

# Banner Requirements Tracking

- What is it?
  - The process by which you assign “file completion” requirements to students, and then monitor their fulfillment of these requirements.

# Banner Requirements Tracking

- What controls requirements tracking?
  - Requirements (e.g., documents)
  - Requirement status (e.g., received)
  - Tracking groups (defined types of students who will be assigned sets of requirements)
  - Selection rules (logic placing students in groups)

# Banner Requirements Tracking

- How do you start ?
  - Define (on paper) the types of students from whom you want sets of requirements. What are these students like? What do you want them to do?

# Banner Requirements Tracking

- How do you set up Banner tracking?
  - **RTVTRST**: define statuses of requirements
  - **RTVTGRP**: define (name) tracking groups
  - **RTVTREQ**: define individual requirements
  - **RRRGREQ**: assign requirements to the groups
  - **RORRULE**: create the logic that puts students into groups.

# Banner Requirements Tracking

- What does Banner do with your setup?
  - As an I S I R becomes a Banner FA record, the group assignment process examines the student's (I S I R) data and places him/her in a tracking group. This causes (group) requirements to be posted to the student's record (RRAAREQ).

# Banner Requirements Tracking

- Tracking Statuses (RTVTRST)
  - G: system-generated
  - S: system-provided
  - R: received
  - C: action complete
  - (etc.)
- Satisfied indicator (for each status): Y/N

# Banner Requirements Tracking

- Tracking groups:
  - Each CC will define its own groups.
    - Dependent/selected/non-filers, etc.
  - Recommended:
    - Reject I SIR's
    - I SIR's with C-flags
    - Default (catches the leftovers)

# Banner Requirements Tracking

- Tracking group priorities:
  - Priority controls the group assignment process.
  - Lower number = higher priority
    - The process looks at group 10 before group 20, etc.
  - Number priorities by 10's to facilitate re-ordering (if necessary). Use 10,20,30...instead of 1,2,3....

# Banner Requirements Tracking

- Requirement creation (RTVTREQ)
  - Code: first digit must be your college digit
  - Short/long description
    - Short shows on screen, long shows on letters.
  - Required: once, to package, to pay, to memo
  - Access Indicator: enables Banner web display.

# Banner Requirements Tracking

- Associate requirements with groups (RRRGREQ)
  - Specify aid year
  - Select (pre-defined) group
  - Select (pre-defined) requirements for the group.
  - Set "required for pkg, disb, memo" (if desired) for this group only.
  - Use "Copy to" to save manual set-up work.

# Banner Requirements Tracking

- **Group Selection (RORRULE)**
  - Uses logic to select students for group assignment
  - Looks at data in Banner, including I S I R data
  - **Example:** I S I R record is "current", student is independent, verification-required is "no"
  - Don't try this at home!

# Banner Requirements Tracking

- Applicant (anecdotal) comments (RHACOMM)
  - Select student
  - Select or enter aid year
  - Enter comment

# Banner Requirements Tracking

- Mass entry form (RRAMASS)
  - Select student
  - Select requirement (e.g., 1040)
  - Skip SBGI
  - Select status (e.g., received)
  - Save

# Banner Requirements Tracking

- Individual student tracking (RRAAREQ)
  - (Also available from ROARMAN)
  - Use it to inquire about student tracking status, and to update tracking status (e.g., documents received).
  - Four “blocks”:
    - Group data
    - Requirements
    - Promissory notes
    - Non-coded (on-the-fly) requirements

# Banner Requirements Tracking

- RRAAREQ continued: **Tracking Group Information**
  - Shows current group assignment
  - Allows manual re-assignment
  - When manually re-assigning, use “create requirements” button to populate the new requirements
  - Shows if the student is due a tracking letter
  - Shows dates requirements were completed

# Banner Requirements Tracking

- RRAAREQ continued: **Requirements**
  - Shows the requirements (and their status) associated with the student's tracking group
  - Allows insertion/deletion of requirements
  - Allows requirement to apply to disbursement of a fund
  - "Req Desc" shows the short description from RTVTREQ

# Banner Requirements Tracking

- **RRAAREQ continued: Promissory Notes**
  - If you associated a promissory note with a loan fund (on RFRMGMT), it shows up here.
- **RRAAREQ continued: Non-Coded Requirements**
  - Use this block to add a unique requirement (not pre-defined) to the student.