Financial Aid Services

2004-2005 Award Year

New Year Start-Up Training

February 10, 2004
February 11, 2004
2004-05 AY Start-Up
Important Dates

- February 6 - software upgrade to Banner Release 5.11
- February 10, 11 – New Year Start-Up Training Activities
- February 27, 28, 29 – software upgrade to Banner Version 6.3
- March 1 – Pivot Date for start of the 2004-05 AY in the Banner Financial Aid System
TODAY’S AGENDA

✦ 2004-05 AY Banner Financial Aid System Start-Up Checklist – Claudia

✦ Dataload Overview – Dave & Cathy

✦ ISIR Receipt Confirmation Process – Ron

✦ 2004-05 AY Batch Posting - Claudia
2004-05 Award Year
Banner Financial Aid Start-Up Checklist
BREAK TIME!
DATALOAD...

It’s more than just loading data!
Dataload: the Overview

Dataload is the set of processes that bring students’ federal aid application data into Banner so that we can work with it.
What federal aid data do we get?

- Initial ISIRs (students’ processed federal aid applications)
- Corrected ISIRs (whether corrected by the college or by the students)
- “Pushed” ISIRs (generated by the CPS, e.g., re-processing to correct CPS errors, or to report new C-flags)
The CPS “ISIR datamart” enables schools to request ISIRs for individual students or for types of students (by query on certain ISIR characteristics). http:\fsa4schools.ed.gov

To comply with TIV requirements that we import ISIRs for any enrolled students, colleges should continue to receive “daily ISIRs,” the process we currently use. This will also allow us to use the datamart when we need to. Duplicate ISIRs will be available only through the datamart; we will not request them through Banner.
CPS message classes we will load for 0405:

❖ **Daily ISIRs:**
  - IDSA05OP (ISIRs from applicant-sent FAFSAs)
  - IDAP05OP (ISIRs from school-sent FAFSAs)
  - IDCO05OP (ISIRs from school-sent corrections)

❖ **CPS-Pushed ISIRs:**
  - IGSA05OP (Pushed ISIRs from applicant-sent FAFSAs)
  - IGCO05OP (Pushed ISIRs from school-sent corrections)

❖ **ISIRs Requested from the datamart:**
  - ISRF05OP
Dataload process overview:

❖ College obtains CPS output through EdConnect.
❖ College moves CPS output files to its prod\ede folder on ctc$robusta.
❖ Dataload processes run each night.
❖ Dataload reports are sent to the college’s prod\reports folder.
❖ College reviews dataload results.
Dataload processes: what happens?

- **RCBTPxx** reads your CPS output files and places the ISIR records in a temporary table. This table is not part of the Banner database.

- **RCPMTCH** attempts to match the ISIR records in the temporary tables with existing general person records in the Banner database.

- **RCRTPxx** brings the matched ISIR data into Banner financial aid, creating RORSTAT and RCRAPP records.
Which records will match in dataload?

- An ISIR record you get from CPS will be brought into Banner if it matches an existing general person record in all three of the following elements:
  - Social Security Number
  - Last Name (16 characters)
  - First Name (9 characters)

- If it fails to match all three elements, it stays in the temporary table.
Why do we require ISIR records to match existing Banner records?

🔹 We chose not to have Banner use federal aid records to create Banner general person records because this would likely increase the number of duplicate records in Banner.

🔹 Requiring a match helps us force students to get into the admission process before we start to deal with their aid applications.
What happens to ISIR data that doesn’t get matched?

- Unmatched records stay in the temporary tables and are not in the Banner database. (These records, and the reasons they didn’t match, are on the dataload report.)

- They can be reviewed on the RCRSUSP form and force-matched if appropriate. (Details to follow.)
The Dataload Report gives the detailed results of the match processes. It’s produced every time dataload runs, even if there are no successful matches. 
Sample Dataload Report

The Dataload Summary shows the records that were successfully matched. These are new financial aid records you can work with, or new ISIR transactions posted to existing Banner financial aid records. It’s produced only when ISIR data is matched and imported. 
Sample Dataload Summary Report
Working with unmatched records on RCRSUSP

- “Identification” block will display your unmatched ISIR data.

- “Production” block enables you to query existing Banner records to see if they should be associated with unmatched ISIR data.

- RCRSUSP allows deletion of unmatched ISIR data when appropriate.
RCRSUSP: Possible Status of Unmatched ISIR Data

» S (SUSP): ISIR data partially matches existing Banner data

» H (HOLD): ISIR data doesn’t match existing Banner record

» D (DUPL): Two or more unmatched ISIR transactions for the same applicant

» *: Indicates an error in Banner records that must be resolved by your college’s duplicate ID specialist.
RCRSUSP: What Puts a Record in HOLD Status?

- HOLD status means that neither the name nor the SSN matches a Banner record.
- Generally this means that the student hasn’t yet applied for admission, but entered your college code on her FAFSA.
- You would probably be wasting your time trying to find a match for a HOLD record through RCRSUSP. Once the student applies for admission, the RCRSUSP record should be matched by regular dataload.

http://www.banner.commnet.edu
Dataload
It’s Lunch Time!
ISIR Receipt Confirmation

- ISIR Receipt is a confirmation to the student that the College has received the ISIR.

- Occurs during dataload for matched records.

- The confirmation is sent via Email or Paper letter.

- Happens only once per Aid Year for the first Need Analysis record created that Aid Year.
ISIR Receipt Confirmation
Dear Customer,

This message is to acknowledge the receipt of the results of your Free Application for Federal Student Aid (FAFSA) for the 2004-2005 Award Year by Tunxis Community College.

You can complete and monitor your financial aid application over the internet using the college's student self-service web site. Visit us ONLINE at www.online.tunxis.commnet.edu.

Login to the secure student area to track your financial aid application and conduct your financial aid transactions. Your User ID is 800405052. Enter your User ID as “U” followed by your 6 digit student number, then enter your PIN. Your initial PIN is your date of birth entered as mmdd. You will be asked to change your PIN when you first login. If you have difficulty with the login process, please contact the REGISTRAR’S OFFICE at the college.

In general, students must meet the following requirements (among others) to receive financial aid from Tunxis Community College:

- Apply for admission to an associate degree program or aid-eligible certificate program and meet all admission requirements;
- Enroll as at least a half-time student (6 credits or more) per term while achieving satisfactory progress toward your certificate or degree;
- Provide all requested documents and information to the financial aid office;
- Demonstrate financial need

If you have any questions concerning the financial aid application process, please e-mail us at tx-finaid@tunxis.commnet.edu.

Financial Aid Services
Tunxis Community College
ISIR Receipt Confirmation

Tunxis Community College
271 Seuss Drive South
Falls Church, VA 22047-2287
(800) 673-7500

January 22, 2004

Dear Mr. Mears,

This message is to confirm that the ISIR has been received. ISIR's are used for the following purposes:

1. To determine the student's eligibility for Federal and State financial aid programs.
2. To calculate the student's net aid package.
3. To determine the student's eligibility for work-study programs.

If you have any questions, please contact your Financial Aid Office at (800) 673-7500.

ISIR Receipt Confirmation

Detailed Results of ISIR Receipt

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Letters Printed: 1

Tunxis Community College

Financial Aid Office
ISIR Receipt Confirmation

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ISIR Receipt Confirmation
Banner Financial Aid System

2004-05 Award Year Batch
Posting Process
In this session, we will cover the following topics:

- Batch Posting Set-Up Review
- 2004-05 C Codes/Reject Codes Spread Sheet
- Batch Posting Process Flow-Chart
- The P…..B Connection
The End

Tom Bradham
Claudia Chafee
Dave Welsh
Catherine Hardy
Joseph McAuliffe
Ron Correll