

Banner Financial Aid Users' Update: June 15, 2000

In This Issue:

Are you checking your dataload reports?
SSN added to RRRAREQ
RFMS for 2000-01 is on the way
Housekeeping on your Banner share
Ready to package? Simulate first!
Banner support for the Independence Day Week
Banner 4.X testing plans

Are You Checking Your Dataload Reports?

Dataload of sara files into Banner may have become routine for you, but there's a good reason to keep reviewing the dataload reports placed in your EDE folder each morning. Even after you package a student, a new I SIR might put that record into different tracking, budget, or packaging groups. We've already seen at least one case where a student already packaged with a full community college grant generated a new I SIR that made him Pell-eligible. In this case, the student ended up with more in grant funds than the college intended.

How do you know if this sort of thing is happening? Your daily dataload report (not the dataload summary) contains "discrepancy" data. This section of the report is generated when a second or subsequent I SIR is loaded for an existing financial aid student. The discrepancy report shows the old (in Banner, "current") and the "new data record." By paying attention to the changes (such as Pell EFC), you can determine whether you need to look more closely at that student's status in your system.

Reminder: when you receive processed corrections from CPS (a sarr file), load only that file (without sara files) so it's easier to differentiate "your" changes from the student's changes.

Schedule change: Dataload now runs at 7:00 pm nightly. Files must be in your EDE folder by then to be included in the night's run.

SSN Added to RRRAREQ

RRRAREQ is the Requirements Tracking Report. As delivered by SCT, it used only the Banner ID. We have added the social security number to it.

RFMS for 2000-01 Is on the Way

RFMS (Pell payment) reporting for 2000-01 will be included in Banner release 3.10. (We're currently at 3.9). SCT plans to make this available by the end of June. We plan to have it implemented by the end of July.

Housekeeping on Your Banner Share

Your Banner share is the drive mapped on one of your office PCs where you place EDE files to be loaded, and where you find reports (dataload, disbursement, corrections, etc.). Once we start processing loans and RFMS data, there will be even more activity there than at present. Physically, this drive is on a server in the system data center called CTCROBUSTA.

To keep this drive easy to work with, and to keep the necessary space available for ongoing use, each of us has to remove from it those files we no longer need there (except sara, sarr, and sys files, which the dataload process itself deletes). Here's a "SUGGESTED" procedure for managing these files:

1. On your PC's hard drive, a campus network drive, a zip drive, etc., create a folder called BannerShare2000. Within it, create folders that mirror your Prod folders on the share: EDE, Reports, Loans, EFT.
2. Once a month, using Windows Explorer, cut all the files from your Reports folder (on CTCROBUSTA) and paste them into the Reports folder in your new BannerShare2000 folder. Do likewise for the Loans, EDE, and EFT folders on CTCROBUSTA.
3. Be sure to backup your BannerShare2000 folders appropriately. See your campus IT staff for advice if necessary.
4. At the end of December 2000, move the last 2000 files to BannerShare2000. Then create new destination folders in BannerShare2001 to store the new year's files.

Ready to Package? Simulate First!

You've probably put a lot of work into your packaging groups and formulas. But packaging is a complex process, and you shouldn't *assume* that Banner packaging is going to do what you intend.

Before you package students "live," we strongly urge you to use the simulation option in RWPXP01 (the batch packaging process). To simplify the process, you can also simulate packaging for one packaging group at a time.

The RWPXP01 simulation places a Simulation Award Report (RPRSAWD) in the Prod/Reports folder on your CTCROBUSTA share. Open this file in Word, print it if you like, and check the package created for each student. You might ask:

1. Is the student in the right packaging group?
2. If you set an equity level for the group, is it met for each student? If not, why not?
3. If a fund specified for the group on RPRGFND is not awarded to a student, why not?
4. Do you know why the amounts awarded from each fund were awarded?

If you identify problems in your setup for a packaging group, correct them and run simulated packaging for that group again to verify your work.

You might also want to print out (from RORRULE/View, or by running RORAPLT) the students included in each packaging group. Then check your Simulation Award Report for each group: if a student was not packaged (in simulation), can you see why? (The most common reason would be unmet packaging requirements.)

You should not run packaging live until you are satisfied that all your groups are working as you intend.

Banner Support for the Week of July 3

To accommodate year-end processing in the finance system, Banner will be unavailable from 4:00 pm June 30 through July 4. We plan to have financial aid support available July 5 and July 6.

Banner 4.x Testing Plans

As you probably know, our system plans to implement Banner version 4 in October. This is the release that incorporates Return of Title IV Funds among other improved functions; it also introduces a more Windows Explorer-like look and feel to Banner navigation.

To make sure that live financial aid processing will make a smooth transition into version 4, we are going to build four test colleges in the development instance of version 4 this summer.