

# Banner Financial Aid Self-Service Release Guide

*Release 8.8  
July 2010*

The logo consists of a horizontal bar divided into three sections. The leftmost section is a black square containing a white photograph of a person's hands writing on a notepad. The middle section is a dark blue rectangle containing the word "SUNGARD" in white, bold, uppercase letters, followed by the words "HIGHER EDUCATION" in white, uppercase letters. The rightmost section is a light gray rectangle.

**SUNGARD** HIGHER EDUCATION

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July 2010	New version that supports Banner Financial Aid Self-Service 8.8 software.
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# 1 Introduction



This guide documents the Banner® Financial Aid Self-Service 8.8 release enhancements and problem resolutions. This section provides you with an overview of the following enhancements.

## **Year Round Pell Phase 3**

The functional and technical sections in this release guide discuss the modifications made to the Banner Financial Aid Self-Service that were necessary to accommodate crossover terms.

## **Problem resolutions**

Problem resolutions are summarized by object at the end of the release guide. For more information about a problem resolution, refer to the `faidss80800resolutions.txt` file that accompanies the Banner Financial Aid Self-Service 8.8 release.

Please refer to the *Banner Financial Aid 8.8 Release Guide* for more comprehensive information about this enhancement.



## 2 Year Round Pell Phase 3 - Functional



The Higher Education Opportunity Act (HEOA) of 2008 provided authorization for awarding up to two Federal Pell Grants within an academic year. Since June 2009, SunGard Higher Education has delivered Banner Financial Aid Year Round Pell functionality in two successive phases:

- Phase 1 - June 2009 (Release 8.4.2)
- Phase 2 - April 2010 (Release 8.7)

Phase 3 (Release 8.8) addresses Banner Financial Aid Self-Service functionality that expands features originally delivered as part of Year Round Pell, Phases 1 and 2. This release includes the Banner Self-Service updates necessary for Year Round Pell Phase 3 processing.

This functional section discusses the Web page changes made to support the Year Round Pell modifications in the Banner Financial Aid Self-Service 8.8 release.

### Changed Web Pages

This section describes the following changed web pages to support the Banner Financial Aid Self-Service 8.8 release:

- [“Award Overview tab \(bwrkrhst.P\\_DisplayTabs\)” on page 7](#)
- [“Accept Award Offer page \(bwrkrhst.P\\_DisplayTabs\)” on page 10](#)
- [“Overall Financial Aid Status page \(bwrksumm.P\\_DispSumm\)” on page 11](#)
- [“Award Payment Schedule page \(bwrkpays.P\\_DispPaySched\)” on page 11](#)
- [“Award History page \(bwrkrhst.P\\_DispAwdHst\)” on page 12](#)

### Award Overview tab (bwrkrhst.P\_DisplayTabs)

Display of specific Financial Aid award information has been changed to show an award amount > 0 for a term defined as a crossover that exists in two aid years. For a crossover Pell award, the crossover term will be returned with the aid year with which the aid year is normally associated (STVTERM\_FA\_PROC\_YR).

## Examples:

### Trailer School

Example 1:

The student's Pell EFC award for 0910 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 0910 aid year. For 1011, the crossover term information will not be displayed to the student (but will display in 0910).

**SUNGARD UNIVERSITY** Sign Out | Help

Browse

Personal Information | Student | **Financial Aid** Find a page...

**Award Package for 2009-2010 Aid Year** 998000090 Christopher Kichline  
Jul 14, 2010 01:02 pm

Home > Financial Aid > Financial Aid Award Information Menu > Award for Aid Year

General Information | **Award Overview** | Resources/Additional Information | Terms and Conditions | Accept Award Offer | Special Messages

Print

Need Calculation		Cost of Attendance	
Component	Amount	Component	Amount
Cost of Attendance	\$23,636.00	Books and SuppliesCôté	\$1,000.00
Estimated Family Contribution	\$1,470.00	Personal Expenses	\$1,576.00
Initial Need	\$22,166.00	Room and BoardCôtéCôtéC	\$4,860.00
Outside Resource	\$0.00	Transportation	\$1,200.00
Need	\$22,166.00	Tuition	\$15,000.00
		<b>Total:</b>	<b>\$23,636.00</b>

Expected Enrollment

**Status**

Full Time

Fund	Status	Fall 2009	Spring 2010	UDC ST 8.3 201030	Total
Admissions Scholarship	Accepted	\$1,333.32	\$1,333.32	\$1,333.36	\$4,000.00
Federal Pell Grant	Accepted	\$2,270.00	\$2,270.00	\$2,775.00	\$7,315.00
Federal Perkins Loan	Accepted	\$1,000.00	\$1,000.00	\$1,000.00	\$3,000.00
Federal SEOG	Accepted	\$833.00	\$833.00	\$834.00	\$2,500.00
<b>Total</b>		<b>\$5,436.32</b>	<b>\$5,436.32</b>	<b>\$5,942.36</b>	<b>\$16,815.00</b>

If you have questions regarding the above information, please contact the Financial Aid office.

Select Another Aid Year

Award Messages | Overall Financial Aid Status | Account Summary By Term | Award Payment Schedule | Award History | Loan Application History

RELEASE: 8.8 SITE MAP

SUNGARD HIGHER EDUCATION

Example 2:

The student's Pell EFC award for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 0910 aid year. For 1011, there is no crossover information that has to be displayed to the student in 0910 because the most beneficial award results from 0910.

## Header School

### Example 1:

The student's Pell EFC for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 1011 aid year. For 0910, the crossover term information will not be displayed (but will display in 1011).

**SUNGARD UNIVERSITY** Sign Out Help

Browse

Personal Information | Student | **Financial Aid** Find a page...

**Award Package for 2010-2011 Aid Year** 998000091 Jennifer Kichline Jul 14, 2010 01:26 pm

Home > Financial Aid > Financial Aid Award Information Menu > Award for Aid Year

General Information | **Award Overview** | Resources/Additional Information | Terms and Conditions | Accept Award Offer | Special Messages

Print

Need Calculation		Cost of Attendance	
Component	Amount	Component	Amount
Cost of Attendance	\$35,454.00	Books and SuppliesCôté	\$1,500.00
Estimated Family Contribution	\$531.00	Personal Expenses	\$2,364.00
Initial Need	\$34,923.00	Room and BoardCôtéCôtéC	\$7,290.00
Outside Resource	\$0.00	Transportation	\$1,800.00
Need	\$34,923.00	Tuition	\$22,500.00
		<b>Total:</b>	<b>\$35,454.00</b>

**Expected Enrollment**

**Status**

Full Time

**Financial Aid Award**

Fund	Status	Mark's 2010-11 summer header	DV January 2011	DV March 2011	Total
Admissions Scholarship	Accepted	\$0.00	\$2,000.00	\$2,000.00	\$4,000.00
Federal Pell Grant	Accepted	\$2,675.00	\$2,500.00	\$2,500.00	\$7,675.00
Federal Perkins Loan	Accepted	\$0.00	\$1,000.00	\$1,000.00	\$2,000.00
Federal SEOG	Accepted	\$0.00	\$750.00	\$750.00	\$1,500.00
Federal Stafford Loan	Offered	\$0.00	\$2,250.00	\$2,250.00	\$4,500.00
<b>Total</b>		<b>\$2,675.00</b>	<b>\$8,500.00</b>	<b>\$8,500.00</b>	<b>\$19,675.00</b>

If you have questions regarding the above information, please contact the Financial Aid office.

Select Another Aid Year

Award Messages | Overall Financial Aid Status | Account Summary By Term | Award Payment Schedule | Award History | Loan Application History

RELEASE: 8.8 SITE MAP

SUNGARD HIGHER EDUCATION

### Example 2:

The student's Pell EFC for 0910 = 500 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 1011 aid year. For 0910, there is no crossover information that has to be displayed to the student in 1011 because the most beneficial award results from 1011.

## Accept Award Offer page (bwrkrhst.P\_DisplayTabs)

Display of the Award Decision information has been changed to show an award amount  $> 0$  for a term defined as a crossover that exists in two aid years. For a crossover Pell award, the crossover term will be returned with the aid year with which the aid year is normally associated (STVTERM\_FA\_PROC\_YR).

### Examples:

#### Trailer School

Example 1:

The student's Pell EFC award for 0910 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 0910 aid year. For 1011, the crossover term information will not be displayed to the student (but will display in 0910).

Example 2:

The student's Pell EFC award for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 0910 aid year. For 1011, there is no crossover information that has to be displayed to the student in 0910 because the most beneficial award results from 0910.

#### Header School

Example 1:

The student's Pell EFC for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 1011 aid year. For 0910, the crossover term information will not be displayed (but will display in 1011).

Example 2:

The student's Pell EFC for 0910 = 500 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 1011 aid year. For 0910, there is no crossover information that has to be displayed to the student in 1011 because the most beneficial award results from 1011.

## Overall Financial Aid Status page (bwrksumm.P\_DispSumm)

When a crossover period exists, the Overall Financial Aid Status page has been changed to show, “You have been awarded financial aid which totals “\$xx,xxx.xx”. The total will reflect the amount of the Pell award for the applicable crossover term.

### Examples:

#### Trailer School

The student has been awarded only Pell for 0910 (2,675 – fall, 2,675 – spring). The student’s summer crossover term is more beneficial in 1011 (2,775). The total amount that will be displayed for 0910 = 8,125.

For 1011, the total amount would be, 5,550 (2,775 – fall, 2,775 – spring). The display does not include the 2,775 for the summer term.

#### Header School

The student has been awarded only Pell for 1011 (2,500 – fall, 2,500 – spring). The student’s summer crossover term is more beneficial in 0910 (2,675). The total amount that will be display for 1011 is 7,675.

For 0910, the total amount would be, 8,025 (2, 675 summer 2009 header, 2,675 – fall, 2,675 – spring). The total does not include the 2,675 for the summer 2010 term.

## Award Payment Schedule page (bwrkpays.P\_DispPaySched)

The Award Payment Schedule page has been modified to display an award amount > 0 for a term defined as a crossover that exists in two aid years. For a crossover Pell award, the crossover term will be returned with the aid year with which the aid year is normally associated (STVTERM\_FA\_PROC\_YR).

### Examples:

#### Trailer School

Example 1:

The student’s Pell EFC award for 0910 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 0910 aid year. For 1011, the crossover term information will not be displayed to the student (but will display in 0910).

Example 2:

The student's Pell EFC award for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 0910 aid year. For 1011, there is no crossover information that has to be displayed to the student in 0910 because the most beneficial award results from 0910.

### Header School

Example 1:

The student's Pell EFC for 0910 = 0 and for 1011 = 500. The scheduled Pell Award for summer term is more beneficial for 0910. Banner Self-Service has been changed to display the term amount from 0910 for this student in the 1011 aid year. For 0910, the crossover term information will not be displayed (but will display in 1011).

Example 2:

The student's Pell EFC for 0910 = 500 and for 1011 = 0. The scheduled Pell Award for summer term is more beneficial for 1011. Banner Self-Service has been changed to display the term amount from 1011 for this student in the 1011 aid year. For 0910, there is no crossover information that has to be displayed to the student in 1011 because the most beneficial award results from 1011.

Additionally, the "Expected Date" currently comes from the current aid year. However, because the actual disbursement will come from the crossover aid year, the **Expected Date** will be populated using the crossover term data.

## Award History page (bwrkrhst.P\_DispAwdHst)

No changes were made to this page for this release. Pell data displayed in this section will follow the aid year it was awarded which corresponds to the NSLDS format.

Example:

For 09-10, the student has 2,675 fall, 2,675 spring award and the summer was more beneficial in 1011 (student also has 2,775 for fall and spring of 10-11). On the award history page, 5,350 will be shown for 09-10 and 8,325 will be shown for 1011.

Browse

Personal Information | Student | **Financial Aid**

Find a page...

## Award History

998000090 Christopher Kichline  
Jul 14, 2010 02:54 pm

Home > Financial Aid > Financial Aid Award Information Menu > Award History

To display more detailed information about a loan listed below, select Loan Application History.

### History for 2010-2011 Aid Year

Fund	Status	Amount	Paid to Date
Admissions Scholarship	Accepted	\$4,000.00	\$0.00
Federal Pell Grant	Accepted	\$8,325.00	\$2,775.00
Federal Perkins Loan	Accepted	\$2,000.00	\$0.00
Federal SEOG	Accepted	\$1,500.00	\$0.00
<b>Total</b>		\$15,825.00	\$2,775.00

No outside resource information is available for you at this time, please contact your financial aid office if you have questions.

### History for 2009-2010 Aid Year

Fund	Status	Amount	Paid to Date
Admissions Scholarship	Accepted	\$4,000.00	\$4,000.00
Federal Pell Grant	Accepted	\$5,350.00	\$5,350.00
Federal Perkins Loan	Accepted	\$3,000.00	\$3,000.00
Federal SEOG	Accepted	\$2,500.00	\$2,500.00
<b>Total</b>		\$14,850.00	\$14,850.00

No outside resource information is available for you at this time, please contact your financial aid office if you have questions.

### History for 2008-2009 Aid Year

Fund	Status	Amount	Paid to Date
Federal Pell Grant	Accepted	\$4,731.00	\$0.00
<b>Total</b>		\$4,731.00	\$0.00

No outside resource information is available for you at this time, please contact your financial aid office if you have questions.

[Back to Top](#)

Overall Financial Aid Status | Account Summary By Term | Award for Aid Year | Award Payment Schedule | Loan Application History



# 3 Year Round Pell Phase 3 - Technical



The Higher Education Opportunity Act (HEOA) of 2008 provided authorization for awarding up to two Federal Pell Grants within an academic year. Since June 2009, SunGard Higher Education has delivered Banner Financial Aid Year Round Pell functionality in two successive phases:

- Phase 1 - June 2009 (Release 8.4.2)
- Phase 2 - April 2010 (Release 8.7)

Phase 3 (Release 8.8) addresses Banner Financial Aid Self-Service functionality that expands features originally delivered as part of Year Round Pell, Phases 1 and 2. This release includes the Banner Self-Service updates necessary for Year Round Pell Phase 3 processing.

This technical section discusses the Web page changes made to support the Year Round Pell modifications in the Banner Financial Aid Self-Service 8.8 release.

## Changed Package

The following package has been changed to support the Banner Financial Aid 8.8 release:

### **bwrkolib**

The `f_checkcrossover` function was added to check for crossover pell terms.



# 4 Problem Resolutions



This section lists problem resolutions included in the Banner Financial Aid Self-Service 8.8 release. At the time this guide was completed, the following problem resolution was targeted for delivery with this release.

 **Note**

For comprehensive and detailed problem, impact, and resolution information for the defect corrected in this release, refer to the supplemental problem resolutions file (`faidss80800resolutions.txt`) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized. ■

Object Name	Defect #	Summary
BWRKTRKR	1-BX85WG	Non D/L promissory notes no longer display on self-service tracking requirements.

