

Banner Financial Aid Users' Update: July 24, 2000

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Tracking Group Assignment Rules Using the "Filed Tax Return?" Response

2000-01 FAFSA questions 37 (students) and 71 (parents) ask about tax return filing, with three possible answers: have filed, will file, won't file. Some applicants, of course, leave these questions blank (or, in Banner, null).

If you assign students to tracking groups on the basis of tax filing status, your group assignment rules should take the null entry into account. If you want to treat the applicant who leaves the question blank as a tax filer, your group assignment rules should include the phrase (for students):

`(RCRAPP4_TX_RET_FILED_IND <> 3 OR RCRAPP4_TX_RET_FILED_IND IS NULL)`

In English, this says: "The student's response to question 31 is not '3', or the student left question 31 blank."

To treat the parent who leaves question 71 blank as a filer, your rules should include the phrase:

`(RCRAPP4_PAR_TX_RET_FILED_IND <> 3 OR RCRAPP4_PAR_TX_RET_FILED_IND IS NULL)`

If you want to treat blanks as indicating non-filer status, you can modify the non-filer rules in the same way.

Banner Financial Aid Release 3.10 Goes Into Production

Our System Data Center has just upgraded the production database to financial aid release 3.10. Among the changes in this release are:

An improved disbursement report now displays only those records *with* disbursement activity, including valid disbursements and rejected disbursement records. Records having no activity during a disbursement run no longer display on the report, as well as those which have the error messages: "No Scheduled Disbursement," "No Memo - Offer Amount Zero," and "Fund Not Disbursable." The disbursement report will continue to be produced each business evening (Monday-Friday) after each disbursement run and automatically sent to your PROD/EDE folder on the CTCROBUSTA file server. Be sure to check out the new format!

RFMS (Pell payment) processing for 2000-2001. The Financial Aid Team will activate the RFMS features in stages, with training as needed.

An improved ISIR print process. SCT completely rewrote the ISIR print program. It now conforms to Federal print specifications and many defects were corrected. For those of you interested in using the RERIS01 process, be aware of the changes to the following parameters. Parameter 07, ISIR ID, now utilizes the SPRIDEN_ID (or Banner ID) of the student. The proper format is SPRIDEN ID (space) Transaction Number. For example: @12345678 01. Also a new parameter, parameter 06, *Create Date*, allows you to print ISIRs by the date on which the files were loaded into Banner 2000.

Student Award and Disbursement Report (RPRAWDB). The new Student Award and Disbursement Report (RPRAWDB) can be requested at any time, not just produced as a result of the disbursement process. The report prints the summary by fund of the accepted award amount, memo'd amount, authorized amount, and disbursed amount. Miscellaneous functionality includes:

- Sort options include Name and ID (primary) and fund (secondary).
- When the *Term Code* parameter is left blank, the report prints data for the entire financial aid year.
- If multiple term codes are selected, the report prints the entire year's data separated by term, for each student, before beginning with the next student.

Institutional Housing Codes: Heads Up!

If your budget group assignment rules look at the FAFSA entry for housing choice (with parent, off campus, etc.) you need to be aware that changes made in Banner to this data do not get reported as ISIR corrections.

You might change (on RNANA01) the housing choice from "off campus" to "with parent," for example, to get the student into the proper budget group. If you also make other data changes (e.g., AGI) that trigger a history correction, the new value for housing choice does not go into the correction record for that student. Therefore, when you receive the corrected ISIR back from CPS, the student's original housing choice ("off campus") is loaded into the Banner EDE record, and the student goes out of the budget group you wanted him in. (The same would happen as the result of a student-initiated change.)

What to do? This is a problem you can solve by reviewing the Discrepancy Report sections of your daily dataload report (not the dataload summary report). The Discrepancy Report clearly identifies the changed ISIR data elements for each record loaded, giving the old and new values. If you see institutional housing code in the Discrepancy Report, you will know whether the change would have placed the student in a new budget group. If necessary, you can enter the correct value on RNANA01, then regroup the student from ROAIMMP.

Coming Soon To a Printer Near You! The Bookstore Report!

A number of colleges have requested a report showing how much of a student's aid for a term is available for bookstore charges. Our Reports Committee wants you to know that the bookstore charge report will be available by August 10. It will show a student's authorized aid for the term, the charges (e.g., tuition) on the student's account, and the difference - which will be the amount available for bookstore charges.

Remember that authorized aid is the award prorated for enrollment status, and tuition and fees appear on the student account only when the student registers. Therefore students will have to register for the term before this report will show how much they can charge for books. (Students without authorized aid will not be included in the report.)

More information about the bookstore charge report will be available when the report is released.

SCT Releases Return of Title IV Federal Funds Functionality

Return of Title IV Federal Funds (RT4F) for students who withdraw completely from a term is one of those financial aid responsibilities that make you wish you were a counselor. The good news is that SCT has released its automated RT4F process in version 4.6. (The "4.X" version is now in our development database, where we are building four colleges for testing purposes. The plan is to move 4.X into production in October 2000.)

RT4 F is a "cross-modular" function in Banner; it involves the student system, accounts receivable, finance, and financial aid. The Community Colleges have set up a multi-disciplinary working group to oversee the implementation.

As the implementation of RT4F proceeds, we'll keep you informed.

Financial Aid Web Update

We continue to aim for a Fall 2000 release date for the introduction of web access to financial aid information by our community college students. Using their Banner IDs and unique PINs, students will access the Community College's Web Connection: *ONLINE* at www.online.comnet.edu. Students will have access to document tracking information, financial aid awards, scheduled award disbursements and dates, loan tracking and history, and account summary by term. We encourage you now to start planning for how web access may effect your office operations and your communications with students.