

Banner Financial Aid Enrollment Periods

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Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session


Thank you for your cooperation!

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Goal

The goal of this course is to review Enrollment Period Functionality in the Banner Financial Aid system.

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Agenda


- Introduction/Background
- Form Changes
- Menu Changes
- Process Changes
- Enrollment Periods
- Enrollment Calculations using Periods



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Introduction/Background



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Introduction/Background

- Effective for 2010-2011 Aid Year, Banner 8x only
- Enrollment Period changes in Banner Financial Aid Functionality begin to break the FA dependencies on STVTERM and aid year constraints.
- Prior phases that have been delivered include Term Based Holds, Archiving and Purging and Term Based Requirements Tracking.
- Future phases include Period based/algorithmic budgeting, period based awarding and disbursement and Borrower Based Academic Year loans.

Introduction/Background

This Release affects almost all modules in Financial Aid system except for the following processes:

- Satisfactory Academic Progress
- Enrollment – ROAENRL is still term-based; however, new functionality allows viewing of enrollment by period
- Resources
- Return of TIV calculation for processing a period with multiple terms has not been included in this release since the length of the enrollment period and the calculation of institutional charges is still by term. Manual calculation will be needed for withdrawals for a combined term. The Title IV Recipient Withdrawn process RPRTIVR is modified to identify if a withdrawal record exists for any term which is part of the period entered as a parameter.



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Introduction/Background

- Periods are created based on term codes in STVTERM tables that have a valid Financial Aid Process Year populated and will have the appropriate terms created.
- Indication of which term code is to be used when multiple terms are combined on enrollment periods.
- Over time the recommendation is to review and update all rules in RORRULE, populations selections, parameter sets, local modifications and scripts to start using the new "table *name_period*" column due to:
 - System's Performance – table term_code column is no longer part of the key index so performance maybe affected
 - If combining terms into a single period there may be a difference between the period name and the term name



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Form Changes

Form Changes

Changes made to Forms:

- "Term" changed to "Period"
 - Form Names (Form mnemonic not changed)
 - Options Menus
 - Field (Column) Labels
 - Auto-hints
 - Error Messages
- Period added to Key Block
- "Period" changed to "Aid Period" – Ex: RBAABUD



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Form Changes

Changes made to Specific Forms:

- RFRDEFA / RFRASCH / RORTPRD / RPRLPRD
 - Period cannot be updated once the record is saved
- ROAINST
 - Credit Hours Tab - Period can not be updated once record is saved
- RPAARSC
 - Term can no longer be updated once record is saved
- RFRMGMT / ROAMGMT
 - New field added to Disbursement Tab; allows number of days +/- functionality to be used for attending hours



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Form Changes

Changes made to Specific Forms:

- Payroll Load Control RJRPAYL – Term Code field removed
- Applicant Immediate Process (ROAIMMP)
 - Current Period / Term designated on ROAINST will be defaulted for TGRP, BGRP, PGRP processes
- Financial Aid Crossover Terms Table (RPRCRSS)
 - Upon install of Release 8.9, this table, if populated, will be used to complete the Crossover fields on the new form RPRPRDS and will then be OBSOLETE
 - If not populated, Crossover terms must be manually populated on RORPRDS after installation of Release 8.9



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Form Changes

- **Changes made to Specific Forms:**
 - Applicant Summary (ROASMRY)
 - Modified to include Tabs:
 - Memos, Authorizations, Loan Distributions, Requirements, Perkins MPN Detail, Promissory Notes
 - Options Menu modified – removed selections related to new tabs
 - Loan Distribution Tab
 - Certified Hours field moved
 - Comment field shortened
 - Will call the new Loan Disbursement API



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Form Changes

- **Changes made to Specific Forms:**
 - Applicant Summary (ROASMRY)
 - Requirements Tab - Requirement Code and SGBI Code LOV buttons removed; columns not updateable
 - Batch Posting Rules (RORPOST)
 - Period field added to main block
 - Terms will be moved to the Period Column during installation of Release 8.9
 - Term code processing removed from the following codes:
 - DD, HT, MD, PNA, RFT, RFTA, RFTS, RT, RTA, RTS, TL



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Form Changes

- **Changes made to Specific Forms:**
 - Financial Aid Selection Rules (RORRULE)
 - PERIOD added as a valid substitution variable.
 - Do not have to change rules from Term to Period immediately; however, performance may be affected
 - Consider changing rule language as soon as possible
 - Applicant Award by Period (RPIATRM)
 - Will display periods comprising the aid year
 - Crossover periods will display in the associated year
 - Applicant Requirements Mass Entry (RRAMASS)
 - Will be validated against ROBPRDS Table



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Form Changes

▪ List of Changed Forms

- "Potential Athletic Grant Defaults (RAAPAGD)"
- "Sport Aid by Period (RAASPTM)"
- "Team Sport Period Aid (RAITMTM)"
- "Applicant Budget (RBAABUD)"
- "Budget Inquiry (RBIBUDG)"
- "Budget Component Rules (RBRCOMP)"
- "2009-2010 Grant Disbursement/Acknowledgement (READI10)"
- "2010-2011 Grant Disbursement/Acknowledgement (READI11)"



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Form Changes

▪ List of Changed Forms (cont.)

- "Donor and Scholarship Demographics (RFADSCD)"
- "Fund Budget Inquiry (RFIBUDG)"
- "Fund Award and Disbursement Schedule Rules (RFRASCH)"
- "Default Award and Disbursement Schedule Rules (RFRDEFA)"
- "Fund Management (RFRMGMT)"
- "Student Employment Mass Entry (RJASEME)"
- "Payroll Load Control (RJRPAYL)"
- "Student Employment Work History (RJISEWH)"



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Form Changes

▪ List of Changed Forms (Cont.)

- "Financial Aid Enrollment (ROAENRL)"
- "Applicant Holds (ROAHOLD)"
- "Applicant Immediate Process (ROAIMMP)"
- "Global Institution Financial Aid Options (ROAINST)"
- "Create and Maintain Funds (ROAMGMT)"
- "Financial Aid Record Maintenance (ROARMAN)"
- "Section Unavailable for Aid (ROASECT)"
- "Applicant Summary (ROASMRY)"
- "NSLDS Transfer Monitoring Application (RNATMNT)"



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Form Changes

▪ List of Changed Forms (cont.)

- "Applicant Status (ROASTAT)"
- "Disbursement Status (ROIDISB)"
- "Financial Aid System Global Establishment Form (ROQMENU)"
- "Financial Aid Object Library (ROQOLIB)"
- "Financial Aid PL/SQL Library (ROQRPLS)"
- "Academic Year Rules (RORACYR)"
- "Batch Posting Rules (RORPOST)"
- "Financial Aid Selection Rules (RORRULE)"



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Form Changes

▪ List of Changed Forms (cont.)

- "Aid Period Rules (RORTPRD)"
- "Package Maintenance (RPAAPMT)"
- "Resource Maintenance (RPAARSC)"
- "Award Maintenance (RPAAWRD)"
- "Electronic Loan Application (RPAELAP)"
- "Loan Application (RPALAPP)"
- "Loan Disbursement (RPALDSB)"
- "Direct Loan Origination (RPALORG)"



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Form Changes

▪ List of Changed Forms (cont.)

- "Promissory Note (RPAPROM)"
- "Scholarship Period Information (RPASTRM)"
- "Applicant Award by Period (RPIATRM)"
- "Fund Award Period Inquiry (RPIFTRM)"
- "Loan Eligibility and Admissions Inquiry (RPQLELG)"
- "Loan Period Base Data (RPRLPRD)"
- "Packaging Options (RPROPTS)"
- "Applicant Requirements (RRAAREQ)"
- "Applicant Requirements Mass Entry (RRAMASS)"



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Form Changes

▪ List of Changed Forms (cont.)

- "Applicant Requirements Inquiry (RRIAREQ)"
- "Batch Posting Type Validation (RTVPTYP)"



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Menu Changes

Menu Changes

The following menus have been changed for the Banner Financial Aid 8.9 release:

Financial Aid Common Functions (*RESCOMN)

- The Period Inquiry (ROI PRDS) form has been added to this menu.

Financial Aid Common Functions Control (*RECOMN NCM)


- The Period Base Data (ROR PRDS) form has been added to this menu.




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Process Changes


Process Changes

- **Changes made to Processes:**
 - Process names with Term were changed to use Period
 - Parameters and/or functions changed from Term to Period.


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Changed Processes

- **List of Changed Processes**
 - "Athletic Grant Period Roll Process (RAPAGRL)"
 - "Athletic Aid Discrepancy Report (RARATAD)"
 - "2005-2006 Financial Aid Dataload Part 3 (RCRTP06)"
 - "2006-2007 Financial Aid Dataload Part 3 (RCRTP07)"
 - "2007-2008 Financial Aid Dataload Part 3 (RCRTP08)"
 - "2008-2009 Financial Aid Dataload Part 3 (RCRTP09)"
 - "2009-2010 Financial Aid Dataload Part 3 (RCRTP10)"
 - "2010-2011 Financial Aid Dataload Part 3 (RCRTP11)"
 - "2010 ISIR Correction/Request Process (REBCD10)"
 - "2011 ISIR Correction/Request Process (REBCD11)"
 - "2009-2010 COD Print Process (RERCD10)"
 - "2010-2011 COD Print Process (RERCD11)"
 - "2009-2010 COD Extract Process (REREX10)"
 - "2010-2011 COD Extract Process (REREX11)"


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Process Changes

•List of Changed Processes (cont.)

- "Grant COD Miscellaneous Report (RERGRNT)"
- "COD Import/Export Report (RERIMEX)"
- "2009-2010 Grant Origination Creation Process (REROR10)"
- "2010-2011 Grant Origination Creation Process (REROR11)"
- "Account Balance Report (RFRABAL)"
- "Fund Description Report (RFRFUND)"
- "Transfer Monitoring Application (RNRTMAC)"
- "Transfer Monitoring Extract (RNRTMNE)"
- "Automatic Rule Compilation (ROOGSQL)"
- "Financial Aid New Year Roll Process (ROPROLL)"
- "Batch Posting Process (RORBPST)"
- "Grade Exception Report (RORGRDE)"
- "Automatic Group Assignment (RORGRPS)"
- "Financial Aid Registration Report (RORREGS)"



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Process changes

•List of Changed Processes

- "Disbursement Process (RPEDISB)"
- "Pell Calculation Process (RPEPELL)"
- "Applicant Disbursement Report (RPRADSB)"
- "Award and Disbursement Report (RPRAWDB)"
- "Applicant Award Report (RPRAWRD)"
- "Disburse Schedule Date Update (RPRDDUP)"
- "Promissory Note Manifest (RPRDLPM)"
- "2009-2010 Direct Loan Flat-File Upload (RPRDU10)"
- "2010-2011 Direct Loan Flat-File Upload (RPRDU11)"
- "EFT Posting Process (RPREFTP)"
- "Electronic Loan Application (RPRELAP)"
- "Electronic Loan Application Extract (RPRELAX)"
- "Electronic Loan Change Transaction Extract (RPRELCT)"
- "Electronic Loan Response Upload (RPRELRU)"



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Process Changes

•List of Changed Processes (cont.)

- "Grant Calculation Process (RPRGRNT)"
- "Hold/Release Process (RPRHDRL)"
- "Loan Proceeds Aging Report (RPRLNAG)"
- "Loan Exception Report (RPRLNEX)"
- "Direct Loan Record Creation (RPRLORC)"
- "Loan Summary Report (RPRLSUM)"
- "Promissory Note Print Program (RPRPNPT)"
- "Financial Aid Student Billing Payment Report (RPRSBPR)"
- "SMART Grant Eligibility Report (RPRSMRT)"
- "Disbursement Validation Report (RPRVDIS)"
- "Applicant Requirements Report (RRRAREQ)"
- "Exit Interview Requirements (RRREXIT)"
- "Data Discrepancies Report (RSRDSCP)"




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Process Changes

- **List of Changed Processes (cont.)**
 - "Financial Aid Enrollment Hours (RSRENRL)"
 - "COBOL Copylib (UCLRTN)"
 - "COBOL Copylib (UCPTRN)"

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Financial Aid Enrollment Periods New Functionality

New Aid Year Set-Up for Enrollment Periods

- **The following validation/rules forms will be set-up as part of your new aid year creation to accommodate Enrollment Periods**
 - RTVAPRD – (optional) if creating new names for your enrollment periods you will create them here, otherwise you can use your existing ones
 - RORPRDS – create enrollment periods associating terms from STVTERM
 - RORTPRD – associate enrollment periods rather than terms per aid period
 - RFRDEFA/RFRASCH – associating Periods rather than terms
 - RPROPTS/ROAINST – build with Periods rather than terms

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[illegible]

Period Description: **Period** **FALL/WTN 2010** **Term Code:** **_____**

Base Data

Description: **2010 Academic Year**

Aid Year: **2011**

Start Date: **06/01/2010**

End Date: **04/30/2011**

Sequence Number: **10030**

Academic Year: **STANDARD**

Comment: **_____**

Crossover

Crossover Aid Year: **_____**

Active

View Current Periods: **_____**



Add Period Rules: R087850 0-9 (P&C)T

Add Year: **Add Period:** Fall, Wintmester

Add Period Base Information

EFC Percent: **Percentage of Full-Year:** ☐ **Pell Crossover**

EFC Proration: **Pell Percentage of Full-Year:**

Add Period Rules

Period	Period Description	Start Date	End Date	Activity Date	Crossover
FALLWTR 2010	Fall Wintmester 2010	08-SEP-10	04-MAY-11	05-OCT-10	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>



File Edit Options Book Record Query Tools Help

Default Award and Disbursement Schedule Rules: SMP1616 v.9.0 (FAS-FCU)

Award Year: 2011 2010-2011 Financial Aid Year Award Period: FAW11

Award Schedule

☐ Default Award Schedule
☐ Delete Award Schedule

Period	Award Percent	Grant Award Percent	Home Explanation Date	Activity Date
FAW11 2011	100	100		09-OCT-2011

Disbursement Schedule

☐ Default Disbursement Schedule
☐ Delete Disbursement Schedule

Period	Disbursement Percent	Disbursement Date	+/- Days	Activity Date
FALLW1R 2010	100	01-AUG-2010		09-OCT-2011

FIM 42001: No changes to save
Record: 1/1 <ESC>

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Backlogging Options: RRP/ROTS: 8.9 (FIN-CCT)

Aid Year: 1011 * * 2010 - 2011 Financial Aid Year

Enrollment Cut Off Date Rules: RRP/ROTS: 8.9 (FIN-CCT)

Period	Description	Disbursement Enrollment Option	Cut Off Date	Crossover	Activity Date
FALLWTR 2010	Fall Wintersemester 2010	A=Adjusted Hours (None)	28-SEP-2010	<input type="checkbox"/>	05-OCT-2010

Backlogging Options: RRP/ROTS: 8.9 (FIN-CCT)

Aid Year: 1011 * * 2010 - 2011 Financial Aid Year

Enrollment Cut Off Date Rules: RRP/ROTS: 8.9 (FIN-CCT)

Grant Options: RRP/ROTS: 8.9 (FIN-CCT)

Pay Grant if Disbursement Amount Differs from Award Amount:
Default: Less than Half-Term Pell COL

Pell Crossover Cutoff Date:

☒ Pay Pell if System EFC and SAR EFC are in Same Pell Payment Cell

☒ Delete Pell Award if Zero

☒ Use NSLDS for Pell

Enrollment Options

Period	Grant Award Enrollment Option	Grant Disbursement Enrollment Option	Grant ISIR Term
FALLWTR 2010	1=Full Time	1=Full Time	(None)

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[illegible]

Term to Enrollment Period Functionality

Two new forms were created for Enrollment Period functionality.

•RORPRDS – Period Base Data

Used to create a 'period' for each period of attendance in the aid year. You may continue to use the term codes as you have in the past by creating a period with the same value as the term code.

Upon install of 8.9, the Enrollment Periods were created for current aid year from existing terms on STVTERM that have a valid FA Year. Periods will have to be built for each aid year in the future. For example: Enrollment Period for combined terms, i.e. Summer 1 and Summer 2, or Fall and Wintermester.

•ROIPRDS – Periods Inquiry

Displays all Periods that have been defined.



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RORPRDS – Create a period for each term in an aid period

There are two ways to complete this form:

1. Name the Period and enter the Term from STVTERM (one aid periods only) that will be assigned to the Period. Do next block and it will populate everything but sequence number and cross over aid year. See below for information about these two fields.
2. Name the Period and leave the Term blank. Do next block and enter all the data that is required. See below for information on these fields.

▪ **NOTE: If you do not want to combine terms there is no impact for part-of-term processing.**



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RORPRDS – Base Data Block

- **Description** – Create a Description for the Period and add Aid Year
- **Start and End Dates** – have to be within Terms that will be associated with the Period
- **Sequence Number** - The sequence number must be unique because the sequence number will be used to ensure sequential period order. To see the sequence numbers already used click on the "View Current Periods".
- **Academic Year** – select the appropriate academic Year type from RORACYR List of Values. STANDARD is delivered to support Formula 1. Future use to allow setup of non-standard enrollment/payment period using same term codes from STVTERM
- **Crossover** – check the field if this period represents a crossover period
- **Aid Year** - crossover aid year for those periods which represent a crossover period
- **Active** - once saved this indicator will be checked as Active



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RORPRDS – Period Rules Block

- **Term** – assign term(s) that go with this period (comes from STVTERM)
- **Flags** – each of these flags can only be checked one time per period
 - **Accounts Receivable (AR) flag** - Disbursement will calculate the enrollment based on all the terms which have been defined as part of the period being disbursed. The term with the Accounts Receivable flag checked will be the term code fed to AR as part of the disbursement process, for example, if you had summer 1 and summer 2 terms and you checked the AR flag on summer 1, disbursement will add the hours for both terms and disburse based on the disbursement date established for the aid period associated with the student (RFRDEFA/RFRASCH) and the funds will feed to AR using the Summer 1 term code. If you are using attending hours for a fund, the attending hours will be determined based on all terms defined for the period. (If you have the AR indicator checked for Summer 2, disbursement will still occur based on the date scheduled (RFRDEFA/RFRASCH)



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RORPRDS – Period Rules Block

- **Student Flag** - This indicator identifies which term will be used for retrieving data from the Student system (campus, level, and major). For determining grade level, you would want the lowest term to find what the grade level is when creating a loan.
- **Satisfactory Academic Progress Flag** - This indicator is used to identify which term will be used in disbursement processing to determine whether or not the student is making satisfactory academic progress



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Changes to Enrollment Calculations using Periods

Enrollment Calculations Using Periods

- Because Periods can have multiple terms and financial aid hours can exist for one term and not another but the student can be registered for courses in the term, Banner will calculate the enrollment for the period, evaluating each term separately to determine financial aid hours/student hours and then perform the sum to determine enrollment for the period.
- See Financial Aid Release Guide 8.9, pages 18-19 for examples.



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Enrollment Calculations Using Periods, con't.

- **Determining ½ time Enrollment (required for Federal Loan disbursement)**
 - Banner will calculate the enrollment for the period evaluating each term separately for determining the hours the student is actively registered and then perform the sum to determine the enrollment for the period.
 - See Financial Aid Release Guide 8.9, pages 19-20 for examples.



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Enrollment Calculations Using Periods, con't.

- **Enrollment Calculation using Periods for Consortium Students**
 - It is possible for a period consisting of multiple terms to not have the Consortium Indicator checked for all terms in the period. Banner will calculate the enrollment for the period, evaluating each term separately to determine financial aid hours/student hours and then perform the sum. If the Consortium Indicator is checked, only financial aid hours for that term will be used.
 - See Financial Aid Release Guide 8.9, pages 20-21 for examples.



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Enrollment Calculations Using Periods, con't.

▪ Attending Hours Functionality using Periods

- Funds set to use Attending Hours are disbursed based on the calculation of the number of hours which have begun for the student using the class start date at the time the disbursement process is run. Banner will calculate the enrollment for the period evaluating each term separately for determining financial aid hours/student hours and attending hours.
- See Financial Aid Release Guide 8.9, pages 21-24 for examples.



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Changes to Financial Aid Enrollment (ROAENRL)


Financial Aid Enrollment (ROAENRL) New Functionality


- This form provides a new option to view an applicant's financial aid hours and student hours by period based on the aid period and Pell aid period, if exists, that has been assigned to the applicant for the aid year in the key-block.
- The attending hours for the period will also be provided to allow the number of hours to be viewed when disbursing on the number of hours currently attending. This allows the user to view the term and attending hours for all terms within the applicant's period.



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Thank you for your participation


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