BANNER FINANCIAL AID USER’S UPDATE

November 2009

In this edition: 8.x Banner Financial Aid Release Information

- Form Changes
- Processing Changes
Introduction

Upon completion of its upgrade to version eight (8), the Banner Financial Aid system will stand at version 8.5. However, since its release in April, 2008, the following versions of Banner 8 have been issued by SunGard and maintained by the Financial Aid Team in a non-production environment: 8.0, 8.1, 8.2, 8.2.1, 8.3, 8.4, 8.4.1, 8.4.2, and 8.5.

This document is meant to assist in acclimating you to some of the notable changes to the Banner Financial Aid system that have been implemented by way of the aforementioned releases. Please note that this document is not meant to be inclusive of all the changes associated with Banner 8, but rather those changes deemed to have the most immediate impact with regard to processes. For example, changes more closely associated with new-year start-up will be addressed at a later time.

As always, please contact User Support with questions regarding changes in Banner 8, regardless of whether they are specifically addressed in this document.

Form Changes

ROAINST

A new form, ROAUSIO, has been created to keep United States-specific functionality separate from global functionality. The fields on ROAUSIO are not new fields, but rather fields that have been moved from ROAINST.

For example, the Aid Year continues to be defined on ROAINST, while the designation of Pell Grant and ACG as “Just in Time” funds has been moved to ROAUSIO:

![ROAINST Form](image-url)
In addition to the “Group Active” indicator on this form that alerts the user as to whether or not a particular group is active for a given aid year, a “View Students” option has been added under the “Options” menu on ROIGRPI. When selected, a pop-up window appears displaying all of those students in a given predefined population (i.e. packaging, tracking, budgeting, or SAP). Highlighted below is an example of viewing students in a respective packaging group:
RPAAWRD & RPAAPMT

The most prominent change with regard to these two forms is a new feature that allows for fund award rules (i.e. RORRULE) to be overridden on an individual student basis for a given aid year. This functionality is accessible from either form, and is highlighted below as seen on RPAAWRD:
Processing Changes

Changes to Batch Packaging (RWPXP01)

The two most prominent changes to the packaging process are as follows:

- **Pell Calculation**: The batch packaging process will now calculate Pell Grant awards, whereas in the past this was a separate batch process. When run in simulation mode, simulated Pell Grant awards are visible on the RPRSAWD report. When run in actual mode, standard Pell processing occurs and a Pell Grant is awarded.

- **Awarding of Exhausted Funds**: In the past, the batch packaging process (when run in simulation mode) would display funds on the RPRSAWD report even if those funds were no longer available. With the current release, only funds that are actually available to be awarded are displayed when the process is run in simulation mode. For example:
  
  o A student is eligible for both CAPS and CCG. CAPS is first in line according to RPRGFND, but is exhausted, and CCG is available. The student will appear on your RPRSAWD report with only CCG visible (up to the maximum amount as determined during set-up). When run in actual mode, the student will be awarded CCG, assigned a packaging date, and CAPS will appear with a notation of “Money Not Available for Fund” on the RPBAWRD report.

  o A student is eligible for CAPS and CCG but neither are available. The student will not appear on your RPRSAWD report. When run in actual mode, the student will not be awarded, will be assigned a packaging date and both funds will appear with a notation of “Money Not Available for Fund” on the RPBAWRD report.