
Banner Financial Aid New Year System Start-Up Checklist

2002-2003 Award Year



Education That Works For a Lifetime

Introduction:

To assist you in your preparation for the 2002-2003 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 third year of a multi-year financial aid system, given our unique 12 college solution. In preparing the Banner Financial Aid System for the 2002-03 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 2002-03 year. We have also been careful to apply all our customized solutions to the program software. During our 2002-03 Award Year Kickoff on February 8, we shared with you the new options and processes available to you in the Banner Financial Aid System. You should use your notes and the PowerPoint handout and slides from that meeting with this document. 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. Both this document and the PowerPoint presentation will be available in PDF format for your reference on the Financial Aid Services web site at www.comnet.edu/finaid. To assist you further in your efforts, we are offering work sessions the week of February 11. 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 2002-03 award year, we are at version 5.3 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 2002-03 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 2001-02 award year to the 2002-03 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

_____ Step 1 ROAINST - Institution Financial Aid Options Form

You will see that most of the data on ROAINST for the 0203 Aid Year was rolled from 0102.

The Pivot Date has been set to March 1, 2002 as a system-wide date for 0203 processing to begin. Please remember that once this pivot date arrives, all nightly data load processes will begin.

As before, the # of Days for JIT Pell processing is pre-set to 5 on ROAINST.

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

- Current Term Code - Enter your term code for Fall 2002.
- Credit Hours (third window) - Update with your term codes for 0203.

Two new fields have been added to the "Institution Financial Aid Options II" window of ROAINST. These new fields are "Process EL Change Trans" and "# of Days for EL Changes". For now, please disregard these indicators - they both pertain to a new enhancement for CommonLine Change Transaction processing in Banner. We will provide training on this feature at a later date TBA.

Review all fields on ROAINST and update if necessary.

_____ Step 2 RORTPRD - Aid Period/Term Rules Form

- On RORTPRD, enter the term codes you want to associate with each aid period for 0203.

Tracking Module

____ Step 1 RTVTGRP - Requirements Tracking Group Validation Form

All of your established tracking groups have been rolled to the 0203 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 both 0001 & 0102 processing, you should not make changes to these current tracking groups. You can add a new group as needed -or- you can disable a group by deleting the 0203 RORRULE for that particular tracking group.

____ Step 2 RTVTREQ - Requirements Tracking Validation Form

All of your tracking requirements from past years have been rolled to the 0203 Aid Year. As with tracking groups, you should not make changes to current tracking requirements. If needed for 0203 processing, add new codes and descriptions of tracking requirements. (Be sure to check: once, pkg, disb, memo for any new requirements you may add.)

New tracking requirements have been added to RTVTREQ for batch posting purposes. You cannot update the tracking codes of these requirements - you can, however, update the descriptions as desired.

As you review RTVTREQ, you will notice that the "Info Access Indicator" field is checked for all of your requirements. This indicator must be checked to display your tracking requirements on the web. The "Access Indicator" is now used solely to indicate the tracking requirements that will be displayed on ROASMRY.

____ Step 3 RTVTRST - Requirements Tracking Status Validation Form

A new tracking status code/description has been added to RTVTRST. The new code of "P/ Batch Posted" will be used solely for the batch posting process.

____ Step 4 RTVAPRD - Aid Period Validation Form

Review aid periods, descriptions and full year/EFC percents. If you want to add new aid periods for 0203, you would do so on RTVAPRD.

____ Step 5 RRRGREQ - Requirements Tracking Group/Requirements Rules Form

All documents associated with your tracking groups have been rolled to 0203. Update as needed.

C Code/Reject Groups - Since Banner will be batch posting tracking requirements for both C codes and reject codes, you must remove all tracking requirements (**0203 only**) pertaining to the resolution of these items. (Be sure to leave other requirements such as ISIR.)

You should review each tracking group for 0203 and modify tracking requirements as needed. Also, be sure to review the "Pk", "Ds", "Mn" requirements and update as desired.

____ Step 6 RORRULE - Requirements Tracking Group

All tracking RORRULES have been rolled to 0203. **Do not change any tracking RORRULE that was used for past processing.**

- If your 0203 tracking groups are the same as past year's, you do not have to update tracking rules. However, if any of your tracking rules refer to aid year specific data, you must create new rules for 0203.
- If you added tracking groups for 0203, you must have a RORRULE assigned to these new groups.
- If you have tracking groups that you do not want to use for 0203, you should remove the RORRULE of those groups.
- Use RRITGRP (Requirements Tracking Inquiry Form) to verify that each of the tracking groups you will be using for 0203 are assigned a RORRULE.

Budgeting Module

____ Step 1 RTVBGRP - Budget Group Validation Form

All of your budget groups have been rolled to the 0203 Aid Year.

Please note: Since RTVBGRP is not an aid year specific form and your existing budget groups have been used for past processing, you must not make changes to these existing budget groups. You can add a new group as needed - or - you can disable a group by deleting the 0203 RORRULE for that particular budget group.

____ Step 2 RTVCOMP - Budget Component Validation Form

If you want to add budget components for the 0203 Aid Year, enter component code(s), description(s) and print order on RTVCOMP. If desired, 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 have been rolled to the 0203 Aid Year.

Review budget components and amounts associated with each budget group code. **Be sure to revise your 0203 budget components to reflect the increase in tuition & fees for the 0203 academic year.**

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 have been rolled to 0203. **You should review the rule of each budget group for 0203.**

As you review your budget group assignment rules, you will notice that part of each rule refers to "**rovst02_resd_code= Y, N or B**". Rovst02 is a view of data stored in the Banner Student system and "rovst_resd_code" is used to determine a student's residence. Since rovst02 is used for the 0102 year, you must update these rules as follows:

- **Change rovst02 to rovst03 on each of your budget RORRULE for the 0203 Aid Year.**
- **If you added budget groups for 0203, you must have a RORRULE assigned to each of these new groups.**
- **If you have budget groups defined that you do not want to use for 0203, you must remove the RORRULES of those groups.**
- **Use RBIBGRP (Budget Group Inquiry Form) to verify that each of the budget groups you will be using for 0203 have been assigned a RORRULE.**

Funds Management Module

_____ Step 1 RTVARSC - Resource Code Validation Form

- Review and add resources, if needed, for 0203.

_____ 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 0203. Review all screens of each fund, and update the following:

- **Aid Year Specific Information - Enter applicable amounts for each of your funds for the 0203 aid year.**

_____ Step 4 RFRDEFA - Default Award & Disbursement Schedule Rules Form

Enter award and disbursement schedules for terms within each aid period for the 0203 aid year. **Be sure to consult with your Registrar/Business Office regarding your college's Disbursement/Refunding/Return of Funds Calendar for Fall 2002. This calendar will give you the dates you need for the following:**

- 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 0102 to 0203.

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 rovst02 to rovst03 on any fund awarding rule for the 0203 Aid Year.**

Packaging & Disbursement Module

____ Step 1 RTVPGRP - Packaging Group Validation Form

The packaging groups that you previously used for have been rolled to the 0203 Aid Year.

Please note: Since RTVPGRP is not an aid year specific form and your existing packaging groups have been used for past processing, you must not make changes to these current packaging groups. You can add a new group as needed - or - you can disable a group by deleting the 0203 RORRULE for that particular packaging group.

- To add new packaging groups for 0203, 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 0203 and update the following:

- Enrollment Cut Off Date Rules (2nd window) - enter term codes and cut off dates for each term in the 0203 AY.

____ Step 3 RPRPCKR - Packaging Rules Form

If you had assigned equity or gap packaging rules for 0102, this data has been rolled to 0203. On RPRPCKR, for the 0203 Aid Year, review each packaging group and make changes as needed.

____ Step 4 RPRGFND - Packaging Group Funds Rules Form

Packaging Group Fund Rules that were assigned to packaging groups for past aid years have been rolled to 0203.

- On RPRGFND for the 0203 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 0203 aid year.

- If you have made any changes to your packaging groups, you may need to update the rule for that group.
- Use RPIPGRP 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 0203 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 - use "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 0203 aid year.

Fall02 & Spring03 - XFSP03

Fall02 Only - XF02

Fall02/Spring03/Summer03 - XFSS03

Fall02/Summer03 - XFSU03

Summer03 Only - XSU03

Spring03 Only - XSP03

Spring03/Summer03 - XSPS03

Letter Generation Module

____ Step 1 RWVPAPA - Financial Aid Letter Validation Form

On RWAPARA, review all of the letters you have been using for the 0102 aid year. If within the text of your letters you refer specifically to 0102, you must either revise your letters to not be aid year specific, or create new letters for 0203.

If you need to create any new letters for the 0203 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

Your 0102 letter set-up is rolled to 0203.

If you added new letters for 0203, 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 0203.

Student Employment Module

____ Step 1 RJAPLBD - Placement Base Data Form

Review all of your job placements and revise as necessary. If you need to add new job placements for 0203, you can do so on RJAPLBD.

____ Step 2 RJRJOBT - Job Title Base Data Form

Please note: Since RJRJOBT is not an aid year specific form, any changes you make to this form will affect your processing from the date of the change. For example, if you want to increase the default rate of pay for 0203 you should not update this field on RJRJOBT until the actual increase takes place.

____ Step 3 RJRJREQ - Job Title Requirements Form

If you created new codes/placements on RJRJOBT, you need to update RJRJREQ to include any new job codes.