Connecticut Community Colleges

Banner 2000 Financial Aid System
Letter Generation
Banner Financial Aid Letter Generation

STEP #1 (SET-UP) - FINANCIAL AID LETTER VALIDATION FORM (RWVPara)

From the Menu: -OR- Direct Access:

• Financial Aid
  • Financial Aid Common Functions
    • Financial Aid Letter Generation
    • Financial Aid Letter Validation Form

On the Financial Aid Letter Validation Form, you define codes and descriptions for specific letter types.

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- **Code** - Enter a code for each letter type. This code must begin with your B-M college identifier.
- **Description** - Enter a description of the letter.
- **Type** - Choose the type of letter from the drop-down menu. The letter types are as follows:

<table>
<thead>
<tr>
<th>Tracking</th>
<th>Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thank You - Initial tracking letter</td>
<td>Award - Initial award letter</td>
</tr>
<tr>
<td>Missing Document - Next tracking letter</td>
<td>Revised Award - Revised award letter</td>
</tr>
<tr>
<td>Last Chance - Last tracking letter</td>
<td>No Award - No award letter</td>
</tr>
</tbody>
</table>
STEP #2 (SET-UP) – FINANCIAL AID LETTER SET-UP FORM

RWLSETU

From the Menu: -OR- Direct Access:

- Financial Aid
  - Financial Aid Common Functions
    - Financial Aid Letter Generation
      - Financial Aid Letter Set-Up Form

On the Financial Aid Letter Set-Up Form, you will associate the codes you established on RWVPARA with the appropriate tracking/award letters. You will also decide the number of tracking letters to send.
Banner Financial Aid Letter Generation

- Update Address - Press this button to enter/update your school’s address. This information will appear as letterhead on all letters.

Tracking Letters

- How Many Letters 1-99 - Enter the total number of tracking letters you want to send to each student.
  1 - One Thank You letter will be sent.
  2 - One Thank You and (assuming the student does not respond) one Last Chance letter will be sent.
  3 - One Thank You, one Missing Docs and one Last Chance letter will be sent.
  4 and greater - One Thank You, one Last Chance and the remaining number of Missing Docs letters in between.
- Thank You LTR
- Missing Docs LTR
- Last Chance LTR
- Number of Days Between Letters - Enter the number of calendar days you want between letters.

Award Letters

- Award LTR
- Revised LTR
- No Award LTR

Associate your codes with tracking letters

Connecticut Community Colleges
STEP #3 (SET-UP) – PARAGRAPH FORM (RWAPARA)

From the Menu: -OR- Direct Access:

- Financial Aid
  - Financial Aid Common Functions
  - Financial Aid Letter Generation
  - Financial Aid Letter Form

On the Financial Aid Letter Form, you create the body of the letter and choose any pre-defined data you want to include in the letter. The college name/address, date (as defined on RWLSETU), student’s name/address and
salutation (Dear First Name) will automatically print. In the text of the letter, the default is set at 90 characters per line.

- Letter Code - Enter the code of the letter you want to compose.
- Pre-Defined Data - Press this button to view the pre-defined data available. The values are:
  @@AWARD - Prints Awards by Term
  @@BUDGET - Prints Budget Components and EFC
  @@ FUNDMSG - Prints Fund Messages
  @@ TRACKING - Prints Outstanding Tracking Requirements

On the RWAPA form, enter the text of your tracking/award letters. (This should be entered in both upper/lower case.) When you reach the point in your letter where you want to enter the pre-defined data, press the Pre-Defined button and choose the variable you want. A blank line will automatically print before and after the pre-defined data.
Banner Financial Aid Letter Generation

This concludes the set-up for Banner Financial Aid Letter Generation. We will cover the process of printing letters in an upcoming training session dealing with Job Submission in Banner.