

Banner Financial Aid Users' Update: May 23, 2000

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3.9 Upgrade

The System Data Center has successfully completed the upgrade of Banner Financial Aid to the 3.9 release. (This process necessitated the short shutdown on Friday, May 19.) Periodic upgrades will continue to be necessary to keep up with regulatory and technical requirements, and we will schedule them in the least disruptive way possible. In October, the entire Banner system will be upgraded to 4.x, which incorporates the new return of Title IV funds function and makes some "look-and-feel" changes to Banner forms.

"Modifying Your Student Budgets" Update:

Earlier this week, we e-mailed you the document entitled "Modifying Your Student Budgets to Accommodate the 2000-01 Tuition Increase." Once you complete the *Action Plan: Implementing the 2000-01 Tuition Increase/Part 1*, you must suspend your Banner Financial Aid System processing for the day. We need to invoke some automatic nightly processes against the database so your student records are adequately brought current. You can resume your Banner Financial Aid work the very next day. Please contact us if you have any questions.

New Form Added to the Clerical Security Class

RNIAPPL is a query-only form that shows the applications (or need analysis records) that exist in Banner for a student. Among other things, it shows which

ISIRs are in the "black box", and which EDE records (or ISIR images) exist in Banner. (The EDE record is what you access when you open RNANA01 for a student.) It also shows which EDE record is the current one.

RNIAPPL has been added to the clerical security class.

New Parameter in RWRXL01 (Tracking Letters)

An optional parameter has been added to RWRXL01, the process that creates tracking letters. This parameter enables you to have a tracking group bypassed when letters are created. This new optional parameter is parameter 05. Leave the field blank to include ALL tracking groups.

Why would you do this? Here's an example from Tunxis: tracking group assignment rules use ISIR data to place students into tracking groups. For students who exist in Banner, Tunxis financial aid logs in documents (tax returns, etc.) on RRAAREQ or RRAMASS whether or not the ISIR has been received. This creates 00-01 financial aid records (RORSTAT records) before Tunxis gets the ISIR. The grouping process assigns these to the default tracking group, because all other tracking group assignment rules use ISIR data. When the ISIR arrives at Tunxis, the grouping process will assign the student to a non-default tracking group.

Tunxis doesn't want to send tracking letters to these students until their ISIRs arrive. Therefore, Tunxis uses the new option on RWRXL01 to have the default group bypassed when tracking letters are created.

This is optional, and it may not make sense for you, depending on how you have structured your tracking groups. If your default tracking group is not a "holding" group (as it is for Tunxis), you probably won't want to exclude it from tracking letters.

New Entry Required on ROAINST

Apparently, there are some schools in the federal aid programs that have different IDs for Pell and for FFELP. To accommodate them, Banner in version 3.9 requires us to enter a FFELP ID in addition to the Pell ID. Please note that you need to enter an eight-digit number: your usual six-digit code plus two zeros. There are 2 fields on ROAINST where you have to enter this code. The first field is entitled "EL school code" and is on the second window of the form, "Institution Financial Aid Options II." The second field is also entitled "EL school code" and is

on the fifth window of the form, "Campus/EDE Defaults." Be sure to complete both fields by entering the eight-digit FFELP ID.

Dataload to Accommodate System-Generated ISIRs

The CPS creates "system-generated" ISIRs (to correct CPS processing errors, update NSLDS data, etc.) and puts them in our mailboxes as (for 2000-2001) sysg01op.dat files.

The Banner dataload process has been modified to read these files just as it does sara01op files. Suggestion: if you want to be sure you will know why you received system-generated ISIRs for the students concerned, you may want to move only the sysg01op file (and no others) to your Prod/EDE folder that day. The resulting dataload reports will enable you to identify the students in the sysg01op file.

What To Do With Rejected ISIR Correction Files (sare01op.dat files)

Everyone makes mistakes. Once in a while, you may send an ISIR correction that gets rejected by the CPS. (For example, the SAR ID may not match what's in the CPS database.) The individual student(s) rejected by CPS will be identified in a sare01op.dat file.

Banner cannot interpret these files for us. We'll have to do as we have been doing: open the sare01op file in Notepad, identify the student, and research the problem.

It's Time to Review Your Disbursement Reports

You've probably noticed disbursement reports placed in your Prod/Reports folder (possibly nightly). You haven't yet paid 2000-2001 funds to students, but Banner has been memoing funds and, if students are enrolled, authorizing them.

You should begin to review these reports to verify that your fund, packaging, and disbursement set-up is working as you intended. As you'll see, the disbursement report shows the student enrollment status in hours (for Fall 2000) when the disbursement process has authorized funds. You can use this information to look back at the (full-time) award amount and verify that your disbursement proration is working properly.

It's important to check these results now, while the number of students involved is relatively small. You must verify that your set-up is correct before the disbursement process produces any actual payments.

TRNG EDE Dataload Process Turned Off

To conserve system resources, we have turned off the nightly EDE dataload process in the Training database. Few colleges have used this process over the last month. If you do wish to perform a TRNG dataload, please contact us, and we'll be happy to schedule the process for you.

ISIR Print Process Update:

Many users have reported a problem with the ISIR Print Process, RERIS01. Our latest testing confirms that this print problem is a local or "college" issue, resulting from printer queue concerns. If you continue to have problems with this process, you should contact your college IT staff who, in turn, can contact the Operations staff at the System Data Center.