award percentages and memo expiration dates.
- Disbursement Schedule block - Enter term codes, disbursement percents and disbursement dates.

\_\_\_\_ Step 5 RORRULE - Fund Awarding

Fund awarding rules have been rolled from 0001 to 0102.

Review all fund rules. If your fund rules use residency as grouping criteria, (e.g., CAP funds to in-state students), update these rules as follows:

- Change rovst01 to rovst02 on any fund awarding rule for the 0102 Aid Year.

Packaging & Disbursement Module
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\_\_\_\_ Step 1 RTVPGRP – Packaging Group Validation Form

The packaging groups that you used for 0001 have been rolled to the 0102 Aid Year. **Please note:** Since RTVPGRP is not an aid year specific form and your existing packaging groups have been used for 0001 processing, you should not make changes to these current packaging groups – Add new groups as needed for your 0102 packaging needs.

- To add new packaging groups for 0102, enter new group code(s), description(s) and priority code(s).

\_\_\_\_ Step 2 RPROPTS - Packaging Options Form

Most fields on RPROPTS have been populated through the roll process. Review all packaging options for 0102 and update the following:

- Enrollment Cut Off Date Rules ( 2<sup>nd</sup> window) - enter term codes and cut off dates for each term in the 0102 AY.

\_\_\_\_ Step 3 RPRPCKR – Packaging Rules Form

If you had assigned equity or gap packaging rules for 0001, this data has been rolled to 0102. On RPRPCKR for the 0102 Aid Year, review each packaging group and make desired changes.

\_\_\_\_ Step 4 RPRGFND – Packaging Group Funds Rules Form

Packaging Group Fund Rules that were assigned to packaging groups for the 0001 aid year have been rolled to 0102.

- On RPRGFND for the 0102 Aid Year, review/modify packaging group fund rules for all of your packaging groups.

\_\_\_\_ Step 5 RORRULE – Packaging Group Assignment Rules

Review each of your packaging group assignment rules for the 0102 aid year.

- If you have made any changes to your packaging groups, you may need to update the rule for that group.
- Use RPRI GRP to see which of your packaging groups have rules.

Loan Module

\_\_\_\_ Step 1 RPRLNDA - Lender/Disbursing Agents Rules Form

Review the lender and disbursing agent information on RPRLNDA.

\_\_\_\_ Step 2 RPRLOPT - Loan Options Form

RPRLOPT must be completed for the 0102 aid year for each of your loan funds. The values entered here are used as defaults when electronic loan applications are created. Required fields are:

- Initial Loan Status - in process
- Default Return ID
- Default Lender ID
- Default Guarantor ID
- Memo Actual Loan, Authorize Loan indicators should be checked.

\_\_\_\_ Step 3 RPRLPRD - Loan Period Rules Form

Create loan periods and associate them with the 0102 aid year.

Fall & Spring - XFSP02

Summer Only - XSU02

Fall Only - XF02

Spring Only - XSP02

Fall/Spring/Summer - XFSS02

Spring/Summer - XSPS02

Fall/Summer - XFSU02

Letter Generation Module
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\_\_\_\_ Step 1 RWVPAPA - Financial Aid Letter Validation Form

On RWAPARA, review all of the letters you have been using for the 0001 aid year. If within the text of your letters you refer specifically to 0001, you must either revise your letters to not be 0001 specific, or create new letters for 0102.

If you need to create any new letters for the 0102 aid year, you will need to enter a new letter code and description for each new letter on RWVPARA. Also, choose the type of letter (award, tracking, etc.)

\_\_\_\_ Step 2 RWLSETU - Financial Aid Letters Set-up Form

The letter set-up you used for 0001 is rolled to 0102.

If you added new letters for 0102, you must modify RWLSETU so the new letter code is now associated with the proper letter.

\_\_\_\_ Step 3 RWAPARA - Paragraph Form

Compose the text of your new letters as needed for 0102.