

# Banner Financial Aid Self-Service Release Guide

*Release 8.2  
September 2008*



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September 2008	New version that supports Banner Financial Aid Self-Service 8.2 software.
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# Banner Financial Aid Self-Service 8.2 Release Guide

## Contents



### Section 1 **Banner Financial Aid Self-Service - Functional**

<b>Overview</b> . . . . .	<b>.5</b>
Enhancements to Award Information Presented in Self-Service . . . . .	.5
Send an E-Mail to Students Notifying Them an Award Letter is Available . . . . .	.6
Ability for Students to Provide Additional Information . . . . .	.6
Requirements Page Enhanced to Include Additional Information for Tracking Requirements . . . . .	.7
Ability for Students to Select Their Lender if not Already in the System . . . . .	.7
Ability to Update Lender Service Web Links on the Loan History Page . . . . .	.8
<b>Tasks</b> . . . . .	<b>.8</b>
Send an E-Mail to Students Notifying them an Award Letter is Available. . . . .	.8
Requirements Page Enhanced to Include Additional Information for Tracking Requirements . . . . .	.9
Ability to Display Detail Resource information . . . . .	.9
Ability for Students to Print Their Electronic Award Letters . . . . .	.9
Ability for Students to Select Their Lender if Not Already in the System . . . . .	.10
Ability to Update Lender Service Web Links on the Loan History Page . . . . .	.10
Ability for Institution to Display Student-Specific Text . . . . .	.10
Create Web Variables. . . . .	.11
Set Up Web Questions and Answers . . . . .	.11
Ability to Define Terms and Conditions Which Must Be Accepted Before the Student Can Accept Awards. . . . .	.14
<b>Changed Web Pages</b> . . . . .	<b>.14</b>
Award for Aid Year Page (bwrkrhst.P_DispaAwdAidYear) . . . . .	.14
General Information Tab . . . . .	.15
Award Overview Tab . . . . .	.16
Resources/Additional Information Tab . . . . .	.19
Terms and Conditions Tab . . . . .	.22

Accept Award Offer Tab . . . . .	.24
Special Messages Tab . . . . .	.27
Accept Award Offer Page (bwrkacpt.P_DispatchAwdAidYear) . . . . .	.28
Award History Page (bwrkrhst.P_DispatchAwdHst) . . . . .	.28
Award Messages for Aid Year Page (bwrkamsg.P_FAAppMsg) . . . . .	.28
Award Payment Schedule for Award Year (bwrkpays.P_DispatchPaySched) . . . . .	.29
Holds (bwrkholdh.P_DispatchHold) . . . . .	.29
Academic Progress (bwrksaph.P_DispatchSAP) . . . . .	.29
Eligibility Page (bmenu.P_FACostMnu) . . . . .	.29
Financial Aid Links Page (bmenu.P_FAUnsecMnu and bmenu.P_FAASecMnu) .30	
Financial Aid Status Page (bwrksumm.P_DispatchLoanHst) . . . . .	.30
Loan Application History Page (bwrklhst.P_DispatchLoanHst) . . . . .	.30
Requirement Messages Page (bwrktmsg.P_DispatchTrkMsg) . . . . .	.31
Student Requirements Page (bwrktrkr.P_DispatchTrkReq) . . . . .	.31

## Section 2 Banner Financial Aid Self-Service - Technical

<b>Changed Packages . . . . .</b>	<b>.33</b>
BWRKAMSG Package (bwrkamsg.sql, bwrkams1.sql) . . . . .	.33
BWRKLHST Package (bwrklhst.sql, bwrklhs1.sql) . . . . .	.33
BWRKPAYS Package (bwrkpays.sql, bwrkpay1.sql) . . . . .	.33
BWRKRHST Package (bwrkrhst.sql, bwrkrhs1.sql) . . . . .	.33
BWRKSUMM Package (bwrksumm.sql, bwrksum1.sql) . . . . .	.33
BWRKTMSG Package (bwrktmsg.sql, bwrktms1.sql) . . . . .	.33
BWRKTRKR Package (bwrktrkr.sql, bwrktrk1.sql) . . . . .	.34
ROKREFC Package (rokrefc1.sql) . . . . .	.34
<b>Obsolete Packages . . . . .</b>	<b>.34</b>
BWRKACPT Package (bwrkacpt.sql, bwrkacp1.sql) . . . . .	.34

## Section 3 Problem Resolutions

# 1 Banner Financial Aid Self-Service - Functional



## Overview

This release of Banner Financial Aid Self-Service contains many enhancements. This section provides you with an overview of each of these enhancements.

- [“Enhancements to Award Information Presented in Self-Service” on page 5](#)
- [“Send an E-Mail to Students Notifying Them an Award Letter is Available” on page 6](#)
- [“Ability for Students to Provide Additional Information” on page 6](#)
- [“Requirements Page Enhanced to Include Additional Information for Tracking Requirements” on page 7](#)
- [“Ability for Students to Select Their Lender if not Already in the System” on page 7](#)
- [“Ability to Update Lender Service Web Links on the Loan History Page” on page 8](#)

## Enhancements to Award Information Presented in Self-Service

You now have the ability to send students an e-mail notifying them that they can go to Financial Aid Self-Service to review their award letter and accept or decline their awards. A new **Print** function has been added which will include information from Self-Service to create an electronic award letter. You may use Web Tailor to include your institution’s letterhead.

Options for the information to display in Self-Service have been added. This includes:

- the cost of attendance (COA)
- cumulative loan amount information from the NSLDS current record
- need analysis information  $COA - EFC = \text{Initial Need} - \text{Outside Resources} = \text{Need}$

- enrollment status information by term or aid year
- housing status information

Additionally, the following enhancements to Self-Service award information are included in this release.

- all awards displayed by term
- award messages displayed through pop-ups, accessible by clicking on the fund award description
- a Terms and Conditions page where the student must accept the terms prior to accepting the awards
- the ability for the student to provide the school with any additional information needed at the time of acceptance
- outstanding disbursement requirements displayed on the Accept Award Offer page
- the ability to display student-specific text on certain tabs of the electronic award letter through institution-defined SQL rules
- the ability to define questions to ask the students through Self-Service and the ability for students to submit answers to those questions through Self-Service
- option to display all outside resources including third-party contracts and exemptions
- option to not display term award information for any term without an award
- option to not display an award that does not have an offer amount
- options to select what displays on the Accept Award Offer page
- option to define specific Web accept and Web decline award statuses for each fund
- option of treating a Null value in the **Info Access** checkbox on the RPAAWRD as either Y(es) or N(o), for use in determining whether a student has access to their award information in Self-Service

## Send an E-Mail to Students Notifying Them an Award Letter is Available

A new process, ROREMAL, was created to provide the ability to send an e-mail mass mailing to students. This can only be used in the Banner Financial Aid application.

## Ability for Students to Provide Additional Information

Through this enhancement, your institution has the ability to define specific questions to ask a student, as well as provide the student an area to submit additional free-form information to the school. This can include information about outside resources, housing

status, enrollment status, or any other pertinent information. Your institution also has the option to stop the student from accepting their award based on the answer provided to a question.

Once a student is stopped from accepting their awards, they will not be allowed to access their award information. A default message or school-defined messages will be displayed to inform the student why their award information is no longer accessible. Once the data submitted by the student has been reviewed by a staff member, the staff member can update the status to reviewed. The **Award Information Access** indicator will be updated to *Yes* once all answers that stop further processing have been updated to *Reviewed*, so the student can again review his or her award information through Self-Service.

The data collected is displayed on a RPAINFO in Banner or by executing RPPINFO for a report. A staff member can review this information and determine whether updates to the student's award must be made.

The table used to collect this information from the student will also be used to collect additional awarding information that the student can submit to the school through the Self-Service.

## **Requirements Page Enhanced to Include Additional Information for Tracking Requirements**

A new column was added to RTVTREQ so that you can enter instructions for tracking requirements. These instructions are displayed through pop-up windows for unsatisfied tracking requirements. After the tracking requirement is satisfied, the instructions are disabled.

Previously, non-coded tracking requirements did not display in Self-Service, which gave the student the impression that all requirements were satisfied. To eliminate this confusion, you now have the ability to display non-coded requirements on the Web. This is accomplished through the use of an Information Access Indicator that was added to RRRAREQ on the Additional Requirements tab. Use this indicator to control whether a particular non-coded requirement can be viewed on the Web by the student.

In addition, you now have the option to choose whether to display Promissory Note requirements (on RRAAREQ and RPAPROM) in Self-Service on a fund code basis.

## **Ability for Students to Select Their Lender if not Already in the System**

If students do not have a lender already established in Banner, they can select from a list of active lenders displayed on the Accept Award Offer tab. The drop-down list is only displayed if a student does not have a lender of choice stored in Banner.

## Ability to Update Lender Service Web Links on the Loan History Page

You now have the ability to customize the Electronic Loan records link on the Loan Application History page through RPRLNDR. You can identify the proper URL and description for each specific lender ID, or you can identify a default URL and description to use if you don't identify a specific URL in RPRLNDR. These are used in Self-Service to direct the student to the correct servicer website for each loan record.

## Tasks

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A number of tasks are necessary to complete before you use the new functionality provided with this release. These tasks are outlined here. Additional setup information is also included in the *Changed Web Page* section of this guide.

## Send an E-Mail to Students Notifying them an Award Letter is Available

In order to send e-mails to students, you must complete some setup in Banner Financial Aid. New forms were created to support this process.

Review the following forms in Banner and enter the information indicated.

Form	Data to Enter
E-Mail Letter Rules (RORELTR)	Used to define the letter
E-Mail Letter Format Rules (RORELTF)	Used to enter/format data to be contained in the e-mail letter.
E-Mail Letter Module Validation (RTVELTM)	Module Code = R (Financial Aid) Source = ROVFAID (These are both default values.)

In order to send e-mails to students, you will need to create a population selection. The ROREMAL process reads the population selected and requires that the students have an e-mail address defined on GOAEMAL. The student must also have a RORSTAT record for the aid year defined in the parameter for ROREMAL.

ROREMAL reports the outcome of all records selected. This includes all people in the population selection who do not have an e-mail address. No e-mail can be sent to these individuals, and a paper letter will need to be sent separately. The process does not report the e-mails returned because of invalid e-mail addresses. That information will be returned to the inbox of the "From" e-mail address.

The exception to this is when the configuration of the e-mail server causes an Oracle error to be encountered. This will produce an Error Received message for the record and print the entire error in the log file so it may be reviewed.

When ROREMAL is run in Update mode and the e-mail letters sent, the letter code defined will be inserted in the mail table and visible on RUAMAIL with an Originator code of *E (E-mail process)*.

 **Note**

ROREMAL can be run in either Audit or Update mode. ■

## Requirements Page Enhanced to Include Additional Information for Tracking Requirements

Use the new **Instructions** field on RTVTREQ to enter form instructions for tracking requirements, which will be displayed through pop-up windows in Self-Service.

Use the new **Additional Requirements** checkbox on RRAAREQ to control whether a particular requirement can be viewed through Self-Service by the student.

## Ability to Display Detail Resource information

Outside Resources: You may choose to have the outside resource display with the estimated and actual amounts in Self-Service. Select the **Information Access** checkbox on RTVARSC for the resource to display. You also have the option to not display the resource for an individual student by selecting the **Info Access** checkbox for the resource on RPAARSC. Additionally, if you enter resources which are not defined on RTVARSC, you may select to display them in Self-Service by selecting the **Info Access** checkbox on RPAARSC.

Contracts and Exemptions: You may choose to have the contracts and exemptions display in Self-Service, along with their estimated and actual amounts. Select the **Info Access** checkbox on RPRCONT for contracts and **Info Access** checkbox on RPREXPT for exemptions.

## Ability for Students to Print Their Electronic Award Letters

Set up the format for the printable award letter through Web Tailor. Review the options for the information to display and the ability to print the terms and conditions with the awards on the Web Processing Rules tab of ROAINST.

## Ability for Students to Select Their Lender if Not Already in the System

Review the Allow Web Lender Selection indicator on RFRMGMT for your loan funds. Check the indicator to allow lender selection from the Accept Award tab as appropriate.

Review RPRLNDR for the lenders you wish to display in the dropdown list presented to the student when accepting their loan funds. The information access indicator must be checked in order for the lender to display in Self-Service. The Lender ID must also be populated and the dropdown list in Self-Service will use the SPRIDEN\_LAST\_NAME value associated with the lender ID in the list.

Also review RPRLNDR and update lenders who are no longer active. Program types have been defined in case a lender is no longer participating in a specific type of FFEL program.

Student Loan History Data Form (RPASLND). A script has been delivered with the release to insert the lenders for students with Electronic loan records for the 2007-2008 and 2008-2009 aid years. If you have lenders who are no longer participating in the program, you should use the Batch Posting process to inactivate the lenders for those students.

## Ability to Update Lender Service Web Links on the Loan History Page

Previously, the link for all Electronic Loan records under Detail Status on the Loan Application History page in Self-Service directed the student to ELM. This was not appropriate for all schools, because not all schools process loans through ELM. Also, different lenders use different loan servicers, so this link needed to be lender specific.

Four new fields were added to eliminate these issues. Two fields were added to the RPRLNDR table, so that you can identify the proper URL and description for each specific lender ID. Also, two fields were added to the Web Processing Rules page of ROAINST. These fields allow you to identify a default URL and description to use if no specific URL has been defined in RPRLNDR. These can be used to direct the student to the correct servicer website for each loan record.

## Ability for Institution to Display Student-Specific Text

With this release, you now have the ability to define specific text to display for a student in Self-Service using SQL rules. You also have the ability to create variables to include data stored in Banner as part of the text similar to the variables used in letter generation.

You must define the following for creating the Student-Specific Text (see examples and further information in the *Banner Financial Aid 8.2 Release Guide*).

- The Web Text Rule code on RTVWTEXT
- The SQL rules for the Web Text Rule code on RORWTEXT. You must select a value to be returned by the rule. The text to be displayed will be defined by the value returned by the rule. Select the appropriate self-service tab for the text you would like to display on the Select Value Rules Tab then enter the Heading and Text you would like displayed for the possible values returned by your rule.
- The order which you would like the text to display on RORWTAB. For each tab in self-service where you would like to display Student-specific text, you must define the sequence for display.

The following must be true in order for the heading and/or text to display on the specified tab in Self-Service.

- The text rule must be defined on the RORWTAB form, indicating the order in which the rules should display.
- The text rule must have SQL rules defined on RORWTEXT in the RORWSQL table where RORWSQL\_ACTIVE\_IND = Y and RORWSQL\_VALIDATED\_IND = Y.
- The text rule must have Select Value rules set up for the specified tab on the RORWTEXT form in the RORWTEXT table where the RORWTEXT\_ACTIVE\_IND = Y.
- The value returned by the SQL rule for the student must match an active RORWTEXT\_SELECT\_VALUE for the specified tab.

When all of the above are true the RORWTEXT\_HEADING (if not null) and the RORWTEXT\_TEXT will be displayed on the tab. If there is no text to be displayed, the remaining items on the page will be moved up appropriately.

## Create Web Variables

You may create variables to pull data from Banner to display as part of the Heading of text in the Web Text that is displayed for the student. Examples of how to create the variable are include in the *Banner Financial Aid 8.2 Release Guide*.

- Define the Variable codes you want to create on RTVWVAR
- Define the SQL statement that will pull the data from Banner.

### Note

When including a variable in either the Heading or Text, you must enclose the variable using the `<*>variable*>` format in the text to be correctly identified and retrieve the correct value. ■

## Set Up Web Questions and Answers

With this release you now have the ability to set up questions for the students to answer in self-service. You have different options for when the questions will be display. Also,

you may define a set of answers for a drop-down list, select a numeric value, or allow free form text answers. You can define if a specific answer will stop the student from continuing on to accept their awards and define a message to be displayed in this instance. The answers to questions submitted from self-service are viewable on RPAINFO in Banner or may be viewed by running the RPPINFO process. Information on RPAINFO and RPPINFO may be found in the *Financial Aid 8.2 Release Guide*.

- RTVMESG. Update or create message codes to be displayed to the student if an answer will stop the accept award process in self-service.
- RORWBQA - Establish the Questions and Answers to display in Self-Service. Establish questions and define occurrence and answer type.

You may define the questions to be asked based on the occurrence as listed below.

The format of the text and how it is displayed are determined by the following settings.

<b>Field/Setting</b>	<b>Action</b>
RORWTAB_DISPLAY_SEQ_NO	Determines the order in which the text displays on a tab
RORWEBQ_OCCURRENCE = O	The question should only be asked once. It is displayed for the student if the RORWEBQ_QUESTION_CODE does not exist for the aid year in RPRINFO_QUESTION_CODE, indicating that the question has already been asked once for the aid year.
RORWEBQ_OCCURRENCE = U	The question is displayed if unaccepted awards exist for the student.
RORWEBQ_OCCURRENCE = E	The question is displayed regardless of whether it was asked before or if unaccepted awards exist.
RORWEBQ_REQUIRED_IND = Y	The question is a required question, and it will be displayed with a red asterisk immediately preceding the question text.

Following the question is a field the student can use to answer the question. How the answer field displays is dependent on RORWEBQ\_ANSWER\_TYPE for the question.

Field/Setting	Action
RORWEBQ_ANSWER_TYPE = L	The answer field is presented as a drop-down list of the available answers to the question. The available answers are those that exist in RORWBQA_ANSWER_VALUE.
RORWEBQ_ANSWER_TYPE = N	The answer is a numeric value. A field is provided for free form entry of the answer. If the answer entered by the student is not a numeric value, they will receive an error message.
RORWEBQ_ANSWER_TYPE = F	The answer is free form text. A field is provided for free form text entry that can hold up to 2000 characters.

Once you have defined the Question Rule, access the Answer Rules tab to define the type of answer, if the answer will stop processing, and the answer values. If the answer will stop processing, you may also attach a message code which will be displayed to the student. The message code must have the information access indicator and the Stop Electronic Award letter indicator checked on RTVMESG and to be used in self-service.

The answer rules are established based on the following:

Field	Column	Description
Question Code	RORWBQA_QUESTION_CODE	Question Code; This field defaults based on the record that was selected on the Question Rules tab of the form when this window was accessed.
Stop Processing	RORWBQA_STOP_PROCESSING	Stop Self-Service award processing if the specified type of answer is given by the student for this question. This displays as a drop-down list using the following values, which are stored in RORMVAL for the column: A = Any Not Null Answer; N = Does Not Stop Processing; S = This Specific Defined Answer; Z = Any Answer > 0.

Field	Column	Description
Answer Value	RORWBQA_ANSWER_VALUE	Valid Answer Value for this question. Enter the valid answers to create a list of pre-defined values for a question type of List.
Message Code	RORWBQA_MESSAGE_CODE	Message Code to display in Self-Service when Award Processing is stopped. LOV: RTVMESG form. The message must be defined on RTVMESG to stop the Electronic Award Process.

## Ability to Define Terms and Conditions Which Must Be Accepted Before the Student Can Accept Awards

You now have the ability to display a Terms and Conditions tab as part of the award for aid year page. The student must then accept the terms and conditions prior to being allowed to accept their awards if this option is chosen.

First, you must establish a requirement meaning Terms and Conditions with the Information Access indicator checked on RTVTREQ. Add the requirement to the Web Accept Tracking rules on ROAINST. The requirement must exist for the student as unsatisfied for the Terms and Conditions to provide the option to accept or decline. Once the student accepts the Terms and Conditions, the requirement will be satisfied based on the status defined.

You will also need to update the option to display the Terms and Conditions tab on the Web Processing rules tab of ROAINST. You also have an option to print the Terms and Conditions when the award information is printed.

## Changed Web Pages

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### Award for Aid Year Page (bwrkrhst.P\_DispAwdAidYear)

The Award for Aid Year page contains all of the required Electronic Award Letter information, including the ability to accept or decline awards. The page contains the following tabs.

- General Information

- Award Overview
- Resources/Additional Information
- Terms and Conditions
- Accept Award Offer
- Special Messages

Options have been provided on the Web Processing Rules page on the ROAINST form so that you can define which of the tabs are displayed to students. The General Information and Award Overview tabs will always be displayed on this page, but the other tabs can be removed if you choose.

Each tab provides areas where you can insert your own text through Web Tailor and where you can display student-specific text messages through the use of SQL rules set up on the RORWTEXT form. The data displayed on the tabs will depend on the new Web Rules indicators and options selected in Banner and by the Web Questions and Text the school has defined.

## General Information Tab

This is the first tab displayed when you initially access the Award for Aid Year Page.

Your institution-defined messages and student specific text are displayed on this page, if available. This text will only display to the student if Info Access checkbox on ROAINST is *Y* or if Info Access checkbox on ROAINST is null and you have selected the option on ROAINST to treat the null value as *Y*. Enter the text for your institution-defined messages through Web Tailor. Define the student-specific text in Banner on forms RTVWTEXT, RORWTAB, and RORWTEXT (see the Tasks section).

If the student has awards offered for the aid year, the following default message is displayed.

*Click on each tab displayed on this page to view your financial aid award details for this aid year. If you have questions regarding your award, please contact the Financial Aid Office.*

If the student does not have any awards offered for the aid year, or there are messages that have been assigned to the student in RORMESG that stop electronic award processing, the following default message is displayed.

*No award information is available for you at this time. Please contact the Financial Aid Office if you have questions.*

Also, if the RORSTAT\_INFO\_ACCESS\_IND = N (or if the RORSTAT\_INFO\_ACCESS\_IND is null and you have not selected the option on ROAINST to treat the null value as Y), all other tabs on the Award page are inaccessible.

These default messages are updatable through Web Tailor.

## Setup Requirements

Item	Description
Web Tailor Information Text	<p>Review the text for the following items for clarity and any information and/or instructions you want to provide to your students.</p> <ul style="list-style-type: none"><li>• DEFAULT, Seq 1 (bwrkrhst.P_GeneralInfoTab)</li></ul> <p>This default text will appear at the top of the General Information Tab: “Click on each tab displayed on this page to view your financial aid award details for this aid year. If you have questions regarding your award, please contact the Financial Aid Office.”</p> <ul style="list-style-type: none"><li>• NOAWARD, Seq 1 (bwrkrhst.P_GeneralInfoTab)</li></ul> <p>This message will appear at the top of the General Information Tab in place of the DEFAULT text, if there are no awards for the student: “No award information is available for you at this time, please contact your financial aid office if you have questions.”</p>

## Award Overview Tab

This tab displays institutionally defined messages and student specific text, if available. Below the initial text section and the student specific text section the following information is displayed.

- Need Calculation
- Cost of Attendance (COA)
- Enrollment Status
- Housing Status
- Cumulative Loan Data
- Award Information

Whether each of these items is displayed is dependent on the new indicators in the Web Rules Table (RORWEBR) found on the ROAINST form under the Web Processing Rules tab.

Field	When it is Displayed
Need Calculation	If RORWEBR_NEED_CALC_IND = Y
Cost of Attendance (COA)	RORWEBR_COA_IND = Y and RBBABUD_INFO_ACCESS_IND = Y *
Enrollment Status	RORWEBR_ENROLLMENT_STATUS = T or F
Housing Status	RORWEBR_HOUSING_STATUS_IND = Y
Cumulative Loan Data	RORWEBR_CUM_LOAN_IND = Y
Award Information	RORSTAT_INFO_ACCESS_IND = Y (or RORSTAT_INFO_ACCESS_IND is null and you have selected the option on ROAINST to treat the null value as Y)  the student has awards offered for the aid year that are for an amount greater than zero for at least one fund

### Cost of Attendance Information Section

The detailed COA information is displayed, but an option to display only the total COA is not available at this time. If your institution wants to display only the total COA, it can be displayed through the Need Calculation detailed data.

#### Note

If you have selected to display the COA from the Web Processing Rules tab of ROAINST but do not want to display the COA for a specific student (or group of students using Batch Posting), the Information Access Indicator may be unchecked on RBAABUD. The non-Pell budget should be updated since it is the non-Pell budget that is displayed in Self-Service. ■

### Award Information Section

All award information displayed includes the term award detail. Only those terms that exist in RPRATRM for the student are displayed on the page.

If RORWEBR\_TERM\_ZERO\_AWRD\_IND = Y, only those terms that have at least one fund with an award greater than zero for the term are displayed for the student.

If RORWEBR\_TERM\_ZERO\_AWRD\_IND = N, all terms that exist in RPRATRM for the aid year are displayed for the student, regardless of whether there are any awards greater than zero.

If RORWEBR\_FUND\_ZERO\_AMT = Y, only those funds that have an awarded amount greater than zero are displayed for the student.

If the RPAWRD\_OFFER\_AMT = 0, the fund will not be displayed for any term.

If RORWEBR\_FUND\_ZERO\_AMT = N, all funds in RPAWRD/RPRATRM for the student will be displayed, regardless of the award amount.

If an award message exists for any of the funds awarded and displayed to the student, the award messages will be displayed through a pop-up window. If an award message is available, the fund award description will appear as a highlighted link. To access the pop-up window, the user can click on the link.

In addition, a **Print** link is on this page so that students can print their award information.

## Links to Other Web Pages

This Link	Action
Print	Clicking on this link will display a pop-up window of a print-ready version of the student's award information.

You can edit the text messages displayed on this page through Web Tailor.

## Setup Requirements

Item	Description
Web Tailor Information Text	<p>Review the text for the following items for clarity and any information and/or instructions you want to provide to your students.</p> <ul style="list-style-type: none"><li>DEFAULT, Seq 1 (bwrkrhst.P_AwardOverviewTab)</li></ul> <p>This text, which your institution defines, will appear at the top of the Award Overview Tab.</p> <ul style="list-style-type: none"><li>INFORMATION, Seq 1 (bwrkrhst.P_AwardOverviewTab)</li></ul> <p>This text will appear at the bottom of the Award Overview Tab: "If you have questions regarding the above information, please contact the Financial Aid office."</p> <ul style="list-style-type: none"><li>DEFAULT, Seq 1 (bwrkrhst.P_PrintAwardOverview)</li></ul> <p>This text, which your institution defines, will appear at the top of the Printed Award Overview.</p>

## Resources/Additional Information Tab

This tab displays the resource detail information and additional information available for the student. This tab is accessible under the following conditions.

- RORSTAT\_INFO\_ACCESS\_IND = Y (or RORSTAT\_INFO\_ACCESS\_IND is null and you have selected the option on ROAINST to treat the null value as Y)
- RORWEBR\_RESOURCE\_TAB\_IND = Y or  
there are questions set up on RORWEBQ for the student to answer

This tab includes the Resource section, Additional Information section, and the Unreviewed Information Previously Submitted section. Whether each of these sections is displayed is dependent on the new indicators in the Web Rules Table (RORWEBR), displayed on ROAINST.

### Resource Section

Detailed resource information is displayed in this section when RORWEBR\_DETAIL\_RESOURCE\_IND = Y. If RORWEBR\_DETAIL\_RESOURCE\_IND = N, a message will be displayed indicating that the student does not currently have any outside resource information to display.

Outside Resources that exist for the student on RPAARSC with the **Info Access** checkbox selected will be displayed.

Contracts and exemptions are displayed in this section as well, when the Info Access checkbox is selected for the contract or exemption on RPRCONT or RPREXPT, respectively.

### Additional Information Section

This section is where students will answer the questions your institution has set up to ask through Self-Service. It also provides a place for students to enter any additional resource information.

#### Note

If the student is viewing an aid year that is inactive, this section will not be displayed. ■

The questions displayed in this section are determined by your setup on RTVWEBQ and RORWBQA. Only questions where RORWEBQ\_ACTIVE\_IND = Y for the aid year are displayed.

After the student has answered all questions presented to them, they must press the Submit Information button so that the answers are sent to the Financial Aid office. The information is saved to the necessary Banner tables.

If all required questions (RORWEBQ\_REQUIRED\_IND = Y) have not been answered when the Submit Information button is clicked, an error message will display informing the student that they have not completed all of the required questions. The answers to the questions previously entered remain on the page so that the student does not have to re-enter them.

Some answers submitted by a student can stop the electronic award processing. Answers that meet the following criteria will stop processing.

- RORWBQA\_STOP\_PROCESSING = A and any Not Null answer is given for the question
- RORWBQA\_STOP\_PROCESSING = Z and the answer given is greater than zero for the question
- RORWBQA\_STOP\_PROCESSING = S and the answer given for the question equals RORWBQA\_ANSWER\_VALUE

When an answer stops award processing, the message code (RORWBQA\_MESSAGE\_CODE) associated with the question is recorded in the RORMESG table. In addition, the RORSTAT\_INFO\_ACCESS\_IND is set to N, so that the student can no longer access award information in Self-Service. The student is returned to the General Information tab where any message codes associated with their answer are displayed. If no message codes are associated with the answer that stopped the processing, then a default error message will be displayed.

The student will not have access to any of the tabs on the Award for Aid Year page until a staff member reviews the student's information and resets the RORSTAT\_INFO\_ACCESS\_IND to Y.

In addition to answering your institution-defined questions, students can enter information about additional outside resources on this tab. They have up to 50 characters to enter information in the Resource Description field and up to 2000 characters to enter comments. The information entered here will get populated on RPAINFO in Banner.

### **Unreviewed Information Previously Submitted Section**

If the student is viewing an aid year that is inactive, this section will not be displayed. This section displays any information that the student has submitted, but the institution has not yet reviewed. This data is from RPRINFO where RPRINFO\_REVIEWED = N or P. It can be reviewed on RPAINFO or by executing RPPINFO for a report.

You can edit the text messages displayed on this page through Web Tailor.

## Setup Requirements

Item	Description
Web Tailor Information Text	<p>Review the text for the following items for clarity and any information and/or instructions you want to provide to your students.</p> <ul style="list-style-type: none"><li>• ADDRESINFO, Seq 1 (bwrkrhst.P_ResourceTab)</li></ul> <p>This text will appear before the Additional Resource Section of the Resource/Additional Information Tab: “If you have additional outside resources that are not reflected above, please inform the financial aid office by entering the information below and pressing Submit.”</p> <ul style="list-style-type: none"><li>• DEFAULT, Seq 1 (bwrkrhst.P_ResourceTab)</li></ul> <p>This text, which your institutionally defines, will appear at the top of the Resource/Additional Information Tab.</p> <ul style="list-style-type: none"><li>• NORESOURCE, Seq 1 (bwrkrhst.P_ResourceTab)</li></ul> <p>This text will appear instead of the student’s Resources, if there are no resources: “No outside resource information is available for you at this time, please contact your financial aid office if you have questions.”</p> <ul style="list-style-type: none"><li>• QAINSTRUCTION, Seq 1 (bwrkrhst.P_ResourceTab)</li></ul> <p>These instructions will be displayed in the Additional Information section: “Please answer the questions displayed below. Also, if you have additional outside resources that are not reflected above, please inform the financial aid office by entering the information below. Once all answers and additional resource information are entered, please press Submit to send this information to the Financial Aid Office.”</p> <ul style="list-style-type: none"><li>• RESOURCEMSG, Seq 1 (bwrkrhst.P_ResourceTab)</li></ul> <p>This message will be displayed at the bottom of the Resource/Additional Information Tab: “Additional unlisted resources may exist. If you have questions regarding the difference between the above total amounts and your calculated total, please contact the financial aid office.”</p>

## Setup Requirements

Item	Description
	<ul style="list-style-type: none"><li>• TOTALWITH, Seq 1 (bwrkrhst.P_ResourceTab)  This message will appear after the student resources, if any resources exist: “If you have questions regarding any differences between the above total amounts and your calculated total, please contact the Financial Aid office.”</li><li>• TOTALWOUT, Seq 1 (bwrkrhst.P_ResourceTab)  This message will appear after the student resources, if resources exist, but cannot be displayed: “The Calculated Resource Total is a total of those funds which have been made available to you by resources other than the federal government, state government, or the school you are currently attending. If you have any questions concerning the origin of this amount, please contact the Financial Aid office.”</li><li>• UNREVIEWINFO, Seq 1 (bwrkrhst.P_ResourceTab)  This text will appear before the Unreviewed Information section: “Information you have submitted to the financial aid office that has not been reviewed is displayed below.”</li></ul>

## Terms and Conditions Tab

This tab displays the text that details the terms and conditions of the award offer as defined by your institution. This text is entered through Web Tailor. The Terms and Conditions tab is accessible under the following conditions.

- RORSTAT\_INFO\_ACCESS\_IND = Y (or RORSTAT\_INFO\_ACCESS\_IND is null and you have selected the option on ROAINST to treat the null value as Y.)
- RORWEBR\_TERMS\_TAB\_IND = Y
- answers have been provided to all required questions

Your institution-defined messages and student specific text are also displayed on this page, if available. Enter the text for your institution-defined messages through Web Tailor. Define the student specific text in Banner on forms: RTVWTEXT, RORWTAB, and RORWTEXT (see the “Tasks” section).

You must establish the tracking requirement for Terms and Conditions with the appropriate status on the Web Processing rules tab of ROAINST, and the student must have the requirement unsatisfied in order for the option to accept or decline the terms and conditions.

If your institution chooses, any award messages specific to the student can also be displayed on this page. These messages can be edited through Web Tailor.

## Setup Requirements

Item	Description
RORWEBR_TERMS_AWARD_MSG_IND	When you set this indicator to Y, award messages specific to the student will be displayed.
Web Tailor Information Text	<p>Review the text for the following items for clarity and any information and/or instructions you want to provide to your students.</p> <ul style="list-style-type: none"><li>• ACCEPTED, Seq 1 (bwrkrhst.P_TermConditionTab)  This message will appear at the bottom of the Terms and Conditions Tab, if the student has already accepted the Terms and Conditions: “You have accepted the Terms and Conditions.”</li><li>• DECLINE, Seq 1 (bwrkrhst.P_TermConditionTab)  This warning message will appear in a popup window if the student chooses to decline the Terms and Conditions: “If you choose not to accept the Terms and Conditions, then you will not be eligible to receive aid.”</li><li>• DEFAULT, Seq 1 (bwrkrhst.P_TermConditionTab)  This text, defined by your institution, will appear at the top of the Terms and Conditions Tab.</li></ul>

## Buttons/Icons on This Page

Button/Icon	Action
Accept	Clicking this button indicates that the student accepts the Terms and Conditions of the award offer. Once this is selected, the student will have access to the Accept Award Offer tab.
Do Not Accept	If the student clicks on this button, a warning message will display that lets the student know that they will not be eligible to receive financial aid until they accept the Terms and Conditions. This message text can be edited.

### Note

After the student selects “Accept,” the Accept and Do Not Accept buttons are no longer displayed on the page. ■

## Accept Award Offer Tab

This tab displays all of the information that was previously on the Accept Award Offer page. It is accessible under the following conditions.

- RORSTAT\_INFO\_ACCESS\_IND = Y (or RORSTAT\_INFO\_ACCESS\_IND is null and you have selected the option on ROAINST to treat the null value as Y.)
- RORWEBR\_AWARD\_ACPT\_TAB\_IND = Y
- all Terms and Conditions tracking requirements assigned to the student are satisfied (if you have selected the option to display Terms and Conditions)
- all required questions have been answered (if you have defined questions which are required or defined answers which stop processing)

The information displayed on the Accept Award Offer page has been enhanced to include your institutionally defined messages and student specific messages. If there are messages associated with a fund, the fund name will be a highlighted link. Clicking on the link will open a pop-up window that contains the messages.

All terms that exist for the student will be displayed, unless you indicate otherwise through your setup on ROAINST.

## Setup Requirements

Item	Description
RORWEBR_TERM_ZERO_AWRD_IND	<ul style="list-style-type: none"><li>• If = Y Only the terms that have at least one fund with an award greater than 0 will be displayed.</li><li>• If = N All funds that exist for the student will be displayed, regardless of the award amount.</li></ul>

Additionally, you have the option to allow students to partially accept awards and to accept the full amount of all awards offered. In order to use this new functionality, use the following fields on the Web Processing Rules tab on ROAINST.

## Setup Requirements

Item	Description
RORWEBR_ACPT_PARTIAL_AMT_IND	Set the Display Partial Amount field to Y to allow students to accept partial award amounts.
RORWEBR_ACPT_ALL_AWARDS_IND	Set the Display Accept Full Amount of All Awards to Y to allow students to accept the full amount of all awards offered.

## Lender Selection and Display of Current Lender

If the student currently has a lender on RPASLND, the lender is displayed for the loan funds. If the student has not yet indicated their lender, active lender will be displayed in a drop-down list. This will only occur for funds where you have indicated to Allow Web Lender Selection on RFRMGMT. The lenders listed will be the active lenders you have indicated on RPRLNDR.

## Additional Comments

If you have selected the option on the Web Processing rules tab of ROAINST to allow the student to submit Award Information, a comment field will appear for the student to enter and submit award information. This information is then stored in the RPRINFO table and may be viewed either from the form RPAINFO or by running the RPPINFO process.

Any requirements which are required for disbursement that are unsatisfied will also display as well as messages associated with the requirement.

## Information Submitted Section

The Information Submitted section of this tab will be displayed under the following conditions.

- RORWEBR\_AWARD\_INFO\_IND = Y
- The aid year is active
- The student has submitted award information to the school that has not yet been reviewed by the financial aid office

The following link has been added to this page so that students can print their award information. You may use Web Tailor to format the print version and include graphics and text specific to your institution. You may also set the option to print the terms and conditions as part of the award letter by selecting the option to **Print Terms and Conditions** from the Web Processing Rules tab of ROAINST.

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
Print	Clicking on this link will display a pop-up window of a print-ready version of the student's award information.

The messages displayed on this tab can be edited through Web Tailor.

## Setup Requirements

Item	Description
Web Tailor Information Text	<p>Review the text for the following items for clarity and any information and/or instructions you want to provide to your students.</p> <ul style="list-style-type: none"><li>• <b>DEFAULT</b>, Seq 1 (bwrkrhst.P_AcceptAwardOfferTab) This text, defined by your institution, will appear at the top of the Accept Award Offer Tab.</li><li>• <b>INSTRUCTION</b>, Seq 1 (bwrkrhst.P_AcceptAwardOfferTab) These instructions will appear after the DEFAULT text and the Student Specific text. “Options for Accept Award Offers include: 1. Accept the full award amount by selecting Accept Full Amount of All Awards. 2. Choose Decline or Accept for each fund. 3. Accept a partial amount by selecting Accept and entering the amount in the Accept Partial Amount field.”</li><li>• <b>UNREVIEWINFO</b>, Seq 1 (bwrkrhst.P_AcceptAwardOfferTab) This text will appear before the display of any information submitted by the student: “Information you have submitted to the financial aid office that has not been reviewed is displayed below.”</li></ul>

## Special Messages Tab

Use this tab to display messages to students after certain awards have been accepted by the student. This tab is accessible under the following conditions.

- RORSTAT\_INFO\_ACCESS\_IND = Y (or RORSTAT\_INFO\_ACCESS\_IND is null and you have selected the option on ROAINST to treat the null value as Y.)
- RORWEBR\_SPECIAL\_MSG\_TAB\_IND = Y
- all Terms and Conditions tracking requirements assigned to the student are satisfied
- all required questions have been answered

Two types of messages are displayed on this page when available, your institutionally defined message and student specific text. Enter the text for your institutionally defined messages through Web Tailor. Define the student specific text in Banner on forms: RTVWTEXT, RORWTAB, and RORWTEXT.

## Setup Requirements

Item	Description
Web Tailor Information Text	<ul style="list-style-type: none"><li>DEFAULT, Seq 1 (bwrkrhst.P_SpecialMsgTab)</li></ul> <p>This text, defined by your institution, will appear at the top of the Special Messages Tab.</p>

## Accept Award Offer Page (bwrkacpt.P\_DispatchAwardYear)

This page was removed from the Award menu. It is now the Accept Award Offer tab on the Award for Aid Year page.

## Award History Page (bwrkrhst.P\_DispatchAwardHst)

This page was updated to display third-party contracts and exemptions, in addition to outside resources.

### Setup Requirements

Item	Description
Info Access checkbox on RPRCONT	To display third-party contracts or exemptions, set this field to Y on the RPRCONT form.
Info Access checkbox on RPREXPT	To display third-party contracts or exemptions, set this field to Y on the RPREXPT form.
Info Access checkbox on RPAAWRD	If this checkbox is not selected for the fund code associated with the message, the fund will not be displayed.
Info Access checkbox on ROAINST	If RORSTAT_INFO_ACCESS_IND is not selected (or RORSTAT_INFO_ACCESS_IND is null and you have not selected the option on ROAINST to treat the null value as Y), the outside resources will not be displayed.

## Award Messages for Aid Year Page (bwrkamsg.P\_FAAppMsg)

The Award Messages page was updated so that award messages will not be displayed when either is true:

- The RPRAWRD\_INFO\_ACCESS\_IND = N for the fund code associated with the message.
- The RORSTAT\_INFO\_ACCESS\_IND = N (or RORSTAT\_INFO\_ACCESS\_IND is null and you have not selected the option on ROAINST to treat the null value as Y) for the student for the aid year.

This will prevent award messages from displaying for awards that the school has chosen not to display in Self-Service.

## **Award Payment Schedule for Award Year (bwrkpays.P\_DisPaySched)**

This page was updated to display the payment schedule for loan funds in addition to all other fund types.

## **Holds (bwrkholdh.P\_DisHold)**

The following link was added to this page.

### **Links to Other Web Pages**

<b>This Link</b>	<b>Action</b>
Requirement Messages	This link takes you to the Requirements Messages (bwrktmsg.P_DisTrkMsg) page.

## **Academic Progress (bwrksaph.P\_DisSAP)**

The following link was added to this page.

### **Links to Other Web Pages**

<b>This Link</b>	<b>Action</b>
Requirement Messages	This link takes you to the Requirements Messages (bwrktmsg.P_DisTrkMsg) page.

## **Eligibility Page (bmenu.P\_FACostMnu)**

The following link was added to this page.

### **Links to Other Web Pages**

<b>This Link</b>	<b>Action</b>
Requirement Messages	This link takes you to the Requirements Messages (bwrktmsg.P_DisTrkMsg) page.

## Financial Aid Links Page (bmenu.P\_FAAUnsecMnu and bmenu.P\_FAASecMnu)

A new link was added to this page to access the FAFSA4caster website. Text associated with this link reads, “Receive early estimates of eligibility for federal financial assistance.” Additionally, the .gif associated with the FAFSA on the Web link was updated.

### Links to Other Web Pages

This Link	Action
FAFSA4caster	This link takes you to the <i>www.fafsa4caster.ed.gov</i> website.

## Financial Aid Status Page (bwrksumm.P\_DispLoanHst)

When the RORSTAT\_INFO\_ACCESS\_IND indicator is set to N, no text will be displayed. Previously, the text, *You have been awarded financial aid which totals \$9,999.99*, displayed an award amount, even when the RORSTAT\_INFO\_ACCESS\_IND = N. This page was updated so that when the RORSTAT\_INFO\_ACCESS\_IND is N (or RORSTAT\_INFO\_ACCESS\_IND is null and you have not selected the option on ROAINST to treat the null value as Y), this line of text will not display at all.

Also, the text that included the link to the Financial Aid History page was modified. The line previously read, *Your financial aid history has been recorded since you began your collegiate career*. It now reads, *View your financial aid history*. The words *financial aid history* are still an active link to the Financial Aid History page (bwrkrhst.P\_DispAwdHst).

## Loan Application History Page (bwrklhst.P\_DispLoanHst)

This page was updated to replace the hard-coded ELM links with links to the appropriate lenders, as defined on the RPRLNDR form. If the URL description and URL have not been defined for the lender on RPRLNDR, the default URL description and URL entered on the Web Processing Rules tab of ROAINST will be used.

### Setup Requirements

Item	Description
RPBLNDR_URL_DESC, RPBLNDR_URL	Use these fields on the RPRLNDR form to define the URL for each lender.
RORWEBR_DFLT_LNDR_URL_DESC, RORWEBR_DFLT_LNDR_URL	Use these fields to set up a default URL to be used when a lender is not specified for the loan or the URL has not been defined for the lender.

## Requirement Messages Page (bwrktmsg.P\_DisPTrkMsg)

The following link has been added to this page.

### Links to Other Web Pages

This Link	Action
Return to Menu	This link returns the user to the Eligibility Menu Page (bmenu.P_FACostMnu).

## Student Requirements Page (bwrktrkr.P\_DisPTrkReq)

Requirement instructions are now displayed through a pop-up window. If instructions are available for the requirement, you will see the link, “View Instructions,” to the right of the Fund column.

In addition, non-coded tracking requirements and Promissory Note requirements are displayed in this same pop-up window when the indicators in Banner are checked.

### Setup Requirements

Item	Description
RRRAREQ_INFO_ACCESS_IND	Set this indicator to Y to display the non-coded tracking requirements.
RFRASPC_DISPLAY_PN_IND	Set this indicator to Y to display the promissory note requirements.



## 2 Banner Financial Aid Self-Service - Technical



### Changed Packages

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#### **BWRKAMSG Package (bwrkamsg.sql, bwrkams1.sql)**

This package was modified for changes to the Award Messages for Aid Year Page.

#### **BWRKLHST Package (bwrklhst.sql, bwrklhs1.sql)**

This package was modified for changes to the Loan Application History Page.

#### **BWRKPAYS Package (bwrkpays.sql, bwrkpay1.sql)**

This package was modified for changes to the Award Payment Schedule for Award year Page.

#### **BWRKRHST Package (bwrkrhst.sql, bwrkrhs1.sql)**

This package was modified for changes to the Award for Aid Year Page and the Award History Page.

#### **BWRKSUMM Package (bwrksumm.sql, bwrksum1.sql)**

This package was modified for changes to the Financial Aid Status Page.

#### **BWRKTMSG Package (bwrktmsg.sql, bwrktms1.sql)**

This package was modified for changes to the Requirement Messages Page.

## **BWRKTRKR Package (bwrktrkr.sql, bwrktrk1.sql)**

This page was modified for changes to the Student Requirements Page.

## **ROKREFC Package (rokrefc1.sql)**

This package was updated to return the RPRCONT\_INFO\_ACCESS\_IND in the case of third-party contracts and the RPREXPT\_INFO\_ACCESS\_IND in the case of exemptions to be displayed.

## **Obsolete Packages**

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### **BWRKACPT Package (bwrkacpt.sql, bwrkacp1.sql)**

This package was made obsolete. The code was moved to the BWRKRHST package (bwrkrhst.sql, bwrkrhs1.sql).

# 3 Problem Resolutions



The following is a summary of the problem resolutions included in Banner Financial Aid Self-Service Release 8.2. The detailed description, impact, and resolution information for each problem resolution is delivered in a separate .txt file. The file for this release is named `finaidss80200resolutions.txt`.

<b>Object Name</b>	<b>Defect #</b>	<b>Summary</b>
twtvmodu	1-3NNAWF	Financial Aid Self-Service 8.1 upgrade does not update the current version on TWTVMODU

