



BANNER FINANCIAL AID SYSTEM

PELL GRANT PROCESSING

Summer Term 2005

We have prepared this document to assist you with the set-up, awarding and disbursing of Pell Grants for the Summer 2005 term. Even though the procedure has not changed from last summer, we strongly recommend that you review this document. As always, if you have any questions or need assistance, please contact User Support.

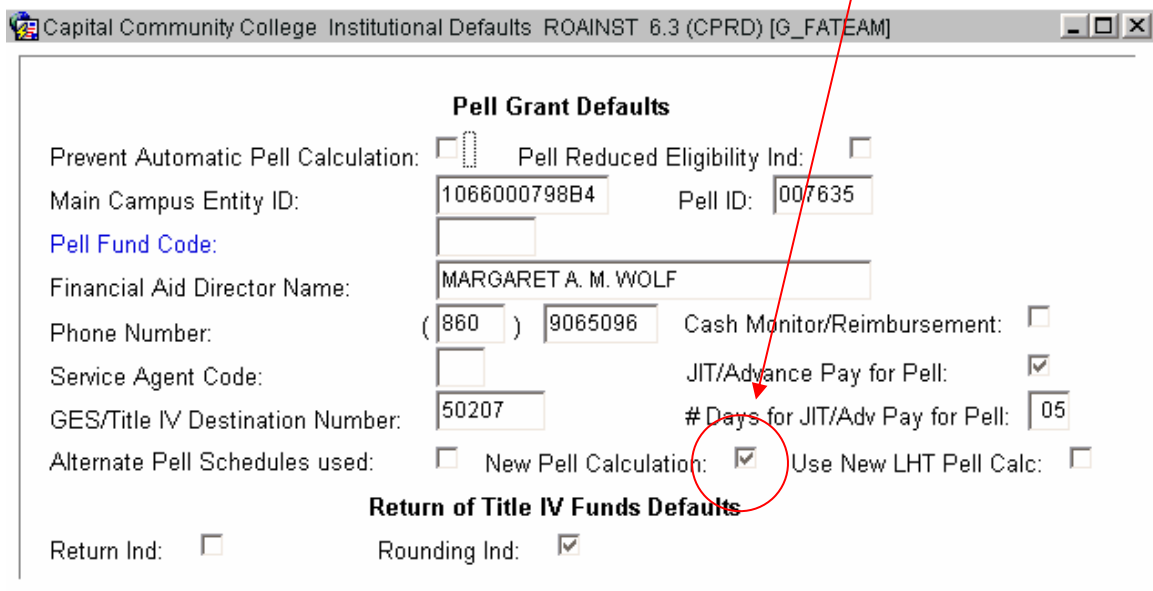
This document is divided into four sections:

- I. Set-Up Reminders**
- II. Awarding**
- III. Disbursing**
- IV. Must Do List**

1. Set-Up Reminders

ROAINST – Institutional Financial Aid Options Form

New Pell Calculation: This indicator is responsible for the proper calculations of Pell Grant. This indicator must remain checked.



Capital Community College Institutional Defaults ROAINST 6.3 (CPRD) [G_FATEAM]

Pell Grant Defaults

Prevent Automatic Pell Calculation: Pell Reduced Eligibility Ind:

Main Campus Entity ID: 1066000798B4 Pell ID: 007635

Pell Fund Code:

Financial Aid Director Name: MARGARET A. M. WOLF

Phone Number: (860) 9065096 Cash Monitor/Reimbursement:

Service Agent Code: JIT/Advance Pay for Pell:

GES/Title IV Destination Number: 50207 # Days for JIT/Adv Pay for Pell: 05

Alternate Pell Schedules used: New Pell Calculation: Use New LHT Pell Calc:

Return of Title IV Funds Defaults

Return Ind: Rounding Ind:

RFRDEFA – Default Award & Disbursement Schedule Rules Form

The “**Pell Award Percent**” fields are used solely for Pell processing. These values are used in the Pell calculation to determine the maximum Pell award for the student for each term.

In order to correctly calculate summer Pell Grants, the **Pell Award Percent** field must be entered as Fall – 50%, Spring – 50% and Summer – 50%. This will allow summer Pell Grant awards, up to 50% of the academic year amount, for students who attended less than full-time during the fall and/or spring semester(s).

Before you begin awarding Summer 05 Pell Grants, confirm that RFRDEFA is set-up as follows:

Capital Community College: Default Award and Disbursement Schedule Rules Form RFRDEFA 6.1 (PROD) [G_FATEAM]

Aid Year: 0405 2004-2005 Award Year Aid Period: GFSPSU

Award Schedule				
Term Code	Award Percent	Pell Award Percent	Memo Expiration	Activity Date
104307	33.33	50	21-SEP-2004	23-FEB-2004
105107	33.33	50	07-FEB-2005	23-FEB-2004
105207	33.34	50	15-AUG-2005	23-FEB-2004

** Press INSERT RECORD to default an Award Schedule **

Disbursement Schedule				
Term Code	Disbursement Percent	Disbursement Date	+/- Days	Activity Date
104307	100	30-SEP-2004		23-FEB-2004
105107	100	15-FEB-2005		23-FEB-2004
105207	100	15-AUG-2005		23-FEB-2004

II. Awarding Summer Pell Grants

RPROPTS (Packaging Options Form)

It is very important that you carefully follow these directions when awarding Pell Grants for Summer 05.

This is a procedure that you must perform **once** during the 2004-05 Award Year. Once you make this change to RPROPTS, do **not** make any additional changes. Make this change to RPROPTS **only** when you have completed most of your Pell Grant activity for the fall and spring terms **AND** are ready to begin to make summer Pell Grant awards. Our suggestion is to pick an effective date (e.g. April 1, April 15) to make this change and communicate this change in your business practices to your office staff. Once you make this change, any new Pell Grant awards will no longer be calculated based upon assumed full-time enrollment but rather the student's actual enrollment for the applicable fall, spring, and summer terms.

As you know, our practice of awarding based upon full-time enrollment and disbursing based upon adjusted hours is controlled by the settings on the first screen of **RPROPTS** – “Default Estimated Enrollment/1=Full Time” and “Enrollment Option for Disbursement/A=Adjusted”. **Before you award summer Pell Grants**, you must make changes to the **Pell Options Window** (3rd screen) of **RPROPTS**, **which** will update the student's Pell award to reflect actual Pell disbursements. This will allow for any unused portion of the Pell Grant to be awarded for the Summer term.

These required changes to RPROPTS are displayed on the following page.

PELL Options Window RPROPTS 5.7 (CPRD) [G_FATEAM]

Pay Pell If Disb Amt Differs From Award Amount: L= Lesser Amount

Default Less Than Half Time Pell COA: 4050

Pay Pell If System EFC and SAR EFC Are In Same Pell Payment Cell:

Delete Pell Award If Zero:

Enrollment Options

Term Code	Pell Award Enroll Option	Pell Disburse Enroll Option	Pell ISIR Term
104307	A=Adjusted Hours	A=Adjusted Hours	F=Fall Semester/Qtr.
105107	A=Adjusted Hours	A=Adjusted Hours	S=Spring Semester/Qtr.
105207	A=Adjusted Hours	A=Adjusted Hours	S1=Summer Term (post Sp...

A. **Pell Award Enroll Option** - For each of your term codes, you must change the award enroll options to “A=Adjusted Hours”.

B. **Pell Disburse Enroll Option** - For each of your term codes, you must change the disburse enroll options to “A=Adjusted Hours”.

C. **Pell ISIR Term** – You must set the ISIR term codes in this column to correspond with your Term Codes in the left column.

IT IS ESSENTIAL THAT YOU MAKE THESE ADJUSTMENTS TO RPROPTS AT THE TIME YOU BEGIN TO MAKE SUMMER TERM AWARDS.

PLEASE REMEMBER.....THIS IS ONLY DONE ONCE.

RWRXE01 (“Remaining Pell Eligibility Report”)

Our Banner report RWRXE01 (“Remaining Pell Eligibility Report”) will help you to identify students who may have Pell Grant entitlement remaining for the summer session. As you may recall, this report identifies students enrolled in the 2004-05 year who have Pell Grant awards, and for whom the remaining Pell Grant (scheduled Pell Grant award minus Pell Grant paid to date) is greater than zero. Once you have identified your summer Pell Grant recipients, proceed with the following steps for each student. These instructions are based on your working from the **ROARMAN** window.

Award/Term Lock Indicator – Be sure that the Pell Grant **award lock** (first screen of ROARMAN) is set as “N”. If you have adjusted a student’s Pell due to a TIV calculation, you should set the Pell Grant **term lock indicator** (Fund Award by Term screen) to “Y” for the applicable term.

Financial Aid Record Maintenance ROARMAN 5.8 C (CPRD) [G_FATEAM]

Aid Year: 0405 SSN: ID:

Summary

	Pell	FM	IM
Budget:	14,211.00	0	.00
Resources:	0	14,211.00	
Offered Aid:	4,050.00	10,161.00	
Sub Loan Excl Amt:			

Status: Tracking
Eligibility: Pell Info
Group Assign: App Data

Award Detail

Fund	Status	Lk	Sys	Offered	Accepted	Declined/ Cancelled	Memo'd/ Authorized	Paid	Ovrd Ind
GPELL	ACPT	N	S	4050.00	4050.00			2025.00	
Award Totals:				4050.00	4050.00	.00	.00	2025.00	Ovrd?

Fund Description: Federal Pell Grant Info Access:

Budgets – Each summer aid recipient must be placed into a new budget to include the summer term. You must place the student in a new budget to reflect the actual term enrollment at your college. For example, if a student attended the fall term and will be attending for summer, his/her budget must be XFASUM (fall and summer). This will allow Pell Grant funds that were originally awarded to the student for the Spring term to now be awarded for summer.

From **ROARMAN/Budget**, select an aid period that includes the Summer term. SAVE. Exit this form and note that the Pell calculation process runs.

Once the Pell calculation process runs, the student's Pell Grant is redistributed to take into account the amount(s) already disbursed and the remaining eligibility. As illustrated below, this student attended half-time for both the fall and spring terms (\$1012.50 each term) and has remaining Pell Grant eligibility of \$2025.00. This remaining Pell Grant is now available to be used for the summer term. Perform the disbursement process from ROAIMMP for the Summer 05 term so the Pell Grants will memo or authorize on the students' accounts.

Fund Awards By Term and Disbursement Schedule ROARMAN 5.8 C (CPRD) [G_FATEAM]

Fund Awards By Term						NSLDS			
Lk	Fund	Term	Lk	Fnl	Percent	Offered	Accepted	Declined	Ov
N	GPELL	104307		N	25.000	1012.50	1012.50		
N	GPELL	105107		N	25.000	1012.50	1012.50		
N	GPELL	105207		N	50.000	2025.00	2025.00		
Totals:						4050.00	4050.00		

Fund Status: Overall NSLDS Override Ind:

Disbursement Schedule						
Fund	Term	Schd Date	Schd Pct	Schd Amt	Disb Amt	Trans No
GPELL	104307	20-SEP-2004	100.000		1,012.50	15
GPELL	105107	28-FEB-2005	100.000		1,012.50	16
GPELL	105207	01-JUL-2005	100.000	2,025.00		
Totals:					2025.00	

Close

III. Disbursing Summer Pell Grants

Because of the variety of summer enrollment patterns, it is extremely difficult to establish a single disbursement date for the summer term as we do for fall and spring terms. For the same reason, we will not be able to use RSRENRL to bring enrollment data from the student system to the financial aid system. As you know, the Banner system will disburse on “Current Adjusted Hours” for the summer term. If you choose to preserve a “snapshot” of the frozen enrollment for your records, you can always manually record the “Financial Aid Adjusted Hours” on the Financial Aid block of the Enrollment Window.

Therefore, you will need to establish a procedure to confirm enrollment and disburse summer aid individually. We suggest the following:

1. Determine a disbursement date for each summer session.
2. For a student enrolled in only one session, verify enrollment on the disbursement date, then disburse from ROAIMMP.
3. For a student enrolled in more than one session, wait until the disbursement date of the student’s last session, verify combined enrollment in summer sessions, and disburse from ROAIMMP.
4. To handle **Common Origination & Disbursement (COD)** processing of Pell Grant payments, ensure all Pell Grant Origination/Origination Acknowledgement Records are processed correctly. Run the COD Extract Process, RWPCODE, immediately after performing ROAIMMP disbursements on the designated disbursement date for each session. Transmit the disbursement records immediately and import the acknowledgments through the COD Import Process, RWPCODI, as soon as they’re received. Then disburse the Pell Grant using ROAIMMP for these students.



IV. MUST DO LIST

To ensure successful Pell Grant processing for the 2004-05 Award Year, be sure to complete the following:

- A. RTVAPRD** Confirm that the **Budget Full Yr Pct & Pell Full Yr Pct** values are correct.
- B. RFRDEFA** Confirm that the **Pell Award Percent** is accurate for all terms.
- C. RPROPTS** **When you are ready to award Summer Pell Grants**
Complete the Pell Options Window as directed in Part II of this document.