



Banner Financial Aid 2014-2015 New Aid Year Checklist

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Introduction

The intent of this document is to ensure that you have set up the required tables for new aid year processing.



Note: You can also use this document to assist in a new implementation of Banner Financial Aid.

This checklist begins with a description of the Financial Aid New Year Roll process (ROPROLL). The ROPROLL process helps you to set up your Financial Aid system for the new aid year by rolling selected rules from one aid year to the next.

Following the description of the ROPROLL process, the checklist is organized by Financial Aid module. The order in which you set up each module is not important. This document ends with a listing of system validation forms and system tables required for Financial Aid processing.

The following special characters are used throughout the checklist to indicate if a form is required and why it is.

- * An asterisk beside the form name indicates that the form is an optional system form.
- ** A double asterisk distinguishes those forms within a specified module that are required if Banner Human Resources or Banner Finance is installed.
- + A plus sign denotes those forms within a specified module that are required if you implement the specific function (for example, automatic packaging).

New Year Start-Up Checklist

Financial Aid New Year Roll Process (ROPROLL)

The ROPROLL process rolls over (copies) selected aid year-specific information from one aid year to the next. Through the process parameters, you have the option to select which rules will be rolled to the new aid year. Parameters 3 through 11 default to Y and Parameters 19 through 21 default to N. If you do not wish to use a certain parameter, you will need to change the parameter value to N. You can determine if the roll was successful by printing or reviewing online the ROPROLL output file created by this process.



Warning! *If you manually enter rules for a module on the RORRULE, RORWEBQ, RORWTAB, RORWTXT, RPRALGR, RBRABRC, or RORALGO forms before you run ROPROLL, the rules that you have entered manually will not be overwritten. ROPROLL will only roll rules that do not yet exist for the new aid year.*

Example: You have entered a tracking rule for a group, INDVER, on RORRULE for the 2014-2015 aid year, but have not entered rules for other tracking groups. When you run ROPROLL for 2014-2015, the process will perform the Tracking Rules Roll step, if you select it, but it will not update the rules for the INDVER tracking group.

Use the following checklist to assist you in running the ROPROLL process.



Note: The ROAINST value for **Banner FM Need Calculation Installed** or **IM/EFM Need Calculation Installed** will be updated automatically when the applicable code for the Need calculation processes are installed (Winter Regulatory update).

_____ Step 1: **Set up Institutional Options** (ROAINST/ROAUSIO or Parameter 11) -- Set up data on ROAINST and ROAUSIO for the new aid year. You can do this manually on ROAINST and ROAUSIO before you run ROPROLL, or you can use Parameter 11 to perform this step automatically when you run ROPROLL.

Data will only be rolled if it does not already exist in the new aid year.

Financial Aid Options (Parameter 11) -- Perform roll of Financial Aid Options data. This parameter rolls the aid year-specific Financial Aid Options data for the current aid year to the new aid year. If you select to use this option, values for parameters 12 through 18 must be entered.

Tables which are rolled include: ROBINST and RORINID.

Review the aid year-specific forms outlined in the Financial Aid Options Module section to assure that the aid year-required changes are made.

_____ Step 2: **Parameters for Financial Aid Options Roll** (Parameters 12-18) -- Enter values for Parameters 12 through 18 if you have selected to use Parameter 11 to roll the Financial Aid Options data.

- Parameter 12 -- Active Aid Year
Indicate if this is an active aid year or not. Values are [A]ctive or [I]nactive.
- Parameter 13 -- Pivot Date
Enter the pivot date (DD-MON-YYYY).
- Parameter 14 -- Aid Year Description
Enter a description to identify the aid year (up to 30 characters).
- Parameter 15 -- Aid Year Start Date
Enter the full date the aid year begins (DD-MON-YYYY).
- Parameter 16 -- Aid Year Start Year
Enter the year the aid year begins (YYYY).
- Parameter 17 -- Aid Year End Date
Enter the full date the aid year ends (DD-MON-YYYY).
- Parameter 18 -- Aid Year End Year
Enter the year the aid year ends (YYYY).

_____ Step 3: **From and To Aid Year** (Parameter 01 and Parameter 02) -- Select the Aid Year to roll. Indicate in Parameter 01 the current aid year from which you want to roll the financial aid data. Indicate in Parameter 02 the new aid year into which you want to roll the financial aid data.

_____ Step 4: **Group Selection Rules Roll (Parameter 03)** -- Perform Roll of Group Rules. This parameter rolls Group Assignment Rules, Fund Awarding and Disbursement Rules, and Group Packaging Awarding Rules found in the current aid year to the new aid year. Review the aid year-specific forms outlined in each module to assure that the aid year-required changes are made.

Tables which are rolled include RORGDAT, RORCMPL, and RORGSQL. (Records with inactivate rules on RORGDAT will not be rolled.)

Both simple and expert (compiled) rules are being rolled. It is unnecessary to compile the rolled rules for use in processing.

Review the sections of this document devoted to the modules for the RORRULE form to assure that data within the rules is valid for the new aid year.

_____ Step 5: **Fund Aid Year-Specific Roll (Parameter 04)** - Perform roll of fund data. This parameter rolls the aid year-specific Funds Management Rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Funds Management module to assure that the aid year-required changes are made.

Tables which are rolled include: RFRASPC, RFRCOMM, RFRBCMP, RFRDETC, RFRTREQ, RFRMMSG, RPBLOPT, ROENRR. (Records in RFRTREQ and RPBLOPT with an inactive **Tracking Requirement Code** on RTVTREQ will have the **Tracking Requirement Code** set to NULL.)

Review the Funds Management Section of this document for the specified forms to ensure that data within the rules is valid for the new aid year.

_____ Step 6: **Budgeting Rules Roll (Parameter 05)** - Perform roll of aid year budget data. This parameter rolls selected aid year-specific Budgeting Rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Aid Year Budgeting Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RBRCOMP and RBRGMSG. (Records with inactive Budget Group Codes on RTVTGRP will not be rolled.)

Review the Budgeting Module of this document for the forms RBRCOMP and RORMMSG to assure that data within the rules is valid for the new aid year.

Step 7: **Tracking Rules Roll (Parameter 06)** - Perform roll of tracking data. This parameter rolls selected aid year-specific Tracking Rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Tracking Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RRRGREQ and RRRTMSG. (Records with inactive Tracking Group Codes or inactive Tracking Requirement Codes on RTVTGRP will not be rolled.)

Review the Tracking Module section of this document for the *forms* RRRGREQ and RORMESG to assure that data within the rules is valid for the new aid year.

Step 8: **Packaging Rules Roll (Parameter 07)** - Perform roll of packaging data. This parameter rolls selected aid year-specific Packaging Rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Packaging Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RORAUDT, RPBOPTS, RPRGGAP, RPRGSHP, RPRGEQY, RPRDEFG, RPRDEFE, RPRDEFS, RPRFSRC, RPRFCAT, RPRGFND, RPRCLSS, RPRDEGR, RPRMAJR, and RPRALGR. (Records on RPRALGR, RPRDEFE, RPRDEFG, RPRDEFS, RPRGEQY, RPRGGAP, RPRGSHP, and RPRGFND with inactive Algorithmic Packaging Group Codes on RTVALGR will not be rolled.)

Review the Packaging Module section of this document for the *forms* RPRAUDT, RPROPTS, RPRDEFR, RPRPCKR, RPRGFND, RPRCLSS, RPRDEGR, RPRMAJR, RPRFSRC, RPRFCAT, and RPRALGR to assure that data within the rules is valid for the new aid year.

Step 9: **Common Functions Rules Roll (Parameter 08)** - Perform roll of common data. This parameter rolls selected aid year-specific Common Functions rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Common Functions Module section to assure that the aid year required changes are made.

Tables which are rolled include: RORUSER, RORPOST, RORALGO, RCRINFR, RCRINFC, RORCAMP, RORCLVE, RORCODI, RTVINTL, RORWEBQ, RORWBQA, RORWSQL, RORWTAB, RORWTXT, RORWEBR, RORWEBA, RORACYR, ROBAPRD, and RORALGO. (Records in RORCAMP with an inactive Pell Fund Code on RFRBASE will have the Pell Fund Code set to NULL.)

Review the Common Functions Module section of this document for the *forms* RORUSER, RORPOST, RORALGO, RCRDTSR, RORCODI, ROAUSIO, ROAINST, RORPRDS, RORACYR, RORWEBQ, RORWBQA, RORWSQL, RORWTAB and RORWTXT to ensure that data within the rules is valid for the new aid year.

_____ Step 10: **Student Employment Rules Roll (Parameter 09)** - Perform roll of employment data. This parameter rolls selected aid year-specific Student Employment rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Student Employment Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RJRPLRL.

Review the Student Employment Module section of this document for the *form* RJRPLRL to assure that data within the rules is valid for the new aid year.

_____ Step 11: **Athletic Data Roll (Parameter 10)** - Perform roll of athletic data. This parameter rolls selected aid year-specific athletic data found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Athletics Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RARPAGD and RARPAGS.

Review the Athletic Module section of this document for the RAAPAGD form to assure the data within the rules is valid for the new aid year.

_____ Step 12: **Period Budget Rules Data Roll (Parameter 19)** - Perform roll of period budget rules data. This parameter rolls selected aid year-specific Period Budget rules found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Period Budget Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RBRABRC, RBRBCAT, RBRPBCP, RBRPBGP, RBRPBTP.

_____ Step 13: **Period Budget Detail Data Roll (Parameter 20)** - Perform roll of period budget detail data. This parameter rolls selected aid year-specific Period Budget detail data found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Period Budget Module section to assure that the aid year-required changes are made.

Tables which are rolled include: RBRPGPT, RBRPELL, RBRPBDR, RBRPMSG, RFRPCMP.

_____ Step 14: **Algorithmic Support Data Roll (Parameter 21)** - Perform roll of algorithmic support data. This parameter rolls selected aid year-specific algorithmic support data found in the current aid year to the new aid year. If this step is selected, review the aid year-specific forms outlined in the Algorithmic Support Module section to assure that the aid year-required changes are made.

Table which is include: RORALGS.

Common Functions Module (*RESCOMN)

Review the following non-aid-year-specific forms within the Common Functions Module to assure that the codes meet the requirements for the new aid year.

- RTVAPRD • RTVHOLD • RTVMESG • RTVSAPR • ROALOGC
- RORWVAR • RORNYVD • RTVWEBQ • RTVWTXT • RTVELTM
- ROELTR • ROELTF • RTVWVAR • RORRPCX • RORTADM
- RORTESC • RTVENRR • ROAINST
(this form is
aid year
specific) • RTVALGO

If you ran the ROPROLL process to roll the Common Functions information or the Group Selection information, review the forms that follow to assure that new aid year-required changes are made.

- RORUSER • RORPOST • RORCODI • ROAUSIO • RCRDTSR
- RORWTXT • RORWBQA • RORACYR • ROENRR • RORALGO
- ROBAPRD

If Group Selection Information was rolled, review all applicable simple and expert rules on the RORRULE form.

Additionally, review ROAINST to determine if changes need to be made to exclude course levels by Student Level.

Use this checklist to assist you with your setup of the Common Functions Module.

Common Functions Module

Aid Year-Specific Forms

_____RORPRDS

Create period definitions for use in the new aid year.

Prerequisites Comments

STVTERM

Terms must be set up on STVTERM to be used in period definitions for the new aid year.

**Common
Functions Module**

Aid Year-Specific Forms (continued)

| | |
|--|---|
| <p>_____ROAINST/ _____ROAUSIO</p> | <p>Create new aid year definition and aid year-specific institutional options.</p> <p>Although "Current Term Code" on the Options Tab of ROAINST is not a required column, it must be populated if you are using the RCPCTxx or RCBTPxx processes.</p> |
| <p>RTVTREQ RTVTRST RTVAPRD RTVSAPR RTVTGRP RTVBGRP RTVPGRP STVLEVL</p> | <p>Create a new aid year before you enter the system rules forms.</p> <p>If you do not use the standard Banner aid year format (e.g., 1415), you must customize the system-required tables to reference your aid year definition (refer to Schedule B).</p> |
| <p>Prerequisites Comments</p> | |
| <p>_____RORPRDS</p> | <p>Ensure periods are setup to use on the Options Tab on ROAINST for "Current Period" and on the Credit Hours Tab.</p> |
| <p>_____RORDATA</p> | <p>Review the indicators for logging and Pell corrections to ensure that these fields are correctly set for the new aid year.</p> |
| <p>Prerequisites Comments</p> | |
| <p>The release for the new aid year is installed.</p> | <p>Values are delivered on this form with the new aid year updates of Banner Financial Aid. These values only become available with the install of the Winter release in January.</p> |
| <p>_____ROBAPRD</p> | <p>Prerequisites Comments</p> <p>Define the aid periods that will be used for the new aid year.</p> |
| <p>_____RORTPRD</p> | <p>Associate periods from RORPRDS to aid periods for the new aid year.</p> <p>Prerequisites Comments</p> <p>ROAINST RTVAPRD RORPRDS ROBAPRD</p> <p>Ensure that rules are setup for all aid periods that you will use.</p> |

_____RORUSER Define optional institutionally defined field definitions for new aid year as needed.

Prerequisites Comments

ROAINST

_____RORALGO Define general algorithmic rules that will be used for the aid year.

Prerequisites Comments

RTVALGO

_____RORPOST Define batch posting rules for the new aid year as necessary.

Prerequisites Comments

ROAINST You must define Selection IDs on GLRSLCT under the
GLRAPPL defined Financial Aid application in order to complete the
GLRSLCT RORPOST rules.

Related These rules are not required in order to process financial
Validations aid for the new year unless batch posting is a
 requirement.

Be sure that the RTVPTYP validation form contains the necessary system required values.

_____RORACYR Establish Academic Year Rules to be used for Pell processing.

Prerequisites

ROAINST

_____ROENRR Update or define enrollment rules for the new aid year as necessary.

Prerequisites

RTVENRR

Data Management Module (*RESDATA)

Prior to building aid year-specific rules, review the following non-aid-year-specific forms within the Data Management Module to assure that the codes meet the requirements for the new aid year. These forms can be found in the Data Management Menu (*RESDATA) under the Financial Aid Common Functions Menu (*RESCOMN).

- RTVINFC • RCRTPTR • GTVCMSC • GORCMSC
- GORCMRL • GORNAME • RCRDTSR • ROAINST/
ROAUSIO
(these forms
are aid year-
specific).

Use the following checklist to assist you in your setup of the Data Management Module.

| Data Management Module | Aid Year-Specific Forms |
|--------------------------------|--|
| _____ ROAINST | Populate year-specific fields. |
| _____ GORCMRL _____ RCRDTSR | Create Data Source Matching Rules for the new aid year for batch and online matching. |
| | Prerequisites Comments |
| | RTVINFC |
| | GTVCMSC |
| | GORCMSC |
| _____ GJAPDFT | Create a <i>Saved</i> parameter set for Data Source for the new aid year for each user loading records online from suspense Financial Aid Suspended Records Maintenance (RCRSUSP). |

Need Analysis Module (*RESNEED)

Review these Need Analysis Module forms prior to building aid year-specific rules to ensure that the codes meet the requirements for the new aid year.

- RORPRDS • RORTPRD • RPROPTS • ROAINST • RFRMGMT
- RPRCLSS • RFRDEFA • RORCODI • ROAUSIO • RFRASCH
- RTVCCOE



Note: The following steps for Pell grant processing are necessary when you perform the online Need Analysis calculation because this process may include the Pell calculation as a secondary phase. You are not required to complete these steps if you only run the Need Analysis calculation exclusively in batch mode or you have prevented the Automatic Pell Calculation on ROAUSIO.

Use the following checklist to assist you in your setup of the Need Analysis Module.

Need Analysis Module

Aid Year-Specific Forms

_____RPROPTS

Check the following packaging fields for the new aid year.

Prerequisites Comments

| | |
|---|--|
| ROAINST ROAUSIO RTVTRST STVTERM RORPRDS | Set the Estimated Enrollment Indicator to Y if you want to permit the use of an applicant's estimated enrollment for a Pell or TEACH Grant in packaging. Enter a value in the Default Estimated Enrollment field for those cases in which an applicant's estimated enrollment does not exist (1 - Full Time, 2 - 3/4 Time, or 3 - Half Time). |
|---|--|

_____ROAINST/
_____ROAUSIO

Review the Global Institution Financial Aid Options form for the new aid year.

Prerequisites Comments

Check to see if all fields in the Options section of the ROAINST form have been completed.

Need Analysis Module

Aid Year-Specific Forms *(continued)*

_____ROAUSIO Review the U.S. Specific Institution Financial Aid Options form for the new aid year.

Prerequisites Comments

ROAINST Check to see if all fields in the Institutional Defaults, Campus Defaults, and Grant and EDE sections of the ROAUSIO form have been completed.

_____RFRMGMT Review the Fund Management form for the new aid year and fund code.

Prerequisites Comments

RFRBASE Enter the necessary data on the RFRMGMT form for the
RTVAWST Pell and TEACH fund codes for this aid year.

_____RPRCLSS Review the Class Code Translation form for this aid year.

Prerequisites Comments

STVLEVL Use the RPRCLSS form to convert the Banner Student
STVCLAS level code and class code combinations into Banner
Financial Aid class codes. Ensure that you have a rule for
each level code with a NULL class code.

_____RTVCCOE Review to ensure that either the actual CSS Nation Code from RTVCCOE exists on STVNATN, or the appropriate Nation Code from STVNATN is set up in the RTVCCOE Crosswalk Code for the nation.

Prerequisites Comments

The Nation Codes and Country Coefficients for RTVCCOE are delivered each aid year with the Early Decision release so the data must be checked each year prior to performing dataload.

Requirements Tracking Module (*RESTRACK)

Review the following forms before you create aid year-specific rules for the Requirements Tracking Module to ensure that the codes meet the requirements for the new financial aid processing year (i.e., add the necessary aid year-specific tracking requirements).

- RORPRDS
- ROAINST
- RTVTGRP
- RTVTREQ
- ROAUSIO

If you ran the ROPROLL process to roll the Tracking information or the Group Selection information from the current aid year to the new aid year, review the forms that follow to assure that new aid year required changes are made.

If you rolled Tracking information, review the following forms.

- RRRGREQ
- RORMESG

If you rolled Group Selection Rules, review all applicable simple and expert rules on the RORRULE form.

Use the following checklist to assist you in your setup of the Tracking Module.

| Tracking Module | Aid Year-Specific Forms |
|---------------------|---|
| <p>_____RRRGREQ</p> | <p>Associate tracking requirements to tracking groups for the new aid year. Use the Copy function to copy group rules from the prior year to the new year.</p> <p>Prerequisites Comments</p> <p>RTVTGRP RTVTREQ ROAINST</p> |
| <p>_____RORRULE</p> | <p>Create Group Assignment Rules for the new aid year. Use the Copy function to copy group rules from the prior year to the new aid year.</p> <p>Prerequisites Comments</p> <p>RTVTGRP ROAINST</p> <p>Check the values in the rules to ensure that you do not need to update hard coded dates. Use ROIGRPI to verify that you set up all required rules for the new aid year (the Rules Exist Indicator is set to Y).</p> <p>Confirm that the Default Group Code exists on ROAINST for the new aid year.</p> <p>Use ROIGRPI from the prior year to derive the Priority Codes on RTVTGRP for the new aid year.</p> <p>Ensure that Group Assignment Rules that use the ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views utilize the new aid year.</p> <p>You should review the above views to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1415" would signify the 2014-2015 Aid Year). Other views use the ROBINST_AIDY_START_YEAR AND ROBINST_AIDY_END_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years).</p> |

Tracking Module

Aid Year-Specific Forms *(continued)*

_____RORMESG* Associate new messages to tracking requirement codes for use in Tracking Letter Generation.

Prerequisites Comments

RTVMESG Set up new message codes on the Message Code
ROAINST Validation (RTVMESG) form. Make sure that you update
RTVTREQ messages which may contain dated information that is
hard-coded within the text.

_____RORPRDS Create period definitions for use in the new aid year as period specific tracking requirements on RRAAREQ.

Prerequisites Comments

STVTERM Terms must be set up on STVTERM to be used in period definitions for the new aid year.

Aid Year Budgeting Module (*RESAIDYBUDG)

Review the following forms before you create aid year-specific rules for the Aid Year Budgeting Module to assure that the codes meet the requirements for the new aid year.

- ROAINST
- RTVAPRD
- RTVBTYPE
- RTVCOMP
- RTVBGRP
- RBRGTYP

If you ran the ROPROLL process to roll the Aid Year Budgeting information or the Group Selection information from the current aid year to the new aid year, review the forms that follow to assure that new aid year required changes are made.

If you rolled Aid Year Budgeting information, review the following forms.

- RBRCOMP
- RORMESG

If Group Selection information was rolled, review all applicable simple and expert rules on the RORRULE form.

Use the following checklist to assist you in your setup of the Budgeting Module.

**Aid Year
Budgeting Module**

Aid Year-Specific Forms

| | |
|---------------|---|
| _____RBRCOMP | Create budget component associations to Budget Group/Type/Period combinations. |
| | <p>Prerequisites Comments</p> |
| | <p>RTVBGRP Create full 100% budgets first. You need to create RBRGTYP prorated budgets if you do not want strict prorating of all RTVAPRD component amounts. (You can only build 100% budgets RTVCOMP for Pell budgets.)</p> <p>Use the Copy function to copy rules to the new aid year. After you copy the rules, use the adjustment functionality to update component amounts.</p> <p>Use RBIBUDG to track those budgets which have been built for the new aid year.</p> |
| _____RORMESG* | Associate budget messages to budget groups for use in award letter generation (if you desire). |
| | <p>Prerequisites Comments</p> |
| | <p>RTVMESG Set up new message codes on RTVMESG. RTVBGRP Review messages from the previous year to ensure that hard-coded date information is not embedded within the text of the message.</p> |
| _____RORRULE | Create Budget Group Assignment Rules for the new aid year. |
| | <p>Prerequisites Comments</p> |
| | <p>ROAINST Use the Copy function to copy group assignment rules to RTVBGRP the new aid year.</p> <p>Use ROIGRPI to assure that you build all required rules. Check values in the rules to ensure that you do not need to update hard-coded dates.</p> <p>If you use ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views, be certain that you use the correct aid year view.</p> |

You should review the above views to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1415" would signify the 2014-2015 Aid Year). Other views use the

ROBINST_AIDY_START_YEAR AND ROBINST_AIDY_END_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years).

Confirm that the Default Budget Group Code exists on ROAINST for the new aid year.

Use ROIGRPI from the prior year to derive priority codes for the new aid year on RTVBGRP.

Period Budgeting Module (*RESPRDSBUDG)

Review the following forms before you create period-specific rules for the Period Budgeting Module to assure that the codes meet the requirements for the new aid year.

- ROAINST
- RTVAPRD
- RTVPBGP
- RTVPBTP
- RTVPBCP
- RTVBCAT
- RTVABRC
- ROBAPRD

If you ran the ROPROLL process to roll the Period Budget Rules information from the current aid year to the new aid year, review the forms that follow to assure that new aid year required changes are made.

If you rolled Period Budgeting Rules information, review the following forms.

- RBRABRC
- RORALGS

If you rolled Period Budgeting Detail information, review the following forms.

- RBRPBDR
- RBRPBGR

If Group Selection information was rolled, review all applicable simple and expert rules on the RORRULE form.

Use the following checklist to assist you in your setup of the Period Budgeting Module.

Period Budgeting Module Aid Year-Specific Forms

_____ RBRPBYR Create period budget groups, types, categories and components for the aid year.

Prerequisites Comments

RTVPBGP Review all groups, types, categories and components that
RTVPBTP were rolled from the prior year to ensure they are valid for
RTVBCAT the current aid year.
RTVPBCP

_____ RBRPBGR Create period budget group type associations and Full Time/Full Year Pell Budget Components.

Prerequisites Comments

RBRPBYR Review all types and Pell budgets that were rolled from
RBRABRC the prior year to ensure they are valid for the Budget
Group for the current aid year.

_____ RBRPBDR Create period budget component associations to Budget Group/Type/Period combinations.

Prerequisites Comments

RBRPBYR The form can be used to set up a budget component for a
RORPRDS Budget Group and Budget Type that is valid for the entire
aid year or a particular period. If a you do not include a
Period in the setup, that budget components will be used
for any period associated with the aid year where period
specific rules have not been defined. If you set up budget
components for a particular period then those
components will be used for that period.

Use the Copy function to copy rules to the new aid year.
After you copy the rules, use the adjustment functionality
to update component amounts.

_____ RBRABRC*+ Create optional algorithmic budgeting rules for the new aid year. Note that maintenance to algorithmic budgeting rules is only necessary if you use algorithmic rules within period budgeting.

Prerequisites

RTVABRC
RORALGS

Period Budgeting Module Aid Year-Specific Forms (continued)

_____ RORALGS* Create optional algorithmic support rules to be used in algorithmic budgeting rules. Note that maintenance to algorithmic support rules is only necessary if you use algorithmic rules within automatic packaging.

Funds Management Module (*RESFUND)

Review the following forms before you create aid year-specific rules for the Funds Management Module to assure that the codes meet the requirements for the new aid year.

- RORPRDS • ROAINST • ROAUSIO • RTVFTYP
- RTVFSRC • RORTPRD • RFRBASE • RTVAWST
- RFRRPCC

The RFRRPCC form is obsolete and no longer used to establish if a fund should use Repeat Course Checking. Please use Fund Enrollment Rules (RFRENRR) to establish the appropriate enrollment rules for the funds.

If you ran the ROPROLL process to roll the Fund information or Group Selection information from the current aid year to the new aid year, review the forms that follow to assure that new aid year-required changes are made.

If Fund information was rolled, review the RFRMGMT form.



Note: As a reminder, the Parent PLUS loan requires a FAFSA to be filed. Any fund codes used for Parent PLUS loan processing must have the "Need Analysis" flag checked on RFRMGMT.

If Group Selection information was rolled, review all simple and expert Fund Awarding and Fund Disbursement rules on the RORRULE form.

Use the following checklist to assist you in your setup of the Funds Management Module.

Funds Management Module Aid Year-Specific Forms

| | |
|---------------|---|
| _____ ROAUSIO | Check Use Multi-Award Years Perkins MPN field on the Institution Loan Options window if you use the Multi-Award Years Perkins MPN at your institution. |
| | Prerequisites Comments |
| | ROAINST Check to see if all fields in the Institutional Defaults, Campus Defaults, and Pell and EDE sections of the ROAINST form have been completed. |

**Funds
Management Module**

Aid Year-Specific Forms (continued)

| | |
|---------------|---|
| _____RFRMGMT | Build aid year-specific data for each fund that you intend to use from RFRBASE in the new aid year. |
| | <p>Prerequisites Comments</p> <p>RTVAWST Use budget totals from the prior year to help determine RTVCOMP over-commitment rates for the new aid year. RTVTREQ RTVMESG TSADETC</p> |
| _____RFRDEFA | Create period award and disbursement default schedules for the new aid year by aid period. |
| | <p>Prerequisites Comments</p> <p>ROBAPRD Banner uses these default rules when you do not specify RTVAPRD fund specific award and disbursement rules (RFRASCH). RORPRDS The Memo Expiration Date is required if funds are able RORTPRD to be memoed. ROAINST The disbursement date initially defaults from the period RPROPTS cut-off date as you define it on RPROPTS for the new aid year. If you do not define cut-off dates, Banner defaults the start date of the period from RORPRDS.</p> |
| _____RFRASCH* | Create optional period award and disbursement schedules for the new aid year by aid period and fund code. |
| | <p>Prerequisites Comments</p> <p>ROAINST You only need to define these rules if a different award RORPRDS and/or disbursement schedule is unique to the specific RORTPRD fund code. RFRMGMT If you use the Create Record function, Banner initially RFRDEFA defaults schedules from RFRDEFA for the aid period.</p> |

| | |
|-----------------------|--|
| <u> </u> RORRULE | Create optional Fund Awarding Rules for the new aid year by fund code. |
| | <p>Prerequisites Comments</p> <p>ROAINST Use the Copy function to copy rules from the prior aid RFRMGMT year to the new aid year.</p> <p>If you use the ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views, be certain to use the new aid year views in your rules.</p> <p>You should review the above views to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1415" would signify the 2014-2015 Aid Year). Other views use the ROBINST_AIDY_START_YEAR AND ROBINST_AIDY_END_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years).</p> <p>Check for embedded values in rules which are year- specific and update the values, if necessary.</p> |

Packaging And Disbursement Module (*RESPACK)

Review the following forms before you create aid year-specific rules for the Packaging and Disbursement Module to assure that the codes meet the requirements for the new aid year.

- RORPRDS • ROAINST • RTVALGR • RTVFCAT
- RTVPGRP • RTVAWST • ROAUSIO • STVTERM
- STVMAJR
 (Aid Eligible
 Indicator)

If you ran the ROPROLL process to roll the Packaging information or the Group Selection information from the current aid year to the new aid year, review the forms that follow to assure that new aid year required changes are made.

If you rolled Packaging information, review the following forms.

- ROASECT • RPRAUDT • RPRFCAT • RPRFSRC • RPRALGR • RPROPTS
- RPRDEFR • RPRPCKR • RPRGFND • RPRCLSS • RPRMAJR • RPRDEGR
- RORALGS

If you rolled Group Selection, review all simple and expert Packaging Group Assignment and Packaging Group Fund Awarding rules on the RORRULE form.

Use the following checklist to assist you in your setup of the Packaging and Disbursement Module.

Packaging & Disbursement Module

Aid Year-Specific Forms

| | | |
|---------------|--|---|
| _____RPROPTS | Create aid year-specific Packaging and Disbursement options. | |
| | Prerequisites | Comments |
| | RORPRDS ROAINST RTVTRST STVTERM | Confirm that STVTERM has terms setup to be used on RORPRDS and RORPRDS has been setup to use periods for the new aid year. |
| _____RPRAUDT* | Create aid year-specific rules for Audit Grading Mode courses for disbursement processing if you elect to use adjusted enrollment hours on the RPROPTS form. | |
| | Prerequisites | Comments |
| | ROAINST | Define the Grading Modes or Registration Status Codes for courses which should be excluded from a student's enrollment hours for financial aid purposes. Use the Copy To function to copy the rules to the new aid year. |
| _____ROASECT | ROAINST | Create aid-year-specific rules for excluding individual courses in the calculation of enrollment for disbursement processing if you elect to use adjusted enrollment hours on the RPROPTS form. |
| | SSASECT | Complete the Banner Student SSASECT form or establish the Course sections in Student prior to entering data on ROASECT. |

_____RPRCLSS Create Class Code Translations for use in Disbursement Processing for the new aid year.

Prerequisites **Comments**

ROAINST Use this form in the translation of the **Class Code** and
STVLEVL **Level** combinations from the Banner Student System to a
STVCLAS Financial Aid **Class Code** for the disbursement of federal
 funds where you apply federal rules.

Confirm the accuracy of STVLEVL and STVCLAS values.

Note that in Banner Student, the **Class Code** can be a NULL value. Be sure that combinations of **Level Codes** and **Class Codes** include the possibility that the **Class Code** is NULL.

_____RORRULE*+ Create Packaging Group Assignment Rules for the new aid year. Note that maintenance to package groups is only necessary if you use automated packaging.

Prerequisites **Comments**

ROAINST Use the **Copy** function to copy rules from the prior aid
RTVPGRP year to the new aid year.

Use ROIGRPI to ensure that you create all required rules for the new aid year.

Be sure to update rules with hard-coded, year-specific values. If you use ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views, be sure to use the proper year view.

You should review the above views to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1415" would signify the 2014-2015 Aid Year). Other views use the ROBINST_AIDY_START_YEAR AND ROBINST_AIDY_END_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years).

Use ROIGRPI from the prior year to derive group priority codes for the new year on RTVPGRP. Ensure that the **Packaging Default Group Code** exists on ROAINST.

| | |
|----------------|---|
| _____RPRDEFR*+ | If you use Gap, Self-Help, or Equity Packaging philosophies, create the default rules on the RPRPCKR form for packaging groups. |
| | <p>Prerequisites Comments</p> <p>ROAINST The Financial Aid System uses the values on the RPRDEFR form to default values to the RPRPCKR form. It does not use the RPRDEFR values in processing.</p> |
| _____RPRPCKR*+ | Create Gap, Self-Help, or Equity Packaging Rules by packaging group for the new aid year. |
| | <p>Prerequisites Comments</p> <p>ROAINST Use the Count Query Hits function to query rules on RPRDEFR or the Create Record function to copy the default rules in each section.</p> <p>RTVPGRP</p> |
| _____RPRGFND*+ | Create fund code associations and algorithmic rule associations to packaging groups for the new aid year. |
| | <p>Prerequisites Comments</p> <p>ROAINST RFRMGMT records must exist for the new aid year for the desired funds before you can build these rules.</p> <p>RTVPGRP</p> <p>RFRMGMT Use these rules only in automatic packaging.</p> <p>RTVALGR</p> <p>Use the Copy function to copy rules from the prior aid year to the current aid year.</p> |
| _____RORRULE*+ | Create optional group/fund awarding rules for the new aid year. |
| | <p>Prerequisites Comments</p> <p>ROAINST Use the Copy function to copy rules from the prior aid year to the new aid year.</p> <p>RTVPGRP</p> <p>RPRGFND You must associate the fund with the Packaging Group on RPRGFND before you can create group-specific awarding rules.</p> <p>Use the Create Record function to copy Fund Awarding rules from RORRULE for the aid year/fund code combination. Be sure to update rules with hard-coded, year-specific values.</p> |

_____RPREXPT*

Create optional exemption interface rules.

The Financial Aid Term Roll Process (ROPTERM) rolls existing data for third party contracts and exemptions from one term to a new term. The exemption must exist in TBBEXPT for the roll “to” term.

Prerequisites Comments

| | |
|-------------------------------|---|
| ROAINST RPROPTS TSAEXPT | You can only build rules for an exemption code if it is already built in Banner Accounts Receivable for the term. Check the Packaging Options 'Interface Exemptions' indicator on RPROPTS for the new aid year in order to interface exemption codes. Students only receive the estimate/payment amount in their package as a resource if you authorize the students for the exemption for the intended terms on TSAEXPT. |
|-------------------------------|---|

_____RPRCONT*

Create optional Contract Interface rules for those contracts in which you want to count student recipient amounts as a resource in their aid package.

The Financial Aid Term Roll Process (ROPTERM) rolls existing data for third party contracts and exemptions from one term to a new term. The **Contract ID/Contract Number** must exist in TBBCONT for the new term.

Prerequisites Comments

| | |
|-------------------------------|---|
| ROAINST RPROPTS TSACONT | You can only define contract interface rules for those contracts already built for the intended terms on TSACONT. The Packaging Options Interface Contracts Indicator on RPROPTS must be checked in order to invoke rules and to count estimate/payment amounts as a resource in the student’s aid package. Students only receive the contract/payment amount as a resource in their package if the you authorize the students for the intended contract on TSACONT. |
|-------------------------------|---|

Packaging & Disbursement Module

Aid Year-Specific Forms *(continued)*

| | |
|-------------------------------|---|
| _____RPRFSRC* | Create optional fund source maximum award rules for the new aid year. |
| | Prerequisites Comments |
| ROAINST RTVPGRP RTVFSRC | Use the Copy function to copy rules from the prior aid year to the new aid year. Only one fund source code can have a maximum for each packaging group. These rules are only invoked by the automatic packaging program. |
| _____RPRDEGR* | Review the values in RPRDEGR for the necessary updates based on your institution's definition of Degree Award and to add the institution-specific values you have determined as eligible for TEACH Grants. |
| _____RPRMAJR* | Review the values in RPRMAJR for the necessary updates based on your institution's TEACH Grant-eligible majors. |
| _____RPRALGR*+ | Create optional algorithmic packaging rules for the new aid year. Note that maintenance to algorithmic packaging rules is only necessary if you use algorithmic rules within automatic packaging. |
| | Prerequisites Comments |
| ROAINST RTVFCAT RTVPGRP | Use the Copy function to copy rules from the prior aid year to the new aid year. |
| _____RORALGS* | Create optional algorithmic support rules to be used in algorithmic packaging rules. Note that maintenance to algorithmic support rules is only necessary if you use algorithmic rules within automatic packaging. |

Loan Processing Module (*RESLOAN)

Review the following forms before you create aid year-specific rules for the Loan Processing Module to assure that the codes meet requirements for the new aid year.

- RORPRDS
- ROAINST
- ROAUSIO
- RTVLNST
- RPRLNDR
- RFRBASE

Use the following checklist to assist you in your setup of the Loan Module.

Loan Module

Aid Year-Specific Forms

| _____RPRLOPT | Create aid year-specific options for each loan fund that you process in the loan module. | | | | |
|---|--|----------------------|-----------------|---|--|
| | <table border="0"> <thead> <tr> <th data-bbox="462 409 673 441">Prerequisites</th> <th data-bbox="673 409 1369 441">Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="462 472 673 724">ROAINST RTVTREQ RFRMGMT/ RFRBASE RTVTRST RTVLNST RTVAWST RPRLNDR</td> <td data-bbox="673 472 1369 724">Set up fund codes for the loans you want to process through the loan module with the Loan Process indicator checked on the RFRMGMT form for the new aid year.</td> </tr> </tbody> </table> | Prerequisites | Comments | ROAINST RTVTREQ RFRMGMT/ RFRBASE RTVTRST RTVLNST RTVAWST RPRLNDR | Set up fund codes for the loans you want to process through the loan module with the Loan Process indicator checked on the RFRMGMT form for the new aid year. |
| Prerequisites | Comments | | | | |
| ROAINST RTVTREQ RFRMGMT/ RFRBASE RTVTRST RTVLNST RTVAWST RPRLNDR | Set up fund codes for the loans you want to process through the loan module with the Loan Process indicator checked on the RFRMGMT form for the new aid year. | | | | |
| _____RPRLPRD | <p>Create valid loan periods for the new aid year.</p> <p>It is recommended that a loan period be defined for each aid period a student would have at the time loans are created.</p> | | | | |
| | <table border="0"> <thead> <tr> <th data-bbox="462 934 673 966">Prerequisites</th> <th data-bbox="673 934 1369 966">Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="462 997 673 1155">ROAINST RTVAPRD RORPRDS RORTPRD STVTERM</td> <td data-bbox="673 997 1369 1155">Create aid year-specific loan periods for the new aid year since rules are Period and date specific.</td> </tr> </tbody> </table> | Prerequisites | Comments | ROAINST RTVAPRD RORPRDS RORTPRD STVTERM | Create aid year-specific loan periods for the new aid year since rules are Period and date specific. |
| Prerequisites | Comments | | | | |
| ROAINST RTVAPRD RORPRDS RORTPRD STVTERM | Create aid year-specific loan periods for the new aid year since rules are Period and date specific. | | | | |

Electronic Data Exchange (EDE) Module (*RESEDE)

For Pell Corrections and COD processing, check the rules on the following forms to assure that you set the rules correctly for the new aid year. Also, refer to the most recent COD Handbook for more detail on set up.

Use the following checklist to assist you in your setup of the EDE Module.

EDE Module

Aid Year-Specific Forms

_____ROAUSIO

Prerequisites Comments

For corrections processing, use the Pell and EDE Options window to check the EDE Correction indicator for the new aid year. Update the desired options for Pell processing.

Institutional Defaults Window

Enter the default COD Attending ID for the institution in the **Attending ID** field. This automatically populates the **Reporting ID**, **Source ID**, **Pell ID**, and **OPEID** fields on this tab, as well as the **Direct Loan School Code** field on the Loan Options window with the data established for the **Attending ID** on the RORCODI form.

Enter the **Main Campus Entity ID** and the **Title IV Destination Number** assigned to your institution in the appropriate fields. If you use an EDE Service Agent, enter the code in the **Service Agent Code** field.

Campus Defaults Window

Build all data related to each campus on the Campus/EDE Defaults window.

_____RORCODI

Prerequisites Comments

Review the ID relationships built on RORCODI for the aid year to verify that relationships are correct. Ensure that one record is identified as the Institutional Default.

_____RORDATA

Prerequisites Comments

This system required form is delivered with all EDE correctable fields checked.

EDE records are loaded through the standard Record Creation process. (Refer to the Record Creation Module section for more information.)

Student Employment Module (*RESEMPL)

Review the following forms before you create aid year-specific rules for Student Employment to assure that the codes meet the requirements for the new aid year.

- RTVAUST
- RTVRFST
- ROAINST

Note - Aid year start and end dates are used in creating authorizations.

- RJAPLBD
- RJRJREQ
- RJRJJOB

Use the following checklist to assist you in your setup of the Student Employment Module.

Student Employment Module

Aid Year-Specific Forms

| | |
|---------------|---|
| _____RJRSEDR* | Define default authorization rules for the new aid year. |
| | <p>Prerequisites Comments</p> <p>ROAINST RTVAUST</p> |
| _____RJRPLRL* | Create valid positions for each placement within the new aid year. |
| | <p>Prerequisites Comments</p> <p>ROAINST If Banner Human Resources/Finance applications are not RJAPLBD installed, the fields on this form are free-format.</p> |
| _____RJRPAYL | Indicate the valid payrolls from Banner Human Resources which you want to load into Banner Financial Aid. |
| | <p>Prerequisites Comments</p> <p>ROAINST This form is only required if you use Banner Human Banner HR/ Resources to load payroll compensation information back Finance to Banner Financial Aid.</p> |

Athletic Module (*RESATHL)

Review the following forms before you create aid year-specific rules for Athletics to assure that the codes meet the requirements for the new aid year.

- RTVFASP
- RTVAATP
- ROAINST

Use the following checklist to assist you in your setup of the Athletic Module.

| Athletic Module | Aid Year-Specific Forms |
|-----------------|---|
| _____RAAPAGD* | Define default athletic grant amounts for the new aid year. |
| | Prerequisites Comments |
| | ROAINST |
| | RTVFASP |

Schedule A — System validation and rules form reference

| Table/Form | Description | System Required |
|------------|---|---|
| * RORACYR | Academic Year Rules | Establishes Academic Year rules to be used for Pell processing. |
| * ROAUSIO | U.S. Specific Institutional Financial Aid Options | Required for U.S. Dataload, Needs Analysis and Federal Fund processing. |
| * RORELTF | E-Mail Letter Format Rules | Required for E-Mail Letters. |
| * RORELTR | E-Mail Letter Rules | Required for E-Mail Letters. |
| * RORENRR | Enrollment Rules | Required. Establishes the rules to be used when calculating enrollment. The “STANDARD” enrollment is system required. |
| * RORMPRM | Miscellaneous Parameters | Required and delivered with values. Establishes the rules for displaying data in Self-Service. |
| * RORPARM | Project Based Parameter Setup | Required and delivered with values. Use to configure institutional specific data to perform Federal Methodology Need Analysis calculations. |
| * RORNYVD | Non Year User-Defined Variables Description | Required for Non Year User-Defined fields. |
| * RORPRDS | Period Base Data | Required. Create enrollment/payment periods for financial aid processing. |
| * ROBAPRD | Aid Period Base Rules | Required. Aid Year specific aid periods that will be assigned to financial aid applicants. |
| * RORRPCX | Financial Aid Repeat Coursework Exclusion | Required for excluding courses from the repeat course enrollment calculation. |
| * RORTADM | Ability-to-Benefit Test Administrator Rules | Required for Ability-to-Benefit data on Applicant High School and Admission Data form. |
| * RORTESC | Ability-to-Benefit Test Score Rules | Required for Ability-to-Benefit data on Applicant High School and Admission Data form. |
| * RORUSER | User-Defined Variables Description | Required for User-Defined Fields. |
| * RORWBQA | Web Question and Answer Rules | Required for Self-Service Dynamic Questions. |
| * RORWTAB | Web Tab Rules | Required for Self-Service Dynamic Text. |

| Table/Form | Description | System Required |
|-------------------|--|---|
| * RORWTXT | Web Text Rules | Required for Self-Service Dynamic Text. |
| * RORWVAR | Web Variable | Required for Self-Service Dynamic Variables. |
| * RPRDEGR | Financial Aid Degree Rules | Required for TEACH-eligible degree codes. |
| * RPRMAJR | Financial Aid Major Rules | Required for TEACH-eligible major codes. |
| * RTVAATP | Athletic Aid Type Validation | Required for Athletic Module. |
| * RTVALGO | General Algorithmic Rules Validation | Required for General Algorithmic Rules functionality (RORALGO). |
| * RTVALGR | Algorithmic Packaging Rule Code Validation | Required for Algorithmic Rule Functionality within Automatic Packaging. |
| * RTVAPRD | Aid Period Validation | Required. |
| * RTVARSC | Resource Code Validation | Required for Other Resource Maintenance. |
| * RTVAUST | Employment Authorization Status Validation | Required for Student Employment Module. |
| * RTVAWST | Award Status Validation | Required. |
| * RTVBGRP | Budget Group Validation | Required. |
| * RTVBTYP | Budget Type Validation | Required. |
| * RTVCCOM | Comment Category Code Validation | Required for Comment Category Codes. |
| * RTVCINT | Certification Initials Validation | Required for Loan Module. |
| * RTVCOMP | Budget Component Validation | Required. |
| * RTVELTM | E-Mail Letter Module Validation | Required for E-Mail Letters. |
| * RTVENRR | Enrollment Rule Validation | Required for calculating Enrollment |
| * RTVFASP | Financial Aid Sport Validation | Required for Athletic Module. |
| * RTVFCAT | Fund Category Validation | Required for Fund Category Functionality within Automatic Packaging. |
| * RTVFSRC | Fund Source Code Validation | Required. |
| * RTVFTYP | Financial Aid Fund Type Validation | Required. |
| * RTVHOLD | Hold Type Validation | Required for Hold Functionality. |
| * RTVINFC | Data Source Code Validation | System Required and Delivered with Values. |
| * RTVLNST | Loan Status Validation | Required for Loan Module. |
| * RTVMESG | Message Code Validation | Required for Messages in Letter Generation. |
| * RTVPGRP | Packaging Group Validation | Required for Automated Packaging. |

| Table/Form | Description | System Required |
|-------------------|---|--|
| * RTVPYTP | Batch Posting Type Indicator Validation | System Required and Delivered with Values. |
| * RTVRFST | Referral Status Validation | Required for Student Employment Module. |
| * RTVRJCT | Rejection Code Validation | System Required and Delivered with Values. |
| * RTVRPSR | Repayment Source Validation | Required for Short-Term Credit Module. |
| * RTVSAPR | Satisfactory Academic Progress Validation | Required. |
| * RTVTGRP | Requirements Tracking Group Validation | Required. |
| * RTVTREQ | Requirements Tracking Validation | Required. |
| * RTVTRST | Requirements Tracking Status Validation | Required. |
| * RTVWEBQ | Web Question Validation | Required for Self-Service Dynamic Questions. |
| * RTVWTXT | Web Text Rule Code Validation | Required for Self-Service Dynamic Text. |
| * RTVWVAR | Web Variable Validation | Required for Self-Service Dynamic Variables. |

Schedule B — Delivered system required data

Tables Reference

The following is a listing of system-required tables and associated forms (if applicable) which are required for Banner Financial Aid processing. The values in these tables are delivered and updated in the new year release, if required. Following the new year install, check these system-required forms to assure that the forms are accurate for the new aid year. Note that in addition to the aid year-specific tables listed below, the views ROVADxx, ROVAMxx, ROVSTxx, ROVA2xx, ROVAYxx, and ROVSAxx are also aid year-specific and must be customized to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1415" would signify the 2014-2015 Aid Year). Other views use the ROBINST_AIDY_START_YEAR AND ROBINST_AIDY_END_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years).

| Table | Description | Associated Form | Aid Year Specific ? |
|---------|---|-----------------|---------------------|
| RCRASMP | Financial Aid Assumption Rules Table | RCIASMP | YES |
| RFRFFID | Federal Fund ID Table | RFIFFID | NO |
| RNRGLBL | Need Analysis Global Policy Options Table | RNRGLxx | YES |
| ROBLOGC | Logging Control Base Table | ROALOGC | NO |
| RORATBT | Ability-to-Benefit Test COD Rules Inquiry | ROIATBT | NO |
| RORDATA | Data Dictionary Table | RORDATA | YES |
| RORDVAL | Audit Log Form/Data Code Table | [NONE] | NO |
| RORLEXM | Local Exit Mapping Table | [NONE] | NO |
| RORLOGC | Logging Control Repeating Table | [NONE] | NO |
| RORMVAL | Miscellaneous Validation Rules Table | ROIMVAL | NO |
| RORPELL | Pell Grant Payment Schedule Table | [NONE] | YES |
| RPRCIPC | Financial Aid CIP Code Rules Table | RPICIPC | NO |
| RPRFEDR | Federal Rules Table | RPIFEDR | YES |
| RPRGRNT | Grant Rules Table | [NONE] | YES |
| RPRSAHP | State Advanced/Honors Program Codes Table | RPISAHP | NO |
| RTVCDNT | COD Nation Table | RTVCDNT | NO |
| RTVCDST | COD State Table | RTVCDST | NO |

| Table | Description | Associated Form | Aid Year Specific ? |
|--------------|--|------------------------|----------------------------|
| RTVDLBT | Batch Type Validation Table | [NONE] | YES |
| RTVELTM | E-Mail Letter Module Validation Table | RTVELTM | NO |
| RTVICMT | ISIR Comment Code Text Validation Table | RTVICMT | YES |
| RTVINFC | Data Interface Validation Table | RTVINFC | NO |
| RTVINTL | International Translation Rules Table | ROAINST | YES |
| RTVPHAS | CommonLine Loan Application Phase Validation Table | [NONE] | YES |
| RTVPRCD | NSLDS Program Code Validation Table | [NONE] | NO |
| RTVPTYP | Posting Code Validation Table | RTVPTYP | NO |
| RTVRJCT | Rejection Code Validation Table | RTVRJCT | NO |
| RTVYICD | Year in College Description Table | [NONE] | NO |
| RURVERS | Financial Aid Version Control Table | GUAINST, GUAABOT | NO |