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

## 2009-2010 Award Year

Connecticut
Community
Colleges

*Education That Works For a Lifetime*

## Introduction:

To assist you in your preparation for the 2009-2010 financial aid award year, the Banner Financial Aid Team crafted a multi-dimensional approach. Since January, we have carefully reviewed the SunGard HE 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 tenth year of a multi-year financial aid system, given our unique 12 college solution. In preparing the Banner Financial Aid System for the 2009-2010 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 2009-2010 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. As we begin the 2009-2010 award year, we are at version 7.13 of the Banner Financial Aid software.

## 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 2008-2009 award year to the 2009-2010 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 2009-2010 Award Year setup, you can contact User Support at 860.244.7802 or e-mail us at SYS-BannerFinAidHelp@commnet.edu. For web development support, you must use our Web Development Request Form. This form is available on the Financial Aid Services web site under the "User Support" link.

## Common Functions Module

____ Step 1 **ROAINST** - Institution Financial Aid Options Form

You will see that most of your 2009-2010 data on ROAINST has been rolled from 2008-2009. Review all tabs and all fields on ROAINST - pay particular attention to the following:

**Options Tab**

The **Pivot Date** has been set to March 1, 2009 as a system-wide date for 2008-2009 processing to begin. Please remember that once this pivot date arrives, all nightly data load processes will begin.

**Current Term Code –** Enter your term code for Fall 2009 (1093xx).

**Loan Options Tab -** Review all fields.

**Credit Hours Tab**

Enter your Fall 09 (1093xx), Spring 10 (1101xx) and Summer 10 (1102xx) term codes. Be sure to include…. Level (X1), Full-time (12), Three-Quarter Time (9) and Half Time (6) for each term.

**Exclude Course Levels Tab** - This screen should be left blank.

**Defaults Tab** - Review all fields and confirm that the Just In Time Advance Pay for Pell indicator is checked and the Number of Days for Just In Time or Advance Pay for Pell processing is set to 05.

**Campus/EDE Defaults Tab**

**Routing No/Common School ID –** Confirm your "Routing No/Common School ID" number is entered correctly.

____ Step 2 **RORTPRD** - Aid Period/Term Rules Form

On RORTPRD, enter the term codes you want to associate with **each** of your aid periods for the 2009-2010 Aid Year. For example, the XFASP Aid Period must have the 1093xx - Fall 09 and 1101xx - Spring 10 entered in the "Aid Period/Term Code Rules" section of RORTPRD.

## Tracking Module

Your 2008-2009 tracking group information has been rolled to the 2009-2010 Aid Year. Review all tracking group information as follows:

____ Step 1 **RTVTGRP** - Requirements Tracking Group Validation Form

RTVTGRP displays the group codes, group descriptions and priority codes for each of your established tracking groups.

**Reminder:** Since RTVTGRP is not an aid year specific form and your existing tracking groups have been used for previous processing, you cannot make changes to these current tracking groups. You can add a new tracking group on RTVTGRP or you can disable a group by deleting the 2009-2010 RORRULE for that particular tracking group.

____ Step 2 **RTVTREQ** – Requirements Tracking Validation Form

On RTVTREQ, you must add any new tracking requirements you need for the 2009-2010 aid year. This includes aid year specific requirements such as student and parent 2008 US Tax Return documents.

As in past years, the 2009-2010 Verification Worksheets (Independent and Dependent) and the 2009-2010 SAR Drug Worksheet are posted on RTVTREQ. These documents and the URLs are designed to point to the correct aid year specific form based upon the aid year you are working in. **Do not make any changes to these requirements on RTVTREQ.**

RTVTREQ has been updated with all tracking requirements needed for the batch posting of both C Flag and Reject ISIR conditions. These requirements are in compliance with the Department of Education processing for 2009-2010.

**Reminder:** If you have 2009-2010 aid year specific tracking requirement forms that you want to enable your students to download, please send us a request via our Web Development Request Form. This form is available on the Financial Aid Services web site under the “User Support” link.

____ Step 3 **RRRGREQ** – Requirements Tracking Group/Requirements Rules Form

As you review your 2009-2010 tracking groups, you will see that requirements have rolled from 2008-2009. If you use year specific tracking requirement documents such as tax returns, be sure to update as needed.

____ Step 4 **RORRULE** – Requirements Tracking Group

All tracking RORRULES have been rolled to 2009-2010.

If your 2009-2010 tracking groups are the same as past years, you do not have to update tracking RORRULES. However, if any of your tracking rules refer to aid year specific data, you must create new rules for 2009-2010. **Do not revise or delete a RORRULE that was used for past processing.**

If you added tracking groups for 2009-2010, you must assign a RORRULE to the new groups. Please email SYS-BannerFinAidHelp@commnet.edu if a new RORRULE is needed. If you have tracking groups that you do not want to use for 2009-2010, you must remove the RORRULE of those groups.

Use ROIGRPI (Group Inquiry Form) to verify that each of the tracking groups you will be using for 2009-2010 are assigned a RORRULE.

## Budgeting Module

Your 2008-2009 budget group information has been rolled to the 2009-2010 Aid Year. Review all budget group information as follows:

____ Step 1 **RTVBGRP** - Budget Group Validation Form

RTVBGRP displays the group codes, group descriptions and priority codes for each of your established budget groups.

**Reminder:** Since RTVBGRP is not an aid year specific form and your existing budget groups have been used for previous processing, you cannot make changes to these current budget groups. You can add a new group as needed or you can disable a group by deleting the 2009-2010 RORRULE for that particular budget group.

____ Step 2 **RTVCOMP** – Budget Component Validation Form

If you want to add new budget components for the 2009-2010 Aid Year, enter component codes, descriptions and print order on RTVCOMP. Review the default indicators which automatically include checked components 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 2009-2010 Aid Year. **As you build your budgets for the 2009-2010 Aid Year, please be sure to use the approved Tuition/Fee schedule for the 2009-2010 Academic Year.** You can access this schedule through the following link: FY2010 Schedule of Tuition and Common Fees. This FY10 Tuition & Fee Schedule is also posted on our Financial Aid Services web site under Research & Publications.

As you build your 2009-2010 budgets, 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 percentages you have entered on RTVAPRD.

____ Step 5 **RORRULE** – Budget Group Assignment

All budget rules have been rolled to the 2009-2010 Aid Year. You should review the rule of each budget group for 2009-2010. **Do not revise or delete a RORRULE that was used for past processing.**

As you review your budget group assignment RORRULES, you will notice that part of each rule refers to **"ROVST09_RESD_CODE= Y, N or B"**. Rovst09 is a view of data stored in the Banner Student system and "rovst_resd_code" is used to determine a student's residence. Since rovst10 must be used for the 2009-2010 year, you must update these rules as follows:
**"ROVST10_RESD_CODE=Y,N or B" on each budget RORRULE for the 2009-2010 Aid Year.**

If you have any RORRULE that groups students into budgets based upon major codes, be sure to update those groups to "**ROVST10_MAJR_CODE=".**

If you added budget groups for 2009-2010, you must have a RORRULE assigned to each of these new groups. If you need to add or revise a budget RORRULE for 2009-2010 processing, please email SYS-BannerFinAidHelp@commnet.edu . If you have budget groups defined that you do not want to use for 2009-2010, you must remove the RORRULES of those groups.

Use ROIGRPI (Group Inquiry Form) to verify that each of the budget groups you will be using for 2009-2010 have been assigned a RORRULE.

## Funds Management Module

____ Step 1 **RTVARSC** – Resource Code Validation Form

Review and add resources, if needed, for 2009-2010.

**Please note that Veteran's Education Benefits will no longer be entered as a Resource as part of the dataload process. No action on your part is required in light of this change.**

____ Step 2 **RFRBASE** – Fund Base Data Form

Review all funds. Check with your Business Office for a detail code of any new fund(s) you may add for 2009-2010.

____ Step 3 **RFRMGMT** - Funds Management Form

Data on RFRMGMT has been rolled to the 2009-2010 Aid Year. However, review all fields and **complete the following for each of your funds**:

**Fund Tab –** Enter your 2009-2010 budget allocated and the over-commitment percent of each fund.

**Packaging Tab** - Review the "Award Min/Award Max" and adjust as desired.

**VERY IMPORTANT –Please adjust your Pell Maximum to $5350 to account for recently released 2009-2010 Pell Grant Payment Schedule.**

**Disbursement Tab -** Review the Payment Percent of the ¾, ½ and < ½ loads and make adjustments if desired.

The remaining tabs are optional and most likely will be blank. If you have questions about these, please contact user support.

____ Step 4 **RFRDEFA** - Default Award & Disbursement Schedule Rules Form

For each 2009-2010 aid period, you must enter **award schedule** and **disbursement schedule** information on RFRDEFA. Be sure to consult with your Registrar and Business Office regarding your college's **Term Set-Up Calendar.** This calendar will give you the dates you need for the following:

**Award Schedule block –** Perform insert record to populate Term Code and Award Percent as defined on RORTPRD. Add Pell Award Percent and Memo Expiration date for each term.

**Disbursement Schedule block –** Perform insert record to populate Term Code, Disbursement Percent and Disbursement Date and defined on RORTPRD. **Please note: You must revise the Disbursement Date of each term to comply with your college's Term Set-Up Calendar.**

___ Step 5 **RFRASCH –** Fund Award and Disbursement Schedule Rules Form

If you use RFRASCH to set-up disbursement schedules by fund, be sure to enter new dates appropriate for the 2009-2010 Aid Year.

____ Step 6 **RORRULE** - Fund Awarding

Fund awarding rules have been rolled from 2008-2009 to 2009-2010. Review all fund rules. If any of your Fund Awarding RORRULES use residency selection criteria, (e.g., CAP funds to in-state students), update these rules as follows: change ROVST09_RESD_CODE=Y to **ROVST10_RESD_CODE=Y**

If you need to add or revise a Fund Awarding RORRULE for 2009-2010 processing, please email SYS-BannerFinAidHelp@commnet.edu . **Do not revise or delete a RORRULE that was used for past processing.**

## Packaging & Disbursement Module

Packaging group information has been rolled to the 2009-2010 Aid Year. Review all packaging group information as follows:

____ Step 1 **RTVPGRP** – Packaging Group Validation Form

The packaging groups that were used for 2008-2009 processing have been rolled to the 2009-2010 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 packaging groups. You can add a new group as needed or you can disable a group by deleting the 2009-2010 RORRULE of that particular group.

____ Step 2 **RPROPTS** - Packaging Options Form

Most fields on RPROPTS have been populated through the roll process. Review all packaging options for 2009-2010 and update the following:

Enrollment Cut Off Date Rules ( 2$^{nd}$ window) - enter term codes, Disbursement Enrollment Options (use "adjusted hours" for each term) and appropriate cut off dates for each term in the 2009-2010 AY.

**Very Important - Pell Options** window #3

It is very important that the **Pell Award Enroll Option, Pell Disburse Enroll Option and Pell ISIR Term** fields remain set as "**none**" for each term code.

____ Step 3 **RPRPCKR** – Packaging Rules Form

On RPRPCKR, review each packaging group and make changes as needed for 2009-2010.

As you know, The Board of Trustees policy is to meet the direct costs of students with financial need. For the 2009-2010 Award Year, you should use a minimum direct cost figure for Connecticut residents of $4200.00. This is based on annual full-time tuition & fees of $3200.00 and a Books/Supplies allowance of $1000.00.

____ 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 2009-2010.

On RPRGFND for the 2009-2010 Aid Year, review/modify packaging group fund rules for each of your packaging groups.

**With the increases in Pell Grants for the 2009-2010 AY, you may want to adjust the way in which your packaging groups are funded. From RPRGFND, review the funds and amounts that you have associated with each of your packaging groups. Adjust as needed.**

____ Step 5 **RORRULE** – Packaging Group Assignment Rules

Review each of your Packaging Group Assignment rules for the 2009-2010 Aid Year.

**If a rule is defined using a Pell Grant amount or EFC, you may want to update this figure to comply with the 2009-2010 Pell Grant Schedule.**

If you need to add or revise a Packaging RORRULE for 2009-2010 processing, please email SYS-BannerFinAidHelp@commnet.edu
**Do not revise or delete a RORRULE that was used for past processing.**

Use ROIGRPI (Group Inquiry Form) to confirm that each of your 2009-2010 packaging groups has a RORRULE defined.

## Loan Module

____ Step 1 **RPRLNDA** – Lender/Disbursing Agents Rules Form

Beginning in the 2008-2009 aid year, RPRLNDA was customized to house information relevant to our system-wide recommended lenders. The form contains the lenders and their respective lender codes, as well as their designated guaranty agency and agreed upon fee structure.

Since RPRLNDA is not an aid-year specific form, the 2008-2009 lender information will be viewable for the remainder of the aid year. The selection of recommended FFELP lenders for 2009-2010 is expected to be completed in April, though the information regarding the lenders will not be copied to RPRLNDA until July 1, 2009. This is being done in an effort to cause as little disruption as possible for loan processing for both 2008-2009 and 2009-2010.

____ Step 2 **RPRLOPT** – Loan Options Form

RPRLOPT has been modified for the 2009-2010 aid year to reflect our movement towards a more centralized electronic loan processing model. Specifically, designations relevant to default items for electronic loan processing items have been removed. This allows Banner to populate this information directly from RPRLNDA, thus ensuring compliance with loan terms set forth and agreed upon during the RFI process.

Most of RPRLOPT has been designated as "query only", with the exception of the field, "Disbursement Amount greater than Loan Amount", as we recognize the importance of having "modify" access to that particular field.

____ Step 3 **RPRLPRD** – Loan Period Rules Form

Create loan periods on RPRLPRD by entering the data listed below. **Remember to replace "X" with your B-M school code.** In the Base Data block, enter the descriptions as noted below. Also enter the Start/End dates associated with each period.

| Loan Period | Base Data | Aid Period Rules |
|---|---|---|
| XFSP10 | Fall09/Spring10 | 0910 – XFASP |
| XF09 | Fall09 only | 0910 – XFALL |
| XFSS10 | Fall09/Spring10/Summer10 | 0910 – XFSPSU |
| XFSU10 | Fall09/Summer10 | 0910 – XFASUM |
| XSU10 | Summer10 only | 0910 – XSUMMR |
| XSP10 | Spring10 only | 0910 – XSPR |
| XSPS10 | Spring10/Summer10 | 0910 – XSPS |

**Very Important!** Be sure to complete the second screen of RPRLPRD – **Disbursement Schedule Rules.** This is where you will enter disbursement dates, term codes and disbursement percents for each of your loan periods.

## Letter Generation Module

____ Step 1 **RWVPARA** – Financial Aid Letter Validation Form

RWVPARA is the validation form that displays the code, description and type of the letters and email notifications that you have been using.

____ Step 2 **RWLSETU** – Financial Aid Letters Set-up Form

Review/revise your letter set-ups that were rolled to 2009-2010.

____ Step 3 **RWAPARA** – Paragraph Form

Review all of your letters and email notification documents for 2009-2010.

Also on RWAPARA, be sure to review your X_AWARDINFO and X_SAPINFO documents. As you recall, this information is displayed on the web to give advice and information to your students. Be sure to update these documents as needed.

**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 2009-2010, 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 2009-2010 do 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 must update RJRJREQ to include any new job codes.

This concludes the 2009-2010 Award Year set-up.

Please remember that if you need assistance, you can contact User Support at 860.244.7802 or e-mail us at SYS-BannerFinAidHelp@commnet.edu. For web development support, you must use the Web Developement Request Form on the Financial Aid Services web site.