

Banner Financial Aid Users' Update: May 4, 2000

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Default Tracking Group Issues

Please check your PROD implementation to make sure that your default tracking group is as follows:

It has no RORRULE associated with it.

It assigns as requirements the minimum that your business practice expects (e.g., ISIR and institutional application).

It is specified on ROAINST as the default tracking group.

(Background: if you enter a comment, post a received document, etc. before you receive an ISIR for a student, you create a RORSTAT record. The grouping process will then assign that record to your default tracking group. If there are no tracking requirements associated with the default group, the record will be picked up by the packaging process. If your default tracking group is as shown above, these records will stay in the tracking process - where you want them - at least until you receive an ISIR.)

"Current Record" Phrase in RORRULEs:

In order to prevent records which do not have a current ISIR from being assigned to non-default tracking, budgeting, and packaging groups, we recommend that every RORRULE contain the following phrase:

```
AND RCRAPP1_CURR_REC_IND='Y'
```

This can simply be added to the end of every rule that does not contain it.

A new requirement status: Z

What to do when you want to know that a student has sent you a tax return (or other required document), but you haven't reviewed it yet? Try the new requirement status Z. This status means "received, not yet reviewed." It is defined as a "not satisfied" status. Therefore, when a student has supplied all documents required for packaging, but one (or more) is in status Z, the student (in Banner) will not have met all packaging requirements. Once you review the student's file, and determine that all is well, change the Z to C (action complete), and the record will go into "packaging requirements met" status.

Note that if a document is required to memo, the Z status on that document will keep the student from memoing (since Z is a not-satisfied status).

The Z status and your tracking letters:

The tracking letter process has been modified so that it will not list (as requirements to be met) any document with a Z status. This will keep your process from requesting (again) documents that students have provided (but you have not yet reviewed).