We have prepared this document as a refresher to assist you with the set-up, awarding and disbursing of Pell Grants for the Summer 2009 term. Please review the document and complete the set-up required for summer processing. As always, if you have any questions or need assistance, please contact User Support.

This document is divided into three sections:

I.  Set-Up Reminders  
II.  Awarding  
III. Disbursing Summer Aid
1. Set-Up Reminders

**RFRDEFA – Default Award & Disbursement Schedule Rules Form**

**Aid Year: 0809 (2008-2009 Award Year)  Aid Period  XFSPSU (Fall, Spring, Summer)**

The **Pell Award Percent** fields on RFRDEFA are used solely for Pell Grant processing. These values are used in the Pell Grant calculation to determine the maximum Pell Grant award for each term.

In order to correctly calculate summer Pell Grants, the **Pell Award Percent** field must be entered as 1083xx – 50, 1091xx – 50 and 1092xx – 50. Using this configuration, students who attended less than full-time during the fall and/or spring terms will be awarded a Pell Grant for up to 50% of the scheduled amount for the summer term.

Before you begin awarding Summer 09 Pell Grants, confirm that the Pell Award Percent fields on RFRDEFA are set-up for the Aid Period XFSPSU (Fall/Spring/Summer) as follows:
Reminder…. If you used a separate award and disbursement schedule for your Pell Grant fund on RFRASCH, be sure to change the Pell Award Percent fields to 50, 50, 50 for the XFSPSU Aid Period on RFRASCH as well as RFRDEFA.

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 09.

This is a procedure that you must perform once during the 2008-2009 Award Year. After 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 16) 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.
A. **Pell Award Enrollment Option** - For each of your term codes, you must change the award enroll options to “A=Adjusted Hours”.

B. **Pell Disburse Enrollment 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 2008-2009 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 to award 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 the student’s fall or spring Pell Grant due to a TIV return calculation, you should lock the Pell Grant for that term only on RPAAWRD, Funds Award by Term window, Options, term lock indicator set to “Y” for the applicable term.

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.

After 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 received a half-time Pell Grant disbursement of $1183.00 for Fall 08 and a full-time Pell Grant disbursement of $2365.50 for Spring 09. The remaining Pell eligibility of $1182.50 is now available to be used for the Summer 09 term.

![Image of the ROAIMMP disbursement process]

Perform the disbursement process from ROAIMMP for the Summer 09 term so the Pell Grant will memo or authorize to the student’s account.
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 that same reason, we will not be able to use RSRENRL to bring enrollment data from the student system to the financial aid system. Consequently, 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 (ROAENRL).

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.

5. If you would like a batch disbursement run for the summer term, please send an email request to user support (SYS-BannerFinaidHelp@commnet.edu).