

Banner Financial Aid User's Update: November 7, 2000

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Banner 4.X Up and Running

As you know, Banner Financial Aid 4.7 went into production October 24. In addition to implementing the return of Title IV funds function, 4.X contains some menu and navigation changes. As you've seen, on the form level little is different from Banner 3.

New Letter Codes

During October, the codes for each college's financial aid letters were modified. (The Tunxis thank-you letter, for example, was changed from JTHANKY to J_THANKY.) If you use RWRXL02 and want to enter the letter code manually, the old code won't work. Instead, "click in the field" or use the "search icon" to call up your letter codes and select the one you want.

Two New Reports

The Reports Committee has reviewed two new reports that are available in PROD. We feel that these reports may be useful for you to maintain and manage your financial aid funds.

RFRBUDG - Fund Budget Report

This report gives information on allocations, offers, accepted, paid and remaining allocations. Depending upon the parameters, this report can be run by fund code

(individual funds or several funds), fund source (federal, state or institutional) fund type (grant, loan, scholarship, work) or for all funds. (This report is run in landscape format.)

	<u>Parameter</u>	<u>Value</u>
01	Aid Year	0001
02	Fund Code	enter fund code or blank for all
03	Fund Source	enter fund source or blank for all
04	Fund Type	enter fund type or blank for all
05	Federal Fund I D	blank
06	Sorting Sequence	A

RFRABAL - Account Balances Report

This report prints detailed information on the status of each fund for the aid year. Depending upon the parameters, this report can be run by fund code (individual funds or several funds), fund source (federal, state or institutional) fund type (grant, loan, scholarship, work) or for all funds. (This report is run in landscape format.)

	<u>Parameter</u>	<u>Value</u>
01	Aid Year	0001
02	Fund Code	enter fund code or blank for all
03	Fund Source	enter fund source or blank for all
04	Fund Type	enter fund type or blank for all
05	Federal Fund I D	blank
06	Term Code	enter term code
07	Sorting Sequence	A

Changing the Current Term Code on ROAI NST

When we set up our 2000-2001 systems, we set (on ROAI NST) Fall 2000 as the "current term." The current term setting has multiple functions:

It defaults into ROAI MMP (for example, when you disburse aid).

It determines how Banner FA looks for data from Banner Student. (When FA wants to see if a student is a Connecticut resident, for example, it will look for that data

in the student system for the ROAI NST current term, or the most recent term prior to that.)

Since we are now dealing with students whose first term at our colleges will be Spring 2001, we need to change the current term code on ROAI NST to Spring 2001. This will *not* create problems in batch processing (such as grouping) for students who need to be considered for aid for Fall 2000. Be aware that once you change the current term code on ROAI NST, it will default in when you use ROAI MMP, but can be changed on ROAI MMP when necessary.

Duplicate Records - Update

A few weeks ago, Tom sent out an e-mail, outlining procedures you need to follow to resolve financial aid records that have been manually matched to improper general person IDs in Banner. As a reminder, if you have not already done so, please follow these procedures and forward all required information to Claudia at chafee@commnet.edu.

Financial Aid Web for Students

Since mid-October, the web for Student function has been available in Banner. At our October 13 council meeting, you received basic information about this feature.

If you haven't yet done so, you might want to enlist a work-study student who would let you look over her shoulder as she uses the web to view her data.

One feature of this system that could use some improvement is the terminology used on the student account page. (The student account data is available to all students and is not under financial aid control.) The Banner FA Team is considering requesting the Student Team to modify the student account page so that it speaks in student terms, rather than accounting terms.

Batch Disbursement Update

For technical reasons, the batch disbursement process has been moved up in the nightly run. Effective November 1, 2000 batch disbursement starts at 6:00 pm.

Also, we have begun disbursement activity for the upcoming Spring 2001 semester. This was necessary as colleges have begun registration activity for the Spring term. And we want to make sure student financial aid awards "memo" or "authorize" as appropriate to

the student account. Two disbursement reports will be placed in your Reports folder on your CTCROBUSTA share each night – a Fall 2000 semester report (1003xx) and a Spring 2001 (1011xx) semester report. Please be sure to review the Spring term report carefully to ensure your “memo” rules are being invoked properly. You may want to discuss your Spring semester “memo advice” with your business office staff to ensure your financial aid recipients’ accounts are proper.

You can, of course, disburse individual students (when necessary) on ROAI MMP anytime Banner is running.

Rollover to 2001-2002

Believe it or not, we’ve received Banner Financial Aid 4.7.1, which enables us to process 2001-2002 applications. The team is working on instructions for rollover from 2000-2001 to 2001-2002. Banner will carry forward our set-ups to the new year; we only need to review them to update year-specific references (such as in rules).

Implementing 2001-2002 also gives us an opportunity to modify Banner set-up elements if we’re not pleased with the way they’ve worked in 2000-2001.

Return of Title IV Funds

This function became available to us with 4.X. One of the concerns we have in common is identifying potential unofficial withdrawals, i.e., students who stay enrolled for the entire term but earn no credits.

The unofficial withdrawal report will be available in production by December 1. Because it uses final grades to find students who earned no credits, you won’t want to run it until your college posts Fall 2000 grades.

RPRTIVR (Return of Title IV Funds Recipient Withdrawn Status Report)

We have been informed that the Banner Student Team has developed additional withdrawal codes that they will use for students who completely withdraw from school.

In order to include these new codes when running your RPRTIVR Report, please make the following change to the “Return of Title IV Funds” documentation. On page 4, Step 1 (RPRTIVR), please change the value of the “Withdrawal Status Code” parameter to “blank”. By doing so,

you will capture all withdrawal codes on this report.

Satisfactory Academic Progress (SAP)

The team is currently working on SAP implementation. The objective is an automated process that will review and evaluate aid recipients' academic standing after Fall 2000, to determine their Spring 2001 eligibility.

The process will apply the basic federal standard we agreed on in the council: completion of two thirds of attempted work, with an average of at least 2.0, 150% maximum time period for program completion, etc.

At the council meeting on November 17, we will hold a focus group discussion and preview of our progress to date. *The SAP implementation will still be in development at that point, and this will give us an opportunity to offer suggestions and recommendations.*