



Banner Financial Aid Release Guide

Release 8.21
August 2014



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Prepared by: Ellucian
4375 Fair Lakes Court
Fairfax, Virginia 22033
United States of America

Revision History

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Introduction

This guide documents the Banner® Financial Aid 8.21 release, which includes enhancements, regulatory updates, and Change Request - Defects.



Note: This 8.21 Release Guide does not include information or descriptions specific to Banner Financial Aid Self-Service as there were no applicable changes to existing Banner Financial Aid Self-Service functionality.

Release hints, suggestions, and corrections

Any release hints, suggestions, or corrections to this release guide that arise, subsequent to the posting of this release, will be documented in the *Are there any helpful hints, suggestions and/or corrections to release documentation for Banner Financial Aid release 8.21?*, Article #000030440, and made available through the Ellucian Support Center (<http://www.ellucian.com/Solutions/Ellucian-Client-Support/>). It is recommended that you refer to this document periodically under Article #000030440 as you use the new release functionality.

Enhancements

The following enhancements are included in this release:

2013-2014 FISAP

The functional and technical sections describe updates for the 2013-2014 Fiscal Operations Report and Application to Participate (FISAP) process.

2014-2015 Direct Loan Compare Extract Process update

The functional and technical sections describe updates for the 2014-2015 Direct Loan Compare Extract Process for School Account Statement (SAS) reporting.

Scheduled Academic Year setup

The functional and technical sections describe changes that allow you to define the academic year start and end dates for Scheduled Academic Year (SAY) processing and to support upcoming changes for the new Direct Loan table and functionality changes.

Miscellaneous Enhancements

The functional and technical sections describe miscellaneous enhancements included in the 8.21 release:

COD Update - Payment Period Start Date

This section provides a path to a solution for institutions that were originally receiving errors and rejected records based on the payment period start date for their loan records.

Code changes have been made available to update the Payment Period Start Date prior to a paid disbursement being sent to COD. These changes address conditions noted by certain institutions having differing academic calendars but use the same period code.

COD Update - Reject Codes

This section describes the addition of two reject codes (213 and 214).

Cumulative documentation and patches

This document provides detailed information about the Banner Financial Aid 8.21 release. Banner Financial Aid 8.21 is a cumulative release that includes:

- Patches delivered after Banner Financial Aid 8.20.1.

Patches

The following postings/patches is included in Release 8.21. Additional information on this patch can be found at the Ellucian Support Center (<http://www.ellucian.com/Solutions/Ellucian-Client-Support/>). Please see the following summarized list:

Release/Patch Number	Dates	Comments	Additional information
pcr-000113741_ res8200101.trz	June 2014	Change Request - Defect Posting	<p>Changes required to support Oracle Database 12c. Updated (8.20.1.1) objects found in this patch (CR-000113741) are used to replace the following program versions:</p> <ul style="list-style-type: none"> • RCBCT10.pco - version 8.8 • RCBTP10.pco - version 8.3 • RCBTP11.pco - version 8.10 • RCBTP12.pco - version 8.10 • RCBTP13.pco - version 8.13 • REBCD10.pco - version 8.9 • REBCD11.pco - version 8.9 • REBCD12.pco - version 8.10 • REBCD13.pco - version 8.13 • REBCD14.pco - version 8.16 • REBCD15.pco - version 8.19 • RPBDRV.pco - version 8.18.2 • RPEDISBO.pco - version 8.10 • RPEDISB.pco - version 8.20 • RPEDISBS.pco - version 8.20 • RPEPCKG.pco - version 8.18.2 • RPEPELLO.pco - version 8.10 • RPEPELL.pco - version 8.19 • RPEPELLS.pco - version 8.19
pcr-000117229_res8200102	August 2014	Change Request - Defect Posting	<p>The FISAP and DL Comparison processes have been delivered as a regulatory patch so clients can process 2013-2014 FISAP data and complete 2014-2015 Direct Loan reconciliation.</p> <p>The 1314 version (RORFS14) of the FISAP and the 1415 version (RPRCP15) of the DL Compare process have been created.</p> <ul style="list-style-type: none"> • Change Request - Defect CR-000117229

Resolutions

This section provides information regarding problems resolved as part of release 8.21.

2013-2014 FISAP - Functional

Overview

Each year, Title IV-eligible schools must report the fiscal year's final campus-based aid disbursed by fund type, as well as the number of students receiving such aid. This reporting is done through Fiscal Operations Report and Application to Participate (FISAP) processing, which includes data from Banner Financial Aid, Banner Student, and Banner Accounts Receivable. Banner provides your institution with the two grids needed to report this campus-based data. You can then use these reports to transfer the data to the Department of Education's FISAP Web site.

The modifications necessary to support 2013-2014 FISAP processing were originally delivered in the Banner Financial Aid 8.20.1.2 posting and re-delivered with this 8.21 release.

For 2013-2014, the Department of Education did not add any new fields to the FISAP. However, dates were incremented and text in the instructions modified. The only change that has an impact on RORFS14 is the aid year increments and the Auto Zero EFC increase for 2013-2014.

For reference purposes, changes that do not impact RORFS14 are:

- Introduction
 - Updated deadline dates for the 2014-2015 Award Year.
 - Clarified information concerning reporting for more than one institution.
 - Added clarification of the deadline date for the FISAP signature page.
- Part 1, Section A:
 - Clarified instructions for Additional Institutions.
- Part I, Section B:
 - Added FISAP signature options to include FISAP eSignature option, electronic submission of the Lobbying form, and Lobbying Form eSignature option.
 - Added clarification of the deadline date for the FISAP signature page.
- Part II, Section F:
 - Added information concerning the use of EDEXpress Packaging Module reports to assist in completing the Part II and Part IV income grids.
- Part III, Section A:
 - Field 18 - Added a note providing the URL for the list of Tribal Colleges and Universities.

- Part III, Section C:
 - Field 2.1 - Updated the new Servicer address.
 - Field 2.2 - Updated the Electronic Announcement reference and the e-mail address for Total and Permanent Disability (TPD) discharge information.
- Part IV, Section A:
 - Field 1 - Added note to clarify the Federal Supplemental Educational Opportunity Grant (FSEOG) underuse penalty.
- Part V, Section A:
 - Field 1 - Added note to clarify the Federal Work-Study (FWS) underuse penalty.
- Part V, Section G:
 - Introduction - Clarified the calculation concerning the minimum amount of FWS federal funds a school must spend on community service jobs by restating the third bullet point.
- Part VI, Section A
 - General Instructions for Section A - Updated details for using the EDEExpress Packaging Module reports and queries to assist with the FISAP Part VI income grid.

Auto Zero EFC

For 2013-2014, the Auto Zero EFC was increased from an income threshold of \$23,000 to \$24,000. Therefore, changes were made to RORFS14 to properly report those qualifying for Auto Zero EFC. The *FISAP Definitions, Calculation of Automatic Zero EFC* section lists the details for the Auto Zero EFC calculation for RORFS14.

The Final FISAP documentation was published on June 30, 2014 and can be found at:

- <http://www.ifap.ed.gov/fisapformandinst/1516FISAPForm.html>
- <http://www.ifap.ed.gov/fisaptechref/1516FISAPTechRef.html>

New process

FISAP Report for 2013-2014 (RORFS14)

The 2013-2014 FISAP Report is needed to properly generate the FISAP due on October 1, 2014. Updates made to the 2013-2014 FISAP process include the following:

- The FISAP report for 2013-2014 has been updated for aid year references.
- Income Grid Updates (Part VI, Section A)
 - From an income threshold of \$23,000 to \$24,000

FISAP Definitions

Calculation of Automatic Zero EFC

Automatic Zero EFC students are determined by the following criteria based upon 2013-2014 information:

Dependent students

Dependent Students automatically qualify for an automatic zero EFC if both item 1 and item 2 are true:

1. A person who is considered part of the parent's household size (as defined on the FAFSA) who received benefits during 2011 or 2012 from any of the designated means-tested Federal benefit programs: the SSI Program, the Food Stamp Program, the Free and Reduced Price School Lunch Program, the TANF Program, and WIC;

OR

the student's parents filed or are eligible to file a 2012 IRS Form 1040A or 1040EZ (they are not required to file a 2012 Form 1040)*, or the parents are not required to file any income tax return;

OR

the student's parent is a dislocated worker.

AND

2. The 2012 income of the student's parents is \$24,000 or less.
 - For tax filers, use the parents' adjusted gross income from 2012 Form 1040A or 1040EZ* to determine if income is \$24,000 or less.
 - For non-tax filers, use the income shown on the 2012 W-2 forms of both parents (plus any other earnings from work not included on the W-2s) to determine if income is \$24,000 or less.

Independent students

Independent students with dependents other than a spouse automatically qualify for an Automatic Zero EFC if both of the following are true:

1. Anyone included in the student's household size (as defined on the FAFSA) received benefits during 2011 or 2012 from any of the designated means-tested Federal benefit programs: the SSI Program, the Food Stamp Program, the Free and Reduced Price School Lunch Program, the TANF Program, and WIC;

OR

the student and the student's spouse (if the student is married) each meet one of the following conditions: filed or is eligible to file a 2012 IRS Form 1040A or 1040EZ or is not required to file any income tax return;

OR

the student (or the student's spouse, if any) is a dislocated worker.

AND

2. The student's (and spouse's) 2012 income is \$24,000 or less.
 - For tax filers, use the student's (and spouse's) adjusted gross income from 2012 Form 1040A or 1040EZ* to determine if income is \$24,000 or less.
 - For non-tax filers, use the income shown on the student's (and spouse's) 2012 W-2 forms (plus any other earnings from work not included on the W-2s) to determine if income is \$24,000 or less.



Note: An independent student without dependents other than a spouse is not eligible for an automatic zero EFC.

Schools have different uses for manual records. Some schools may use them in lieu of EDE records and want to include them in their FISAP reporting. Banner will calculate the FISAP Total Income for manual records without a need analysis calculation, but there are certain mandatory field requirements the institution must input for the student to be a part of the FISAP calculation. This is outlined in the income information described in the *Calculation of FISAP Total Income* section, below. Some schools will want partial MANUAL records in the FISAP reporting and some will not want any. Regardless of the scenario, the information outlined in the *Calculation of FISAP Total Income* section should be used to ensure valid results.

* One of the following 2012 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ:

- The income tax return required by the tax code of the Commonwealth of Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or Palau.

Applicants who are not required to complete an IRS Form 1040, but do so solely to claim an educational tax credit are considered eligible if they meet all the other requirements for the simplified EFC formulas.

Calculation of FISAP Total Income

FISAP Total Income (TI) is calculated as follows:



Note: Each of the calculations in this section use the following common variables:

UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income

AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Dependent student

1. Total Income (TI)

Tax Filer

If parents' tax filing status is tax filer, the following information is used to determine Total Income:

$$\text{Parents' Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

Non-Tax Filer

If parents' tax filing status is non-tax filer, the following information is used to determine Total Income:

$$\text{Father's Income} + \text{Mother's Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

2. Student's Total Income (STI)



Note: Each of the calculations in this section use the following common variables:

UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income + Other Non-Reported Money

AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Student Tax Filer

If the student's tax filing status is tax filer, the following information is used to determine Student Total Income:

$$\text{Student's Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{STI}$$

Student Non-Tax Filer

If the student's tax filing status is non-tax filer, the following information is used to determine Student Total Income:

$$\text{Student's Income} + (\text{UI}) - (\text{AFI}) = \text{STI}$$

3. Dependent Student FISAP Total Income (FTI)

$$\text{TI} + \text{STI} = \text{FTI}$$

Independent student

1. Total Income (TI)



Note: Each of the calculations in this section use the following common variables:

UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income + Other Non-Reported Money

AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Student Tax Filer

If student's tax filing status is tax filer, the following information is used to determine Total Income:

$$\text{Student's Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

Student Non-Tax Filer

If student's tax filing status is non-tax filer, the following information is used to determine Total Income:

$$\text{Student's Income} + \text{Spouse's Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

2. Independent Student FISAP Total Income (FTI)

$$\text{TI} = \text{FTI}$$

Creating manual records without FAFSA

The FISAP depends on the student's dependency status, tax filing status and income being reported in Banner Financial Aid. If you have created student records by just entering the student's EFC on the 2013-2014 Need Analysis Result Form (RNARS14) so that the student is packaged, then Banner doesn't have sufficient data in order to accurately place or count the student in the two income grids. At a minimum, you must enter the following on the 2013-2014 Need Analysis Form (RNANA14):

Dependent Students	Independent Students
Parent Tax Return Filed	Student Tax Return Filed
Parent Tax Return Type Form Filed	Student Tax Return Type Form Filed
Parent Eligible to File 1040A/EZ	Student Eligible to File 1040A/EZ
First Bachelor's Degree by 01-JULY-2013	Student Have Children You Support
Parent AGI or wages	Student Have Legal Dependents
Parent SSI	First Bachelor's Degree by 01-JULY-2012
Parent Food Stamps	Student and spouse AGI or wages
Parent Free or Reduced Lunch	Student SSI
Parent TANF	Student Food Stamps
Parent Dislocated Worker	Student Free or Reduced Lunch
Parent WIC	Student TANF
Parent Additional Financial Information	Student Dislocated Worker
• Education Tax Credits	Student WIC

Dependent Students	Independent Students
• Child Support Paid	Student Additional Financial Information
• Need Based Employment	• Education Tax Credits
• Grant and Scholarship Aid	• Child Support Paid
• Combat Pay	• Need Based Employment
• Co-op Earnings	• Grant and Scholarship Aid
Parent Untaxed Income	• Combat Pay
• Tax-Deferred Pensions	• Co-op Earnings
• IRA and Keogh Deductions	Student Untaxed Income
• Child Support Received	• Tax-Deferred Pensions
• Tax-Exempt Interest	• IRA and Keogh Deductions
• Untaxed IRA Distributions	• Child Support Received
• Untaxed Pensions	• Tax-Exempt Interest
• Military and Clergy Allowance	• Untaxed IRA Distributions
• VA Non-Education Benefits	• Untaxed Pensions
• Other Untaxed Income	• Military and Clergy Allowance
	• VA Non-Education Benefits
	• Other Untaxed Income
	• Other Non-Reported Money

Also, for these records dependency may be directly entered on the Applicant Override Form (RNAOV14), FM-Student Dependency.

2014-2015 Direct Loan Compare Extract Process Compare Extract Process - Functional

Direct Loan institutions are required to use the School Account Statement (SAS) report for reconciliation of funds for the Direct Loan Program. The SAS is generated by COD on a monthly basis and automatically sent to the school's SAIG mailbox.

The modifications necessary to support 2014-2015 Direct Loan Comparison processing were originally delivered in the Banner Financial Aid 8.20.1.2 posting and re-delivered with this 8.21 release.

To assist institutions in reconciliation of records from their internal database to the SAS report, the Department of Education provides a Windows based application, Direct Loan (DL) Tools for Windows. For the 2014-2015 aid year, institutions must use version 14.0 of DL Tools for Windows.



Note: The software and related user documentation for DL Tools for Windows version 14.0 is available from the U.S. Department of Education's Federal Student Aid Download Web site located at:

- <https://www.fsadownload.ed.gov/software.htm>

New process

The following new process was created for Direct Loan processing in 2014-2015.

2014–2015 Direct Loan Compare Extract Process (RPRCP15)

RPRCP15 was created based upon the 2013-2014 Direct Loan Compare process (RPRCP14). RPRCP15 creates the following files for the 2014-2015 aid year:

- Cash Detail Extract File (DLEXCASH)
- Loan Detail Extract File (DLEXLOAN)
- Disbursement Detail Extract file (DLEXDISB)

The new RPRCP15 process has been updated to validate the Aid Year Code entered in Parameter 01 (ROBINST_AID_YEAR_END_YEAR = 2015).

Scheduled Academic Year (SAY) Setup - Functional

Overview

The Scheduled Academic Year (SAY) setup changes are part of the upcoming enhancements for the Direct Loan re-design/streamlining which offers support for Borrower Based Academic Year processing. The new tables and forms should be included in your Aid Year setup for 2015-2016 to support Direct Loan, TEACH, and Pell Grant processing. Delivering the setup tables and forms as part of the Financial Aid Summer Release allows you time to review how you distinguish your aid periods, begin planning for the new Direct Loan features, and test these initial forms.



Note: Due to these upcoming Direct Loan processing changes, an edit has also been added to the Direct Loan Record Creation (RPRLORC) process to prevent originations from being created beginning with aid year 2015-2016.

A new Direct Loan origination creation process will be provided in a future Banner Financial Aid release to address Direct Loan processing for aid years 2015-2016 and beyond.

The new Direct Loan processing features will determine the academic year for the Origination records when processing the student's loan as SAY, based upon the SAY code associated with the student's aid period. When the aid period is subsequently changed to include summer (crossover), new Originations created which include the summer will then use the SAY which includes summer and is associated with the student's new aid period.

Setup of the Scheduled Academic Year Rules (RORSAYR) is required for 2015-2016 and each subsequent aid year. The SAY codes are included in the FA New Year Roll process (ROPROLL). However, establishing the start and end dates, as well as defining the periods associated with the SAY, must be done prior to defining your Aid Period Rules (RORTPRD).

You will also need to define at least one SAY code if you are using a traditional calendar which begins and ends about the same time each year and you are not processing summer or crossover period. If processing summer, at least two SAY codes must be defined, one which will be the scheduled academic year start and end dates your institution defines as an academic year and one which will define the academic year dates including summer. You may define multiple SAY codes to differentiate academic year start and end dates to account for different program calendars. However, these codes should also be distinguished by the use of different aid periods. For example, your undergraduate programs begin August 25th and your graduate programs begin September 6th, both undergraduate and graduate programs should have aid periods and corresponding SAY codes to match the different begin and end dates for the different academic calendars.

The SAY codes are then associated with the appropriate aid period on Aid Period Base (ROBAPRD). The academic year is then defined by the aid period assigned to the student. A SAY code representing a Scheduled Academic Year of Fall/Spring should be assigned to the aid periods defined representing Fall/Spring, Fall only, and Spring only, since the academic year to be reported for Direct Loans for all three aid periods should be Fall/Spring.

Another change with this release to support upcoming Direct Loan and BBAY enhancements is the ability to update the start and end date of a period when assigning to an aid period on RORTPRD. This change allows you to use the same period in different aid periods while having unique start and end dates to establish different payment period start and end dates. When assigning the periods to the aid period, you will need to make sure the start and end dates of the period fall within the start and end dates of the SAY associated with the aid period. The start and end date of each period will be used for determining the loan period start and end dates as well as the payment period start date for COD reporting of Direct Loans, TEACH, and Pell grant beginning with the 2015-2016 aid year.

Scheduled Academic Years - Setup

Once you have determined the Scheduled Academic Years needed to support your institution's calendar and reviewed the need for any new aid periods, the following additional configuration steps are required:

- Define necessary SAY codes
- Establish the start/end dates
- Define periods associated with each SAY code for the aid year
- Associate the SAY code to the appropriate aid periods for the aid year
- Create aid periods

Scheduled Academic Year Validation (RTVSAYR)

Define the codes and description that represent the Scheduled Academic Years for your institution. If you have an optional summer enrollment, you will need to define one SAY code that represents your school's defined academic year and one SAY code representing your defined academic year plus the summer (crossover) enrollment. Define SAY codes for each of your school's different academic calendars.

Example

Institution processes separate academic calendars for Undergraduate students and Pre-Law students. Summer enrollment is optional.

SAY Code	SAY Description
UG-FA/SP	UG - Fall/Spring

SAY Code	SAY Description
UG-FA/SP/SU	UG - Fall/Spring/Summer
LAW-FA/SP	Law - Fall/Spring
LAW-FA/SP/SU	Law - Fall/Spring/Summer

Scheduled Academic Year Rules (RORSAYR)

For each SAY code for the aid year:

- Establish if the SAY code is the Scheduled Academic Year (Type of S-SAY No Crossover) or if the SAY code includes summer (Type of C-SAY Includes Crossover)
- Define the start and end dates for the Scheduled Academic Year the SAY represents
- Enter any comments
- Assign the periods that are associated with the SAY code

SAY Code	SAY TYPE	Start Date	End Date	Periods
UG-FA/SP	S	25-AUG-2015	10-MAY-2016	FALL 2015 SPRING 2016
UG-FA/SP/SU	C	25-AUG-2015	05-AUG-2016	FALL 2015 SPRING 2016 SUMMER 2016
LAW-FA/SP	S	06-SEP-2015	24-MAY-2016	FALL 2015 SPRING 2016
LAW-FA/SP/SU	C	06-SEP-2015	15-AUG-2016	FALL 2015 SPRING 2016 SUMMER 2016

Aid Period Base Rules (ROBAPRD)

Associate the SAY codes to the appropriate aid periods:

Aid Period Code	Aid Period Description	SAY Code
FA/SPR	Fall-Spr UG	UG-FA/SP
FALL	Fall UG	UG-FA/SP
SPRING	Spring UG	UG-FA/SP
FASPSU	Fall-Spr-Sum UG	UG-FA/SP/SU
SPSU	Spr-Sum UG	UG-FA/SP/SU

Aid Period Code	Aid Period Description	SAY Code
FS-LW	Fall-Spr LAW	LAW-FA/SP
F-LW	Fall LAW	LAW-FA/SP
S-LW	Spring LAW	LAW-FA/SP
FSS-LW	FallSprSum LAW	LAW-FA/SP/SU
SS-LW	Spr-Sum LAW	LAW-FA/SP/SU

Aid Period Rules (RORTPRD)

For each of your aid periods, assign the periods and update the start and end dates as necessary to reflect the correct dates of the payment period.



Note: The examples below uses the same period code for both academic calendars. You may also establish distinct period codes representing the correct payment period start and end dates on RORPRDS.

FA/SPR aid period		UG-FA/SP SAY Code
Period	Start Date	End Date
FALL 2015	25-AUG-2015	10-DEC-2015
SPRING 2016	05-JAN-2016	10-MAY-2016

FS/LW aid period		LAW-FA/SP SAY Code
Period	Start Date	End Date
FALL 2015	06-SEP-2015	20-DEC-2015
SPRING 2016	15-JAN-2016	24-MAY-2016



Note: Due to upcoming Direct Loan processing changes, an edit has also been added to the Direct Loan Record Creation (RPRLORC) process to prevent originations from being created beginning with aid year 2015-2016. A new process will be delivered in a subsequent release to support creating Direct Loan Originations for the 2015-2016 aid year.

Scheduled Academic Year Rules (RORSAYR)

The new RORSAYR form is used to establish the Scheduled Academic Year (SAY) calendar(s) that your institution will be using for the Aid Year. You will define the type of SAY (S = SAY - No Crossover or C-SAY - Includes Crossover), the start date and end date of the SAY, and associate the periods that are included in the SAY. You may also enter comments. The SAY codes are associated with the appropriate aid periods to reflect the SAY of the student.



Note: If your institution offers optional summer attendance, you must define both a SAY with a type of S (SAY-No Crossover) and C (SAY-Includes Crossover) to distinguish when the academic year start or end date is different for the summer attendance.

You may create multiple Scheduled Academic Years to differentiate the academic year start and end dates needed for different cohorts of students which begin and end their programs on different dates.

Beginning with the 2015-2016 aid year, you must define the Scheduled Academic Years for your institution and associate them to the appropriate aid periods. The SAY codes assigned to the aid period on Aid Period Base (ROBAPRD) will roll as part of the FA New Year Roll Process (ROPROLL) however you will need to establish the start and end dates and the periods included in the SAY each year.



Note: If you need to create a new aid period for the 2014-2015 aid year, you will need to define a Scheduled Academic Year code and rules prior to defining the aid period on RORTPRD. The edits for the 2014-2015 aid year are in place to allow you to setup and test creating SAY codes prior to implementing for the 2015-2016 aid year.

The following image shows the new RORSAYR form:

The screenshot shows the RORSAYR form with the following fields:

- Aid Year:** 1415 (dropdown), 2014-2015 Aid Year
- SAY Code:** UG-FA/SP (dropdown), UG - Fall/Spring
- Base Data:**
 - Type:** S=SAY - No Crossover (dropdown)
 - Start Date:** 01-AUG-2014 (calendar icon)
 - End Date:** 30-MAY-2015 (calendar icon)
 - Comment:** Undergraduate - Fall/Spring (text area)
- Period Rules:**

Period	Period Description
201510	Fall 2014-2015
201520	Spring 2014-2015

Key block

The key block allows you to select an Aid Year and a SAY code.

Fields	Descriptions
Aid Year	Aid Year. (KEYBLCK_AIDY_CODE).
SAY Code	Scheduled Academic Year Code. (KEYBLCK_SAYR_CODE).
SAY Code Description	SAY Code Description. (RTVSAYR_DESC).

Base Data block

The Base Data block allows you to define SAY Start and End periods.

Fields	Descriptions
Type	Type Indicator. (ROBSAYR_TYPE_IND).
Start Date	Start Date. (ROBSAYR_START_DATE).
End Date	End Date. (ROBSAYR_END_DATE).
Comment	Comment. (ROBSAYR_COMMENT).

Period Rules block

The Period Rules block allows you to associate period data.

Fields	Descriptions
Period	Period. (RORSAYR_PERIOD).
Period Description	Period Description. (ROBPRDS_DESC).

Changed forms

Aid Period Base Rules (ROBAPRD)

The ROBAPRD form has been updated for the 8.21 release to add the Scheduled Academic Year Code.

You must define the SAY code which represents the academic year the aid period should be associated to that will be assigned to the student. For example, a Scheduled Academic Year of Fall/Spring should be associated to the aid periods Fall/Spring, Fall, and Spring. A Scheduled Academic Year Code which includes summer (Academic year dates include Fall, Spring, and Summer) should be associated with any aid period which includes the Summer (crossover) period such as Fall/Spring/Summer, Fall/Summer, Spring/Summer, and Summer.



Note: Although the ROBAPRD form allows the SAY Code field to be NULL, you must associate a SAY code to the aid period prior to creating the Aid Period Rules (RORTPRD) for the aid year beginning with the 2015-2016 aid year. If you do not associate SAY codes to the aid period, you will receive errors when attempting to save the records on RORTPRD.

Additionally, if you need to create new aid periods or update aid period rules for the 2014-2015 aid year, you will need to define a SAY and associate it to the new/updated aid period.

The following image shows the updated ROBAPRD form:

Code	Description	Budget Full Year Percent	Pell Full Year Percent	Grant Full Year Percent	FM Budget Duration	IM Budget Duration	SAY Code
FA/SPL	Fall-Spring Law	99.999	100.000	100.000	9	9.0	FALL/SPR LAW
FA/SPR	STD Fall-Spring Semesters	100.000	100.000	100.000	9	9.0	FALL/SPRING
FALL	STD Fall Semester	50.000	50.000	50.000	4	4.0	FALL/SPRING
FASPSL	Fall-Spring-Sum Law	150.000	100.000	100.000	12	12.0	FALL/SPR+SU LAW
FASPSU	STD Fall, Spring, Summer	150.000	150.000	100.000	12	12.0	FALL/SPRING+SUM
SPRING	STD Spring Semester	50.000	50.000	50.000	4	4.5	FALL/SPRING
SUMMER	STD Summer Semester	50.000	50.000	50.000	3	3.0	FALL/SPRING+SUM

The following field has been added to ROBAPRD:

Fields	Descriptions
SAY Code	Scheduled Academic Year Code. (ROBAPRD_SAYR_CODE).



Note: This new **SAY Code** field (ROBAPRD_SAYR_CODE) will not be displayed if the aid year is less than or equal to 2013-2014 (ROBINST_AIDY_END_YEAR <= 2014).

Aid Period Rules (RORTPRD)

The RORTPRD form has been updated for the 8.21 release.

New columns have been added to the RORTPRD table for the start and end date of the periods associated with aid period being created or updated. This allows you to correctly define the start and end dates of each period when the same period code has been used in multiple aid period definitions created to represent different academic year calendars based on the student's program. The start and end dates of the periods associated with the aid period must fall within the start and end dates of the Scheduled Academic Year. You must associate a SAY code to the aid period on ROBAPRD starting with the 2015-2016 aid year and going forward prior to creating the Aid Period Rules on RORTPRD.

The dates for each of the periods in the aid period will be used to determine the loan period start and end dates for Direct Loans. Likewise, these dates are also used to determine the payment period start date for Direct Loans, TEACH, and Pell grant reporting to COD.



Note: If you need to create new aid periods or update aid period rules for the 2014-2015 aid year, you will need to define a SAY and associate it to the new/updated aid period prior to creating RORTPRD. You may also update the start and end dates of the periods associated with the aid period.

Aid Period Base Information block

The Aid Period Information block has been updated to include the **SAY Code** with **Start** and **End** dates.



Note: These new fields will not be displayed if the aid year is less than or equal to 2013-2014 (`ROBINST_AIDY_END_YEAR <= 2014`).

The following image shows the new RORTPRD form:

The screenshot shows the 'Aid Period Rules: RORTPRD 8.21 (FAID-CIT)' window. At the top, there are dropdown menus for 'Aid Year' (1415) and 'Aid Period' (FA/SPR), with a note 'STD Fall-Spring Semesters'. Below this is the 'Aid Period Base Information' section, which includes input fields for 'Percentage of Full-Year' (100), 'FM Budget Duration' (9), 'SAY Code' (FALL/SPRING), 'Start Date' (25-AUG-2014), 'Pell Percentage of Full-Year' (100), 'IM Budget Duration' (9), 'End Date' (20-MAY-2015), and 'Grant Percentage of Full-Year' (100). The 'SAY Code' field is highlighted with a red box. The 'Aid Period Rules' section is a table with columns for 'Period', 'Period Description', 'Start Date', 'End Date', and 'Activity Date'. The table contains two rows of data: '201510 Fall 2014-2015' and '201520 Spring 2014-2015'. The 'Start Date' and 'End Date' columns are highlighted with a red box.

The following fields have been added to RORTPRD:

Fields	Descriptions
SAY Code	Scheduled Academic Year Code. (ROBAPRD_SAYR_CODE).
Description	Scheduled Academic Year Description. (RTVSAYR_DESC).
Start Date	Start Date. (ROBSAYR_START_DATE).
End Date	End Date. (ROBSAYR_END_DATE).

Aid Period Rules block

The Aid Period Rules block has been updated to include the new Period Start and End date columns in the RORTPRD table. The start and end dates defined for the period on Period Base Data (RORPRDS) will be displayed for existing records and when creating the RORTPRD records for the aid year. The start and end dates are not updateable for aid year <= 2013-2014.

The following fields have been added to Aid Period Rules block:

Fields	Descriptions
Start Date	Start Date. (RORTRPD_START_DATE).
End Date	End Date. (RORTRPD_END_DATE).

Changed menus

Aid Year Budgeting Control [*RESAIDYBUDGCM]

The following forms have been added to the *RESAIDYBUDGCM menu:

- Scheduled Academic Year Rules (RORSAYR)
- Scheduled Academic Year Validation (RTVSAYR)

Period Budgeting Control [*RESPRDSBUDGCM]

The following forms have been added to the *RESPRDSBUDGCM menu:

- Scheduled Academic Year Rules (RORSAYR)
- Scheduled Academic Year Validation (RTVSAYR)

Financial Aid Common Functions Control [*RESCOMNCM]

The following forms have been added to the *RESCOMNCM menu:

- Scheduled Academic Year Rules (RORSAYR)
- Scheduled Academic Year Validation (RTVSAYR)

Changed processes

FA New Year Roll Process (ROPROLL)

The FA New Year Roll Process (ROPROLL) has been modified to add the ability to roll the following:

- Scheduled Academic Year Base Table (ROBSAYR)
 - The Scheduled Academic Year codes will be rolled to the new aid year with the start and end dates as NULL. You will need to update the start and end dates for the new year as well as associate the appropriate periods to the Scheduled Academic Year code.
- SAY Code (ROBAPRD_SAYR_CODE) to the roll of the Aid Period Base Table (ROBAPRD)

Direct Loan Record Creation (RPRLORC)

The RPRLORC process has been modified to include an edit that prevents creation of Direct Loan Originations where the aid year is greater than or equal to 1516 (ROBINST_AIDY_END_YEAR >= 2016).

The following error message will be displayed:

Unable to create originations beginning with 1516 aid year



Note: A new Direct Loan origination creation process will be provided in a future Banner Financial Aid release to address Direct Loan processing for aid years 2015-2016 and beyond.

Miscellaneous Enhancements - Functional

This section describes miscellaneous functional enhancements included in the 8.21 release.

COD Update - Payment Period Start Dates

Overview

The Banner Financial Aid 8.20 release (April 2014) included functionality used to extract and send origination and disbursement records for the 2014-2015 aid year. Shortly after release, some institutions reported receiving errors and rejected records based on the payment period start date for their loan records.



Note: This condition was noted when institutions had different academic calendars but used the same Period code.

To prevent records from rejecting at COD, a Banner Financial Aid update was posted (`pcr-000111383_res8200001.trz`). This update made certain the Payment Period Start Date for a disbursement was never earlier than the Loan Period Begin Date.

While this 8.20.1 update effectively prevented rejected loan originations at COD, it also uncovered two additional conditions facing these institutions:

- The need to report a different Payment Period Start Date for additional Periods for the loan.
- The need to update and report a different Payment Period Start Date for the TEACH and/or Pell Grant disbursements for students enrolled in the differing academic calendars.

Solution

To meet the needs of those institutions with differing academic calendars, a two script solution has been made available (one for Direct Loans and another for TEACH and Pell Grants). These two scripts are used to update the Payment Period Start Date prior to a paid disbursement being sent.

These two scripts are available by contacting the ActionLine.

In addition to the scripts provided by ActionLine, an update was also made to the 2014-2015 COD Extract Process (REREX15). The change prevents an overwrite of the Payment Period Start Date for TEACH and Pell Grants if the record is already populated. This processing change allows the updates made by the TEACH and Pell Grant scripts to remain on the record and be extracted by the process.

These updates will allow institutions to report the correct Payment Period Start Date for all Periods for Direct Loans, TEACH, and Pell Grants.

Changed process

2014-2015 COD Extract Process (REREX15)

The REREX15 process has been modified to no longer calculate the Payment Period Start Date (RPRADSB_PAY_PD_START_DATE) if it is already populated.

2013-2014 FISAP and 2014-2015 Direct Loan Compare Extract Process - Technical

Required data

Parameter Validation Table (GJAPVAL)

A new script, `rgjbpvali_08200102.sql`, has been included to add Parameter Validation Table (GJBPVAL) entries for the new 2013-2014 FISAP (RORFS14) and 2014-2015 Direct Loan Compare (RPRCP15) processes.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

Report/Process Definition Table (GJBJOBS)

A new script, `rgjbjjobsi_08200102.sql`, has been included to add Report/Process Definition Table (GJBJOBS) entries for the new 2013-2014 FISAP (RORFS14) and 2014-2015 Direct Loan Compare (RPRCP15) processes.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

Parameter Definition Table (GJBPDEF)

A new script, `rgjbpdefi_08200102.sql`, has been included to add Parameter Definition Table (GJBPDEF) entries for the new 2013-2014 FISAP (RORFS14) and 2014-2015 Direct Loan Compare (RPRCP15) processes.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

Default Parameter Table (GJBPDFT)

A new script, `rgjbpdfi_08200102.sql`, has been included to add Default Parameter Table (GJBPDFT) entries for the new 2013-2014 FISAP (RORFS14) and 2014-2015 Direct Loan Compare (RPRCP15) processes.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

General Object Base Table (GUBOBS)

A new script, `rgubobsi_08200102.sql`, has been included to add General Object Base Table (GUBOBS) entries for the new 2013-2014 FISAP (RORFS14) and 2014-2015 Direct Loan Compare (RPRCP15) processes.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

Scheduled Academic Year (SAY) Setup - Technical

This technical section discusses the changes made to support Scheduled Academic Year (SAY) processing in the Banner Financial Aid 8.21 release.

New tables

Scheduled Academic Year Base Table (ROBSAYR)

The new ROBSAYR table has been included for the 8.21 release.

Column	NULL?	Type	Comment
ROBSAYR_AIDY_CODE	No	VARCHAR2 (4)	AID YEAR CODE: The aid year associated with information in this record.
ROBSAYR_SAYR_CODE	No	VARCHAR2 (15)	SAY CODE: The code to define the Scheduled Academic Year.
ROBSAYR_TYPE_IND	No	VARCHAR2 (1)	SAY TYPE INDICATOR: Identifies whether a crossover period is included as a header or trailer.
ROBSAYR_START_DATE	Yes	DATE	SAY START DATE: The start date of the Scheduled Academic Year.
ROBSAYR_END_DATE	Yes	DATE	SAY END DATE: The end date of the Scheduled Academic Year.
ROBSAYR_COMMENT	Yes	VARCHAR2 (4000)	SAY COMMENT: The comment associated with the Scheduled Academic Year.
ROBSAYR_ACTIVITY_DATE	Yes	DATE	ACTIVITY DATE: The date that information in this record was entered or last updated.
ROBSAYR_USER_ID	Yes	VARCHAR2 (30)	USER ID: The user ID of the person who inserted or last updated this record.

Column	NULL?	Type	Comment
ROBSAYR_DATA_ORIGIN	Yes	VARCHAR2 (30)	DATA ORIGIN: The latest source for the data contained in this record.
ROBSAYR_SURROGATE_ID	Yes	NUMBER (19)	SURROGATE ID: The surrogate id for this record.
ROBSAYR_VERSION	Yes	NUMBER (19)	VERSION: The optimistic lock token for this record.
ROBSAYR_VPDI_CODE	Yes	VARCHAR2 (6)	VPDI CODE: The code representing the entity to which this record belongs to for Multi-entity Processing support.

Table comment

The following table comment has been included for the 8.21 release:

Scheduled Academic Year Base Table

Keys

Primary

The following primary key (PK_ROBSAYR) has been included for the 8.21 release:

- ROBSAYR_AIDY_CODE
- ROBSAYR_SAYR_CODE

Foreign

The following foreign keys have been included for the 8.21 release:

```
CONSTRAINT FK1_ROBSAYR_INV_ROBINST_KEY
FOREIGN KEY (ROBSAYR_AIDY_CODE)
REFERENCES ROBINST (ROBINST_AIDY_CODE)
```

```
CONSTRAINT FK1_ROBSAYR_INV_RTVSAYR_KEY
FOREIGN KEY (ROBSAYR_SAYR_CODE)
REFERENCES RTVSAYR (RTVSAYR_CODE)
```

Scheduled Academic Year Rules Table (RORSAYR)

The new RORSAYR table has been included for the 8.21 release.

Column	NULL?	Type	Comment
RORSAYR_AIDY_CODE	No	VARCHAR2 (4)	AID YEAR CODE: The aid year associated with information in this record.
RORSAYR_SAYR_CODE	No	VARCHAR2 (15)	SAY CODE: The code to define the Scheduled Academic Year.
RORSAYR_PERIOD	No	VARCHAR2 (15)	PERIOD: The period associated with the Scheduled Academic Year.
RORSAYR_ACTIVITY_DATE	Yes	DATE	ACTIVITY DATE: The date that information in this record was entered or last updated.
RORSAYR_USER_ID	Yes	VARCHAR2 (30)	USER ID: The user ID of the person who inserted or last updated this record.
RORSAYR_DATA_ORIGIN	Yes	VARCHAR2 (30)	DATA ORIGIN: The latest source for the data contained in this record.
RORSAYR_SURROGATE_ID	Yes	NUMBER (19)	SURROGATE ID: The surrogate id for this record.
RORSAYR_VERSION	Yes	NUMBER (19)	VERSION: The optimistic lock token for this record.
RORSAYR_VPDI_CODE	Yes	VARCHAR2 (6)	VPDI CODE: The code representing the entity to which this record belongs to for Multi-entity Processing support.

Table comment

The following table comment has been included for the 8.21 release:

Scheduled Academic Year Rules Table

Keys

Primary

The following primary key (PK_RORSAYR) has been included for the 8.21 release:

- RORSAYR_AIDY_CODE
- RORSAYR_SAYR_CODE
- RORSAYR_PERIOD

Foreign

The following foreign keys have been included for the 8.21 release:

```
CONSTRAINT FK1_RORSAYR_INV_ROBINST_KEY  
FOREIGN KEY (RORSAYR_AIDY_CODE)  
REFERENCES ROBINST (ROBINST_AIDY_CODE)
```

```
CONSTRAINT FK1_RORSAYR_INV_ROBPRDS_KEY  
FOREIGN KEY (RORSAYR_PERIOD)  
REFERENCES ROBPRDS (ROBPRDS_PERIOD)
```

```
CONSTRAINT FK1_RORSAYR_INV_ROBSAYR_KEY  
FOREIGN KEY (RORSAYR_AIDY_CODE , RORSAYR_SAYR_CODE)  
REFERENCES ROBSAYR (ROBSAYR_AIDY_CODE , ROBSAYR_SAYR_CODE)
```

Scheduled Academic Year Validation Table (RTVSAYR)

The new RTVSAYR table has been included for the 8.21 release.

Column	NULL?	Type	Comment
RTVSAYR_CODE	No	VARCHAR2 (15)	SAYR CODE: The code to define a Scheduled Academic Year.
RTVSAYR_DESC	No	VARCHAR2 (30)	SAYR DESCRIPTION: The description of the Scheduled Academic Year.
RTVSAYR_ACTIVE_IND	No	VARCHAR2 (1) Default = Y	ACTIVE INDICATOR: Indicates whether the Scheduled Academic Year is active.
RTVSAYR_ACTIVITY_DATE	Yes	DATE	ACTIVITY DATE: The date that information in this record was entered or last updated.

Column	NULL?	Type	Comment
RTVSAYR_USER_ID	Yes	VARCHAR2 (30)	USER ID: The user ID of the person who inserted or last updated this record.
RTVSAYR_DATA_ORIGIN	Yes	VARCHAR2 (30)	DATA ORIGIN: The latest source for the data contained in this record.
RTVSAYR_SURROGATE_ID	Yes	NUMBER (19)	SURROGATE ID: The surrogate id for this record.
RTVSAYR_VERSION	Yes	NUMBER (19)	VERSION: The optimistic lock token for this record.
RTVSAYR_VPDI_CODE	Yes	VARCHAR2 (6)	VPDI CODE: The code representing the entity to which this record belongs to for Multi-entity Processing support.

Table comment

The following table comment has been included for the 8.21 release:

Scheduled Academic Year Validation Table

Key

Primary

The following primary key (PK_RTVSAYR) has been included for the 8.21 release:

- RTVSAYR_CODE

Changed tables

Aid Period Base Table (ROBAPRD)

The following column has been added for the 8.21 release:

Column	NULL?	Type	Comment
ROBAPRD_SAYR_CODE	Yes	VARCHAR2 (15)	SAY CODE: The code to define the Scheduled Academic Year associated with the aid period.

Aid Period/Enrollment Period Table (RORTPRD)

The following columns have been added for the 8.21 release:

Column	NULL?	Type	Comment
RORTPRD_START_DATE	Yes	DATE	START DATE: The start date of the period when associated with the aid period.
RORTPRD_END_DATE	Yes	DATE	END DATE: The end date of the period when associated with the aid period.

New packages

The following new program objects have been added to support the Banner Financial Aid 8.21 release:

RB_RTVSAYR API

The Scheduled Academic Year Validation API includes standard functions to support the Scheduled Academic Year Validation Table (RTVSAYR).

Package	Specification	Body
RB_RTVSAYR	rvkb_rtvsayr0.sql	rvkb_rtvsayr1.sql

Function

The F_CODE_IS_ACTIVE function is used to return RTVSAYR_ACTIVE_IND.

RB_SAY_BASE API

The Scheduled Academic Year Base API (RB_SAY_BASE) is based on the Scheduled Academic Year Base Table (ROBSAYR). The Scheduled Academic Year Base API defines the columns which exist in the table and the edits which exist on each of the columns.



Note: This API is designed to support Banner internal processing and is not recommended or supported for use with external or third party systems. The recommendation for external applications is to use message level integration to integrate with this entity in Banner.

Package	Specification	Body
DML_RORSAYR	rokd_robseyr0.sql	rokd_robseyr1.sql
RB_SAY_BASE	rokb_robseyr0.sql	rokb_robseyr1.sql
RB_SAY_BASE_RULES	rokb_robseyr_r0.sql	rokb_robseyr_r1.sql
RB_SAY_BASE_STRINGS	rokb_robseyr_s0.sql	rokb_robseyr_s1.sql

RB_SAY_RULES API

The Scheduled Academic Year Rules API (RB_SAY_RULES) is based on the Scheduled Academic Year Rules Table (RORSAYR). The Scheduled Academic Year Rules API defines the columns which exist in the table and the edits which exist on each of the columns.



Note: This API is designed to support Banner internal processing and is not recommended or supported for use with external or third party systems. The recommendation for external applications is to use message level integration to integrate with this entity in Banner.

Package	Specification	Body
DML_RORSAYR	rokd_rorsayr0.sql	rokd_rorsayr1.sql
RB_SAY_RULES	rokb_rorsayr0.sql	rokb_rorsayr1.sql
RB_SAY_RULES_RULES	rokb_rorsayr_r0.sql	rokb_rorsayr_r1.sql
RB_SAY_RULES_STRINGS	rokb_rorsayr_s0.sql	rokb_rorsayr_s1.sql

Changed packages

RB_AID_PERIOD_BASE API

The Aid Period Base API (RB_AID_PERIOD_BASE) has been updated to process the newly added Period Start Date (RORTPRD_START_DATE) and Period End Date (RORTPRD_END_DATE) columns.

Package	Specification	Body
RB_AID_PERIOD_BASE	rokb_robaprd0.sql	rokb_robaprd1.sql

Procedures

The following procedures have been updated for the 8.21 release:

- P_CREATE
- P_UPDATE
- P_VALIDATE

RB_AID_PERIOD_RULES API

The Aid Period Rules API (RB_AID_PERIOD_RULES) has been updated to process the newly added Period Start Date (RORTPRD_START_DATE) and Period End Date (RORTPRD_END_DATE) columns.

Package	Specification	Body
RB_AID_PERIOD_RULES	rokb_aprd_rule0.sql	rokb_aprd_rule1.sql

Procedures

The following procedures have been updated for the 8.21 release:

- P_CREATE
- P_UPDATE
- P_VALIDATE

ROK_ARCHIVE_DATA Package

Package	Specification	Body
ROK_ARCHIVE_DATA	rok_archive_data0.sql	rok_archive_data1.sql

Procedure

The P_DELETE_MISC_RULES procedure has been updated to add the following tables:

- Scheduled Academic Year Base (ROBSAYR) Table
- Scheduled Academic Year Rules (RORSAYR) Table

ROK_PERIOD Package

Package	Specification	Body
ROK_PERIOD	rok_period0.sql	rok_period1.sql

Procedure

The P_VERIFY_SAY_PERIODS procedure has been updated to verify periods assigned to the aid period.

New databases triggers

RT_ROBSAYR_LOG_INSUPDDL (rotbsayr9.sql)

This new trigger has been created to perform logging for the Scheduled Academic Year Base Table (ROBSAYR).

RT_ROBSAYR_USERACTIVIT_INSUPD (rotbsayr0.sql)

This new trigger has been created to maintain User ID and Activity Date for the Scheduled Academic Year Base Table (ROBSAYR).

RT_RORSAYR_LOG_INSUPDDTL (rotrsayr9.sql)

This new trigger has been created to perform logging for the Scheduled Academic Year Rules Table (RORSAYR).

RT_RORSAYR_USERACTIVIT_INSUPD (rotrsayr0.sql)

This new trigger has been created to maintain User ID and Activity Date for the Scheduled Academic Year Rules Table (RORSAYR).

RT_RTVSAYR_LOG_INSUPDDTL (rttsayr9.sql)

This new trigger has been created to perform logging for the Scheduled Academic Year Validation Table (RTVSAYR).

RT_RTVSAYR_USERACTIVIT_INSUPD (rttsayr0.sql)

This new trigger has been created to maintain User ID and Activity Date for the Scheduled Academic Year Validation Table (RTVSAYR).

Changed database triggers

RT_ROBAPRD_LOG_INSUPDDTL (rotaprd9.sql)

The RT_ROBAPRD_LOG_INSUPDDTL logging trigger has been modified to add the new ROBAPRD_SAYR_CODE column.

RT_RORTPRD_LOG_INSUPDDTL (rottprd9.sql)

The RT_RORTPRD_LOG_INSUPDDTL logging trigger has been modified to following new columns:

- RORTPRD_START_DATE
- RORTPRD_END_DATE

Required data

Logging Control Base Table (ROBLOGC)

roblogci_082100.sql

A new script, `roblogci_082100.sql`, has been included to add entries to the Logging Control Base Table (ROBLOGC) for the following new tables.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

- ROBLOGC_ACTIVITY_DATE = SYSDATE
- ROBLOGC_USER_ID = USER
- ROBLOGC_ACTIVE_IND = N
- ROBLOGC_LOG_INSERT_IND = N
- ROBLOGC_LOG_UPDATE_IND = N
- ROBLOGC_LOG_DELETE_IND = N

ROBLOGC_TABLE_NAME	ROBLOGC_TABLE_DESC
ROBSAYR	Scheduled Academic Year Base Table
RORSAYR	Scheduled Academic Year Rules Table
RTVSAYR	Scheduled Academic Year Validation Table

Logging Control Repeating Table (RORLOGC)

rorlogci_082100.sql

A new script, `rorlogci_082100.sql`, has been included to add entries to the Logging Control Repeating Table (RORLOGC) for the following new columns.



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

- RORLOGC_ACTIVITY_DATE = SYSDATE
- RORLOGC_USER_ID = USER
- RORLOGC_LOG_IND = N

RORLOGC_TABLE_NAME	RORLOGC_COLUMN_NAME	RORLOGC_COLUMN_DESC
ROBSAYR	ROBSAYR_AIDY_CODE	AID YEAR CODE
ROBSAYR	ROBSAYR_SAYR_CODE	SAY CODE
ROBSAYR	ROBSAYR_START_DATE	SAY START DATE
ROBSAYR	ROBSAYR_END_DATE	SAY END DATE
ROBSAYR	ROBSAYR_TYPE_IND	SAY TYPE INDICATOR
ROBSAYR	ROBSAYR_COMMENT	SAY COMMENT
RORSAYR	RORSAYR_AIDY_CODE	AID YEAR CODE
RORSAYR	RORSAYR_SAYR_CODE	SAY CODE
RORSAYR	RORSAYR_PERIOD	PERIOD
RTVSAYR	RTVSAYR_CODE	SAYR CODE
RTVSAYR	RTVSAYR_DESC	SAYR DESCRIPTION
RTVSAYR	RTVSAYR_ACTIVE_IND	ACTIVE INDICATOR
ROBAPRD	ROBAPRD_SAYR_CODE	SAY CODE
RORTPRD	RORTPRD_START_DATE	START DATE
RORTPRD	RORTPRD_END_DATE	END DATE

Miscellaneous Validation Rules Table (RORMVAL)

rormvali_082100.sql

A new script, `rormvali_082100.sql`, has been included to add entries to the Miscellaneous Validation Rules Table (RORMVAL).

- `RORMVAL_ACTIVITY_DATE = SYSDATE`
- `RORMVAL_USER_ID = USER`
- `RORMVAL_DATA_ORIGIN = BANNER`
- `RORMVAL_SYSTEM_REQ_IND = Y`

SAYR_TYPE_IND

RORMVAL_COLUMN	RORMVAL_CODE	RORMVAL_DESC
SAYR_TYPE_IND	S	SAY - No Crossover
SAYR_TYPE_IND	C	SAY - Includes Crossover

Changed forms

Financial Aid Referenced Object Library (ROQOLIB)

The following libraries have been added for the 8.21 release:

- ROBSAYR_LOV and ROBSAYR_RG
 - Title = Scheduled Academic Year (ROBSAYR)
- RTVSAYR_LOV and RTVSAYR_RG
 - Title = Scheduled Academic Year Validation (RTVSAYR)

Miscellaneous Enhancements - Technical

This section describes miscellaneous technical enhancements included in the 8.21 release.

COD Update - Reject Codes

Reject Validation Table (RTVRJCT)

rtvrjcti_082100.sql

A new script, `rtvrjcti_082100.sql`, has been included to insert two new codes to the Reject Validation Table (RTVRJCT).



Note: You must execute this script as part of the Banner Financial Aid 8.21 installation to ensure that correct values exist in the table prior to user processing.

RTVRJCT_ TYPE	RTVRJCT_ CODE	RTVRJCT_ ACTIVITY_ DATE	RTVRJCT_DESC	RTVRJCT_ SYSTEM_ REQ_IND
F	213	SYSDATE	Actual DL Disbursement w/Incorrect Fee or Rebate Percent	Y
F	214	SYSDATE	Foreign Address Submitted on PLUS Award	Y

Resolutions

At the time this guide was completed, a set of Change Request resolutions (Enhancements and Defects) were targeted for delivery with this release.

The Banner Financial Aid 8.21 Resolution Report is a companion to this release guide. This Resolution Report (`finaid82100resolutions.txt`) provides summary information about the Change Requests that are resolved in Banner Financial Aid 8.21. For additional details about specific change requests, go to <http://www.ellucian.com/Solutions/Ellucian-Client-Support/> and use the Ellucian Hub to access the Ellucian Support Center.