Financial Aid Self-Service Enhancements and Interface

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Introduction

• Review the Self-Service enhancements and interface with financial aid
• Understanding the new features of self-service
Agenda
• Outside Resources
• Basic Messages
• Display Lender URL Information
• Banner Financial Aid Self-Service Advanced Controls
• Award Acceptance Online
• Satisfy Award Letter Tracking Requirements
• Satisfy Terms and Conditions Tracking Requirements
• Choose Lender Online
• Print and Display Award Letter
• Web Questions and Answers
• Processing Web Applicant Reported information
• Web Text

Outside Resources
• The Resource Code Validation Form (RTVARSC) allows you to define outside resources and identify which resources should display on FA Self-Service.
• The Resource Maintenance Form (RPPARSC) allows you to change a student’s specific resource to not display on FA Self-Service.

Basic Messages
• The Message Code Validation Form (RTVMESG) allows you to build messages and indicate which messages should display on FA Self-Service.
• All non-coded student messages on ROAMESG Applicant Message Form will display, unless it expired.
Display Lender URL Information

- The Lender Base Data Form (RPRLNDR) allows you to maintain lender information and indicate if this lender should display on FA Self-Service. In addition, you can define a specific lender URL and URL Description to be viewable in the Loan History section of FA Self-Service.
- When a student selects a lender via FA Self-Service, it will automatically update the student’s lender on RPASLND for that loan type.

Banner Financial Aid Self-Service Advanced Controls

- description of Advanced Financial Aid Self-Service
- review of Banner Financial Aid Self-Service Main Menu
- review of Banner Financial Aid Self-Service Control Menu
- advanced Overall Self-Service Controls
- award Acceptance On-line
- satisfy Award Letter or Terms and Conditions Tracking Requirements
- choose Lender On-line
- print and Display Award Letter
- web Questions and Answers
- processing Web Applicant Reported Information
- display Web Text
Award Acceptance

- Students will only be allowed to accept funds currently in an offered status. Funds that are auto-accepted or already accepted cannot be updated by the student via FA Self-Service.
- This process is not allowed on packages or funds that are locked. This process is not allowed on years that are coded as inactive.
Satisfy Award Letter Tracking Requirements

- The Web Accept Tracking Rules on the Institutional Financial Aid Options Form (ROAINST) allows you to specify your tracking document that means Terms and Conditions so this document can be satisfied when the student accepts their Terms and Conditions on FA Self-Service.
- The Award Letter tracking requirement you are using must already exist on RRAAREQ for a student in order to use this functionality. System indicator for tracking document satisfied in this manner will be a 'W' for Web. The requirement is only satisfied if 'no' funds remain in an offered status, not just web enables funds. Multiple requirement codes are possible.

Satisfy Terms and Conditions Tracking Requirement

- The Terms and Conditions tracking requirement you are using must already exist on the Applicant Requirements Form (RRAAREQ) for a student in order to use this functionality. System indicator for tracking document satisfied in this manner will be a 'W' for Web.
- Be sure to not enable the Terms and Conditions information on the Institution Financial Aid Options Form (ROAINST) until you have setup the appropriate information.
- If you enable the Terms and Conditions functionality in FA Self-Service prior to a student being assigned this tracking document, the student will see the following message:

> You have accepted the Terms and Conditions.

Satisfy Terms and Conditions Tracking Requirements

- **Award Accept Offer Tab**

  Terms and Conditions:

  Financial Aid award based on you maintaining satisfactory academic progress as outlined in the university catalog. You must be enrolled at least half time to be eligible for most financial aid awards. If this requirement for eligibility is not met, you may lose eligibility for financial aid awards. If you withdraw from the university or if you fail to meet the required academic performance, you may lose eligibility for financial aid awards. You must continue to meet the terms and conditions in order to remain eligible for financial aid awards.
Satisfy Terms and Conditions Tracking Requirements

• If the student chooses the Do Not Accept button, the following message will appear:

![Message.png](image1.png)

• Clicking the OK button will bring them back to the General Information tab. Clicking the
  • Cancel button will allow them to choose to accept.

Choose a Lender Online

• The Banner Electronic Loan module contains logic to store a student’s lender on the Student Lender History Form (RPASLND). In addition, lenders can be coded as active or inactive on the Lender Base Data Form (RPRLNDR). Information on these two forms can be found in the Electronic Loans workbook.

• The Funds Management Form (RFRMGMT) allows you to indicate for your loan funds if a lender can be chosen online for this fund.

• Note: Students will only be given the Choose Lender Option if they currently do not have an active lender in history (on RPASLND). Only lenders coded as active on RPRLNDR will be in the list of lenders displayed when the student is selecting a lender.
Choose a Lender Online

**Choose a Lender Online**

- eb Page will have a drop down box displaying all the active lenders in Banner that have been given access on RPRLNDR.

Print and Display Award Letter

- Students will have the ability to print an award letter from the **Award Overview** tab or the **Accept Award Offer** tab.

- The award letter will print and will look very similar to the **Award Overview** tab on FA Self-Service. The terms and conditions will also print at the end of the award letter if the **Print Terms and Conditions** checkbox was selected on the **Web Processing** tab of the Institution Financial Aid Options Form (ROAINST).

- You can add your logo to the printed award letter via **Web Tailor**.

Web Questions and Answers

- The Web Questions Validation Form (RTVWEBQ) contains the validation codes for any question you choose to ask the student on FA Self-Service. These codes are defined and maintained by the institution.
Web Questions and Answers

- The Web Question and Answer Rules Form (RORWBQA) allows you to define the question text and characteristics and what rules to follow according to a student's answer.

- **Answer Type** for this question:
  - L = Defined List (You will define values on next tab)
  - N = Numeric
  - T = Free Form Text

- **Question Occurrence**:
  - E = Every Time Awards are Accessed
  - O = Once for Aid Year
  - U = When Unaccepted Awards Exist

RORWBQA continued
RORWBQA Continued

- You can choose to stop processing under the following conditions:
  - A = Any not null answer will stop processing
  - N = This specific answer does not stop processing (define in Answer Value column)
  - S = This specific answer does stop processing (define in Answer Value column)
  - Z = Any Answer > Zero will stop processing
  - (None)

- For any value that stops processing, you also can attach a message code. This message code must first be built on RTVMESG and have the Stop Electronic Award Process indicator checked.

Web Questions and Answers

Processing Web Applicant Reported information

- The Web Applicant Reported Information Form (RPINFO) allows you to review outside resource information, award information and question responses submitted by applicants.
Processing Web Applicant Reported information

- **RPAINFO**
- **Type:**
  - All
  - A = Award Information
  - Q = Question Response
  - R = Outside Resource
- **Records Displayed:**
  - All
  - N = Not Reviewed
  - P = Pending
  - R = Reviewed

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Processing Web Applicant Reported information

- Review each response and once complete, update review status to Reviewed. You can also use the Pending status if further action is needed and you want to mark this response in progress.
- Note: When you indicated Reviewed to a question that was set to Stop Processing:
  - The student can then view award information in Self-Service. The Information Access indicator on the Award Maintenance Form (RPAAWRD) will be rechecked so student can access award information.
  - The message originally assigned on the Applicant Messages Form (ROAMESG) due to stop processing will be expired.

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Processing Web Applicant Reported information

- If a student entered information indicating he/she is receiving an Outside Resource, the resource name, term code, and dollar amount will display on RPAINFO. You have the option to take this information and manually enter it into the Resource Maintenance Form (RPAARSC) or you can click on the **Update Applicant Resource Table** checkbox and Banner will update the Resource Maintenance Form (RPAARSC).
- The Web Applicant Info Process (RPPINFO) can be utilized to identify students who need to have information reviewed. This process reports the appropriate information from the Web Applicant Reported Information Form (RPAINFO) according to the parameters you choose.
Web Text

• Purpose
• Student-specific web text can be used to display different
text to a group of students and to display your terms and
conditions information

<table>
<thead>
<tr>
<th>SQL Code</th>
<th>Description</th>
</tr>
</thead>
</table>
| SELECT '1' FROM RCRAPP1
WHERE RCRAPP1_INF_C_CODE = 'EDE' AND RCRAPP1_AIDY_CODE = :AIDY |

Will bring back a value of '1' for all students who have an
EDE record for the specified aid year.

• You can Validate and test your rule on RORWTXT

Web Text

• Purpose
• The SQL Rules tab on Web Text Rules Form (RORWTXT)
allows you to define the rules to follow when displaying web
text.

Web Text

• Sample Text Rule
• SELECT '1' FROM RCRAPP1
WHERE RCRAPP1_INF_C_CODE = 'EDE' AND RCRAPP1_AIDY_CODE = :AIDY

Will bring back a value of '1' for all students who have an
EDE record for the specified aid year.

• You can Validate and test your rule on RORWTXT
Web Text

Purpose

The Select Value Rules tab on Web Text Rules Form (RORWTXT) allows you to define the heading, the specific text you wish to display according to the value returned by the SQL Rules, and the Self Service tab to display the text.

Web Text

Purpose

The Select Web Tab Rules Form (RORWTAB) is necessary for you to define which text you wish to show on each tab and in a particular sequence.

Web Text

Purpose

The Web Variable Validation Form (RTVWVAR) allows you to define variables you wish to use in your web text. These variables can calculate or pull specific student information to insert into text.
Web Text

- **Purpose**
  - The Web Variable Rules Form (RORWVAR) allows you to create SQL rules to select or calculate the variable information.

- **Sample**
  - ```
  SELECT RNVAND0_UNMET_NEED FROM RNVAND0
  WHERE RNVAND0_AIDY_CODE = :AIDY AND
  RNVAND0_PIDM = :PIDM
  ```
  - This statement will bring back a calculated value for each student selected in your web text criteria.
  - You can validate and test your rule on RORWVAR.
  - To add this variable to your web text, enter it on the Web Text Rules Form (RORWTXT) for your PLUS_LOAN_ELIGIBILITY text. The format in using a variable is shown in this example: Your parents may be eligible to borrow up to $<**PLUS_LOAN_ELIGIBILITY**> in the Federal PLUS Loan.

Summary

- Banner Financial Aid Self-Service set up
- Banner Financial Aid Self-Service information displayed based on controls
Questions & Answers

Thank You!

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