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# **Banner Financial Aid New Year System Start-Up Checklist**

**2003-2004 Award Year**

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Connecticut  
Community  
Colleges

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## Introduction:

To assist you in your preparation for the 2003-2004 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 fourth year of a multi-year financial aid system, given our unique 12 college solution. In preparing the Banner Financial Aid System for the 2003-04 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 2003-04 year. We have also been careful to apply all our customized solutions to the program software. 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.

We strongly encourage you to develop your financial aid system with the Banner Web Self-Service product (ONLINE) in mind. Throughout the guide, we have referenced where appropriate development opportunities await you. In a recent *Entering Student Survey (Fall 2002)* conducted by the System Office, 92% of our students indicated they had Internet access either through home or office. We need to capitalize on the opportunity for improved electronic delivery of financial aid services to these students.

As we begin the 2003-04 award year, we are at version 5.7 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 next month. Best wishes as you embark upon the 2003-04 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 2002-03 award year to the 2003-04 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. For general assistance with your college's 2003-04 Award Year setup, you can contact User Support at 860.244.7802 or e-mail us at [SYS-BannerFinAidHelp@commnet.edu](mailto:SYS-BannerFinAidHelp@commnet.edu). For web development support, you must use the [Web Development Request Form](#) on the Financial Aid Services web site.

## Common Functions Module

### \_\_\_\_ Step 1 ROAINST - Institution Financial Aid Options Form

You will see that most of the data on ROAINST for the 0304 Aid Year was rolled from 0203. Review all fields on ROAINST and update if desired.

The Pivot Date has been set to March 1, 2003 as a system-wide date for 0304 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.

Current Term Code - Enter your term code for Fall 2003.

#### "Credit Hours" window

Update with your term codes for 0304

#### "Institutional Defaults" window

"New Pell Calc" - leave this indicator unchecked until the pending Pell issue is resolved by SCT. Once this new Pell calculation is available, we will let you know.

#### "Web Processing Rules" window

"Info Access" - this indicator is checked to allow your students to access financial aid data via Banner Web.

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 0304.

## Tracking Module

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

All of your established tracking groups have been rolled to the 0304 Aid Year. Review all tracking groups.

**Please remember:** Since RTVTGRP is not an aid year specific form and your existing tracking groups have been used for previous 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 0304 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 0304 Aid Year. As with tracking groups, you should not make changes to current tracking requirements.

As we explained during our "Developing a Web-based Financial Aid System" meetings, the following URLs have been established for "common" tracking requirements that are used by all colleges. Be sure to enter these URLs along with the appropriate requirements on RTVTREQ.

<http://mapping-your-future.org/entrancecounseling/>

<http://mapping-your-future.org/exitcounseling/>

<http://www.commnet.edu/finaid/download/X/0304DependentWorksheet.pdf>

<http://www.commnet.edu/finaid/download/X/0304IndependentWorksheet.pdf>

<http://www.commnet.edu/finaid/download/X/0304SARDrugWorksheetcolor.pdf>

<http://www.commnet.edu/finaid/download/X/insverificationform.pdf>

**Reminder:** If you have additional tracking requirement forms that you want to enable your students to download, please send us a request via our [Web Request Form](#).

All batch posted requirements have been updated to comply with the Dept of Ed processing for 0304.

### \_\_\_\_ 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 0304, you would do so on RTVAPRD.

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

Review each tracking group for 0304 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 0304. Do not change any tracking RORRULE that was used for past processing.

- If your 0304 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 0304.
- If you added tracking groups for 0304, you must have a RORRULE assigned to these new groups.
- If you have tracking groups that you do not want to use for 0304, 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 0304 are assigned a RORRULE.

## Budgeting Module

As you build your budgets for 0304, please be sure to use the approved Tuition/Fee schedule for the 0304 Academic Year. At a later date, we will schedule meetings to discuss the impact of the new lab/program fees on the Financial Aid system.

### \_\_\_\_ Step 1 RTVBGRP - Budget Group Validation Form

All of your budget groups have been rolled to the 0304 Aid Year. Do not make changes to existing budget groups. You can add a new group as needed - or you can disable a group by deleting the 0304 RORRULE for that particular budget group.

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

If you want to add budget components for the 0304 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 0304 Aid 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 0304. You should review the rule of each budget group for 0304. As you review your budget group assignment rules, you will notice that part of each rule refers to "rovst03\_resd\_code= Y, N or B". Rovst03 is a view of data stored in the Banner Student system and "rovst\_resd\_code" is used to determine a student's residence. Since rovst03 is used for the 0203 year, you must update these rules as follows:

- Change rovst03 to rovst04 on each of your budget RORRULE for the 0304 Aid Year.
- If you added budget groups for 0304, 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 0304, 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 0304 have been assigned a RORRULE.

## Funds Management Module

### \_\_\_\_ Step 1 RTVARSC - Resource Code Validation Form

- Review and add resources, if needed, for 0304.

### \_\_\_\_ 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 0304. Review all screens of each fund, and update the following:

- Aid Year Specific Information - Enter "Award Max/Award Min" for each fund. Keep in mind that a minimum award amount should be entered for any fund that is "Web Accept".

"Web Accept Flag" - check this indicator for any fund that you want your students to accept over the web.

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

Enter award and disbursement schedules for terms within each aid period for the 0304 aid year. Be sure to consult with your Registrar/Business Office regarding your college's Disbursement/Refunding/Return of Funds Calendar for Fall 2003. 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 0203 to 0304.

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 rovst03 to rovst04 on any fund-awarding rule for the 0304 Aid Year.

### Packaging & Disbursement Module

As you know, BOT policy is to meet the Direct Costs of students with financial need. For the 2003-04 Award Year, you should use a minimum Direct Cost figure for Connecticut Residents of \$3,026. (Annual full-time tuition & fees @12 credits of \$2,226 and a Books/Supplies allowance of \$800).

\_\_\_\_\_ Step 1 RTVPGRP - Packaging Group Validation Form

The packaging groups that you previously used for have been rolled to the 0304 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 0304 RORRULE for that particular packaging group.

- To add new packaging groups for 0304, 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 0304 and update the following:

- Enrollment Cut Off Date Rules ( 2<sup>nd</sup> window) - enter term codes and cut off dates for each of your term in the 0304 AY.

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

If you had assigned equity or gap packaging rules for 0203, this data has been rolled to 0304. On RPRPCKR, review each packaging group and make changes as needed for 0304.

\_\_\_\_ 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 0304.

- On RPRGFND for the 0304 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 0304 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 0304 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 0304 aid year.

Fall03 & Spring04 - XFSP04

Fall03 Only - XF03

Fall03/Spring04/Summer04 - XFSS04

Summer04 Only - XSU04

Spring04 Only - XSP04

Spring04/Summer04 - XSPS04

Fall03/Summer04 - XFSU04

## Letter Generation Module

### \_\_\_\_ Step 1 RWVPAPA - Financial Aid Letter Validation Form

On RWAPARA, review all of the letters you have been using for the 0203 aid year. If within the text of your letters you refer specifically to 0203, you must either revise your letters to not be aid year specific, or create new letters for 0304.

**Web Set-Up** - As you set up your web email notifications and web information, please be sure to use the following code/type naming conventions. (You can use any description you desire.)

	<u>Code</u>	<u>Type</u>
Award Notification	X_EMAILAWARD	EMAIL AWARD
Tracking Notification	X_EMAILTRK	EMAIL TRK
Award Information	X_AWARDINFO	WEB
Sap Information	X_SAPINFO	WEB

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

Review/revise your letter set-ups that were rolled to 0304.

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

Review all of your letters for 0304.

#### **Web Set-Up**

**Set up the text of your tracking/award email notifications.** Please keep in mind that the intent of tracking/award email is to direct students to our ONLINE system (<http://www.online.comnet.edu/>) and should not include actual tracking/award information.

**Set up the text of your award information.** Enter the terms and conditions of financial aid awards that you want to communicate to students via our ONLINE system. The link to this information appears on the "Accept Award Offers by Aid Year" screen.

**Set up the text of your SAP information.** Enter your Satisfactory Academic Progress policy. This information is displayed through the "Academic Progress" link on the "Overall Status of Financial Aid" screen.

## 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 0304, you can do so on RJAPLBD.

### \_\_\_\_ Step 2 RJRJOB - Job Title Base Data Form

**Please note:** Since RJRJOB 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 0304 you should not update this field on RJRJOB until the actual increase takes place.

### \_\_\_\_ Step 3 RJRJREQ - Job Title Requirements Form

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