Using the HOPE Module

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 8.6

Information Technology Services

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Using HOPE Processing

Introduction to HOPE

Purpose of HOPE Processing

The Georgia Banner Enhanced Student and Financial Aid HOPE Process calculates transfer and institutional hours to determine HOPE eligibility for financial aid. Georgia's HOPE Scholarship Program is entirely funded by the Georgia Lottery and administered by the Georgia Student Finance Commission (GSFC). It provides scholarship and grant assistance to residents of Georgia attending eligible Georgia post-secondary institutions. The HOPE Invoicing Process produces an invoice to be sent to the GSFC. The State Department of Audits requested the establishment of the system for necessary accounting controls over HOPE funds. University System of Georgia (USG) institutions are required to submit invoices to receive HOPE funds from the GSFC.

The Georgia Enhanced HOPE process includes both Banner baseline and Georgia requirement information. You can use the HOPE process to determine HOPE eligibility for an individual student, with a population selection of students or by selecting all students with a ROASTAT record.

Schools calculate HOPE eligibility at the end of each term, or when new transfer information is available.

Target Audience

Financial Aid and Business Officers

Technical Notes

The user must have Delete and Insert privileges for the ZHRHINV and ZHRRCON tables. This access is granted by the institution's DBA.

Purpose and Scope of Document

This document explains how to use the Georgia Enhanced HOPE module to meet the needs and requirements for awarding, disbursing, requesting, receiving, and reconciling HOPE funds specified by the USG, GSFC, and State Department of Audits.

This chapter includes the following topics:

- Introduction to HOPE
- HOPE Processing Requirements
- HOPE Forms and Processes Reference
- HOPE Process Flow
- Using HOPE
  - Setting up Codes and Rules
  - Creating HOPE Rules
  - Create HOPE High School Records
  - Calculating and Verifying HOPE

  - Creating the State Grant Export File
  - Creating a HOPE Invoicing Extraction File
  - Loading a GSFC Return File
  - Verify Learning Support
- Reconciliation
- Document history
- Obsolete Processes

These steps will take you through most of the HOPE processing steps. With the decommissioning of the Paid Hours Load process (ZHRPDHR), the PAID Hours information is included with the GSFAPPS processes and forms in the GSFAPPS user documentation.

Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.

Steps for recovery or support.

For additional information, see references.

Exercise caution.

Warning: an error here is critical.

References

For information about the baseline product, see the *SGHE Banner Financial Aid User Guides.*

Support

For additional ITS resources and support, contact the ITS Helpdesk:

- Web support request self-service: http://www.usg.edu/customer_services
- E-mail: Helpdesk@usg.edu

For emergency, business interruptions, or production down situations, call the ITS Helpdesk immediately

- 706-583-2001
- Toll free within Georgia: 1-888-875-369

HOPE Processing Requirements

Introduction to HOPE Processing Requirements

ITS has provided the Georgia Enhanced HOPE Module for USG institutions to process the Georgia HOPE scholarship. HOPE processing and HOPE invoicing require specific setup and usage of the HOPE Module within Banner Financial Aid to function properly. This section describes the requirements for HOPE processing.

Fund Codes

Each HOPE fund offered at the institution will have a fund code established for tuition and fees and a fund code for books. Each fund code is cross-walked on the EDI Cross-Reference Rules Form (SOAXREF). The HOPE Invoicing process is designed to execute appropriately under this scenario.

Note: An institution may have a fund code established for tuition, a fund code for fees, and a fund code for books. HOPE Invoicing will also process records based on this scenario.

Transient Students

The financial aid counselor at the transient institution receives the HOPE agreement form/letter stating the student's eligibility status and HOPE tier information. The counselor then creates a ZHAHOPE record for the student and logs the information on the RRAAREQ, RBAABUD, and any other form needed to ensure that the student is awarded HOPE. Once all necessary forms are populated, the counselor runs the ZORHGPA process. A manual change in the tiers might be necessary to reflect what has been indicated on the transient agreement form. The HOPE fund is then added on the RPAAWRD form under normal packaging and disbursement conditions.

Program Changes

Students who receive HOPE funds for a certificate program may convert to a degree-seeking program. These changes will be reflected in the HOPE Invoicing Extraction File (ZHRHINV).

HOPE Forms and Processes Reference

Overview

Use the following forms to maintain HOPE:

Descriptive Title	Name
Applicant Status Form	ROASTAT
Detail Code Control Form	ZSADETC
EDI Verification Label Validation	STVXLBL
EDI Cross-Reference Rules Form	SOAXREF
Financial Aid Reconciliation Form	ZHARCON
Financial Aid Selection Rules Form	RORRULE/ZORRULE
Fund Base Data Form	RFRBASE
Fund Management Form	RFRMGMT
HOPE Eligibility Form	ZHAHOPE
HOPE Fund Code Rules Form	ZFRHOPE
HOPE Excluded Fund Code Rules Form	ZFRHEXF
HOPE Tier Validation Form	ZTVTIER
HOPE Exclusions Form	ZHAHPEX
HOPE Eligibility Reason Validation Form	ZTVHPER
HOPE Eligibility Status Validation Form	ZTVHPEL

Use the following processes to establish HOPE eligibility

Descriptive Title	Name
Financial Aid Reconciliation Process	ZHRFARR
HOPE Accumulation/Eligibility Process	ZORHGPA
HOPE Transfer GPA Calculation Process	ZORHTGA
HOPE High School Load Process	ZORHHSL
HOPE Invoicing Extraction Process	ZHRHINV
HOPE Invoicing Reconciliation Process	ZHRGHIL
Learning Support Hours Report	ZORLSUP
State Grant File Export Process	ZFBGEXP
RCTINFR Load Process	ZORINFR

HOPE Process Flow

Description of HOPE

The HOPE Process establishes a standard procedure for institutions to use that calculates transfer and institutional hours to determine HOPE eligibility for Financial Aid. It also provides the ability to produce invoices to be sent to the Georgia Student Finance Commission (GSFC) and load return files from the GSFC into Banner.

The HOPE Process flow includes the following major steps:

- Setting up codes and rules
- Creating HOPE rules for each HOPE fund code
- Calculating HOPE
- Verifying HOPE results
- Creating an extraction file and submitting it to the GSFC
- Loading the file returned from the GSFC
- Reconciling HOPE funds

HOPE Eligibility Tracking Information

The following HOPE Scholarship Programs, which are administered by the GSFC, provide significant student financial aid funding to Georgia students:

- HOPE Scholarship Program for Degree-Seeking Students
- HOPE Scholarship Program for Students Seeking Diploma/Certificate
- HOPE Scholarship Program for Students Attending Georgia Private Colleges and Universities
- HOPE Scholarship Program for GED Recipients
- HOPE Promise Scholarship
- HOPE Promise II Scholarship
- HOPE Teachers Scholarship
- HOPE Accel Program for High School Students attending Georgia College and Universities

The Degree-Seeking Program is the most difficult to administer due to its unique eligibility and awarding requirements that cannot be handled by Banner baseline. In this enhancement, the Degree-Seeking Program has processes to establish eligibility automatically and to track and update eligibility at the required checkpoints. Eligibility for the other HOPE programs can be tracked in this enhancement but currently must be determined and entered manually into the form.

The Georgia Student Finance Authority (GSFA), a division of the GSFC, administers the following teacher scholarship loan programs:

- Promise Teacher Scholarship
- Promise II Teacher Scholarship
- HOPE Teacher Scholarship

Timeframe

An institution calculates HOPE eligibility at the end of each term, or when new transfer information is available.

An institution must create a HOPE invoice each time it needs to draw down or receive HOPE funding.

Exceptions

Warning about Manual Adjustments for HOPE Invoicing

The HOPE Invoicing extraction file created from Banner does not account for manual adjustments to awards via SURFER. Manual adjustments must be treated as exceptions when creating the HOPE Invoicing file.

Veteran's Fee Waiver:

Effective August 8, 2007, the Board of Regents of the University System of Georgia (USG) approved a measure waiving mandatory fees for all Georgia residents who recently served in a combat zone for the Georgia National Guard or the U.S. Military Reserves.

As a result, institutions may have to adjust HOPE fee payments manually on the Award Maintenance form (RPAAWRD). Instructions regarding how to handle the Veteran's Fee Waiver are included in the Hope Invoicing section of this document.

Overview

I. Setting Up Codes and Rules	
1. Create detail codes	ZSADETC
2. Create fund codes	RFRBASE
3. Relate detail code rules to HOPE fund codes	RFRMGMT
4. Set indicators for each fund code	ZFRHOPE
5. Establish Eligibility Status Codes	ZTVHPEL
6. Establish Reason Codes	ZTVHPER
7. Establish Grade Related Exclusions	ZHAHPEX
8. Establish HOPE Tier Codes	ZTVTIER
9. Establish Excluded Fund Codes (if needed)	ZFRHEXF
10. Create Non-HOPE Fund Code RGTGSFCO label	STVXLBL
11. Create student attributes label RGTATTS to identify guaranteed tuition plan (GTP) students	STVXLBL
12. Establish cross-reference rules for tuition, fee, and book detail category codes and fund codes	SOAXREF
13. Establish cross-reference rules for Non-HOPE Fund Codes	SOAXREF
14. Establish cross-reference translation rules for GTP.	SOAXREF
15. Create eCORE or Distance Ed Courses for HOPE Invoicing	TSADETC SSADETL
16. Create a HOPE Spring checkpoint label so that eligibility statuses can be updated correctly at Spring checkpoints	GTVSDAX
17. Create a HOPEINVTERM label on the GTVSDAX form so that your HOPE Invoicing files will be extracted and imported correctly during the HOPE Invoicing Process	GTVSDAX

↓

II. Create HOPE Rules for each Code Fund	
1. Create fund awarding and disbursement rules. Creating these rules on RORRULE will transfer over to ZORRULE	RORRULE/ ZORRULE
2. Verify the student files are complete	ROASTAT

II. Create HOPE High School Records	
1. Execute RCTINFR Load Process for verification that student IDs do not exist in SPRIDEN	ZORINFR
2. Load HOPE High School records	ZORHHSL

III. Calculating and Verifying HOPE	
1. Calculate HOPE Transfer GPA	ZORHTGA
2. Calculate HOPE Accumulation Eligibility	ZORHGPA
3. Verify that the student status is updated	ZHAHOPE

IV. Create the State Grant Export File	
1. Create the State Grant Export File	ZFBGEXP
2. Submit file to the GSFC	SURFER

V. Creating the HOPE Invoicing Extraction File	
1. Create the HOPE Invoicing Extraction File	ZHRHINV
2. Verify file and record layout	zhrhinv.log, .lis, & INU###.txt
3. Submit extraction file to the GSFC	SURFER

VI. Loading the GSFC Return File	
1. Place return file in a location from which load process can pull the records/file	$DATA_HOME/ finaid directory
2. Load the return file	ZHRGHIL
3. Review errors in the load process and request .log and .lis files	zhrghil.log and zhrghil.lis
4. Review student records in the Financial Aid Reconciliation Form	ZHARCON
5. Make corrections	SURFER
6. Submit subsequent file	

↓

VII. Verify Learning Support	
Learning Support	ZORLSUP

↓

VIII. Reconciliation	
1. Request GSFC Reconciliation File	SURFER
2. Load/Produce Report Output	ZHRFARR
3. Compare Records	.log and .lis
4. Verify Errors	.log and .lis

Using HOPE

I. Setting Up HOPE Codes and Rules

Introduction to Setup

The first major step in the HOPE Process is setting up HOPE codes and rules.

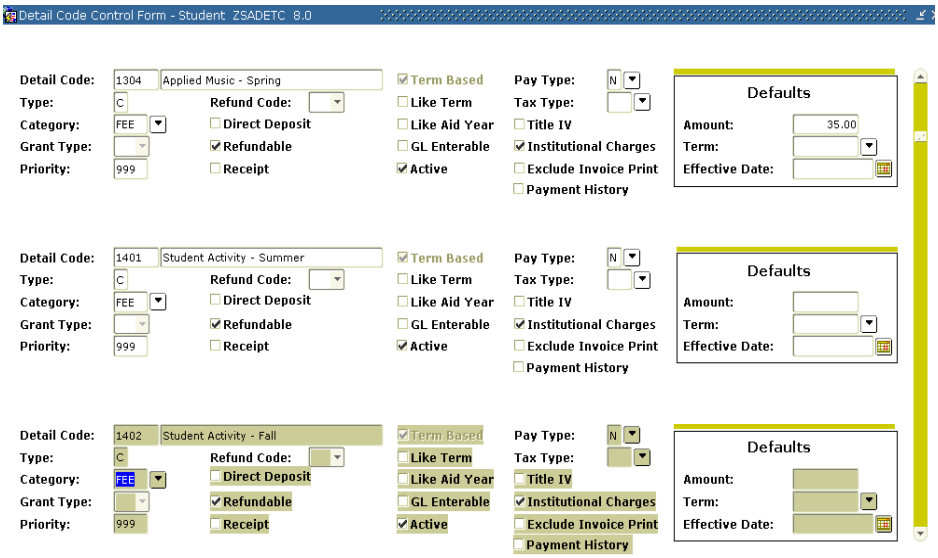
In the Detail Code Control Form (ZSADETC), create detail codes for each HOPE fund code represented in the Fund Base Data Form (RFRBASE). Establish a fund code with the detail code assigned for each HOPE fund that your institution receives and awards. Each HOPE fund also has an associated book fund. Detail code rules for each of the HOPE funds are established in the Fund Management Form (RFRMGMT).

The indicators in the HOPE Fund Code Rules Form (ZFRHOPE) provide the grant type information that the GSFC uses for processing records.

Establish the cross-reference rules for the detail category codes associated with a fund code in the EDI Cross-Reference Rules Form (SOAXREF).

1. Create Detail Codes

Create detail codes to be associated with the HOPE fund codes in the Detail Code Control Form (ZSADETC).



Institutions may have multiple detail codes for the category codes of TUI and FEE.

2. Create Fund Codes

Create and maintain fund codes for HOPE funds in the Fund Base Data Form (RFRBASE). Detail codes created in ZSADETC are assigned to the appropriate fund code in RFRBASE.

The illustration below indicates the use of both two and three fund codes for processing the HOPE Invoicing Extraction. However, you should only use two fund codes or three fund codes rather than a combination of the two for HOPE Invoicing to function properly. Please note the Fund Active indicator must be checked to indicate the fund code is active. The Detail Code Active indicator indicates whether the A/R detail code is active. Also, the Info Access indicator must be checked for the fund to be viewed via Banner Self-Service.

Fund Base Data RFRBASE 8.5

Fund Code	Short Description	Accounts Receivable Detail	Detail Code Active	Fund Source	Fund Type	Federal Fund ID	Fund Cross Reference	Print Order	Message Number	Fund Category Exists	Fund Active	Info Access
ZHABBP	HOPE AL Books By-Pass	4389	☑	HOPE	SCHL			245	245	☐	☑	☑
ZHADBP	HOPE AL By-Pass	4388	☑	HOPE	SCHL			240	240	☐	☑	☑
ZHBKBP	HOPE Degree Bks By-Pass	4387	☑	HOPE	SCHL			235	235	☐	☑	☑
ZHDGBF	HOPE Sch (Fee)	4393	☑	HOPE	SCHL			286	286	☐	☑	☑
ZHDGBP	HOPE Degree By-Pass	4386	☑	HOPE	SCHL			230	230	☐	☑	☑
ZHGDBP	GED By-Pass	4398	☑	HOPE	GRNT			241	241	☐	☑	☑
ZHPABK	HOPE Sch. (Books)	4384	☑	HOPE	SCHL			15	15	☐	☑	☑
ZHPADG	HOPE Sch. (Tuition)	4383	☑	HOPE	SCHL			10	10	☐	☑	☑
ZHPBK	HOPE Sch. (Books)	4382	☑	HOPE	SCHL			15	15	☐	☑	☑
ZHPDEF	HOPE Sch (Fees)	4392	☑	HOPE	SCHL			287	287	☐	☑	☑
ZHPDEG	HOPE Sch. (Tuition)	4381	☑	HOPE	SCHL			10	10	☐	☑	☑
ZHPGED	HOPE GED	4385	☑	HOPE	GRNT			20	20	☐	☑	☑
ZHPPBK	HOPE Promise II Books	4391	☑	HOPE	SCHL			235	235	☐	☑	☑
ZHPPDG	HOPE PROMISE II Degree	4390	☑	HOPE	SCHL			230	230	☐	☑	☑
ZION	Zion Grove Baptist Church	4783	☑	EXTN	SCHL			204	204	☐	☑	☑
			☐							☐	☐	☐
			☐							☐	☐	☐
			☐							☐	☐	☐

Long Description: HOPE Sch. (Tuition)

3. Relate Detail Code Rules

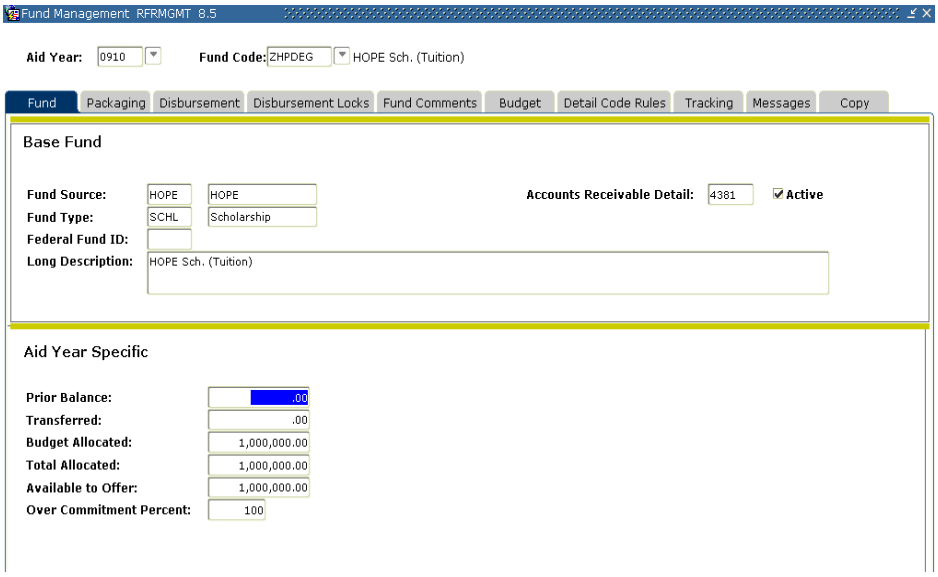
Define and maintain the various attributes of a fund for a given aid year in the Fund Management Form (RFRMGMT). It is from this form that a user allocates a budget, defines packaging and disbursement options, declares budget and detail code components, maintains disbursement locks, defines tracking requirements, assigns messages, and adds comments.

The percentages associated with the detail codes will be used to calculate the total fees that will be written to the HOPE Invoicing Extraction file when two fund codes are used.

The amount of Tuition and the total fees extracted in the HOPE Invoicing process (ZHRHINV) are based on the Round Schedule (round dollars or round cents) your institution indicates on the Packaging tab of RFRMGMT. Campuses should use only the Round Dollars or Round Cents option. Using Truncate Dollars or Truncate Cents may result in erroneous reporting of tuition and fees in the INU file.

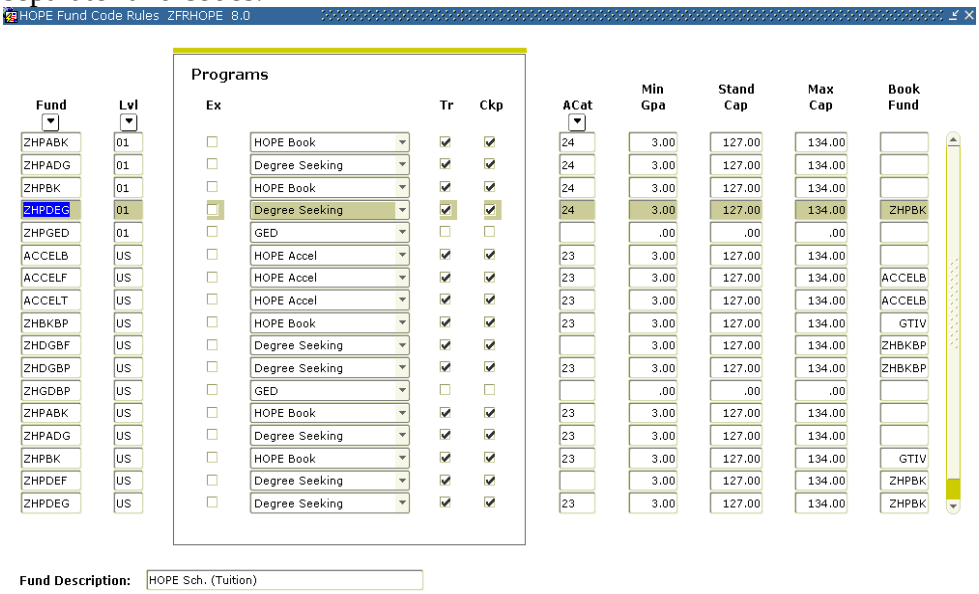
Institutions using three fund codes (one for tuition, one for fees, and one for books) will have the tuition fee column of the extraction file populated based on the rpratrm table.

Note: Percentages are used in the calculation only when two fund codes are used for each HOPE Fund. HOPE Fees have been capped at the January 2004 rates, so you must be sure that your fees are rounding to the exact capped rate on the HOPE invoice sent to GSFC. To accomplish this, you might need to expand the percentage of fees paid (for specific Detail Codes) on the Detail Code Rules block of Fund Management Form RFRMGMT. Example: 75 percent might need to be expanded to 74.99 percent. Any future changes in fee rates may require an adjustment to the calculated percent, on the Detail Code Rules tab, to correctly extract fee amounts.



4. Set Indicators for Each Fund Code

The HOPE Fund Code Rules Form (ZFRHOPE) is used for two primary purposes: to specify those fund codes that may be used with HOPE processing and to indicate the type of HOPE program. Other processing flags indicate whether the program is tier-based (**Tr**), requires verification at specified checkpoints (**CkP**) and the minimum GPA (**Min GPA**) for eligibility, if any. The first illustration displays the setup for use with two separate fund codes.



Description

The HOPE Fund Code Rules Form is used for two primary purposes: to specify those fund codes that may be used with HOPE processing and to indicate the type of HOPE program. Other processing flags indicate whether the program is tier-based (**Tr**), requires verification at specified checkpoints (**CkP**) and the minimum GPA (**Min GPA**) for eligibility, if any.

The **Fund** Code field is used to identify the fund code being authorized for use with HOPE processing. If necessary, you can select the Fund Code button or List to access the Fund Base Data Form (RFRBASE) in order to see a list of valid fund codes.

The Level Code (**Lvl**) field is used to specify the level associated with the particular HOPE program.

The Exclude Fund Indicator (**Ex**) is used to exclude the fund from HOPE processing.

The Program Type dropdown box specifies which HOPE program to associate with the given Fund code. Each fund code must have one of the program flags selected.

The Tier-Controlled Program Type Indicator (**Tr**) field is used to specify whether the HOPE program being defined is controlled by tiers. A checked field indicates a yes value.

The Requires Checkpoints Indicator (**CkP**) field is used to specify whether the HOPE program being defined is controlled by checkpoints. A checked field indicates a yes value.

The Degree Award Category (**ACat**) field is used by the HOPE Accumulation/Eligibility process to determine whether a person should be ineligible for further HOPE awards because of having been awarded a degree. The Degree Award Category code is validated against the Degree Award Category Code Validation Form (STVACAT).

The Minimum GPA Required (**Min GPA**) field is used to specify the minimum GPA required for continued eligibility, if any.

The Standard Attempted Hours Cap (**Stand Cap**) field is used to specify the standard attempted hours cap for the specified HOPE award type. The Standard Cap value is used by the HOPE Accumulation/Eligibility process to determine if a student is no longer eligible for HOPE because of attempting more hours than are allowable.

The Maximum Attempted Hours Cap (**Max Cap**) can be used in conjunction with the 'Override Standard Cap' type Eligibility Status Code to indicate that a student can have attempted hours over the Standard Cap but not over the Maximum Cap.

The Book Fund field (Book Fund) allows the user to associate a specific fund code with another fund code that is used for HOPE book funds.

5. Establish Eligibility Status Codes

The HOPE Eligibility Status Validation Form (ZTVHPEL) is used to define codes and descriptions that indicate the status of a person's HOPE Grant eligibility at the current time.

The Eligibility Status Code and Description fields are used to define eligibility status codes.

The Eligibility Indicator (**Elg**) field is used to specify whether HOPE awards should be processed for a person who has the specified status. Multiple codes can have this flag set to ‘Y’ for yes. A checked field indicates a yes value.

The Process Indicator (**Pro**) field is used to specify whether HOPE eligibility will continue to be processed for an applicant—whether the person is eligible to receive the particular HOPE fund at the current time. For example, some students may not be HOPE-eligible originally or may lose eligibility during tier 1, yet they are attempting to gain or re-gain eligibility. Eligibility tracking can be performed without packaging or awarding the HOPE funds. A checked field indicates a yes value.

Note: The Eligibility Status Code = 'NEHS' (Not Eligible- Final HS) should have the Process Indicator checked. Please see the ZORHHSL section of this User Doc for further explanation.

The Default Indicator (**Dft**) field is used to define the single default value for eligibility status codes. Only one Eligibility Status Code can be flagged as default, and at least one must be flagged as the default. A checked field indicates a yes value.

The GPA Satisfied Indicator (**GPA OK**) field is used to specify that the status code represents one in which a minimum GPA is required and that the student has been verified and the requirement met.

A **single** eligibility status code can have this flag set to 'Y'. To assign people who have not met the requirement, the batch and on-line verification processes look for the eligibility status with this code. A checked field indicates a yes value.

The Below GPA Indicator (**Bel GPA**) field is used to specify that the status code represents one in which a minimum GPA is required and that the student has not met the minimum requirement. A **single** eligibility status code can have this flag set to 'Y'. To assign people who have not met this requirement, the batch and on-line verification processes look for the eligibility status with this code. A checked field indicates a yes value.

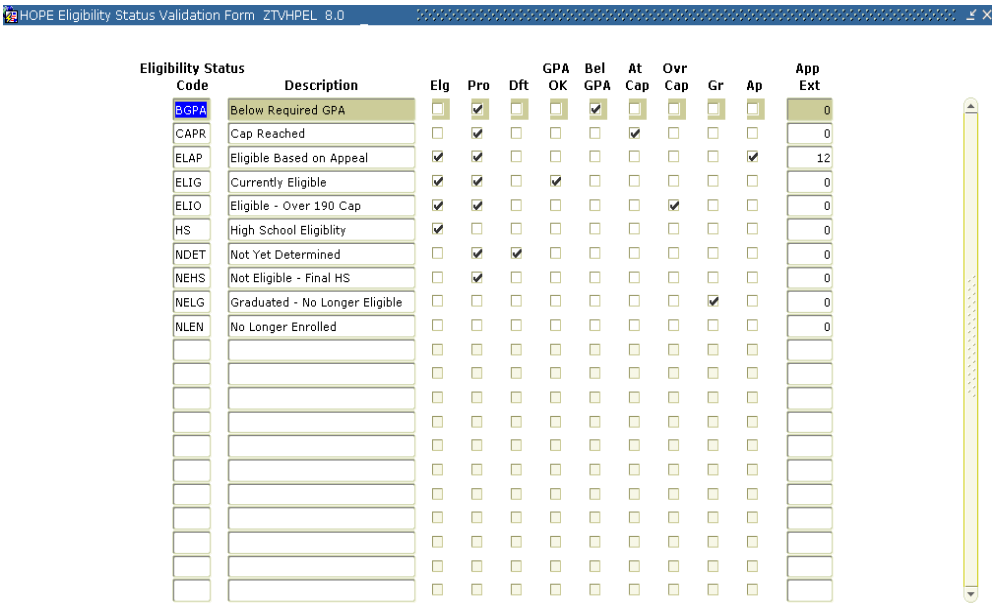
The **At Cap** Indicator field is used to specify which status code represents the one indicating that a person has reached the standard attempted hours cap for the program. It is used by the Accumulation/Eligibility Process to indicate that a person has reached the standard cap for a HOPE program. A **single** eligibility status code can have this flag set to 'Y'. A checked field indicates a yes value.

The Override Cap Indicator (**Ovr Cap**) field is used to specify that the status code represents that the standard attempted hours cap (currently 190 hours) can be overridden to use the maximum cap hours. A **single** eligibility status code can have this flag set to 'Y'. A checked field indicates a yes value.

The Graduated Indicator (**Gr**) field is used to specify that the status code represents the one indicating that a student has graduated and is therefore ineligible for further HOPE processing. A **single** eligibility status code can have this flag set to 'Y'. A checked field indicates a yes value.

The Appeal Status Indicator (**Ap**) field is used to specify that the status code represents an approved appeal. Any number of status codes can represent a granted-appeal status. A checked field indicates a yes value. If the appeal status indicator is 'Y,' the Extension Credits cannot be zero.

The Appeal Extension Credits (**App Ext**) field is used to specify the total number of credits beyond a checkpoint that may be funded for a student, based upon an approved appeal. If the appeal-status indicator is 'Y,' the Extension Credits cannot be zero.



Eligibility Status Code	Description	Elg	Pro	Dft	GPA OK	Bel GPA	At Cap	Ovr Cap	Gr	Ap	App Ext
BGPA	Below Required GPA	☐	☑	☐	☐	☑	☐	☐	☐	☐	0
CAPR	Cap Reached	☐	☑	☐	☐	☐	☑	☐	☐	☐	0
ELAP	Eligible Based on Appeal	☑	☑	☐	☐	☐	☐	☐	☐	☑	12
ELIG	Currently Eligible	☑	☑	☐	☑	☐	☐	☐	☐	☐	0
ELIO	Eligible - Over 190 Cap	☑	☑	☐	☐	☐	☐	☑	☐	☐	0
HS	High School Eligiblity	☑	☐	☐	☐	☐	☐	☐	☐	☐	0
NDET	Not Yet Determined	☐	☑	☑	☐	☐	☐	☐	☐	☐	0
NEHS	Not Eligible - Final HS	☐	☑	☐	☐	☐	☐	☐	☐	☐	0
NELG	Graduated - No Longer Eligible	☐	☐	☐	☐	☐	☐	☐	☑	☐	0
NLEN	No Longer Enrolled	☐	☐	☐	☐	☐	☐	☐	☐	☐	0

6. Establish Eligibility Reason Codes

The HOPE Eligibility Reason Validation Form (ZTVHPER) is used to define codes and descriptions that describe the reason for which a person is eligible for a particular HOPE program. The purpose of the codes is mainly informational, although the HOPE High School Load process requires that one code be set up to define the preliminary high school load and one to define the final high school load.

The eligibility reason codes for the high school load can be broken down to define college preparatory or other, if desired.

The High School Load program requires that Reason Codes be entered to distinguish student information that was loaded from the preliminary HOPE list as opposed to the final HOPE list. When the High School Load program processes a Final HOPE list file, it checks for students who were on the Preliminary list but not on the Final list, i.e., students who still had a Preliminary Load Reason Code. These HOPE records are either made inactive by updating the Eligibility Code or deleted, depending on the job submission parameters used.

7. Establish Exclusion Codes

The HOPE Exclusions Rules Form (ZHAHPEX) may be used to maintain information about work that should be excluded from HOPE GPA processing. HOPE regulations specifically exclude certain types of work from inclusion in HOPE GPA and checkpoint processing. These exclusions include Advanced Placement Credit, Credit by Exam and credits earned before a student's high school graduation. Because institutions may choose to record these types of information differently, the HOPE Exclusions GPA Form provides several options to identify work that should be excluded.

Note: Use of this form is optional.

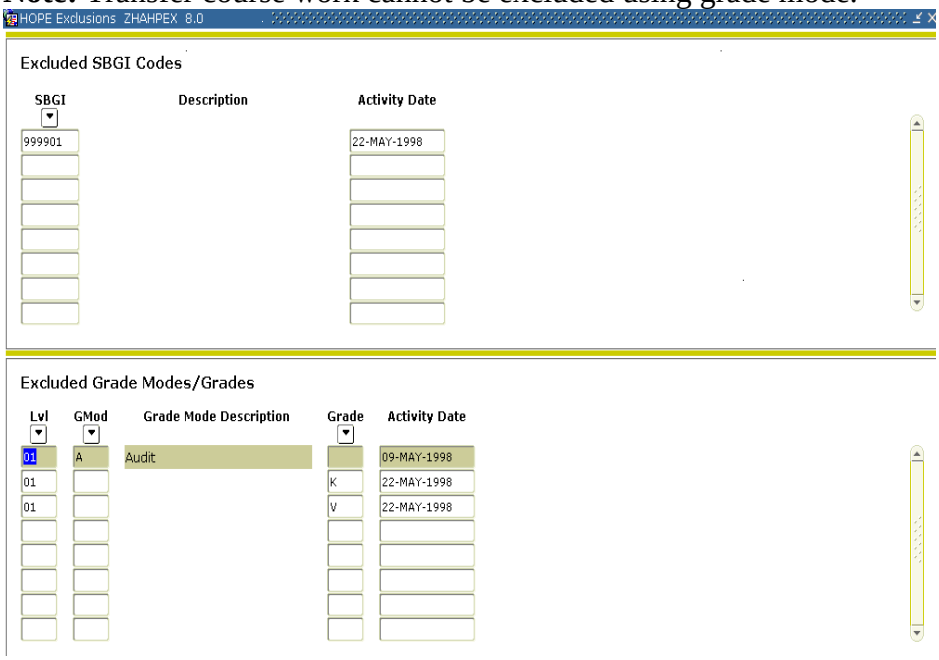
EXCLUDED SBGI CODE BLOCK

For institutions that maintain Advanced Placement Credit as transfer credit, the Excluded SBGI Code Block can be used to identify the SBGI code assigned for use with Advanced Placement Credit. Other SBGI codes also could be entered if there are other codes for which work should not be included in HOPE calculations. For example, some institutions choose to maintain Credit by Exam as transfer credit. Any work associated with a specified SBGI code is not included in HOPE calculations.

EXCLUDED GRADE MODES/GRADES BLOCK

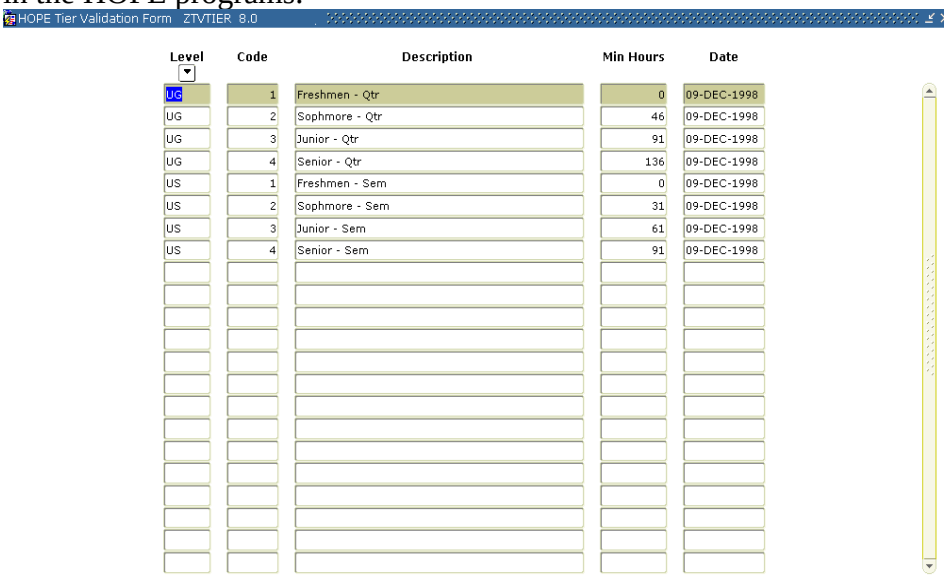
Some institutions choose to maintain either credit by exam and/or Advanced Placement Credit using specific grades or grade mode. The Excluded Grade Modes/Grades Block can be used to specify the excluded grade modes or excluded grades. For example, some institutions choose to identify a specific grade mode for Credit by Exam, while others choose to define specific grade codes to be assigned to Credit-by-Exam work. Both situations are accommodated by the HOPE rules and processes.

Note: Transfer course work cannot be excluded using grade mode.



8. Establish HOPE Tier Codes

The HOPE Tier Validation Form (ZTVTIER) is used to define codes, descriptions, and minimum attempted hours for each level-specific tier used in the HOPE programs.



9. Establish Excluded Fund Codes (if needed)

The HOPE Excluded Fund Code Rules Form is used to define the funds that should be subtracted from total HOPE grant eligibility (tuition and fees) in order to determine the amount of the HOPE award. These rules are used both in HOPE Packaging (RPEPCKG) and HOPE Disbursement (RPEDISB) processing for calculating the HOPE award.

KEYBLOCK

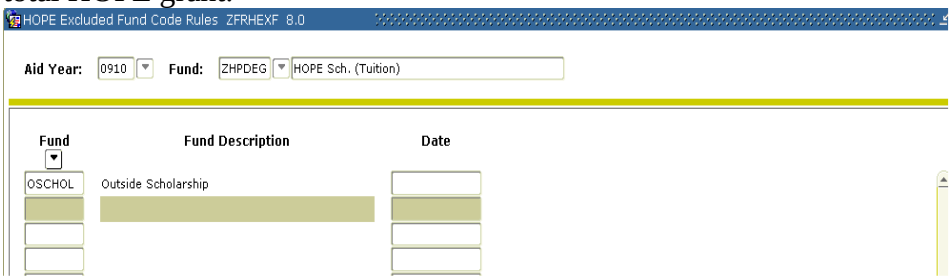
The **Aid Year** field specifies the aid-year to which rules apply.

The **Fund Code** field is used to identify the HOPE fund code to which rules apply.

Note: Both Aid-Year and Fund Code must be entered and valid in order to navigate the data block.

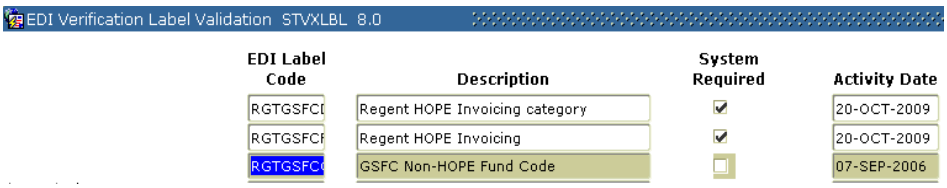
EXCLUDE AWARDS BLOCK

The **Fund** code field is used to define the funds to be subtracted from the total HOPE grant.



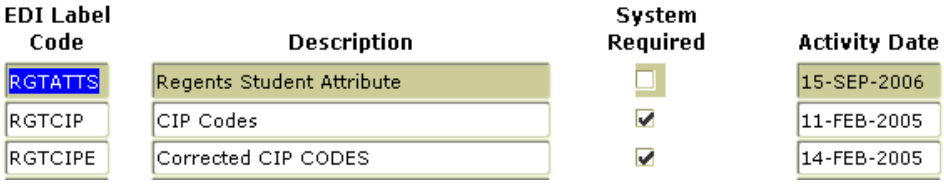
10. Create a Label on STVXLBL for ROTC and LEAP Funds

Create the label RGTGSFCO on STVXLBL for non-HOPE Fund Codes for ROTC and LEAP funds for the HOPE Invoicing Extraction Process.



11. Create the RGTATTS Label on STVXLBL for GTP cohort.

Create the RGTATTS label on STVXLBL to identify guaranteed tuition plan cohort.

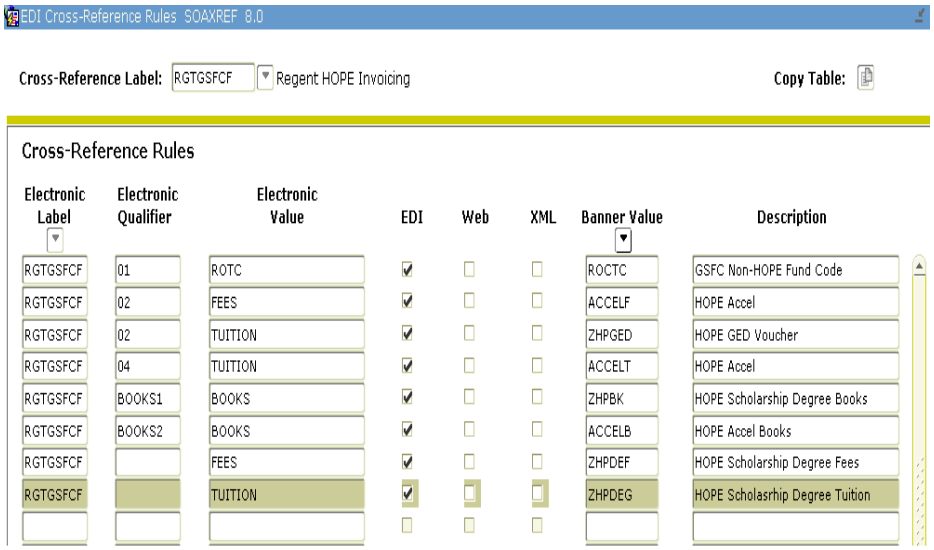


Please note: The RGTATTS label is currently being used by the Academic Data Warehouse and should already exist in your Banner database. The Georgia Enhancements 7.4 test plan instructed campuses on how to set up this label if it did not exist.

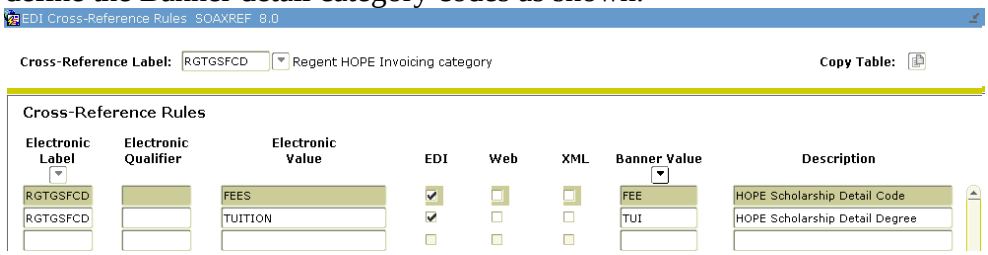
12. Create Cross-Reference Rules for HOPE

Create cross-reference rules in the EDI Cross-Reference Rules Form (SOAXREF). Use the label "RGTGSFCF" to define the Banner fund codes associated with tuition, fees, and books. An Example of the settings on SOAXREF for the use of two fund codes is located below:

Invoicing



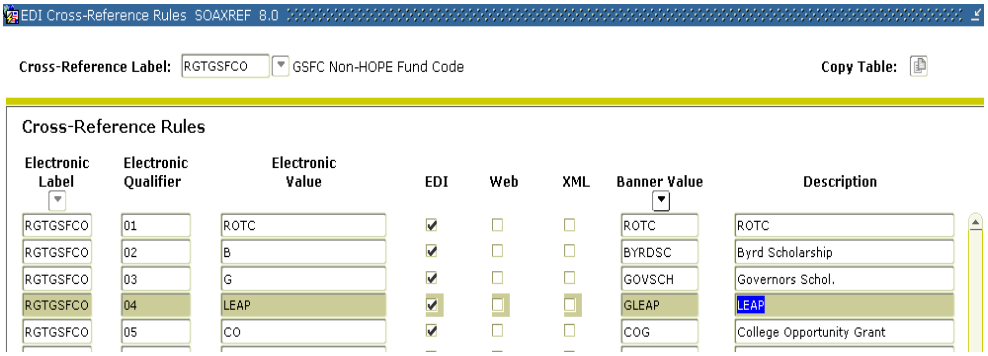
Create a value to cross-reference each fund code to the associated detail category codes in ZSADETC. Use the RGTGSFCD cross-reference label to define the Banner detail category codes as shown.



Note: The rules established in SOAXREF are currently used for HOPE Invoicing.

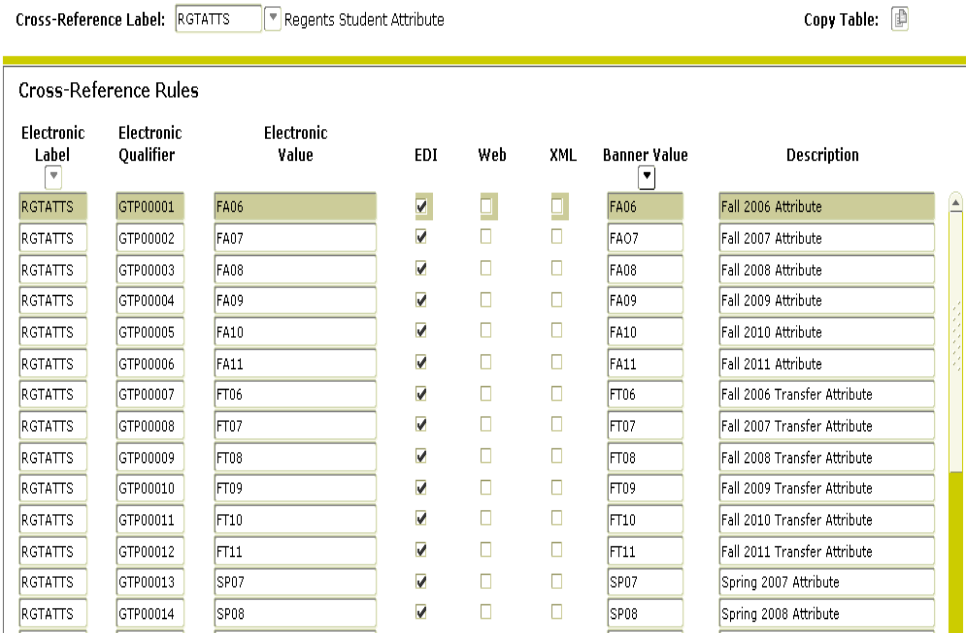
13. Create cross reference rules for non-HOPE fund codes.

Add ROTC, BYRD, Governors, COG and LEAP fund codes on the SOAXREF form:



14. Create cross reference rules for student attributes associated with GTP

Add the necessary GTP qualifier values on SOAXREF:



Electronic Label	Electronic Qualifier	Electronic Value	EDI	Web	XML	Banner Value	Description
RGTATTS	GTP00001	FA06	☑	☐	☐	FA06	Fall 2006 Attribute
RGTATTS	GTP00002	FA07	☑	☐	☐	FA07	Fall 2007 Attribute
RGTATTS	GTP00003	FA08	☑	☐	☐	FA08	Fall 2008 Attribute
RGTATTS	GTP00004	FA09	☑	☐	☐	FA09	Fall 2009 Attribute
RGTATTS	GTP00005	FA10	☑	☐	☐	FA10	Fall 2010 Attribute
RGTATTS	GTP00006	FA11	☑	☐	☐	FA11	Fall 2011 Attribute
RGTATTS	GTP00007	FT06	☑	☐	☐	FT06	Fall 2006 Transfer Attribute
RGTATTS	GTP00008	FT07	☑	☐	☐	FT07	Fall 2007 Transfer Attribute
RGTATTS	GTP00009	FT08	☑	☐	☐	FT08	Fall 2008 Transfer Attribute
RGTATTS	GTP00010	FT09	☑	☐	☐	FT09	Fall 2009 Transfer Attribute
RGTATTS	GTP00011	FT10	☑	☐	☐	FT10	Fall 2010 Transfer Attribute
RGTATTS	GTP00012	FT11	☑	☐	☐	FT11	Fall 2011 Transfer Attribute
RGTATTS	GTP00013	SP07	☑	☐	☐	SP07	Spring 2007 Attribute
RGTATTS	GTP00014	SP08	☑	☐	☐	SP08	Spring 2008 Attribute

Please Note: HURK, TEDU, and UCOL are labels used by the Academic Data Warehouse. The HOPE Invoicing extraction process will only use the "GTP" values associated with the guaranteed tuition plan. The "Banner Value", shown above, corresponds to the attributes listed on SGASADD (Additional Student Information form) for individual students. The Value column under Electronic is the value assigned to the INU###.txt file submitted to the GSFC for invoicing. The XML check box was added with 7.2.2 and is not necessary for ZHRHINV purposes. The ZHRHINV process has been tested on the 8.0 version of the SOAXREF form.

The Board of Regents has established the following standard student attribute codes:

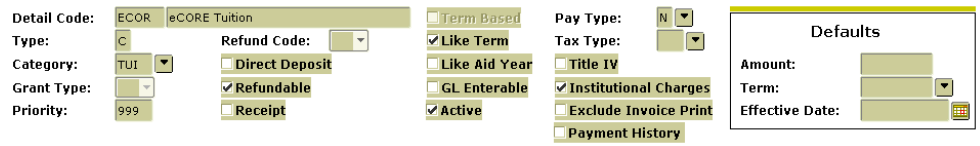
- FA## = Fall freshmen and USG transfer/transient/non-degree students
- FT## = Fall non-USG transfer/transient students
- SP## = Spring freshmen and USG transfer/transient/non-degree students
- ST## = Spring non-USG transfer/transient students
- SU## = Summer freshmen and USG transfer/transient/non-degree students
- UT## = Summer non-USG transfer/transient students
- NGTP = Non-GTP participants enrolled prior to Fall 2006 (student is paying the current tuition rate)
- XGTP = GTP has expired for the student. (student is paying the current tuition rate)
- 624BPGTP = Part-time students.

114BNote: ## is the last two digits of the year in which the semester resides (i.e. Fall 2006 is FA06 or FT06).

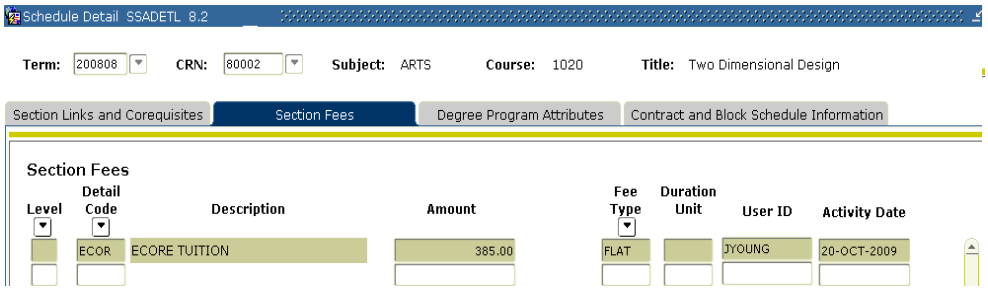
15. Create eCORE or Distance Ed Courses on TSADETC and SSADETL for HOPE Invoicing

If you charge tuition for any course section that is greater than standard Board of Regents approved tuition rates (Example: E-CORE, Distance Education Course, etc.) those additional tuition costs must be established on TSADETC as well as on SSADETL. These additional charges with a detail code category of TUI will then be picked up by the HOPE invoice process. This will place a Y in *field 29 Method of Course Delivery* of the invoice file you submit to the GSFC.

This is an example of what your TSADETC form will look like:



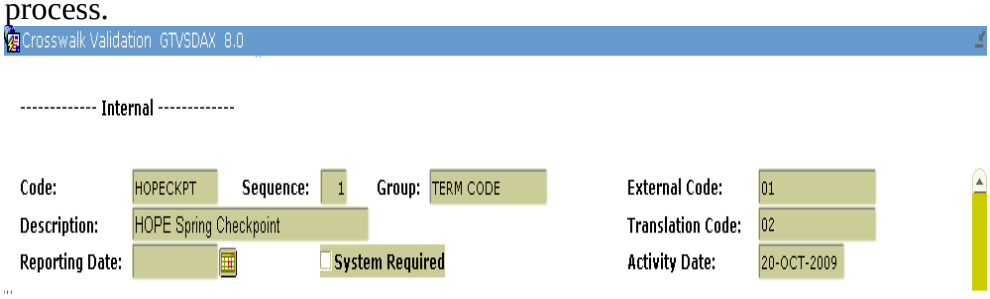
This is an example of what your SSADETL form will look like:



Note: You must enter the detail code associated with the E-CORE class in order for the student to be extracted properly with HOPE Invoicing.

16. Create Spring Checkpoint Label

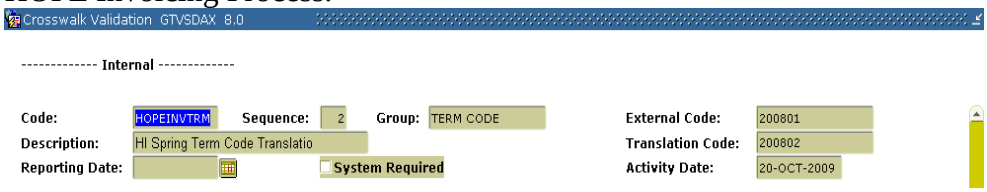
Create a Spring checkpoint label on the GTVSDAX form so that Spring checkpoints can be processed correctly when running the ZORHGPA process.



Note: The External Code field equals the institution's Term code for Spring which is 200501. The Translation Code field equals the Regent's Standard term code for Spring which is 200502. If your institution already uses Regent's Standard Term Codes listed as the examples in the previous sentence, translation is **not** needed.

17. Create a HOPEINVTERM Label

Create a HOPEINVTERM label on the GTVSDAX form so that your HOPE Invoicing files will be extracted and imported correctly during the HOPE Invoicing Process.



Note: The External Code Field equals the institution's term code. The entire term code should be included. Ex. If your Spring 2008 term is 200801 then the field should be 200801. The Translation Code equals the Regents Standard Term Code for terms: Fall = 08, Spring = 02, and Summer = 05. Again, the entire term code should be included in this field. If your institution has Regents' Standard Term Codes listed as the examples in the previous sentence, translation is **not** needed.

II. Creating HOPE Rules for each Fund Code

Introduction to Creating HOPE Rules

The next major step in the HOPE Process is setting up HOPE rules for each fund code.

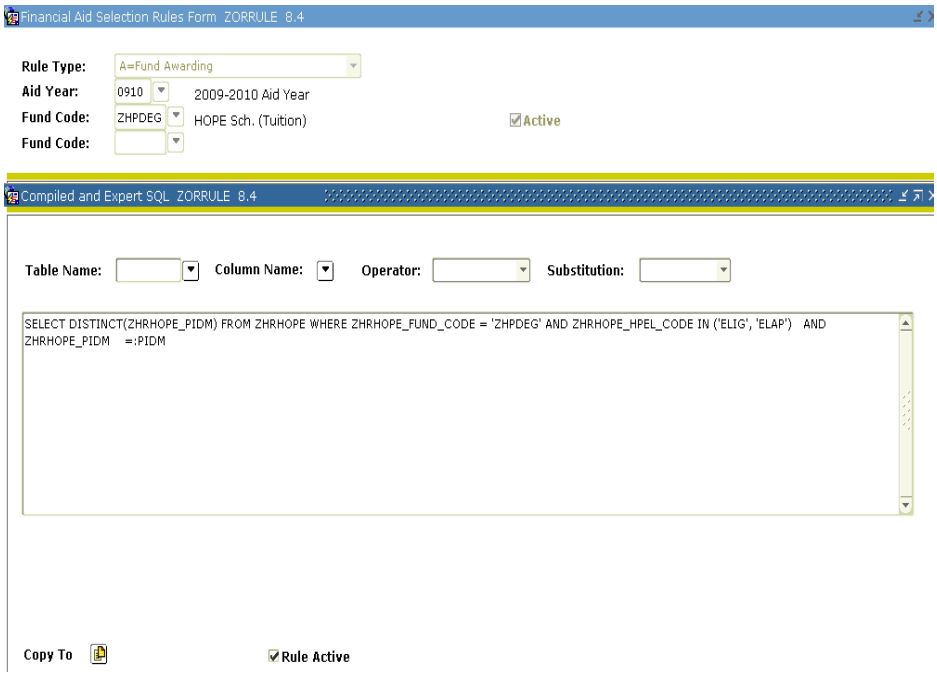
The Financial Aid Selection Form (RORRULE/ZORRULE) is used to create, compile, and execute rules for assigning requirement tracking groups, budget groups, packaging groups, satisfactory academic progress (SAP), fund awarding, fund assignment, and fund disbursement.

The Applicant Status Form (ROASTAT) displays information about an applicant. Most of the data on the form are display-only and contain general financial aid status information, financial need, and award data. The student application status is verified complete in the Applicant Status Form (ROASTAT).

1. Create Award and Disbursement Rules

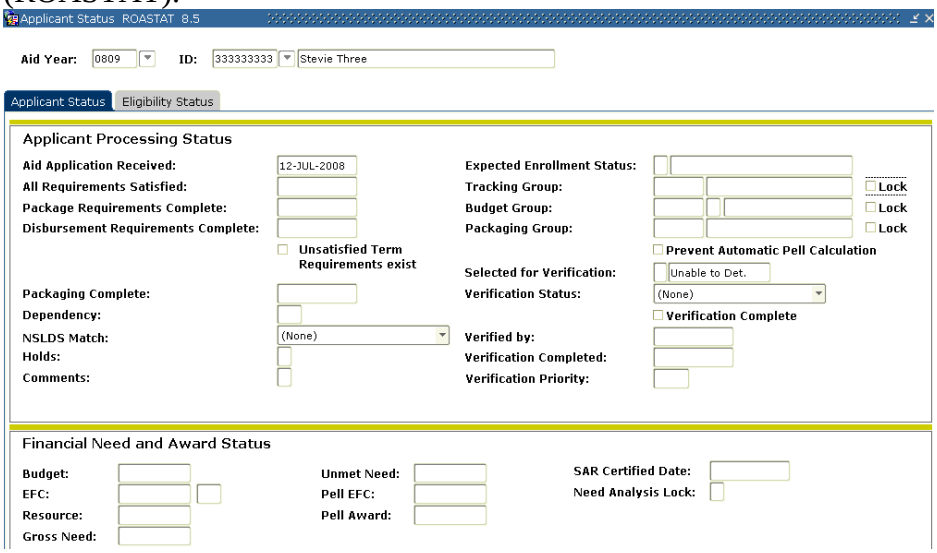
Create award and disbursement rules in the Financial Aid Selection Rules Form (ZORRULE).

Note: Rules created on RORRULE will transfer over to ZORRULE. The Active indicator represents whether a Fund Code is active. The Rule Active indicator is checked if the rule is active.



2. Application Verification

Verify that the student file is complete on the Applicant Status Form (ROASTAT).



III. Creating HOPE High School Records

Introduction to Creating High School Records

The next major step in the HOPE Process is creating HOPE high school records.

The RCTINFR Load Process (ZORINFR) provides a 'snapshot' of SPRIDEN in the temporary table RCTINFR. These records are used to match against the records in the High School File when the HOPE High School Load Process (ZORHHSL) process is executed.

1. Execute the ZORINFR Load Process

Execute ZORINFR to create a 'snapshot' of SPRIDEN in the RCTINFR temporary table. The records written to the temporary table are compared to the records in the High School File provided by the GSFC when the HOPE High School Load Process is executed.

Note: Verify that the ZORINFR process completes successfully prior to executing ZORHHSL.

Sample Files

Samples of the zorinfr.log and zorinfr.lis follow.

```
Username: Connected.
zorinfr completed successfully
7 lines written to /home/banjob/zorinfr_540680.lis


Deleting old RCTINFR table records...
Creating RCTINFR table records...
```

```
30-NOV-04 09:26:27                                          OIIT
                                        PAGE 1
                                                  RCTINFR Load Process
                                        ZORINFR

                                            * * * REPORT CONTROL INFORMATION
 * * *

RPTNAME: ZORINFR
RCTINFR RECORDS CREATED: 132063
```

2. Load HOPE High School Records

Execute ZORHHSL to create a HOPE Eligibility record. The ZORINFR process must be finished running before executing the ZORHHSL process.

The process reads the High School File (preliminary file= “pl2007.txt” or final file= “fl2007.txt”.containing the final HOPE candidates provided by the GSFC. The file is placed in the $DATA_HOME/finaid directory for processing.

The process will perform matching to ensure that records do not currently exist in Banner for the students found in the High School File. The process matches against the data in RCTINFR after running ZORINFR to completion. The process then generates a HOPE eligibility record in the HOPE Eligibility Form (ZHAHOPE).

HOPE applicants are identified as being from the preliminary load versus the final load by use of Reason Codes specified in the Job Submission parameters. Also by Job Submission parameters, the program can be set up to either delete the record or just update the eligibility status of applicants who were on the preliminary list but not on the final list. Beginning Fall 2008, the Eligibility Status code ‘NEHS’ (Not Eligible- Final HS) should not be deleted when running ZORHHSL. Therefore, Job Submission parameter 12 should be set to “Inactivate” (and NOT delete) the eligibility status of applicants who were on the preliminary list but not on the final list. This is needed as a result of State Legislation (Senate Bill 482), which ensures that students who have taken college level classes (for example AP, IB courses) prior to graduation from high school and did not qualify for HOPE scholarship, due to Grade Point Average, will be able to have those college level class hours count towards their attempted hours. The ZORHGPA process will use the ‘NEHS’ Eligibility Status Code to identify these students.

After ZORHHSL processes a final list from GSFC, identified by the "FL" record type field in the file, the program then checks for any HOPE Eligibility records that still have a Reason Code indicating that they were from a preliminary file load. These records are deleted or their eligibility statuses changed by the process, depending on the way the Job Submission parameters have been set.

Note: The Reason Code used in parameters 07, Preliminary College Prep, and 08, Preliminary Other Track, can be the same. The Reason Code used in parameters 09, Final College Prep, and 10, Final Other Track, can be the same. But any of the Reason Codes used in the Preliminary parameters cannot be used as any of the Final parameters. Also, if you wish to create multiple Fund Codes (ex HOPE and HOPE Book on ZHAHOPE), on parameter 05 you may click ‘Insert Record’ in the Parameter Values block, and type 05 in the Number field, then enter the additional fund code.

Warning

If you use the full file of all the Georgia high school students, the program can run for over 12 hours. It is recommended to use the file of only HOPE High School students who have selected your institution on their FASFA. Also, beginning Fall 2008, the Eligibility Status code 'NEHS' (Not Eligible- Final HS) should NOT be deleted when running ZORHHSL. Therefore, Job Submission parameter 12 should be set to "Inactivate" (and NOT delete) the eligibility status of applicants who were on the preliminary list but not on the final list. Please see the paragraph above for further explanation.

Record Layout for the Detail Record

Order	Data Type	Field Name	Description
1	A (2)	GPA Type	**PL** for preliminary GPA and **FL** for final GPA
2	N (9)	SSN	Student's SSN
3	A (20)	First Name	Student's first name
4	A (2)	Middle Initial	Student's middle initial
5	A (20)	Last Name	Student's last name
6	A (30)	Address	Student's address
7	A (20)	City	Student's city of residency
8	A (2)	State	Student's state of residency
9	N (9)	ZIP Code	Student's ZIP Code
10	A (9)		Not used
11	A (1)	Gender	Student's gender
12	A (170)		Not used
13	N (4)	Fiscal Year	Fiscal Year
14	A (47)		Not used
15	N (6)	GPA	Student's GPA or Final GPA (GPA value x 1,000 – no decimals)
16	A (1)	Track	Student's Track or Final Track
17	N (8)	Graduation Date	Student's graduation date in the YYYYMMDD format
18	A (243)		Not used

Parameters for ZORHHSL

No	Name	Required ?	Description/Instructions	Default Values
1	File Name	Yes	Enter the name of the high school file. Note: This parameter is case sensitive.	
2	Term	Yes	Enter the term(s) for which records are processed.	
3	Level	Yes	Enter the level code to be used for matching and eligibility record insert.	
4	Aid Year Code	Yes	Enter the Financial Aid Year(s) for which FA records are created.	
5	Fund Code	Yes	Enter the fund code for which eligibility records are created.	
6	Eligible Status Code	Yes	Enter the code to use when creating the eligible records.	
7	Preliminary College Prep	Yes	Enter the reason code to update preliminary college preparatory students' eligibility records.	
8	Preliminary Other Track	Yes	Enter the reason code to update preliminary other track students' eligibility records.	
9	Final College Prep	Yes	Enter the reason code to update final college preparatory students' eligibility records.	
10	Final Other Track	Yes	Enter the reason code to update final other track students' eligibility records.	
11	Required Match	Yes	Enter 'I' = ID/Name only, 'C' = Accepted, 'A' = Applied, 'P' = Prospect	
12	Inactivate/Delete	Yes	Enter 'I' for Inactivate or 'D' for delete for 'no longer eligible' preliminary records.	
13	Ineligible Status Code	Yes	Enter the code for 'no longer eligible' preliminary records	
14	Run Mode	Yes	Enter 'A' for Audit Mode or 'U' for Update Mode.	

Sample Files

Samples of the zorhhsl.log and zorhhsl.lis follow.

```
Ø24-MAR-09 09:39:00                                    Database                                                    PAGE 1
                                                 HOPE High School Load Process                                      ZORHHSL

    SSN       ID              Name           Trk GPA  Graduation  FAF Fund   Stat Reas       Message
888800099  444555555  Beans, Porkan            B  3.75 29-MAY-2008     GHOPE  ELIG PR30       *FUND ESTABLISHED*
                                                                                 *RORSTAT(S)
                                                                                 EXIST*
222333333  222333333  Brown, Charlie           C  3.36 19-MAY-2008     GHOPE  ELIG PR30       *FUND ESTABLISHED*
                                                                                 *RORSTAT(S)
                                                                                 EXIST*
521521521  521521521  Sailor, Popeye           B  3.93 18-MAY-2008     GHOPE  ELIG PR30       *FUND EXISTS*
                                                                                 *RORSTAT(S)
                                                                                 CREATED*
Ø24-MAR-09 09:39:00                                    Database                                                    PAGE 2
                                                 HOPE High School Load Process                                      ZORHHSL

                                              * * * REPORT CONTROL INFORMATION * * *
                                                        ZORHHSL 8.0

FILE NAME: PL_2008.txt
TERM: 200808
FILE NAME: US
AID YEAR: 0809
FUND CODE: GHOPE
ELIGIBLE STATUS CODE: ELIG
PRELIMINARY COLLEGE PREP: PR30
PRELIMINARY OTHER TRACK: PR32
FINAL COLLEGE PREP: HS30
FINAL OTHER TRACK: HS32
REQUIRED MATCH: I
INACTIVATE/DELETE: I
INELIGIBLE STATUS CODE: NEHS
RUN MODE: U

STUDENTS PROCESSED: 3
```

```
Username: Connected.

Run Sequence Number.....................................:zorhhsl completed successfully
35 lines written to /home/banjob/zorhhsl_790075.lis


ZORHHSL 8.0 completed successfully
Connected.
Connected.
```

IV. Calculating and Verifying HOPE

Introduction to Calculating HOPE

The next major step in the HOPE Process is calculating HOPE eligibility.

The HOPE Transfer GPA Calculation Process (ZORHTGA) calculates HOPE transfer GPA records by term. When calculated, HOPE transfer GPA records are displayed on the HOPE Eligibility Form (ZHAHOPE).

The HOPE Accumulation/Eligibility Process (ZORHGPA) calculates or updates HOPE accumulation rows of data and HOPE eligibility information. This process may also be executed from the HOPE Eligibility Form (ZHAHOPE). The ZORHGPA process is run to calculate a student's eligibility at 30, 60, 90, end of Spring term (for full-time students), and at the end of three terms (for part-time students). The 'S' or Spring term checkpoint will only appear if the student was ELIG at the beginning of the term and their GPA drops below 3.0 at the end of the term. The logic is that the student can only lose eligibility due to a Spring checkpoint.

ZHAHOPE displays and allows for the maintenance of information related to HOPE eligibility and HOPE processing. An auto accumulation may be performed from the Accumulation block of the form. The Auto Accum button will execute ZORHGPA. The Auto Accum function only updates those records with changes to their term

information. The Force Update function will recheck all terms related to the student's academic record.

The GSFC requires that campuses track two additional checkpoints. Campuses have requested that the HOPE accumulation block be updated in the checkpoint field. The new checkpoints are Y = 30, 60, 90 checkpoint, S = Spring Checkpoint, and T = Three Term Checkpoint. The S = Spring Checkpoint will only insert for those students that are currently eligible for HOPE and are below the required 3.0 GPA at the end of Spring term. N will remain in case the student is not at a checkpoint.

For students who have taken college level classes (for example AP, IB courses) prior to graduation from high school and did not qualify for HOPE scholarship, due to Grade Point Average, ZORHGPA will count those college level class hours towards their attempted hours if the 'HS' indicator on ZHAHOPE is checked prior to running ZORHGPA. This legislation is effective for courses taken in terms beginning July 1, 2008 or after, per State Legislation (Senate Bill 482). The earliest term in which high school course work can be counted is 200805. In addition, a 02/27/2009 GSFC Dear Colleague Letter was published and states that the GSFC allows **waivers** for such students who attempted coursework during a High School term that began prior to July 1, 2008. If an institution is notified by the GSFC that a student is receiving the waiver (of the SB 482 legislation), the High School Waiver indicator ('WVR'), on ZHAHOPE must be checked, as well as the 'HS' indicator, for the ZORHGPA process to count High School Hours for terms that began prior to July 1, 2009.

Note: It may be necessary to create a GTVSDAX label for HOPE Spring checkpoint calculations if your institution's Spring term code is different than the Regent's Standard Term. Please see the "Setting Up HOPE Codes and Rules" section of this user doc.

1. Calculate HOPE Transfer GPA

Execute the HOPE Transfer GPA Calculation Process (ZORHTGA) to calculate the HOPE transfer GPA records by term.

The following are possible scenarios for running the HOPE Transfer GPA Calculation Process in Batch Mode:

- If a term is entered; all persons who have valid enrolled (SFBETRM) records for that term are processed.
- If a population selection is entered, process all applicant IDs in the population selection.
- If IDs are entered and no population selection is entered, process the entered IDs.

Note: The ZORHTGA process uses the Default Grading Table 000000 on SHATGRD to calculate transfer work. In order to calculate the student's GPA, the Passed Indicator must be set to 'Y' for all grades

that have Quality Points assigned to them. For grades where no Quality Points are assigned, the Passed Indicator should be set to 'N'.

When using a population selection, processing is restricted only to students who have an eligibility record for a HOPE Degree-Seeking type fund with a 'processable' eligibility status. Any courses for a term where the attendance end date is less than or equal to the person's high school graduation date are excluded. Any course work with SBGI codes that match the HOPE-excluded SBGI codes or with grade codes that match HOPE-excluded grade codes are excluded from processing.

Note: This process may also be executed for individual students online from the HOPE Eligibility Form (ZHAHOPE).

Manually updated records are NOT overwritten by this process.

Parameters for ZORHTGA

No	Name	Required?	Description/Instructions	Default Values
1	Level Code to Process	Yes	Level Code of transfer work to be processed.	
2	Process Indicator	Yes	Enter ‘B’ for Batch or ‘I’ for Online. Note: Must be ‘B’ when running from job submission.	
3	Audit Trail Report Request	Yes	Enter ‘Y’ to request production of an audit trail report.	
4	Skip Detail Processing	Yes	Enter ‘Y’ only if your institution will NOT be entering any transfer detail records. The HOPE transfer hours and GPA need to be calculated and updated manually. Online processing defaults to ‘N’.	
5	Skip Transfer Articulation Pr	Yes	Enter ‘N’ if Transfer Articulation is used at your institution. Online processing defaults to ‘N’.	
6	Student ID	No	Student IDs that the user wishes to process for recalculation. This parameter is validated against SPAIDEN.	
7	Enrolled Term	No	Process IDs for students enrolled in this term. This parameter is validated against STVTERM.	
8	Selection Identifier	No	Population selection identifier.	
9	Application Code	No	Population selection application code. Note: This parameter is required if Selection Identifier is entered.	
10	Creator ID	No	User ID of person creating the sub-population. Note: This parameter is required if Selection Identifier is entered.	

Sample File

The following is a sample zorhtga.lis file:

```
 22-FEB-2010 11:35:53                                  Database                                                    PAGE 1
201002                                          HOPE Tranfer GPA Recalculation                                      ZORHTGA


NAME                                   ID                    LEVEL TERM   TRIT TRAM ATTEMPT GPA HRS QUAL PTS     GPA

Rogers, Dan                            888999000             US    200905 1    1       6.00    6.00    18.00    3.00

 22-FEB-2010 11:35:53                                  Database                                                    PAGE 2
201002                                          HOPE Tranfer GPA Recalculation                                      ZORHTGA

                                                  * * * REPORT CONTROL INFORMATION * * *

VERSION: GAMOD 8.0

SELECTION IDENTIFIER: DAN_ROGERS
APPLICATION CODE: FINAID
CREATOR ID: JYOUNG
LEVEL CODE PROCESSED: US
SKIP TRANSFER ARTICULATION: N
TERM: 201002

STUDENTS PROCESSED: 1
```

2. Calculate HOPE Accumulation Eligibility

Execute the HOPE Accumulation Eligibility Process (ZORHGPA) to calculate or update the HOPE accumulation rows of data and HOPE eligibility information.

The process creates a term record for each term a student has either a HOPE transfer information term record, a term GPA record in Banner Student, or an enrolled term record. The process will also insert Spring terms when the student did not attend to ensure that students are being checked for the Spring checkpoint. HOPE accumulation is calculated from the HOPE transfer information, specific excluded hours, and institutional coursework. Specific grade modes are excluded automatically by the process. Students with a course work prior to high school graduation are also excluded from processing.

For students who have taken college level classes (for example AP, IB courses) prior to graduation from high school and did not qualify for HOPE scholarship, due to Grade Point Average, ZORHGPA will count those college level class hours towards their attempted hours if the 'HS' indicator on ZHAHOPE is checked (prior to running ZORHGPA). This functionality is a result of legislation effective for courses taken in terms beginning July 1, 2008 or after, per State Senate Bill 482. The earliest term in which high school course work can be counted is 200805.

NOTE: In addition, a 02/27/2009 GSFC Dear Colleague Letter was published and states that the GSFC allows **waivers** for such students who attempted coursework during a High School term that began prior to July 1, 2008. If an institution is notified by the GSFC that a student is receiving the waiver (of the SB 482 legislation), the High School Waiver indicator ('WVR'), on ZHAHOPE must be checked, as well as the 'HS' indicator, for the ZORHGPA process to count High School Hours for terms that began prior to July 1, 2009.

Transfer Work

If High School courses are to be counted as Attempted Hours as a result of the legislation mentioned above AND these hours are considered transfer work at your institution; the **term, SBGI and Attempted Hours** should be manually entered on the Transfer Block of ZHAHOPE. The student must have a High School Grad Date entered on the High School Information Form (SOAHSCH), prior to running ZORHGPA, as well.

The following are possible scenarios for running the HOPE Accumulation Eligibility Process.

- If a term is entered; all persons who have valid enrolled (SFBETRM) records for that term are processed.
- If a population is entered, process all applicant IDs in the population selection.
- 240BIf IDs are entered and no population is entered, process the entered IDs.
- 241BIf start and end terms are specified, the batch process includes students who do not have academic histories.

Parameters for ZORHGPA

No	Name	Required?	Description/Instructions	Default Values
1	Level Code to Process	Yes	Level Code to be processed.	
2	Process Qtr Level	Yes	Enter Y to process Quarter Level records before processing Semester Level records if Parameter 01 is Semester Level.	Y
3	Enrolled Term	No	Process students enrolled in this term; do not use with Population Selection or individual IDs.	
4	Student ID	No	Student ID number(s); do not use with population selection.	
5	Selection Identifier	No	Population Selection identifier code.	
6	Application Code	No	Population Selection application code. The parameter is required if the Selection Identifier is used.	
7	Creator ID	No	User ID of person creating the sub-population. Note: This parameter is required if Selection Identifier is entered.	
8	Print Ineligible Only	Yes	Enter Y to print only ineligible persons' accumulation records.	
9	Create RORSTAT	No	Enter Y to create a RORSTAT record.	
10	Aid Year for RORSTAT	No	Enter Aid Year for RORSTAT. Note: This parameter is required if Create RORSTAT is Y.	
11	Least SFBETRM Term	No	Enter the beginning term for which a student was enrolled and did not have an academic history.	
12	Greatest SFBETRM Term	No	Enter the end term for which a student was enrolled and did not have an academic history.	
13	Forced Eligibility Update	Yes	Forces update to HOPE eligibility even if a student's hours or grades have not changed. **Note**: If you use Y for this parameter, all rows for the student record will be updated to the system date (the date that Force Update was run). The audit trail for the student record will be lost.	N

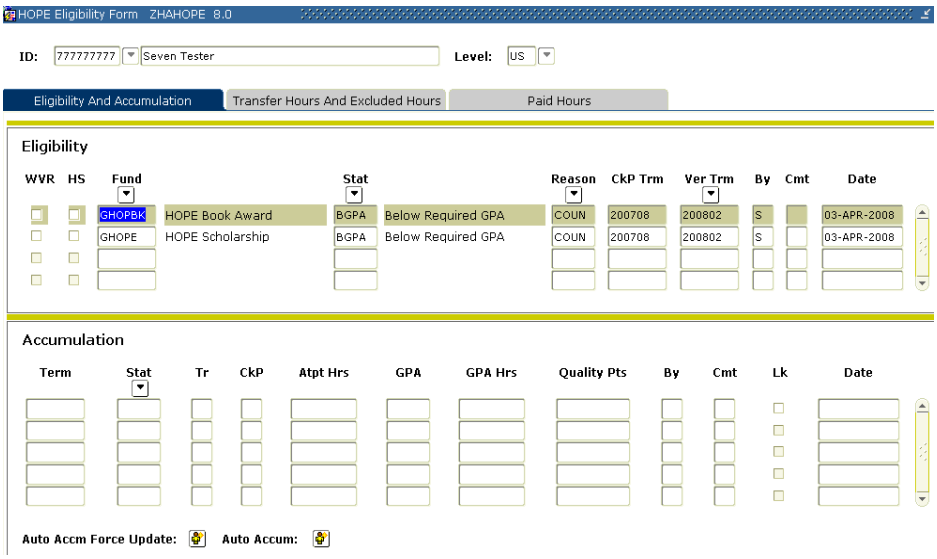
Sample File

Sample of the zorhgpa.lis file:

```
01-SEP-2010 14:33:42                                Database                                                                  PAGE 1
                                                Hope accum/elig process                                                        ZORHGPA

Id          Name                                Fund  Levl   StatusTerm        ATTMPT   GPA HR   Points     GPA  Tier CkPt Status
788788788 Dressing, Turkey                     **Replaced**        200802        24.00    24.00     76.00   3.16 1    T    ELIG
788788788 Dressing, Turkey                      GHOPE US     ELIG  201102        39.00    39.00    115.00   2.95 2    N    ELIG
01-SEP-2010 14:33:43                                Database                                                                  PAGE 2
                                                Hope accum/elig process                                                        ZORHGPA

                                              * * * REPORT CONTROL INFORMATION * * *

VERSION: GAMOD 8.4

LEVEL: US
PROCESS QTR: Y
TERM:
ID NUMBER: 788788788
SELECTION IDENTIFIER:
APPLICATION CODE:
CREATOR ID:
USER ID:
PRINT INELIGIBLE ONLY: N
CREATE RORSTAT:
AID YEAR FOR RORSTAT:
LEAST SFBETRM TERM: 000000
GREATEST SFBETRM TERM: 999999
FORCE ELIGIBILITY UPDATE: N

STUDENTS PROCESSED: 0
```

3. Verify HOPE calculation

The student status is checked in the HOPE Eligibility Form (ZHAHOPE).



The HOPE Eligibility Form is used to display and maintain a variety of information related to HOPE eligibility and on-going HOPE processing.

Subsequent blocks of data depend upon at least one HOPE eligibility record. In other words, items like HOPE transfer work are not calculated nor allowed unless a person is eligible for consideration, or has been eligible, for at least one type of HOPE award.

Additional forms and/or processes use the data displayed and maintained on this form to calculate HOPE awards and record them in appropriate places in the Financial Aid System.

KEY BLOCK

Key block fields are Student ID and Level code.

Level code entered controls the creation and selection of records that display in all blocks. Only records for the specified level are displayed. The level code is validated against the Level Code Validation Form (STVLEVL) and indicates whether the coursework selected is undergraduate quarter, undergraduate semester, graduate, or any other level.

Note: No navigation functions are permitted unless both keys are entered and valid.

ELIGIBILITY BLOCK

This block displays information about the current status of a person's HOPE eligibility at the institution and controls all other HOPE processing for the person. No other blocks can be accessed unless at least one record exists in this block. Accordingly, none of the batch processes that assist in determining HOPE eligibility process a student

unless the person has at least one existing eligibility record.

Eligibility block information is inserted initially using the HOPE High School Load process (ZORHHSL), explained in detail earlier in this document. Records may also be inserted manually in cases where initial eligibility is not transmitted electronically (for example, transfer students or students who become eligible after an initial waiting period).

Eligibility information is updated by the HOPE Accumulation/Eligibility process (ZORHGPA). Manual overrides are permitted, for example, in the case of the granting of a legislative appeal.

The High School Hours Indicator (HS) is used to indicate whether a student should have college level class hours (for example AP, IB courses), taken prior to graduation from high school, count towards the attempted hours calculated by ZORHGPA. Please see the ZORHGPA section of this User Doc for more information.

The High School Waiver indicator (WVR), on ZHAHOPE must be checked, as well as the 'HS' indicator, for the ZORHGPA process to count High School Hours for terms that began prior to July 1, 2009.

The Fund Code field is used to specify the HOPE program being tracked for a student. Fund codes entered must be valid in ZFRHOPE for the level in the key block. If necessary, you can select the Fund button or List to access the HOPE Fund Code Rules Form (ZFRHOPE) to see a list of valid fund codes.

HOPE Eligibility Status (Stat) field displays the current eligibility status for the specified program. This field is updated by the accumulation/verification process but can also be updated by the user. For example, a user could override a calculated status of "not eligible" to indicate that a person is eligible to continue receiving funds based upon a granted appeal. If necessary, you can select the Stat button or press the List function to access the Eligibility Status Code window to verify an eligibility status code.

The Eligibility Reason (Reason) field is used to describe the reason a person is eligible for the associated HOPE program. If necessary, you can select the Reason button or press the List function to access the Eligibility Reason Code window to verify an eligibility reason code.

The Last Checkpoint Term (Ckp Trm) field is used to specify the last checkpoint term for those HOPE programs that have checkpoint terms. It is set by the accumulation/eligibility process whenever that process determines that a checkpoint term has been reached. This field may not be updated by a user.

Last Verified Term (Ver Trm) may be used to specify when eligibility was last verified for a person. It is normally by the accumulation/eligibility process but may be updated by the user. If

necessary, you can select the Term button or press the List function to access the Term Code window to verify a term code.

System/User Indicator (By) field indicates whether the record was last updated by the system (S) or manually by a user (U). This field may not be entered or updated by the user.

The Comment (Cmt) field displays a 'Y' if a comment is associated with the HOPE Eligibility record. Use of the TEXT function key within the record opens a text window in which the comment can be displayed or maintained.

Activity Date field is the date the record was entered or last updated and is maintained by the system.

ACCUMULATION BLOCK

The Accumulation Block displays detailed information relative to eligibility and checkpoint terms and also allows update of the Eligibility Status and comments (no maintenance of the basic eligibility data, such as attempted and GPA hours, quality points, and GPA are allowed). Basic eligibility data are calculated by the Accumulation/Eligibility process (ZORHGPA) either in batch mode from job submission or online from within the form. No records can be created manually or deleted from this block.

Use the Auto Accum button in the main window to perform a current accumulation. The Auto Accm Force Update feature will recheck every term where the student has academic records.

The Accumulation/Eligibility process evaluates the terms in ascending order. When an accumulation is performed and the resulting attempted hours, GPA hours, quality points, and GPA have not changed on a term, the existing record is not overwritten. As soon as attempted hours, GPA hours, quality points, and/or GPA on a term differ from the existing record for that term, the record is updated, and all terms evaluated after the changed term are updated. If a new term is inserted, all following terms are re-evaluated and updated. When a record is updated, it overwrites any eligibility status that may have been manually entered. A copy of the replaced record is written to a report. If no term records are updated the eligibility block is updated with the same status code. If any term records were updated, the re-evaluated status code is used to update the eligibility block.

The Term field displays the term for which all attempted hours, GPA hours, and quality points have been accumulated.

The Eligibility Status (Stat) field displays the code of the eligibility status of the person for the term specified by the term code. Field is updatable by the user and validated against ZTVHPEL.

The Tier (Tr) field displays the code of the calculated tier of the student.

Tiers generally reflect the first year, second year, etc. of the student as defined on the Tier Validation Form (ZTVTIER)

The Checkpoint Term (CkP) field displays whether the specified term is a term in which the person crossed one of the checkpoint thresholds: Y = 30, 60, 90 hour checkpoint, S = Spring checkpoint, T = Three term checkpoint, and N = No checkpoint.

The Attempted Hours (Atpt Hrs) field reflects the accumulated attempted hours up to and including the term coursework.

The GPA Hours (GPA Hrs) field reflects the accumulated GPA hours accumulated up to and including the term coursework.

The Quality Points (Quality Pts) field reflects the accumulated quality points accumulated up to and including the term coursework.

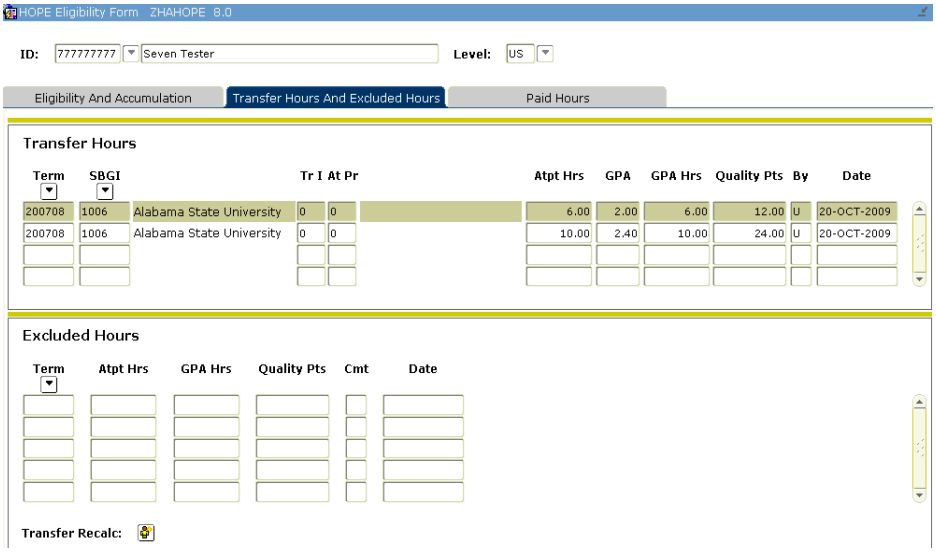
The GPA field reflects the calculated GPA associated as of the term specified, by dividing the Quality Points by the GPA Hours.

The System/User Indicator (By) field displays a 'U' (for user) or an 'S' (for system), depending upon whether the Eligibility Status code or Tier code was last updated by the system or by the user manually.

The Comments (Cmt) field displays a 'Y' if comments are maintained in the accumulation record.

The Locked Record Indicator (Lk) field prevents changes to the student's accumulation record if you check this indicator. If you lock the student's accumulation record it halts processing at the locked recorded, and the Accumulation/Eligibility process does not update the locked record, any subsequent term records, or the student's eligibility.

TRANSFER HOURS BLOCK



The Transfer Hours Block is used to display and maintain information about a person's work at other institutions which must be included in the HOPE attempted hour checkpoint and GPA calculations.

Use the Transfer Recalc button anywhere in the HOPE Transfer and Excluded Hours window to perform the HOPE Transfer GPA Recalculation process (ZORHTGA) that verifies HOPE transfer records for each transfer attendance period in the system.

TRANSFER INSTITUTION AND TRANSFER ATTENDANCE PERIOD SEQUENCE NUMBERS

Transfer Institution and Attendance Period sequence numbers are generated by the system in a student's record when an entry is made on the Transfer Course form (SHATRNS). Every HOPE transfer student should at least have one entry for each institution and each attendance period that is required to determine HOPE eligibility.

Multiple terms for an institution can be summarized under one attendance period, or if desired, terms can be represented more accurately through multiple attendance periods. The HOPE Transfer GPA Recalculation process generates HOPE transfer information records from these transfer institution/attendance period entries.

CREATING RECORDS

Manually created records always have Transfer Institution Sequence Number (Tr I) and Transfer Attendance Period Sequence Number (At Pr) set to zero. The assumption is that the user knows that the institution for which information is to be inserted does not already and will not ever have that attendance period defined on SHATRNS. The user determines this either by running the HOPE Transfer GPA Recalculation process or by checking the Transfer Course form (SHATRNS).

Note: A good procedure is first to run the HOPE Transfer GPA Recalculation process on a student before manually creating new records.

Once a record has been committed, the Term and the SBGI code CANNOT be updated. However, the record can be duplicated or re-entered by making changes to the Term and/or SBGI Code and then deleting the old record.

DELETING RECORDS

Only user updated or created records can be deleted. If it is necessary to delete a system-generated record, the record must first be altered by the user, committed so that the System/User Indicator (By) is set to 'U,' and then deleted.

SYSTEM GENERATED RECORDS

Term and SBGI codes, Transfer Institution Sequence Number (Tr I), and Transfer Attendance Period Sequence Number (At Pr) CANNOT be changed on system-generated records. If it is necessary for the user to change the Term and/or SBGI code on a record, it can either be duplicated or re-entered and then the original record altered, committed, and then deleted. The Transfer Institution Sequence Number and Transfer Attendance Period Sequence Number in the new record are defaulted to zeros because the originals are no longer valid when either term or SBGI codes are changed.

The Term field displays the term code to which the associated transfer work has been applied. It corresponds to the Effective Term field in the Transfer Attendance Period Block of the Transfer Course Form (SHATRNS) if the record has been system-generated. If necessary, you can select the Term button or press the List function to access the Term Code window to verify a term code.

The SBGI field displays the transfer institution's SBGI code for the associated transfer work.

The Transfer Institution Number (Tr I) field displays the transfer institution number of the associated transfer work. The field corresponds to the Transfer Institution Number field in the Key Block of the Transfer Course Form (SHATRNS). Only system-generated records have values in this field. Manually created records default to values of zero.

The Transfer Attendance Period Number (At Pr) field displays the attendance period number of the associated transfer work. It corresponds to the Attendance Period Number field in the Key Block of the Transfer Course Form (SHATRNS). Only system-generated records have values in this field. Manually created records default to values of zero.

The Attempted Hours (Atpt Hrs) field displays the number of hours attempted at another institution for a specified attendance period (or term, if entered manually). This field may be updated by the user. If this field is manually updated, the System/User Indicator (By) sets to 'U' (for user).

The GPA Hours (GPA Hrs) field displays the number of hours to use in calculating the GPA at the institution for the specified attendance period. This field may be updated by the user. If this field is updated manually, the System/User Indicator (By) sets to 'U' (for user).

The Quality Points (Quality Pts) field displays the number of quality points to use in calculating the GPA at the institution for the specified attendance period. This field may be updated by the user. If this field is updated manually, the System/User Indicator (By) sets to 'U' (for user).

The GPA field displays the calculated GPA for the institution/attendance period combination. It is calculated when either GPA hours or quality points have been changed. The calculation is a division of quality points by GPA hours. This is a calculated field and may not be updated by the user.

The System/User Indicator (By) field displays a 'U' (for user) or an 'S' (for system), depending upon whether the record was last updated by the system or by a user manually. It also controls whether the record is recalculated by the HOPE Transfer GPA Recalculation process.

Note: If a user has updated the record, the HOPE Transfer Recalculation process never changes it.

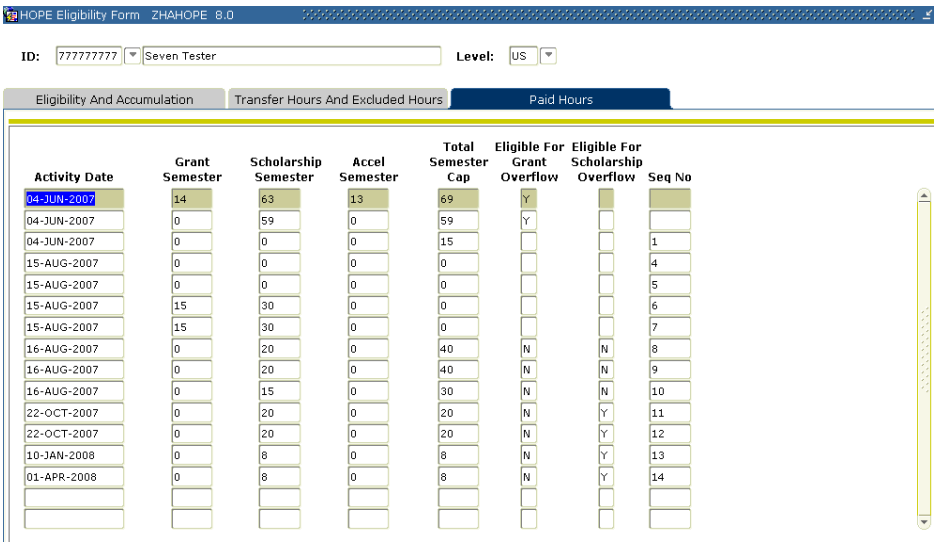
EXCLUDED HOURS BLOCK

The Excluded Hours Block may be used to maintain information about hours that should be excluded from HOPE accumulation. The Accumulation process automatically excludes certain types of work, such as hours taken prior to high school graduation (if these can be determined), hours granted for Credit by Exam, or Advanced Placement. The Exclude Hours Block can be used to maintain excluded hours if the hours to be excluded cannot be calculated based upon the rules defined on the HOPE Exclusions form (ZHAHPEX).

Values entered in the Attempted Hours (Atpt Hrs) field, GPA Hours (GPA Hrs) field, and Quality Points (Quality Pts) fields are subtracted from the accumulative totals of the term specified by the term code entered in the Term field when the Accumulation/Eligibility process is run. If a student does not have any coursework in a term created in the Excluded Hours block, an accumulation record is still created for that term. If necessary, you can select the Term button or press the List function to access the Term Code window to verify a term code.

A Comment (Cmt) field is provided to describe the hours that are being excluded. This field displays a 'Y' if comments are maintained in the excluded hours record.

PAID HOURS BLOCK



Activity Date	Grant Semester	Scholarship Semester	Accel Semester	Total Semester Cap	Eligible For Grant Overflow	Eligible For Scholarship Overflow	Seq No
04-JUN-2007	14	63	13	69	Y		
04-JUN-2007	0	59	0	59	Y		
04-JUN-2007	0	0	0	15			1
15-AUG-2007	0	0	0	0			4
15-AUG-2007	0	0	0	0			5
15-AUG-2007	15	30	0	0			6
15-AUG-2007	15	30	0	0			7
16-AUG-2007	0	20	0	40	N	N	8
16-AUG-2007	0	20	0	40	N	N	9
16-AUG-2007	0	15	0	30	N	N	10
22-OCT-2007	0	20	0	20	N	Y	11
22-OCT-2007	0	20	0	20	N	Y	12
10-JAN-2008	0	8	0	8	N	Y	13
01-APR-2008	0	8	0	8	N	Y	14

The Paid Hours block contains information related to the student's PAID Hours as calculated by the GSFC. The information in this block is updated by running the GSFAPPS Return File Load process (ZOPAPPL). The column headings are self-explanatory and all data is obtained from the GAD###.txt file returned by the GSFC. A sequence number (Seq No) is maintained on the form to display the history of Paid Hours information. Paid Hours information is explained in detail in the GSFAPPS User Documentation.

V. Creating the State Grant Export File

Introduction to the Grant Export File

The next major step in the HOPE Process is creating and submitting the State Grant File Export.

The State Grant File Export Process (ZFBGEXP) extracts records for Leveraging Educational Assistance Partnership (LEAP) and HOPE grant award information to transmit to the GSFC.

Note: This process is being replaced by the HOPE Invoicing Process.

1. Create the Grant Export File

Execute ZFBGEXP to create certain HOPE awards information in a flat file to be submitted to the GSFC.

The following types of funds are reported using the State Grant File Export Process and are determined by the value selected in the Process Record Type:

- HOPE Promise II Awards (HP)
- HOPE Teacher Awards (TS)
- HOPE Teachers Promise Awards (PR)
- HOPE Teachers Scholarship, HOPE Promise Scholarship, and HOPE Promise II Scholarship Awards (OP)

Parameters for ZFBGEXP

No	Name	Required?	Description/Instructions	Default Values
1	GSFC Password	Yes	Enter the nine-character password provided to you by the GSFC.	
2	Federal School Code	Yes	Enter the six-digit federal school code (FICE).	
3	Financial Aid Year Code	Yes	Aid year to determine Budget and select Needs Analysis data.	
4	Academic Year Reporting	Yes	Last year in the financial aid year code. For example, 0405 is 2005	
5	Process Record Type	No	Record type(s) to process or blank to process all LEAP and HOPE funds.	
6	Summer Term Code	Yes	Enter the term code for summer awards.	
7	Fall Term Code	Yes	Enter the term code for fall awards.	
8	Winter Term Code	Yes	Enter the term code for winter awards	
9	Spring Term Code	Yes	Enter the term code for spring awards.	O
10	BLEAP Fund Code	No	Enter the LEAP fund code. Note: This parameter is required if Process Record Type is LP or blank.	
11	Budget Type Code	Yes	Budget type to calculate cost of attendance.	
12	Award Amount Type	Yes	Enter **P** for paid only records, **A** for accepted, and **O** for offered.	
13	Address Selection Date	Yes	Enter the date to be used in the address hierarchy selection.	SYSDATE

No	Name	Required?	Description/Instructions	Default Values
14	Address Hierarchy	Yes	Indicates which address type should be used first, second, third, etc.	1MA
15	Selection Identifier	No	Population selection identifier code.	
16	Creator ID	No	User ID of person creating the sub-population. Note: This parameter is required if a Selection Identifier is used.	
17	Application Code	No	Population selection application code. Note: This parameter is required if a Selection Identifier is used.	

2. Submit File to GSFC

The export file created is named xxx.lis, where the xxx is the run sequence number. The file must be renamed to GRUxxx.TXT prior to submission to the GSFC.

Note: The xxx is the three-digit number assigned to the institution by the GSFC.

Submit GRUxxx.TXT to the GSFC.

Sample Files

Samples of the zfbgexp.log and zfbgexp.lis files follow.

```
Username: Connected.

Run Sequence Number.....................................:
08-07-2009 10:32:13                  OIIT                              PAGE:   1
Run No. 529579         State Grant File Export Report                ZFBGEXP 8.0

                      * * * ERROR/WARNING REPORT * * *

Id         Name                      Message
222222222 Daniels, Sam               *Warning* no ZHRHACC record - assuming tier 1
222222222 Daniels, Sam               *Warning* no SPBPERS Basic Person record
111111111 Sanford, Fred              *Warning* no ZHRHACC record - assuming tier 1
08-07-2009 10:32:13                  OIIT                              PAGE:   2
Run No. 529579         State Grant File Export Report                ZFBGEXP 8.0

                         * * * CONTROL REPORT * * *

  Parameter Description         Parameter Value(s)
  GSFC Password                 123456
  Federal School Code           001602
  Financial Aid Year Code       0809
  Academic Year for Reporting   2009
  Process Record Type           ALL
  Summer Term Code              200905
  Fall Term Code                200808
  Winter Term Code              n/a
  Spring Term Code              200902
  LEAP Fund Code                LEAP
  Budget Type Code              CAMP
  Award Amount Type             O
  Address Selection Date        04-AUG-2009
  Address Heirarchy             1MA
  Selection Identifier
  Creator ID
  Application Code

  Record Count:    2


  ZFBGEXP 8.0 completed successfully
  4 lines written to /home/banjob/zfbgexp_529579.lis
Connected.
Connected.

GB123456   0016020020090807

H1222222222Sam               Daniels           250 lake dr                 athens             GA306050000       D
00522800000000000000000000000000000187000018150000000000181500  00  00  00  00
2009
H1111555999Fred              Sanford           100 junk way                athens
GA306050001990010 5IMB0108930000000000000000000000000000000187000018150000000000181500  00  00  00  00
                2009
GT00000002001100000
```

VII. Creating the HOPE Invoicing Extraction File

Introduction to the Extraction File

The next major step in the HOPE Invoicing Process is creating and submitting the extraction file.

The HOPE Invoicing Extraction Process (ZHRHINV) extracts records for students who have been awarded HOPE funds, Governor's scholarship, BYRD, Leveraging Educational Assistance Partnership Awards (LEAP), College Opportunity Grant (COG) and North Georgia's ROTC funds. The records are placed in a flat file in the format specified by the GSFC (INU###.txt) and submitted to the GSFC for processing.

Beginning with the Fall 2005 term, the Georgia Student Finance Commission (GSFC) seeks to expand the current HOPE Invoice processes to perform the following edit checks:

1 – Identify the type of programs students are currently in at an institution at the time an invoice for HOPE awards is submitted.

2 – Determine if any students submitted in the HOPE Invoice file are Pell eligible based on FAFSA information located in the institution's Banner database.

Note: It may be necessary to create a GTVSDAX label for HOPE Invoicing if your institution's Spring term code is different than the Regent's Standard Term. Please see the "Setting Up HOPE Codes and Rules" section of this user doc.

If you charge tuition for any course section that is greater than standard Board of Regents approved tuition rates (Example: E-CORE, Distance Education Course, etc.) those additional tuition costs must be established on TSADETC as well as SSADETL. These additional charges with a detail code category of TUI will then be picked up by the HOPE invoice process. This will place a Y in *field 29 Method of Course Delivery* of the invoice file you submit to the GSFC. Please see the "Setting Up HOPE Codes and Rules" section of this user doc.

Beginning Fall 2006, the Board of Regents approved a tuition plan that allows a certain cohort of students enrolling in the University System of Georgia's 35 colleges and universities to pay a guaranteed tuition rate for a specified period of time.

The GSFC has asked the USG system schools to report tuition rates students are receiving based on the GTP. To accomplish this, a 4 character code will be added to the end of the current ZHRHINV file layout. This 4 character code will only pull attributes related to the GTP. This code will be a translation on SOAXREF.

Please note: The label being used to track student attribute is RGTATTS. This label is currently being used by the Academic Data Warehouse and should already exist in your Banner database. It may be

necessary to create a SOAXREF label for GTP if your institution's Banner database does not already have one.

Effective July 1, 2008, new State Legislation called for a HOPE Grant Paid Hour exclusion. This provision states that high school students enrolled in USG or TCSG institutions will now have dual enrolled courses (taken while the students were in high school) exempt from the paid hours CAP counted towards HOPE Grant. A new field has been added to the end of the INU###.txt file which indicates the number of hours to be excluded in the CAP hour calculation of the HOPE Grant program.

The amount of Tuition and the total fees extracted in the HOPE Invoicing process (ZHRHINV) is based on the Round Schedule (round dollars or round cents) your institution indicates on the Packaging tab of RFRMGMT. You should not use the Truncate Cents or Truncate Dollars function from RFRMGMT when processing your HOPE tuition and fees. This may cause the tuition amount to be incorrect on the INU###.txt file.

Dual Enrolled Students

If a student is enrolling in one or more courses which will result in college credit only **and** one or more courses which will result in both high school and college credit the student will be assigned the 'JE' Admit Type code. If the student is also awarded the HOPE Grant or Accel, institutions should utilize the manual invoicing process (SURFER) to correctly report paid or excluded hours to the Georgia Student Finance Commission.

Veteran's Fee Waiver

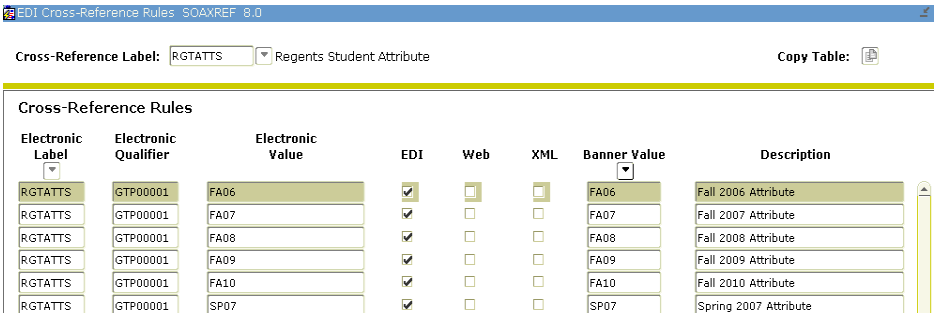
Effective August 8, 2007, the Board of Regents of the University System of Georgia (USG) approved a measure waiving mandatory fees for all Georgia residents who recently served in a combat zone for the Georgia National Guard or the U.S. Military Reserves.

As a result, institutions may have to adjust HOPE fee payments manually on the Award Maintenance form (RPAAWRD).

If a manual adjustment to the HOPE amount on RPAAWRD is made, the tuition and/or fee amounts in the INU###.txt files produced by the ZHRHINV process will be inaccurate. This means a manual adjustment to the INU###.txt files will need to be performed to ensure that the correct amounts are sent to the GSFC for these students.

Warning

Student 7.2.2, which was a mandatory release of XML Transcript, included SOAXREF 7.2.2 (This functionality has been rolled into the 8.0 version.) Below is a screen shot of what your SOAXREF should currently look like:



The XML check box was added with the previous 7.2.2 and is not necessary for ZHRHINV purposes.

1. Create the HOPE Invoice

Execute the HOPE Invoicing Extraction Process (ZHRHINV) to create the flat file to be submitted to the GSFC.

Exceptions

Warning about Manual Adjustments

The extraction file does not account for manual adjustments to awards. Manual adjustments must be treated as exceptions when creating the HOPE Invoicing file.

The parameters displayed in the Job Submission Form (GJAPCTL) are as follows. The parameter number, name, requirement, and description are provided to assist you when entering the parameter values.

Parameters for ZHRHINV

No	Name	Required?	Description/Instructions	Default Values
1	GSFC Password	Yes	Enter the nine-character password provided to you by the GSFC.	
2	Federal School Code	Yes	Enter the six-digit federal school code (FICE).	
3	Extraction File Name	Yes	Enter INU###.txt	
4	Financial Aid Year Code	Yes	Enter the aid year to determine budget and needs analysis data.	
5	Academic Year for Reporting	Yes	Enter the last year in the academic year. Example: 0506 = 2006	
6	Process Record Type	No	Enter record types to be processed. Leave blank to process all LEAP, ROTC and HOPE funds.	
7	Term Code	Yes	Enter the term code to report. **Note:** The term entered must be the Regents Standard Code term.	
8	Grant Header Record	No	Enter the grant header record type to be used.	GI
9	Selection Identifier	No	If population selection is used, enter the selection ID.	
10	Application	No	If population selection is used, enter the application code.	
11	Creator ID	No	Enter the creator ID associated with the population selection.	

No	Name	Required?	Description/Instructions	Default Values
12	User ID	No	Enter the user ID.	
13	Address Selection Date	Yes	Enter the date to be used for selecting the address type to be processed.	SYSDATE
14	Address Hierarchy	Yes	Enter the address hierarchy to be used for the selection of address type to be placed in the flat file.	1MA
15	Purge Term Indicator	No	Indicates if records are to be purged.	N
16	Purge Term Code	No	Enter the term code for the records to be purged. **Note:** The term entered must be the Regents Standard Code term.	

2. Check Results (INU###.txt, zhrhinv.lis, and zhrhinv.log)

Review file and record layout to check your results. The record layout files should meet the following conditions.

- There are one or more records per file.
- The electronic invoice file naming convention is INU###.TXT.
- The error report is found in the zhrhinv_xxxxxx.lis file.

3. Submit File to GSFC

Submit INU###.TXT to the GSFC.

Sample Files

Samples of the INU, zhrhinv.lis, and zhrhinv.log follow.

Sample INU###.txt

123456|00|GI|2009|963963963|FAT||TONY|098 EVERGREEN TERRACE|30606||I||91079959|963963963|B|2|7|0050000|0000000|0000000||1||Y||AASCIS|ATCO|N|NONE||
123456|00|GI|2009|951951951|CHIEF||WIGGUM|9876 EVERGREEN TERRACE|30606|19800815|D|N|91079957|951951951|G|2|8|0040200|0000000|0000000||1||Y||AASCIS|ATCO|N|NONE||
123456|00|GI|2009|951951951|CHIEF||WIGGUM|9876 EVERGREEN TERRACE|30606|19800815|D|N|91079957|951951951|HD|2|8|0020000|0009000|0007500||1||Y||AASCIS|ATCO|N|NONE|8.00|

Sample zhrhinv.log

```
Username: Connected.

Run Sequence Number.....................................:
10-22-2010 15:25:48              Database                          PAGE:   1
Run No. 814882 HOPE Invoicing Extraction Process       ZHRHINV 8.6

                           * * * CONTROL REPORT * * *

  Parameter Description         Parameter Value(s)
  GSFC Password                 123456
  Federal School Code           001602
  GSFC Data File Name           INU111.txt
  Financial Aid Year Code       0809
  Academic Year for Reporting   2009
  Process Record Type           ALL
  Regent Term Code              200808
  Grant Header Record Indicator GI
  Address Selection Date        10-AUG-2008
  Selection Identifier
  Creator ID
  Application Code
  User ID
  Purge Indicator               N
  Purge Term
  Purge Count                   0
  Student Count                 14
  Record Count                  19

  Grand Total (T+F+B)           $8,869.30


  ZHRHINV 8.6 completed successfully
  182 lines written to /home/banjob/database/zhrhinv_814882.lis
Connected.
Connected.
```

Sample zhrhinv.lis

```
``````````````

10-22-2010 15:25:48   Database   PAGE: 1
Run No. 814882 HOPE Invoicing Extraction Process   ZHRHINV 8.6

                       * * * ERROR/WARNING REPORT * * *

Id   Name   Message

966966966 Baker, Alice   *Warning* no ZHRHACC record - assuming tier 1
966966966 Baker, Alice   ***ERROR** - no SPRADDR Address record
567567567 Brooks, Bonnie   *Warning* no SPBPERS Basic Person record
567567567 Brooks, Bonnie   ***ERROR** - no SPRADDR Address record
521521521 Sailor, Popeye   *Warning* no ZHRHACC record - assuming tier 1
855855855 Sims, Steven   *Warning* no ZHRHACC record - assuming tier 1
566566566 Sixes, Fitty   *Warning* no ZHRHACC record - assuming tier 1
891891891 Squimus, Remus   *Warning* no ZHRHACC record - assuming tier 1
133133133 Thompson, Bertha   *Warning* no ZHRHACC record - assuming tier 1
233233233 Toeup, Tony   *Warning* no ZHRHACC record - assuming tier 1
10-22-2010 15:25:48   Database   PAGE: 1
Run No. 814882 HOPE Invoicing Extraction Process   ZHRHINV 8.6

                       * * * ERROR/WARNING REPORT * * *

Error   Banner   Banner   Total   RPATRM
Code   ID   Tuition   Fees   Tuition   Total

100T 521521521   792   228   1020   99
100T 855855855   792   228   1020   99

Number of records written to error report: 2

ZHRHINV 8.6 completed successfully
```
```

Report Output Errors

You might see the following error:

Error Code	Description
100T	The total sum of tuition and fees does not equal the award amount found in RPAAWRD.

Record Layout for the Detail Record (INU###.txt)

Order	Data Type	Field Name	Description
1	A (6)	School Code	Six-digit federal school code.
2	A (2)	Campus Code	Two-digit number that represents the campus code. Leave blank or zero if there is no campus code.
3	A (2)	File Type Indicator	Two-character field that designates a Grant header record. Valid values GI and SI for Summer term only.
4	N (4)	Academic Year	Four-digit number that represents the last year in the academic year. The academic year 0304 should be entered as 2004.
5	N (9)	SSN	Nine-digit numeric social security number.
6	A (30)	First Name	Student's first name. Should be left justified.
7	A (1)	Middle Initial	Student's middle initial.
8	A (30)	Last Name	Student's last name. Should be left justified. This field should not contain any titles such as SR, JR, III, etc.
9	A (40)	Street Address	Student's permanent street address.
10	N (5)	ZIP Code	Student's permanent ZIP Code.
11	N (8)	Date of Birth	Student's date of birth in CCYYMMDD format. Should not include any dashes or slashes.
12	A (1)	Dependency Status	Valid Values: I – Independent D – Dependent
13	A (1)	Gender	Valid Values: M – Male F – Female
14	A (10)	PIDM	Student's ID generated by the school system.
15	A (10)	Student ID	School system's student ID number.

Order	Data Type	Field Name	Description
16	A (2)	Scholarship Type	Type of record, including following valid values: H1 – Degree seeking grant first tier (0-45 hrs) H2 – Degree seeking grant second tier (46-90 hrs) H3 – Degree seeking grant third tier (91-135 hrs) H4 – Degree seeking grant fourth tier (136-190+ hrs) S1 – Degree seeking grant first tier (0-45 hrs) S2 – Degree seeking grant second tier (46-90 hrs) S3 – Degree seeking grant third tier (91-135 hrs) S4 – Degree seeking grant fourth tier (136-190+ hrs) AC-Accel HE – HOPE GED HD – HOPE Diploma seeking T – GTEG LP – LEAP TR – GTEG Roster R – ROTC G – Governor's Scholarship B – BYRD CO- College Opportunity Grant
17	N (1)	Term	Term the invoice is being awarded: Summer (1), Fall (2), Winter (3), Spring (4).
18	N (5)	Hours	Number of hours student attempted for the term of the invoice.
19	N (11)	Tuition	Numeric amount representing the tuition award amount. Field should include cents.
20	N (11)	Fees	Numeric amount representing the fees award amount. Field should include cents.
21	N (11)	Books	Numeric amount representing the book award amount. Field should include cents.
22	A (1)	Selective Service	Valid values are: 1 = registered Not registered: 2 = Female. 3 = Active duty. 4 = Not 18. 5 = Born before 1960. 6 = Citizen of the Federated States of Micronesia, or the Marshall Islands, or the Trust Territory of the Pacific Islands. 7 = Not registered.
23	N (1)	Grade Level	Valid Values are: 1 – 1st year freshman 2 – 2nd year sophomore 3 – 3rd year junior 4 – 4th year senior 5 – 5th year other undergraduate
24	A (1)	Transaction Status	***Currently not used***

Order	Data Type	Field Name	Description
25	A (1)	Pell Eligibility	N – Student is not Pell eligible based on current FAFSA information in institution's Banner database. Y – Student is Pell eligible based on current FAFSA information in institution's Banner database.
26	A (3)	Program of Study Campus	The Program of Study campus the student ins enrolled in.
27	A (6)	Program of Study Degree	The Program of Study degree the student is enrolled in.
28	A (4)	Program of Study Major	The Program of Study major the student is enrolled in.
29	A (1)	Method of Course Delivery	Non-standard rates for tuition and fees.
30	A (10)	Guaranteed Tuition Plan	The Student Attribute associated with GTP
31	N (11)	Dual-enrollment excluded hours	Hours to be excluded in CAP hour calculation for HOPE Grant program

Return File Layout from GSFC (IND###MMDDYYYYHHMMSS.txt)

Positions	Data Type	Field Name	Description
25	N (10)	Awarded Amount	Award Amount (exclude credits school may have). **Note**: This field replaces the field that is sent to the GSFC in the ZHRHINV process.
26	A (1)	Pell Eligibility	Is the student Pell eligible Y (Yes) or N (No).
27	A (3)	Program of Study Campus	The program of study campus at which the student is enrolled (USG & DTAE schools only).
28	A (6)	Program of Study Degree	The program of study degree in which the student is enrolled (USG & DTAE schools only).
29	A (4)	Program of Study Major	The program of study major in which the student is enrolled (USG & DTAE schools only).
30	A (1)	Program of Study Method of Delivery	The program of study method of delivery the student is enrolled (USG & DTAE schools only - Non-standard rates for tuition and fees).

Positions	Data Type	Field Name	Description
31	A (2)	Denial Code	Invoice award indicator. Valid values are: 01 – Incomplete application 02 – Owes a refund 03 – School funds depleted 04 – Loan in default 05 – Max terms allowed 06 – Min award allowed 07 – Max award allowed 08 – GTEG residency question 09 – Invalid term 10 – No Selective Service 11 – Student has been paid 12 – No application of file 13 – Not Prev cert elig 14 – Student has been invoiced 15 – No high school GPA 17 – Hours do not equal 18 – No GED voucher 19 – Military scholarship 20 – Future term 21 – Hours are zero 22 – Past cutoff date 23 – Not eligible grant 24 – Already reconciled 25 – Invalid year 26 – Invalid Disbursement Indicator 27 – No budget record 28 – Missing school code 29 – System error 30 – Locked for check run 31 – Locked for loan CC – Cancelled OA – Original award NC – No change AU – Adjusted award up AD – Adjusted award down LC – Locked term UN – Undetermined

VIII. Loading the GSFC Return File

Introduction to Loading the Return File

GSFC provides fund/payment information for each student in a return file to the institution.

Load the GSFC return file (IND###MMDDYYYYHHMMSS) into Banner using the GSFC HOPE Invoicing Load Process (ZHRGHIL). Place the return file in the location specified on the Banner machine for processing.

The load process also produces an error report for review.

Note: If you created a GTVSDAX label for the ZHRHINV process, you do not need to create a new label for the ZHRGHIL process.

1. Place Return File

Place the GSFC Return File in the $DATA_HOME/finaid directory. This file is processed by the GSFC HOPE Invoicing Load Process (ZHRGHIL) from the above directory. The file will be named IND###MMDDYYYYHHMMSS. This file name may be changed by the user when it is moved to the $DATA_HOME/finaid directory.

Caution: The file will not be processed if you place it anywhere else.

2. Load Return File

Execute the GSFC HOPE Invoicing Load Process (ZHRGHIL) to load the return GSFC file information into Banner.

Following are the parameters for ZHRGHIL:

Parameters for ZHRGHIL

No.	Name	Req?	Description/Instructions
1	GSFC Password	Yes	Enter the nine-character password provided by the GSFC.
2	Federal School Code	Yes	Enter the institutional federal school code (FICE).
3	GSFC Data File Name	Yes	Enter the name of the return file from the GSFC.
4	Financial Aid Year Code	Yes	Enter the aid year to determine Budget and Needs Analysis.
5	Academic Year for Reporting	Yes	Enter the last year in the academic year. Example: 0506 = 2006
6	Term Code	Yes	Enter the term code to report. **Note:** The term entered must be the Regents Standard Code term.
7	Purge Term Indicator	No	Indicates if records are to be purged.
8	Purge Term Code	No	Enter the term code for the records to be purged. **Note:** The term entered must be the Regents Standard Code term.

3. Review zhrghil.log and zhrghil.lis files

After ZHRGHIL has completed successfully, review the .log and .lis files for any errors that may occur during the processing of the return file. If you find errors, you can submit a subsequent file to the GSFC after the errors have been corrected.

Sample Files

Sample zhrghil.log

```
Username: Connected.

Run Sequence Number.................................:

OIIT TMX - Before purge_ind if - purge_ind:  N, purge_term:  , purge_cnt:  0
09-01-2009                          OIIT                              PAGE:   1
Run No. 531138 HOPE Invoicing Load Process            ZHRGHIL 8.0

                          * * * CONTROL REPORT * * *

  Parameter Description             Parameter Value(s)
  GSFC Password                         12345
  Federal School Code                   001502
  GSFC Data File Name                   IND777.txt
  Financial Aid Year Code               0607
  Academic Year for Reporting           2007
  Regent Term Code                      200608
  Deny  Count                           0
  Purge Indicator                       N
  Purge Term
  Purge Count                           0
  Record Count - Records Read:          1
  Record Count - Unmatched IDs:         0
  Record Count - Varying Amounts:       2,273
  Record Count - Unmatched Grant Types: 61

  Grand Total                           $   300.00


  ZHRGHIL 8.0 completed successfully
  2,342 lines written to /home/banjob/zhrghil_531138.lis
Connected.
Connected.
```

Sample zhrghil.lis

```
09-01-2009                          OIIT                              PAGE:   0
Run No. 531138 HOPE Invoicing Load Process            ZHRGHIL 8.0

                    * * * ERROR/WARNING REPORT * * *

Error          GSFC       GSFC          GSFC        GSFC        GSFC        GSFC       Banner      Banner      Banner      Banner
Code     ID    Grant     Tuition        Fees        Books       Total       Code        Grant      Tuition       Fees       Books

102V  090113169  H2                                                0                     H2         469          85         150
102V  090121690  H2                                                0                     H2         737          85         150
102V  090148563  H1                                                0                     H1         802          85         150
102V  090148563  H1                                                0                     H1         802          85         150
102V  090131600  H1                                                0                     H1         802          85         150
102V  090131600  H1                                                0                     H1         802          85         150
102V  090156389  H1                                                0                     H1         802          85         150
102V  090156389  H1                                                0                     H1         802          85         150
102V  090147452  H1                                                0                     H1         802          85         150
102V  090147452  H1                                                0                     H1         802          85         150
```

Report Output Errors

You might receive any of the following errors:

Error Code	Description
101P	The value returned for pidm in the return file from the GSFC does not match a pidm value in the HOPE Invoice file.
102V	The values returned for tuition, fees, and books in the return file from the GSFC do not match the values in the HOPE Invoice file.
103G	The value returned for grant type in the return file from the GSFC does not match the grant type value in the HOPE Invoice file.
104D	The value returned when a denial code is returned by the GSFC.

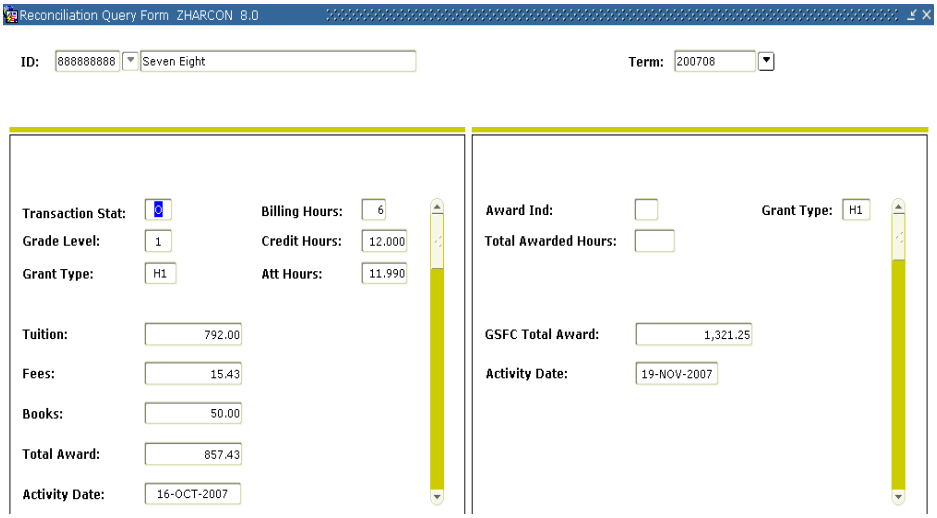
4. Review Student Records

Review student records in the Financial Aid Reconciliation Form (ZHARCON) by entering the student ID number and the term code in the key block of the form. The information extracted/submitted from Banner and the return file information from the GSFC are displayed on the screen so that you can review individual student records.

After you load the data into Banner, you see data about the student on the left side of ZHARCON, but you do not have data from the GSFC until their file is returned to you and processed.

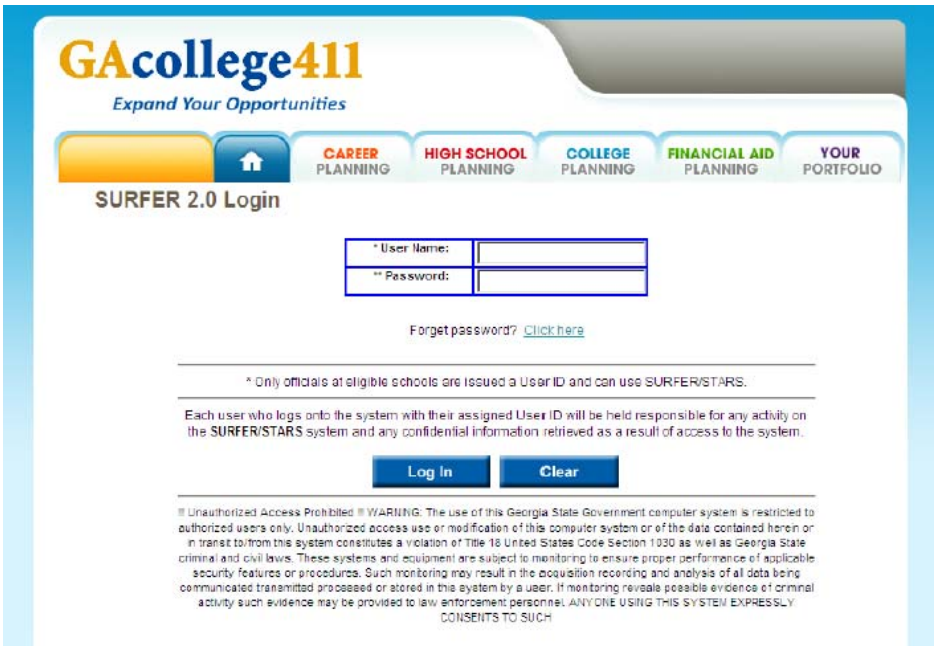
You can receive data from the GSFC that might not also appear in the data extracted from Banner.

There may also be multiple entries in this form for a student record. Scroll bars allow for viewing the records for the student queried.



5. Make Corrections

Make necessary corrections through the View/Edit Rejected Invoices Tab on SURFER. Corrections made through SURFER are not included in Banner.



6. Submit Subsequent Extraction File

Follow the same procedures to submit subsequent invoices to the GSFC at any time during a term. Include corrections for omissions and errors from previous invoices when you submit a subsequent invoice. The subsequent invoice includes all HOPE awards for term.

IX. Verify Learning Support

Introduction

Produce a list of the students with Learning Support hours.

The Learning Support Hours Report (ZORLSUP) provides a list of students from a given ID, population selection, or all students with a Financial Aid Applicant Status record.

Learning Support Hours Report

ZORLSUP produces report output of students with a ROASTAT record for the specified financial aid year that meet one of the following requirements.

- Attempted over 45 learning support quarter hours.
- Attempted over 30 learning support semester hours.
- Attempted a combination of learning support quarter and semester hours equivalent to over 30 semester hours.

Parameters for ZORLSUP

No	Name	Required?	Description/Instructions	Default Values
01	Financial Aid Year	Yes	Enter the financial aid year of the students to be reported.	
02	Term	Yes	Enter the term code for the term to be processed.	Y
03	Student ID	No	Enter the student ID of the student for whom learning support hours are to be processed. Note: Do not use this parameter if you are using a population selection.	
04	Application Code	No	Enter the code that identifies the general area for which the selection identifier is defined.	
05	Selection Identifier	No	Enter the code that specifies the desired sub-population. Note: This parameter is required if Application Code is used.	
06	Creator ID	No	Enter the user ID of the person who created the sub-population rules. Note: This parameter is required if Application Code is used.	
07	User ID	No	Enter the user ID of the sub-population. Note: This parameter is required if Application Code is used.	

Sample Files

Samples of the zorlsup.log and zorlsup.lis follow.

```
Username: Connected.

Run Sequence Number:zorlsup completed successfully
5,330 lines written to /home/banjob/zorlsup_531463.lis


                                                                    Page:  1

200608                    Learning Support Semester Hours Report                    ZORLSUP - 8.0

                                                          TERM              TOTAL
     ID         Name                                   LS Hrs   LS Hrs   Oth Hrs   LS Hrs
 001006607  Jensen, Tracy                                3.00     9.00     53.00    85.00
 090137372  Jensen, Uzoma                                8.00     3.00     36.00     4.00
 090131332  Jensen, Waliyu                                .00    15.00     32.00    19.00
 090107776  Jensen, Youbertha                            4.00     6.00     40.00    19.00


                                                                Contd...Page:  2

200608                    Learning Support Semester Hours Report                    ZORLSUP - 8.0

                                  CONTROL SUMMARY
                                  ---------------
                        Program Name                  :ZORLSUP ZORLSUP
                        One up Number                 :531463
                        Aid Year Code                 :0607
                        Term Code                     :200608
                        Student ID                    :
                        Selection ID                  :
                        Application Code              :
                        Creator ID                    :
                        User ID                       :
                        Number of lines per page      :60
                        Log file name                 :

                              ****** END OF REPORT ******
```

X. Reconciliation

Introduction to Reconciliation

Load and produce a report of students for the purpose of reconciliation between the GSFC and Banner.

The Financial Aid Reconciliation Report (ZHRFARR) provides the user the ability to load the GSFC Reconciliation File into Banner. Report output is generated comparing the data between the GSFC and Banner.

The process will generate errors for those students who have varying amounts, no SSN/name match, and/or varying grant types.

1. GSFC Reconciliation File

Request the GSFC Reconciliation File through SURFER.

The file is placed in the $DATA_HOME/finaid directory for processing.

Note: The process will not execute successfully unless the reconciliation file is placed in the above directory.

Record Layout for the Detail Record

Order	Data Type	Field Name	Description
1	N	SSN	Nine-digit numeric social security number. Must not contain any slashes or dashes
2	A	First Name	Student's first name. Should be left justified.
3	A	Middle Initial	Student's middle initial.
4	A	Last Name	Student's last name. Should be left justified. This field should not contain any titles.
5	A	Street Address	Student's permanent street address.
6	A	City	Student's city.
7	A	State	Student's state.

Order	Data Type	Field Name	Description
8	N	ZIP Code	Student's permanent ZIP Code.
9	N	Date of Birth	Student's date of birth. Must be formatted CCYYMMDD and should not contain any dashes or slashes.
10	A	Gender	Student's gender. Valid values are (M) male and (F) female.
11	N	Fiscal Year	Award fiscal year.
12	A	Scholarship Type	Type of record, including following valid values: H1 – Degree seeking grant first tier (0-45 hrs) H2 – Degree seeking grant second tier (46-90 hrs) H3 – Degree seeking grant third tier (91-135 hrs) H4 – Degree seeking grant fourth tier (136-190+ hrs) S1 – Degree seeking grant first tier (0-45 hrs) S2 – Degree seeking grant second tier (46-90 hrs) S3 – Degree seeking grant third tier (91-135 hrs) S4 – Degree seeking grant fourth tier (136-190+ hrs) HE – HOPE GED HD – HOPE Diploma seeking AC= Accel Program Public AC= Accel Program Private T – GTEG LP – LEAP TR – GTEG Roster R – ROTC B= BYRD G= Governor's GH= Georgia Hero PS= Public Safety BC= Charles McDaniel
13	N	Term	Term the invoiced is being awarded for: Summer (1), Fall (2), Winter (3), and Spring (4).
14	N	Tuition Amount	Numeric amount representing the tuition award amount. This field should include cents with no decimal.
15	N	Fees Amount	Numeric amount representing the fees award amount. This field should include cents with no decimal.
16	N	Books Amount	Numeric amount representing the books award amount. This field should include cents with no decimal.
17	N	Hours	Number of hours the student attempted for the term of the invoice.
18	N	Date Received	Date invoice was received. This field must use the CCYYMMDD format and should not contain dashes or slashes.
19	A	FAFSA Record	Indicates whether student has a FAFSA record. Valid values are **Y** (FAFSA record exists) or **N** (FAFSA record does not exist).
20	A	GPA	Indicates whether student has a high school record and a GPA value. Valid values are **Y** (GPA exists) or **N** (GPA does not exist).
21	A	Final GPA	Indicates whether student has a high school record and a final GPA value. Valid values are **Y** (Final GPA exists) or **N** (Final GPA does not exist).

Order	Data Type	Field Name	Description
22	A	Default on a Loan	Indicates whether student is in default on a loan. Valid values are **Y** (In default) or **N** (Not in default).
23	A	Owe a Refund	Indicates whether student owes a refund. Valid values are **Y** (Owes a refund) or **N** (Does not owe a refund).
24	N	Selective Service	Valid Values are: 1 – Registered Not Registered: 2 – Female 3 – Active Duty 4 – Not 18 5 – Born before 1960 6 – Citizen of the Federated States of Micronesia, or Marshall Islands, or the Trust Territory of the Pacific Islands 7 – Not Registered
25	A	Alien Number	Indicates whether student has an alien number. Valid values are: **A** (student has an alien number) or **Blank.**
26	N	HOPE Grant Semester Hours	Quantity of hours student has been paid for HOPE Grant in Semesters.
27	N	HOPE Grant Quarter Hours	Quantity of hours student has been paid for the HOPE Grant in quarters.
28	N	HOPE Scholarship Semester Hours	Quantity of hours student has been paid for HOPE Scholarship in Semesters.
29	N	HOPE Scholarship Quarter Hours	Quantity of hours student has been paid for the HOPE Scholarship in quarters.
30	N	Accel Program Semester Hours	Quantity of hours student has been paid for Accel Program in Semesters.
31	N	Accel Program Quarter Hours	Quantity of hours student has been paid for the Accel Program in quarters.
32	N	Total Semester Hours	Total of hours student has been paid in semesters.
33	N	Total Quarter Hours	Total of hours student has been paid in quarters.
34	A	HOPE Grant Overflow Flag	Indicates whether student can go above the HOPE Grant maximum CAP hours. Valid values are **Y** (overflow allowed) or **N** (overflow not allowed).
35	A	HOPE Scholarship Overflow Flag	Indicates whether student can go above the HOPE Scholarship maximum CAP hours. Valid values are **Y** (overflow allowed) or **N** (overflow not allowed).

2. Load/Produce Report Output

Execute the ZHRFARR process from Job Submission (GJAPCTL).

The process will load the records into a temporary table and produce report output for the use of reconciling.

Parameters for ZHRFARR

No	Name	Required?	Description/Instructions	Default Values
01	Financial Aid Year	Yes	Enter the financial aid year of the students to be reported.	
02	GSFC File Name	Yes	Enter the GSFC reconciliation file name.	
03	Term	Yes	Enter the term code you are processing.	
04	Academic Year	No	Enter the academic year.	

3. Compare Records

The report output files provide both the GSFC and Banner grant type and totals.

4. Verify Errors

Verify that the errors reported on the report output are accurate.

Errors will be received when the following conditions are met:

- No SSN/Name match found.
- Grant type does not match.
- Total award amounts do not equal.

Sample Files

Samples of the zhrfarr.log and zhrfarr.lis follow.

```
Username: Connected.

Run Sequence Number.....................................:
02-08-2010 15:51:44              Database                                PAGE:   1
Run No. 801093         Financial Aid Reconciliation Process             ZHRFARR 8.1
                                  Term Code:  200608

Connected.
Connected.
```

```
02-08-2010 15:51:44              Database                                PAGE:   0                                                  PAGE 1
Run No. 801093         Financial Aid Reconciliation Process             ZHRFARR 8.1                                                ZORHTGA
                                  Term Code:  200608

                                 GSFC      GSFC        GSFC Banner    Banner      Banner
ID          Name                 Type     T&Fees       Books Type     T&Fees       Books   ATTEMPT GPA HRS QUAL PTS     GPA

899234321   BELLLY, JELLY         H1     1359.00       99.00  H1     1359.00       99.00      6.00    6.00    18.00    3.00

Grand Totals:                            1359.00       99.00         1359.00       99.00                                                PAGE 2
                                                                                                                                  ZORHTGA

Number of unmatched totals:        0


                      * * * ERROR/WARNING REPORT * * *

ID          Name                   Message

222222222   BEACH, MARILYN         *Warning* No SSN/Name match found.
222222222   JOE, JITTERY           *Warning* No SSN/Name match found.
111111111   MAMA, HOOCHEE          *Warning* No SSN/Name match found.

Number of unmatched SSN/Names:     3


                      * * * ERROR/WARNING REPORT * * *

ID          Name                   Message

222222222   BEACH, MARILYN         *Warning* Grant Type does not match.
222222222   JOE, JITTERY           *Warning* Grant Type does not match.
111111111   MAMA, HOOCHEE          *Warning* Grant Type does not match.

Number of unmatched grant types:   3


                      * * * ERROR/WARNING REPORT * * *
                      *Warning* Amounts not equal.

                                 GSFC      GSFC        GSFC Banner    Banner      Banner
ID          Name                 Type     T&Fees       Books Type     T&Fees       Books

222222222   BEACH, MARILYN        H3      784.00      150.00            0.00        0.00
888888888   EIGHT, SEVEN          H3     1083.00      150.00  H3      818.88      150.00
222222222   JOE, JITTERY          H1      465.00      150.00            0.00        0.00
111111111   MAMA, HOOCHEE         H2      465.00      150.00            0.00        0.00
999999999   PEA, SWEET            H3     1420.00      150.00  H3        0.00      150.00
777777777   TESTER, SEVEN         H4      784.00      150.00  H4     1347.25      100.00

Grand Totals:                            5001.00      900.00         2166.13      400.00


Number of unmatched totals:        6

                          * * * CONTROL REPORT * * *

  Parameter Description             Parameter Value(s)
  GSFC Data File Name                   ind062907recon.txt
  Financial Aid Year Code               0607
  Academic Year for Reporting           2007
  Term  Code                            200608
  Record Count - Records Read:          7
  Record Count - Unmatched IDs:         3
  Record Count - Varying Amounts:       6
  Record Count - Unmatched Grant Types: 3


  ZHRFARR 8.1 completed successfully
  34 lines written to /home/banjob/Database/zhrfarr_801093.lis
  6 at the end
```

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 7.0, June 30, 2006	NA	NA	Original
Georgia Enhancements 7.2, June 30, 2006	ZORHGPA, ZHRHINV, ZHRPDHR	15	Addition of information about External Code File
Georgia Enhancements 7.4, July 31, 3006	ZHRHINV	8 14-18	Modifications to the process flow. Modifications to the steps to execute the process.
Georgia Enhancements 7.9, September 15, 2007	ZHRFARR, ZHAHOPE, ZHRPDHR	Multiple	The process is decommissioned and incorporated into the GSFAPPS user documentation. Addition of appendices A and B.
Georgia Enhancements 7.17, December 19, 2009	ZHRHINV	46-49	Added BYRD and Governor's to invoicing process. Changed process to indicate excluded Dual Enrolled hours in INU file for HOPE Grant recipients only.
Georgia Enhancements 7.19, March 31, 2009	ZHAHOPE ZORHGPA	14, 26 29-32	Added 'HS' indicator to ZHAHOPE. Changed ZORHGPA process to calculate college level class hours (attempted hours only) for students who have taken college level classes (for example AP, IB courses) prior to graduation from high school and did not qualify for HOPE scholarship, due to Grade Point Average. Impacts ZORHHSL: parameter 12 must be set to "Inactivate" so that 'NEHS' Status Code will appear on ZHAHOPE.
Georgia Enhancements 7.20.1, July 31, 2009		30, 33	A "High School Waiver" indicator (WVR) has been added to ZHAHOPE. This indicator is to be checked, along with the "High School Indicator" (HS), (only for students who took college level classes during a high school term that began prior to July 1, 2008), and graduated high school as non-HOPE scholars. If both indicators are checked HS coursework that began prior to July 1, 2008 will be counted as attempted hours by ZORHGPA. The GSFC will notify campuses of students who applied for and receive the waiver.

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 7.21, September 30, 2009		49	Updated screenshots for ZHRHINV 8.1. When a student has a GTP Attribute assigned on the Additional Student Information form (SGASADD)that has the same 'From Term' as the 'To Term' from the previous semester, the HOPE Invoicing Extract process will place the correct GTP attribute into the INU###.txt file.
Georgia Enhancements 8.1, March 31, 2010	All	Multiple	Updated screenshots, Process Flow and v8.0 functionality
Georgia Enhancements 8.4, September 17, 2010	ZORHGPA & ZHRHINV	Multiple	Updated screen shots and added Section on Dual Enrolled Students (p. 47)
Georgia Enhancements 8.6, December 17, 2010	ZHRHINV	Multiple	Updated SOAXREF section for College Opportunity Grant setup. Also updated ZHRHINV section with .lis & .log. INU###.txt file layout updated with COG Scholarship Type.

Appendix B: Process No Longer Supported

Appendix B includes the Paid Hours Load process (ZHRPDHR), for which ITS has discontinued support. ITS redeveloped the GSFAPPS Extraction process (ZHRAPPS) and the GSFAPPS Return File Load process (ZOPAPPL) to retrieve required information. Both the HOPE Eligibility form (ZHAHOPE) and the GSFAPPS Application Information form (ZHAAPPS) have been modified to include the changes.

Summary Data by Account Number

Paid Hours Load

Paid hours information was tracked and stored by the GSFC and was retrieved by the campuses with the Paid Hours Load (ZHRPDHR) process.

The ZHRPDHR process provided users with the ability to receive paid hours information from the GSFC and load the information back into the institution's Banner instance on the third page of the ZHAHOPE form.

This process generated a .log, .lis file, and an error report for users to identify students that did not have a ZHAHOPE record in the Banner system.

The Paid Hours Load File

Campuses can request a file directly from the GSFC via SURFER in order to get the paid hours information needed to run this process. However, it is strongly recommended that campuses create a pop selection (pop sel) to only retrieve information from your institution's students you want to process. The pop sel is created in Banner and placed on the FTU server. The file is then submitted to the GSFC via the eHOPE Data Management System. The return file from the GSFC, which has the naming convention of HAD###.txt, will have the paid hours information in it.

Note: Please see the E-HOPE Data Management System user document for detailed instructions on how to use E-HOPE.

Record Layout for the Detail Record

Order	Length	Data Type	Field	Description
1	6	A	School Code	School Code.
2	2	A	Campus Code	Campus Code.
3	2	A	Record type	Type of record. Valid values are: **HA = e-HOPE application** **TE = e-TEG application**
4	9	N	SSN	Nine-digit numeric social security number. Does not contain any slashes or dashes.
5	20	A	First Name	Student's first name.
6	1	A	Middle Initial	Student's middle name.
7	20	A	Last Name	Student's last name.
8	8	N	Date of Birth	Student's date of birth. Format **CCYYMMDD**.

Order	Length	Data Type	Field	Description
9	8	N	Date Received	Date e-HOPE was received.
10	1	A	Preliminary HOPE Scholar	Preliminary HOPE Scholar indicator. **Y** or **N**.
11	1	A	Final HOPE Scholar	Final HOPE Scholar Indicator. **Y** or **N**.
12	1	A	Date of Birth Match	Does the e-HOPE date of birth match the school's date of birth? **Y** or **N**. Blank = no e-HOPE.
13	1	A	Default/Owe a refund	Student in default or owe refund indicator. **Y** or **N**.
14	1	N	Selective Service Status	Student selective service status code.
15	1	A	Alien Status	Student alien indicator. **A** = Alien. Blank = U.S. citizen.
16	4	N	Grant Semester Hours	Total number of HOPE Grant (HD) semester cap hours.
17	4	N	Grant Quarter Hours.	Total number of HOPE Grant (HD) quarter cap hours.
18	4	N	Scholarship Semester Hours.	Total number of HOPE Scholarship (H1-H4, S1-S4) semester cap hours.
19	4	N	Scholarship Quarter Hours.	Total number of HOPE Scholarship (H1-H4, S1-S4) quarter cap hours.
20	4	N	Accel Semester Hours.	Total number of HOPE Accel (AC) semester cap hours.
21	4	N	Accel Quarter Hours.	Total number of HOPE Accel (AC) quarter cap hours.
22	4	N	Total Semester Cap Hours	Total number of Semester cap hours.
23	4	N	Total Quarter Hours	Total number of Quarter cap hours.
24	1	A	Eligible for Grant Overflow Hours	Student eligible for grant overflow hours indicator. **Y** or **N**
25	1	A	Eligible for Scholarship Overflow Hours	Student eligible for scholarship overflow hours indicator. **Y** or **N**.

1. Load/Produce Report Output

Execute the ZHRPDHR process from Job Submission (GJAPCTL).

The process will load the records into a temporary table and produce report output for the use retrieving paid hours information.

Parameters for ZHRPDHR

No	Name	Required?	Description/Instructions	Default Values
01	Run Mode	Yes	Enter **A** if you would like to run the process in Audit mode or **U** for update mode. Update mode will update the information that is displayed on the third page of ZHAHOPE.	BA
02	Term	Yes	Enter the term code you are processing.	
03	File Name	Yes	Enter the GSFC Data file name you are processing. The file name is up to 30 characters in length.	

2. Load the records into the ZHAHOPE form

The report output provides the paid hours information that the GSFC has in their system for the student. It will list the grant type and the amounts of hours paid to the student thus far. This information will be loaded into the third page of the ZHAHOPE form for review.

3. Verify Errors

Verify that the errors reported on the report output are accurate.

Errors will be received when the following conditions are met:

- No HAD###.txt file exists.
- No ZHAHOPE record exists.
- No match found for SSN and name.

Sample Files

Samples of the zhrpdhr.log and zhrpdhr.lis follow.

log file sample:

```
Username: Connected.

Run Sequence Number.....................................:
09-20-2004 09:11:00                    OIIT                                PAGE: 1

Run No. XXXXX                  Paid Hours Load Process        ZHRPDHR

                            * * * CONTROL REPORT * * *

  Parameter Description          Parameter Value(s)

  Audit/Update                   A
  Term Code                      200408
  File Name                      HAD###.txt


  Error Count                    0
  Student Count                  2
  Record Count                   2



  ZHRPDHR        completed successfully
  16 lines written to /home/banjob/zhrpdhr_XXXXXX.lis
```

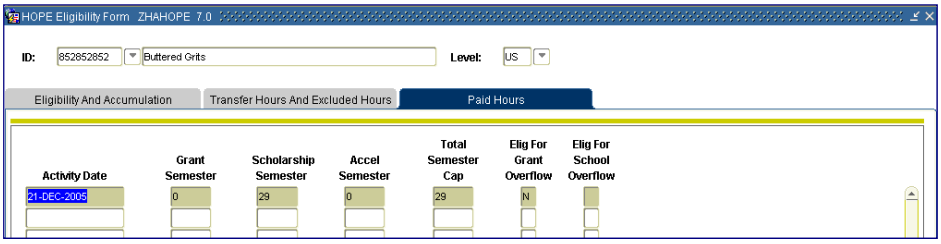
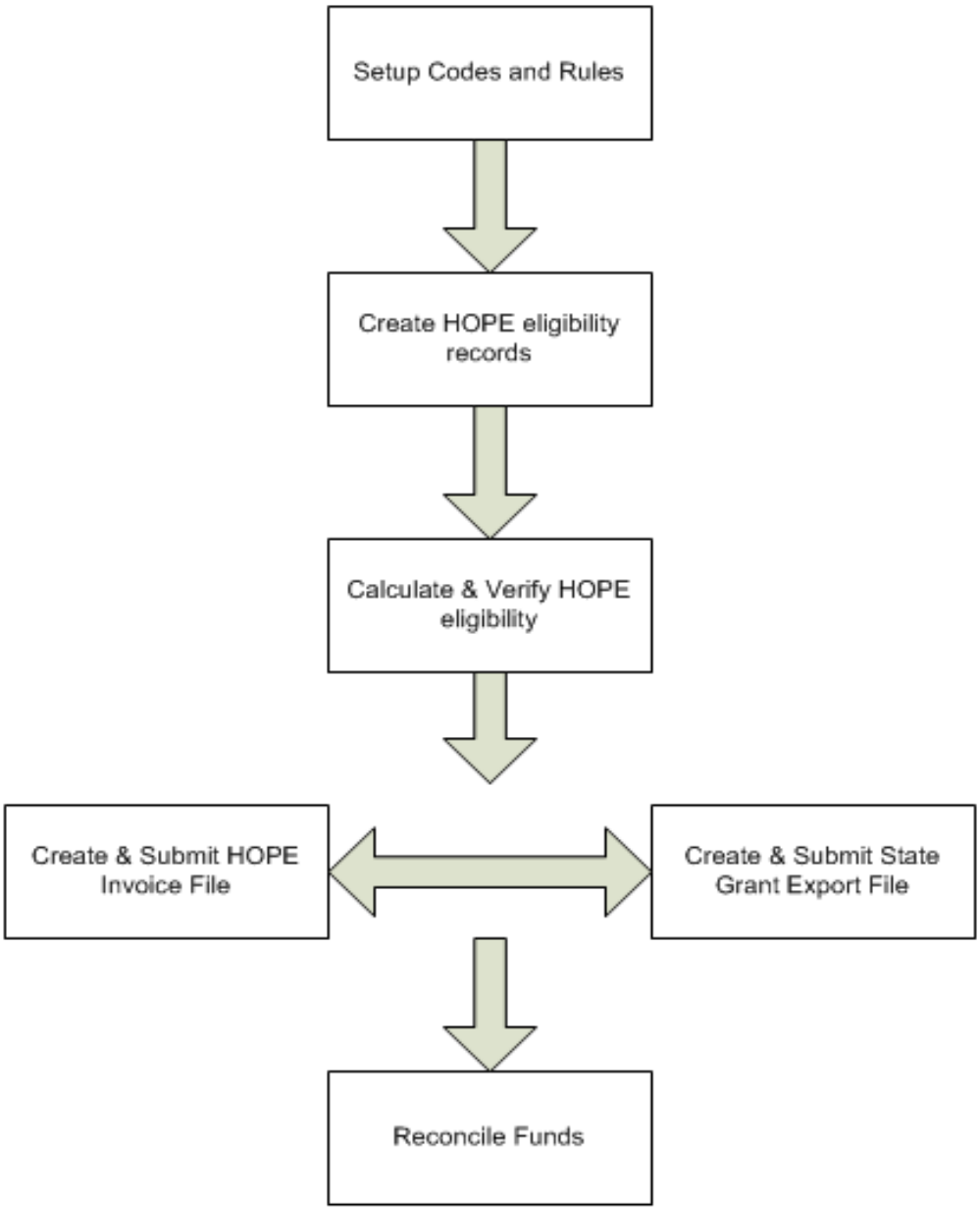
.lis file sample:

```
09-20-2004 09:11:00                    OIIT                                PAGE:   1
Run No. XXXXX                  Paid Hours Load Process        ZHRPDHR

                        * * * ERROR/WARNING REPORT * * *

Id        Name                      Message

@00017139 Bilack, Frank             *Warning* no ZHAHOPE record
@00017138 Davis, Paige              *Warning* no ZHAHOPE record

Number of no ZHAHOPE records written to report:  2
```

```
09-20-2004 09:11:00                    OIIT                                PAGE:   2
Run No. XXXXX                  Paid Hours Load Process        ZHRPDHR

                        * * * ERROR/WARNING REPORT * * *

Id        Name                      Message

@00017137 Treadway, Ty              *Warning* no SSN/Name match found.
@00017136 Wynn, Amy                 *Warning* no SSN/Name match found.

Number of no SSN/Name matches found written to report:  2
```

ZHAHOPE appearance sample:

40B



Appendix C: Process Flow