

# Banner Financial Aid Release Guide

*Release 8.4  
April 2009*



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**Revision History Log****Publication Date    Summary**

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April 2009	New version that supports Banner Financial Aid 8.4 software.
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## Contents



	<b>Introduction</b> . . . . .	<b>.11</b>
<b>Section 1</b>	<b>2009-2010 COD Updates - Functional</b>	
	<b>COD Overview</b> . . . . .	<b>.13</b>
	New and Updated Forms and Processes for 2009-2010 . . . . .	.13
	Support of Flat-File Processing Changes for TEACH. . . . .	.14
	Support for COD XML Changes . . . . .	.14
	Support Advanced Pay for ACG and SMART . . . . .	.15
	Support for ACG and SMART Award Changes. . . . .	.16
	<b>Message Classes</b> . . . . .	<b>.17</b>
	XML Files and Message Classes . . . . .	.17
	Fixed-Length Flat Files and Message Classes . . . . .	.19
	<b>New Forms</b> . . . . .	<b>.21</b>
	2009-2010 Grant Disbursement/Acknowledgement Form (READI10) . . . . .	.21
	2009-2010 Grant Origination/Acknowledgement Form (REAOR10) . . . . .	.21
	ACG/SMART Tab . . . . .	.21
	TEACH Tab . . . . .	.21
	<b>Changed Forms</b> . . . . .	<b>.21</b>
	2005-2006 Pell Origination/Acknowledgement Form (REAOR06) . . . . .	.21
	2006-2007 Grant Origination/Acknowledgement Form (REAOR07) . . . . .	.22
	2007-2008 Grant Origination/Acknowledgement Form (REAOR08) . . . . .	.22
	2008-2009 Grant Origination/Acknowledgement Form (REAOR09) . . . . .	.22
	COD Document Control Form (REICODD) . . . . .	.22
	Key Block . . . . .	.22
	Fund Management Form (RFRMGMT) . . . . .	.23
	Packaging Tab . . . . .	.23

Applicant High School and Admission Data Form (ROAHSDT) . . . . .	.24
Funds Management Form (ROAMGMT) . . . . .	.24
Packaging Options . . . . .	.24
Loan Packaging Rules . . . . .	.24
U.S Specific Institution Financial Aid Options Form (ROAUSIO) . . . . .	.25
Grant and EDE Options Tab . . . . .	.25
Package Maintenance Form (RPAAPMT) . . . . .	.26
Fund Awards by Term Tab . . . . .	.26
Award Maintenance Form (RPAAWRD) . . . . .	.26
Fund Awards by Term Tab . . . . .	.26
Direct Loan Origination Form (RPALORG) . . . . .	.26
Main Window . . . . .	.26
PLUS Parent or Endorser Data Window . . . . .	.28
TEACH Grant Agreement to Serve Form (RPATATS) . . . . .	.28
Electronic Counseling Status Form (RPILECS) . . . . .	.29
Main Window . . . . .	.29
Financial Aid Major Rules Form (RPRMAJR) . . . . .	.30
<b>Changed Menus . . . . .</b>	<b>.31</b>
2009-2010 Electronic Data Exchange Menu (*RESEDE10) . . . . .	.31
<b>New Reports and Processes . . . . .</b>	<b>.32</b>
2009-2010 COD Print Process (RERCD10) . . . . .	.32
2009-2010 COD Extract Process (RREX10) . . . . .	.32
2009-2010 Grant File Import (RERFI10) . . . . .	.33
2009-2010 COD File Import (RERIM10) . . . . .	.34
3.0b Schema Updates . . . . .	.34
New TEACH Entrance Requirement and Entrance Satisfied Status Parameters .34	
New TEACH ATS Requirement and ATS Satisfied Status Parameters . . . . .	.37
Advance Pay for ACG and SMART . . . . .	.38
New Tags for Pell Awards . . . . .	.39
New MPN Status Code Valid Values . . . . .	.39
2008-2009 COD 3.0b File Import (RERIM3B) . . . . .	.40
2009-2010 Grant Origination Creation (REROR10) . . . . .	.40
2009-2010 Direct Loan Flat-File Upload (RPRDU10) . . . . .	.40
<b>Changed Reports and Processes . . . . .</b>	<b>.41</b>
Disbursement Process (RPEDISBS) . . . . .	.41
Grant COD Miscellaneous Report (RERGRNT) . . . . .	.41
COD Import/Export Report (RERIMEX) . . . . .	.42

New Parameters . . . . .	.42
FA New Year Roll Process (ROPROLL) . . . . .	.43
FA HS/Admission Data Posting Process (RORHSDP) . . . . .	.43
Disclosure Statement Printing (RPRDSPT) . . . . .	.43
Direct Loan Record Creation (RPRLORC) . . . . .	.47
SMART Grant Eligibility Report (RPRSMRT) . . . . .	.47

## **Section 2 2009-2010 INAS Technical Upgrade #2, Post #3 - Functional**

<b>Introduction . . . . .</b>	<b>.49</b>
<b>Changed Forms . . . . .</b>	<b>.50</b>
2009-2010 Need Analysis Global Policy Options Rules (RNRGL10) . . . . .	.50
New Fields . . . . .	.50
<b>Changed Reports and Processes . . . . .</b>	<b>.52</b>
2009-2010 Need Analysis Calculation Process (INAS) (RNEIN10) . . . . .	.52

## **Section 3 Financial Aid Archive and Data Purge Enhancement - Functional**

<b>Overview . . . . .</b>	<b>.53</b>
Federal Regulations and Specific Tables . . . . .	.53
New Applicant Saved Requirements Table (RORSREQ) . . . . .	.54
Financial Aid Tables and Archive/Purge Availability . . . . .	.54
<b>Changed Forms . . . . .</b>	<b>.69</b>
Fund Sequence History Inquiry (RHIAFSH) . . . . .	.69
Transfer Award window . . . . .	.69
Transfer Loan window . . . . .	.69
Options menu . . . . .	.69
Global Institution Financial Aid Options (ROAINST) . . . . .	.70
Aid Year Definition Tab . . . . .	.70
Applicant Status Inquiry (ROIASIQ) . . . . .	.71
Archived Financial Aid Summary Block . . . . .	.71
Additional Forms . . . . .	.72
<b>Changed Menus . . . . .</b>	<b>.73</b>
History and Transcripts (*RESHIST) . . . . .	.73

<b>New Reports and Processes</b> . . . . .	<b>.73</b>
Applicant Purge Process (RORAPRG) . . . . .	.73
Parameters . . . . .	.75
Archive/Purge Applicant Process (RORARCH). . . . .	.76
Parameters . . . . .	.81
Archive Document. . . . .	.82
Rules Purge Process (RORRPRG). . . . .	.97
Parameters . . . . .	.102
 <b>Changed Reports and Processes</b> . . . . .	 <b>.102</b>

**Section 4 2009-2010 COD Updates - Technical**

<b>Changed Tables</b> . . . . .	<b>.105</b>
Pell Origination Table (REBPAYV) . . . . .	.105
Financial Aid Institution Table (ROBINST) . . . . .	.105
SMART Grant Qualified Course Code Table (RPRCIPC). . . . .	.106
Electronic Counseling Table (RPRLECS). . . . .	.107
Financial Aid Major Rules Table (RPRMAJR). . . . .	.108
ACG Rigorous High School Program Code Table (RPRSAHP) . . . . .	.108
TEACH Grant Agreement to Serve Table (RPRTATS) . . . . .	.108
 <b>New Packages</b> . . . . .	 <b>.109</b>
2009-2010 COD Extract Database Package (REKCE10) . . . . .	.109
2009-2010 COD Import Database Package (REKCI10) . . . . .	.109
2008-2009 COD 3.0b Import Database Package (REKCI3B) . . . . .	.110
2009-2010 Grant Origination Package (REKOR10) . . . . .	.110
 <b>Changed Packages</b> . . . . .	 <b>.110</b>
DML_REBPAYV Package. . . . .	.110
DML_RPRMAJR Package . . . . .	.110
DML_RPRTATS Package. . . . .	.111
RB_COMMON Package . . . . .	.111
RB_APPLICANT_STATUS_RULES . . . . .	.111
RB_AWARD_DISBURSEMENT_RULES. . . . .	.111
RB_AWARD_RULES. . . . .	.112
RB_AWARD_SCHEDULE_RULES . . . . .	.112
RB_AWARD_SCHEDULE_STRINGS . . . . .	.112

RB_COD_DOCUMENT_RULES . . . . .	112
RB_GRANT_ORIGINATION_RULES . . . . .	113
RBPELL_ORIGINATION . . . . .	113
RBPELL_ORIGINATION_RULES . . . . .	113
RBPELL_ORIGINATION_STRINGS . . . . .	113
RB_MAJOR_RULES . . . . .	114
RB_MAJOR_RULES_RULES . . . . .	114
RB_MAJOR_STRINGS . . . . .	114
RB_TEACH_ATS . . . . .	115
RB_TEACH_ATS_RULES . . . . .	115
RB_TEACH_ATS_STRINGS . . . . .	115
REKCE09 Package . . . . .	116
REKCI09 Package . . . . .	116
REKORIG Package . . . . .	116
RPK_AWARD_VALIDATION_US Package . . . . .	116
RPK_COMMON_VALIDATION_US . . . . .	117
RPK_DISB_VALIDATION_US Package . . . . .	118
RPK_DISB_VAL_STRINGS_US Package . . . . .	119
<b>Changed Database Triggers . . . . .</b>	<b>120</b>
RT_REBPAYV_LOG_INSUPDDTL (retpayv9.sql) . . . . .	120
RT_ROBINST_LOG_INSUPDDTL (rotinst9.sql) . . . . .	120
RT_RPRLECS_LOG_INSUPDDTL (rptlecs9.sql) . . . . .	120
RT_RPRMAJR_LOG_INSUPDDTL (rptmajr9.sql) . . . . .	120
RT_RPRTATS_LOG_INSUPDDTL (rpttats9.sql) . . . . .	120
<b>Required Data . . . . .</b>	<b>121</b>
Data Dictionary Table (RORDATA) . . . . .	121
Audit Log Form/Data Code Table (RORDVAL) . . . . .	121
Logging Control Repeating Table (RORLOGC) . . . . .	122
Miscellaneous Validation Rules Table (RORMVAL) . . . . .	123
REBORIG_GRANT_TYPE . . . . .	123
REBORIG_YR_IN_COLL . . . . .	123
RFRPROM_DL_SERV_NOTE_STATUS . . . . .	124
RPRAWRD_OVERRIDE_YR_IN_COLL . . . . .	124
RPRLAPP_MPN_STATUS_IND . . . . .	124
RPRTATS_DISCHARGE_REASON_CDE . . . . .	125
RPRTATS_STATUS . . . . .	125
Federal Rules Table (RPRFEDR) . . . . .	125

ACG Rigorous High School Program Code Table (RPRSAHP) . . . . .	126
Reject Validation Table (RTVRJCT). . . . .	127
<b>Changed Form . . . . .</b>	<b>128</b>
Form Library (ROQOLIB) . . . . .	128

## **Section 5 2009-2010 INAS Technical Upgrade #2, Post #3 - Technical**

<b>Required Data . . . . .</b>	<b>129</b>
INAS Global Policy Options Table script (RNRGLBL) – rinsgl10.sql . . . . .	129
New rnrglblu_071401.sql Script. . . . .	133

## **Section 6 Financial Aid Archive and Data Purge Enhancement - Technical**

<b>New Tables . . . . .</b>	<b>135</b>
Applicant Archive Table (RORARCH). . . . .	135
Applicant Saved Requirements Table (RORSREQ) . . . . .	136
<b>Changed Tables . . . . .</b>	<b>138</b>
Pell Origination Table (REBPAYV) . . . . .	138
Financial Aid Institution Table (ROBINST) . . . . .	139
Applicant Status Table (RORSTAT) . . . . .	139
Temporary Applicant Status Table (ROTSTAT) . . . . .	140
Packaging Simulation Applicant Status Table (ROTSTTS) . . . . .	140
Applicant Award Disbursement Table (RPRADSB). . . . .	141
<b>New Packages/Procedures/Functions . . . . .</b>	<b>142</b>
ROK_ARCHIVE_DATA Package . . . . .	142
F_AWARDS_EXIST . . . . .	142
F_LOANS_EXIST . . . . .	142
F_RESOURCES_EXIST . . . . .	143
F_STUDENT_DATA_EXISTS . . . . .	143
F_YEAR_AWARDS_EXIST . . . . .	143
F_YEAR_LOANS_EXIST . . . . .	144
F_YEAR_RESOURCES_EXIST . . . . .	144
F_YEAR_STATUSES_EXIST . . . . .	144
P_CREATE_ARCHIVE_DOC . . . . .	145
P_PURGE_PERSON . . . . .	145
P_PURGE_RULES . . . . .	146

<b>Changed Packages/Procedures/Functions</b> . . . . .	<b>.146</b>
RB_AWARD_DISBURSEMENT . . . . .	.146
RB_REQUIREMENTS . . . . .	.147
RP_AWARD_SCHEDULE . . . . .	.147
<b>Changed Plus Procedures</b> . . . . .	<b>.148</b>
Disable Referential Integrity Script - RDISCON. . . . .	.148
<b>New Database Triggers</b> . . . . .	<b>.148</b>
RT_RORARCH_USERACTIVIT_INSUPD (rotarch0.sql) . . . . .	.148
<b>Changed Views</b> . . . . .	<b>.148</b>
Financial Aid Applications View (RCVAPPL) . . . . .	.148
Prior College Selection View (ROVPCOL) . . . . .	.149
<b>Obsolete Objects</b> . . . . .	<b>.149</b>
<b>Other Interfaces</b> . . . . .	<b>.150</b>
Cross-Product Relationship (STURESG) . . . . .	.150
Cross-Product Relationship (TRARESG) . . . . .	.150

## **Section 7    Problem Resolutions**



# Introduction

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This guide documents Release 8.4 of the Banner Financial Aid System. This is a cumulative release that also includes enhancements, regulatory updates, RPEs, and problem resolutions delivered with the 8.3.1 release in February 2009. This guide provides detailed information about the 8.4 release only. For documentation regarding the 8.3.1 release, please refer to the *Banner Financial Aid 8.3.1 Release Guide* (finaid80301rg.pdf).

## Note

Any release hints, suggestions, or corrections to this release guide that come up subsequent to the posting of this release will be documented in the *Are there any helpful hints and suggestions for using Banner Financial Aid 8.4?*, Solution/FAQ # 1-58KMFM, and made available through the Customer Support Center ([https://connect.sungardhe.com/customer\\_support](https://connect.sungardhe.com/customer_support)). It is recommended that you refer to this document periodically under Solutions/FAQs (# 1-58KMFM) as you use the new release functionality. ■

The following updates are included in this release.

### ***Common Origination and Disbursement (COD) Processing***

The functional and technical sections in this release guide discuss the modifications made to support COD processing for the 2009-2010 aid year. All changes are based upon the *2009-2010 Technical Reference*. This release includes support for:

- Changes due to Schema 3.0b.
- Direct Loan Rebate Fee Percentage changes.
- New TEACH Grant ATS Discharge Report (ATSDISOP).
- New TEACH Grant Entrance Counseling Files (CRAC10OP).
- Changes to ACG and SMART grants for the *Ensuring Continued Access to Student Loans Act of 2008 (ECASLA)*.
- Support for Advanced Pay processing for ACG and SMART disbursements.
- Changes to resolve RPE 1-41AXBH allowing schools to define an ATS tracking requirement to be satisfied when ATS data is imported to Banner.

### ***2009-2010 INAS Technical Upgrade #2, Post #3***

On March 20, 2009, the College Board released INAS Technical Upgrade #2, Post #3. Banner Financial Aid has been updated to accommodate the following INAS changes.

- Missing fields were added to the College Board Compare tables.
- Copybook IWKGLB10, group Y-N-OPTIONS definition, was updated to bring it into alignment with its corresponding block (GLB-COMPARE-RQSTS) in the GLOBAL10 layout module.
- There was a version control update to the INAS2010.pco module.

### ***Financial Aid Archive and Data Purge Enhancement***

The functional and technical sections in this release guide discuss the modifications made to archive/purge Banner Financial Aid records when processing is complete.

Three new C processes allow you to archive/purge Financial Aid records.

- The Applicant Purge Process (RORAPRG) removes records for the applicant who did not complete financial aid processing and did not attend your institution for an aid year. This new process resolves RPE CMS-RPE27339.
- The Archive/Purge Applicant Process (RORARCH) removes records for the applicant for an aid year once your institution's record retention policy has been met. This new process resolves RPE CMS-RPE1377.
- The Rules Purge Process (RORRPRG) removes rules records for the aid year.

### ***Problem Resolutions***

Problem resolutions are summarized by object at the end of the release guide. You can find detailed information for each problem resolution in a separate .txt file. The file for this release is named `finaid80400resolutions.txt`.

This table summarizes the interim releases which are included in Release 8.3.1. Refer to the associated release guides for additional release documentation.

<b>Release Number</b>	<b>Contents</b>	<b>Release Date</b>
8.3.1	Holds by Term Enhancement	February 2009

# 1 2009-2010 COD Updates - Functional



## COD Overview

---

This release includes the updates necessary for 2009-2010 COD processing, based upon the guidelines outlined in the *2009-2010 COD Technical Reference*. The following updates are included.

## New and Updated Forms and Processes for 2009-2010

All aid year specific processes and forms were created and updated for 2009-2010 processing. Updates are based on the most recent 2009-2010 COD Technical Reference provided by the Department of Education.

### Specific Changes

- The Direct Loan Rebate Fee Percentage is changing on 7/1/09. You could not update the **Rebate Fee Percent** field on the RPALORG Form prior to this release. With this release, we have changed the **Rebate Fee Percent** field so that it can be updated and so that any changes to the field will be logged as a Direct Loan change record.
- Support for Schema 3.0b – see below for more information
- TEACH Grant ATS Discharge Report (ATSDISOP) – see below for more information
- TEACH Grant Entrance Counseling Files (CRAC10OP) – see below for more information
- Changes for ACG and SMART grants for the *Ensuring Continued Access to Student Loans Act of 2008 (ECASLA)*.
- Support for Advanced Pay processing for ACG and SMART disbursements.
- Changes to resolve RPE 1-41AXBH allowing schools to define an ATS tracking requirement to be satisfied when ATS data is imported to Banner.

## Support of Flat-File Processing Changes for TEACH

The RERFI10 process was updated to support the import of the new non-aid year specific ATSDISOP message class for ATS records that have been inactivated due to Death, Unauthorized Signature or Identify Theft. You must import the ATSDISOP file so that the RERFI10 process can update the matching ATS ID in the RPRTATS table to a C (Closed) status.

### Note

For 2009-2010, COD will now allow Data Requests for TEACH MRRs. However, COD has specifically not updated the Grant Data Request Batch File Layout for this functionality. Instead, COD is requiring schools to make these requests on the COD website. Therefore, no changes to Banner are required. ■

## Support for COD XML Changes

### Warning

Beginning in March 2009, the COD system began using the 3.0b version of the Common Record XML schema for all aid year processing. All 2009-2010 processes will use this new schema.

All 2008-2009 extract and response files in Banner will continue to use the 3.0a schema. Schools will continue to import all response files from COD for 2008-2009 through RERIM09 as those will continue to be sent in the 3.0a Schema used in the extract files.

However, system-generated files for 2008-2009 will be sent in either the new 3.0b schema or the 2.0e schema. The option for which of these two schemas you want to receive your system-generated files can be updated on the COD website. With this release we are providing a new process (RERIM3B) which you can use to import 2008-2009 system-generated files received in the 3.0b schema. If you continue to receive system-generated files in the 2.0e schema, you can continue to use the RERIM2E process to import those files. ■

REREX10 and RERIM10 use the new 3.0b schema. The 3.0b schema is identical to the 3.0a schema except for the following changes:

### **New Teach Counseling Block**

With the 3.0b schema, COD will begin sending the new CRACxxOP message class for TEACH Grant Entrance Counseling records. These records include the new TEACH Counseling Block that contains the following new tags:

*<CounselingType>*

*<CounselingCompleteDate>*

*<CounselingSequenceNumber>*

Parameters were added to RERIM10 to identify the tracking requirement and status for TEACH Entrance Counseling records. RERIM10 was also updated so that the Entrance Counseling data is imported to RPRLECS and the specified tracking requirement is updated - if it already exists in RRRAREQ.

Report output provides the details in which records were updated in RRRAREQ and RPRLECS, as well as any records that were not matched to a student in RERSTID.

## **New Pell Award Complex Tags**

COD has added the following new tag in the Pell Award complex to be used in the future for Year Round Pell processing.

*<AdditionalEligibilityIndicator>*

COD has determined that there will continue to only be one Pell origination for the student for the aid year at a school. A student that is receiving more than one full Pell Grant award within the aid year will be identified on the origination record by having the *<AdditionalEligibilityIndicator>* tag set to "true".

COD has not yet updated their systems for Year Round Pell processing. Therefore, the value in this tag will be "false" for all students until those updates have been made at COD and within Banner.

In anticipation of COD's changes for Year Round Pell processing, new columns were added to REBPAYV to be used for the Additional Eligibility Indicator. These columns will not display on REAOR10 and the values will default to *N* in the REBPAYV table. REREX10 will extract the tag into the extract file. Currently, the value will always be 'false' and COD will ignore the tag. RERIM10 will import the tag if present in the response document. When changes are later made at COD and within Banner to support Year Round Pell processing, changes to REREX10 and RERIM10 will not be necessary as they are already coded to handle the processing of the new tag.

## **New Agreement to Serve Status Code**

The *<AgreementToServeStatusCode>* tag can now contain a value of *C* (Closed). RERIM10 was updated to properly import this new value.

## **New MPN Status Code Valid Values**

The *<MPNStatusCode>* tag can now contain values of *I* (Inactive) and *C* (Closed). RERIM10 was updated to properly import the new values.

# Support Advanced Pay for ACG and SMART

Advance Pay disbursement processing for ACG and SMART is similar to JIT/Advance Pay disbursement processing for Pell where disbursements are reported to COD prior to

actually paying them to the student's account. However with ACG and SMART, schools are only allowed to report disbursements 7 days prior to the actual disbursement date. With Pell, they are allowed to report disbursements up to 30 days prior to disbursement. For this reason, a new indicator was added to ROBINST to capture whether or not the school wants to process ACG and SMART disbursements as Advance Pay and to define the number of days prior to disbursement they wish to report their disbursement records.

The Disbursement process was updated to disburse in a way similar to Pell - based on this new indicator. The RREX10 and RERIM10 processes were updated to extract and import Advance Pay ACG and SMART disbursements properly.

 **Note**

At this time, Banner does not support Advance Pay processing for TEACH disbursements. ■

## Support for ACG and SMART Award Changes

Changes were made to ACG and SMART grants with the *Ensuring Continued Access to Student Loans Act of 2008 (ECASLA)*.

- Eligible non-citizens are eligible to receive ACG and SMART grants (previously only U.S. citizens were eligible).
- A 5th Year SMART Grant is now available for those programs that require a 5th year.
- ACG and SMART grants are now available for students with less than Full-Time attendance.

This release addresses the citizenship and 5th year SMART changes. Changes have been made in this release to the RPRFEDR table to allow student's enrolled less than full-time to be awarded ACG or SMART. However, additional updates to automatically calculate the correct award amount for ACG and SMART based on less-than full-time enrollment status will be addressed in a future release. Until that time, less-than full-time awards must be calculated manually.

These changes are all effective July 1, 2009 and for the 2009-2010 aid year. Banner updates will allow these grants to be awarded, disbursed and originated properly within the new regulations for the 2009-2010 aid year.

 **Note**

The ACG program was also changed to make students enrolled in certain certificate programs eligible for ACG grants. No Banner changes were necessary for this change, but schools will need to review their setup on the RPRDEGR Form to add any eligible certificate programs. ■

# Message Classes

The COD message classes and formats that Banner Financial Aid supports are listed below. This includes both XML and fixed-length, flat file formats.



## Warning

You may use Filecat with fixed-length files, but it cannot be used with XML files.

## XML Files and Message Classes

These message classes are supported when processing XML files with COD.

Program	Import/ Export	Process	Message Class	Description
Pell	Export	REREXxx	CRPGxxIN	Pell Program Aid Year Specific Common Record
Pell	Import	RERIMxx	CRPGxxOP	Pell Program Aid Year Specific Common Record Response
Pell/ACG/ SMART	Import	RERIMxx	CRNDxxOP	System-Generated Aid Year Specific Negative Disbursement Common Record
ACG	Export	REREXxx	CRAGxxIN	ACG Program Aid Year Specific Common Record
ACG	Import	RERIMxx	CRAGxxOP	ACG Program Aid Year Specific Common Record Response
SMART	Export	REREXxx	CRSGxxIN	National SMART Program Aid Year Specific Common Record
SMART	Import	RERIMxx	CRSGxxOP	National SMART Program Aid Year Specific Common Record Response
TEACH	Export	REREXxx	CRTHxxIN	TEACH Program Aid Year Specific Common Record

<b>Program</b>	<b>Import/ Export</b>	<b>Process</b>	<b>Message Class</b>	<b>Description</b>
TEACH	Import	RERIMxx	CRTHxxOP	TEACH Program Aid Year Specific Common Record Response
TEACH	Import	RERIMxx	CRATxxOP	System-Generated Aid Year Specific Agreement To Serve Common Record
TEACH	Import	RERIMxx	CRACxxOP	System-Generated Aid Year Specific TEACH Grant Counseling Acknowledgement Common Record
Pell/ACG/ SMART/ TEACH/Direct Loan	Export	REREXxx	CRAAxxIN	Multi-Program Aid Year Specific Common Record
Pell/ACG/ SMART/ TEACH/Direct Loan	Import	RERIMxx	CRAAxxOP	Multi-Program Aid Year Specific Common Record Response
Pell/ACG/ SMART/ TEACH/Direct Loan	Import	RERIMxx	CRRCxxOP	Aid Year Specific Common Record Receipt
Direct Loan	Export	REREXxx	CRDLxxIN	DL Program Aid Year Specific Common Record
Direct Loan	Import	RERIMxx	CRDLxxOP	DL Program Aid Year Specific Common Record Response
Direct Loan/ TEACH	Import	RERIMxx	CRBNxxOP	System-Generated Aid Year Specific Booking Notification Common Record
Direct Loan	Import	RERIMxx	CRPSxxOP	System-Generated Aid Year Specific Payment to Servicer Common Record

<b>Program</b>	<b>Import/ Export</b>	<b>Process</b>	<b>Message Class</b>	<b>Description</b>
Direct Loan	Import	RERIMxx	CRCOxxOP	System-Generated Aid Year Specific Credit Override Common Record
Direct Loan	Import	RERIMxx	CRPNxxOP	System-Generated Aid Year Specific Promissory Note Common Record

## Fixed-Length Flat Files and Message Classes

These message classes are supported when processing Fixed-Length Flat files with COD.

<b>Program</b>	<b>Import/ Export</b>	<b>Process</b>	<b>Message Class</b>	<b>Description</b>
Pell	Export	RERORxx	PGRQxxIN	Pell Data Request Record
Pell	Import	RERFIxx	PGRAxxOP	Pell Data Request Record Response
Pell	Import	RERFIxx	PGRCxxOP	Pell Reconciliation Record
Pell	Import	RERFIxx	PGYRxxOP	Pell Year-To-Date Record
Pell	Import	RERFIxx	PGASxxOP	Pell Electronic Statement of Account
Pell	Import	RERFIxx	PGMRxxOP	Pell Multiple Reporting Record
ACG	Export	RERORxx	AGRQxxIN	ACG Data Request Record
ACG	Import	RERFIxx	AGRAxxOP	ACG Data Request Record Response
ACG	Import	RERFIxx	AGRCxxOP	ACG Reconciliation Record
ACG	Import	RERFIxx	AGYRxxOP	ACG Year-To-Date Record
ACG	Import	RERFIxx	AGASxxOP	ACG Electronic Statement of Account
ACG	Import	RERFIxx	AGMRxxOP	ACG Multiple Reporting Record

<b>Program</b>	<b>Import/ Export</b>	<b>Process</b>	<b>Message Class</b>	<b>Description</b>
National SMART	Export	RERORxx	SGRQxxIN	National SMART Data Request Record
National SMART	Import	RERFIxx	SGRAxxOP	National SMART Data Request Record Response
National SMART	Import	RERFIxx	SGRCxxOP	National SMART Reconciliation Record
National SMART	Import	RERFIxx	SGYRxxOP	National SMART Year-To-Date Record
National SMART	Import	RERFIxx	SGASxxOP	National SMART Electronic Statement of Account
National SMART	Import	RERFIxx	SGMRxxOP	National SMART Multiple Reporting Record
TEACH	Import	RERFIxx	ATSDISOP	TEACH ATS Discharge Report
TEACH	Import	RERFIxx	THMRxxOP	TEACH Multiple Reporting Record
Direct Loan	Import	RPRDUxx	DSDFxxOP	DL Disbursement Level Loan Detail School Account Statement
Direct Loan	Import	RPRDUxx	DSLFXxOP	DL Loan Level Loan Detail School Account Statement
Direct Loan	Import	RPRDUxx	DECFENOP	DL Entrance Counseling Results
Direct Loan	Import	RPRDUxx	DLFFEXOP	DL Exit Counseling Results
Direct Loan	Import	RPRDUxx	MPNDISOP	MPN Discharge Report
Direct Loan	Import	RPRDUxx	MPNINAOP	Expired MPN Report
Direct Loan	Import	RPRDUxx	MPNEXPOP	MPNs Due to Expire Report

## New Forms

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The following new forms are available for 2009-2010 year-specific processing with COD. The year-specific updates were based upon the 2009-2010 *COD Technical Reference* provided by the Department of Education.

### 2009-2010 Grant Disbursement/Acknowledgement Form (READI10)

The READI10 Form is an updated version of the READI09 Form.

### 2009-2010 Grant Origination/Acknowledgement Form (REAOR10)

The REAOR10 Form is an updated version of the REAOR09 Form.

#### ACG/SMART Tab

The logic on this tab was updated so that the tab is accessible if:

- an origination exists in the REBORIG table for the student and aid year, or
- an offered or accepted ACG or SMART award exists in the RPRAWRD table.

#### TEACH Tab

The logic on this tab was updated so that the tab is accessible if:

- an origination exists in the REBTCHO table for the student and aid year, or
- an offered or accepted TEACH award exists in the RPRAWRD table.

## Changed Forms

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The following forms have been modified for 2009-2010 processing with COD. These updates were based upon the 2009-2010 COD Technical Reference provided by the Department of Education.

### 2005-2006 Pell Origination/Acknowledgement Form (REAOR06)

There are no functional changes to this form. It is being re-delivered due to changes to the Pell Originations API.

## 2006-2007 Grant Origination/Acknowledgement Form (REAOR07)

There are no functional changes to this form. It is being re-delivered due to changes to the Pell Originations API.

## 2007-2008 Grant Origination/Acknowledgement Form (REAOR08)

There are no functional changes to this form. It is being re-delivered due to changes to the Pell Originations API.

## 2008-2009 Grant Origination/Acknowledgement Form (REAOR09)

There are no functional changes to this form. It is being re-delivered due to changes to the Pell Originations API.

## COD Document Control Form (REICODD)

### Key Block

The *AC* option for the new TEACH Grant Counseling Documents was added to the **Document Type** field. The **Document Type** field was also expanded to ensure that larger descriptions display properly.

<b>Field</b>	<b>Description</b>
Document Type	(REICODD_DOCUMENT_TYPE) Based on the value you select, this field limits the display by Document Type (Booking Notification, Credit Override, etc.). If you select All Documents, all documents display. The valid values are:  <i>All Documents</i> <i>AC=TEACH Grant Counseling</i> <i>AT=Agreement to Serve</i> <i>BN=Booking Notification</i> <i>CO=Credit Override</i> <i>Null=Extracted Documents</i> <i>ND=Negative Disbursement</i>

Field	Description
	<i>PS=Payment to Servicer</i>
	<i>PN=Promissory Note Acknowledgements</i>
	<i>PM=Promissory Note Manifest</i>
	<i>RC=Receipt</i>
	<i>RS=Response</i>

## Fund Management Form (RFRMGMT)

### Packaging Tab

The **SMART Grade Level** drop-down list was updated to include the new *5=5th Year* value. The **LMS Loan Fund** field name was renamed to **CLM Loan Fund** to reflect the name change of LMS (Loan Management System) to CLM (Campus Loan Management).

Field	Description
SMART Grade Level	(RFRASPC_SMART_YEAR) Indicates the SMART Grant year funding level. The allowable values for this field are:  <i>3 = 3rd Year</i>  <i>4 = 4th Year</i>  <i>5 = 5th Year</i>  <i>(None)</i>
CLM Loan Fund	(RFRASPC_LMS_FUND) The <b>CLM Loan Fund</b> field is intended strictly for those who use the Campus Loan Management System (CLM) interface to Banner. Enter a value in this field for all funds for which a disbursement feed to CLM is required. The value is composed of the CLM four-character Fund ID and the CLM two-character loan number. An entry is not permitted if the Financial Aid fund is not a loan fund. Disbursements against the Financial Aid fund will not result in an CLM feed transaction unless the <b>CLM Loan Fund</b> value has been entered.

## Applicant High School and Admission Data Form (ROAHSDT)

The validation for the **State of Student's High School Graduation** (RORHSDT\_HS\_GRAD\_STATE\_CODE) field has been updated so that the field only accepts state codes from the COD State Code Rules Form (RTVCDST) with an active status (RTVCDST\_INACTIVE\_DATE is NULL). An invalid state code message displays if you attempt to use an inactive state code.

## Funds Management Form (ROAMGMT)

### Packaging Options

The **SMART Grade Level** drop-down list was updated to include the new *5=5th Year* value.

Field	Description
SMART Grade Level	(RFRASPC_SMART_YEAR) Indicates the SMART Grant year funding level. The allowable values for this field are:  <i>3 = 3rd Year</i>  <i>4 = 4th Year</i>  <i>5 = 5th Year</i>  <i>(None)</i>

### Loan Packaging Rules

The **LMS Loan Fund** field name was renamed to **CLM Loan Fund** to reflect the name change of LMS (Loan Management System) to CLM (Campus Loan Management).

Field	Description
CLM Loan Fund	(RFRASPC_LMS_FUND) The <b>CLM Loan Fund</b> field is intended strictly for those who use the Campus Loan Management System (CLM) interface to Banner. Enter a value in this field for all funds for which a disbursement feed to CLM is required. The value is composed of the CLM four-character Fund ID and the CLM two-character loan number. An entry is not permitted if the Financial Aid fund is not a loan fund. Disbursements against the Financial Aid fund will not result in an CLM feed transaction unless the <b>CLM Loan Fund</b> value has been entered.

# U.S Specific Institution Financial Aid Options Form (ROAUSIO)

## Grant and EDE Options Tab

The *Pell and EDE Options* tab was renamed to *Grant and EDE Options*.

The screenshot shows the 'Grant and EDE Options' tab in the ROAUSIO software. The 'Aid Year' is set to 0910 (2009-2010). The 'Grants' section has the following options:  Prevent Automatic Pell Calculation,  Pell Reduced Eligibility,  Cash Monitoring or Reimbursement,  Alternate Pell Schedules Used, and  Use Pell Less than Half Time Calculation. The 'EDE' section has: Update Transaction Number, EFC, Auto Zero EFC: A=Always update; SAR Requirement Code: ADMIT; SAR Requirement Status: E;  EDE Correction Logging;  Use EFC Proration. The 'Advance Pay for ACG and SMART' section (highlighted in yellow) has:  Indicator; Number of Days: [input field].

The *Advance Pay for ACG and SMART* section is new with this release and includes the following two fields.

Field	Description
(Advance Pay for ACG and SMART) Indicator	(ROBINST_GRANT_ADVANCE_PAY_IND) Indicates if the school wants Advance Pay disbursement edits applied to ACG and SMART disbursements. Check this field to report a disbursement prior to the actual disbursement date. If you check this field, you must also enter a value (0-7) in the <b>Number of Days</b> field.
(Advance Pay for ACG and SMART) Number of Days	(ROBINST_GRANT_AP_NO_DAYS) The number of days prior to the scheduled disbursement date that an authorized ACG or SMART disbursement can be extracted when using Advance Pay disbursement edits. If the <b>Indicator</b> field is checked, you must also enter a value (0-7) in the <b>Number of Days</b> field.

## Package Maintenance Form (RPAAPMT)

### Fund Awards by Term Tab

The **Major Code Override** (RPRATRM\_MAJR\_OVERRIDE\_CODE) field is no longer reserved for just TEACH fund codes. You can now update this field for both TEACH and 5th Year SMART Grants. The List of Values for this field was also updated to display the 5th Year SMART Eligibility Indicator from RPRMAJR.

## Award Maintenance Form (RPAAWRD)

### Fund Awards by Term Tab

The **Major Code Override** (RPRATRM\_MAJR\_OVERRIDE\_CODE) field is no longer reserved for just TEACH fund codes. You can now update this field for both TEACH and 5th Year SMART Grants. The List of Values for this field was also updated to display the 5th Year SMART Eligibility Indicator from RPRMAJR.

## Direct Loan Origination Form (RPALORG)

The contents of the Options Menu for RPALORG have been rearranged so that the Entrance/Exit Results (RPILECS) Form is listed after Account Statement Loan Detail. This change ensures that all RPALORG windows are listed first in the menu before any separate forms.

### Main Window

As of 07/01/2009, the method of applying the rebate fee percent for Direct Loans is changing. The interest rebate percent was a flat 1.5%. Now, the interest rebate percent will vary depending on the interest rebate period in which the Earliest Disbursement Date (EDD) falls. Due to this change, you can now update the amount in the **Rebate Fee Percent** (RPRLAPP\_DL\_REBATE\_PERCENT) field on the RPALORG form.

When a change is made to a sent origination record, the change is logged by Banner as a Direct Loan change that needs to be sent to COD. Changes are also made to the disbursements in RPRLADB to account for the change in the rebate percent.

### Procedures for July 1, 2009 Changes to the Rebate Fee Percent and Loan Fee Percent

The Rebate Fee Percent is changing from 1.5% to 1.0% for all loans that are disbursed on or after July 1, 2009. Also the Loan Fee Percent is changing from 2.0% to 1.5% for all loans that are disbursed on or after July 1, 2009. Institutions have two options for handling these changes within Banner. It is up to each school to decide which method works best for their particular situation.

### **Option #1 (Recommended for most institutions)**

Use a single fund code and set the Rebate Fee Percentage to 1.0% and the Loan Fee Percentage to 1.5% on RFRMGMT. Once the loan origination has been created by the RPRLORC process, manually update the first window of RPALORG to set the Rebate Fee Percent to 1.5% and the Loan Fee Rate to 2.0% for any loan that has a first scheduled disbursement date prior to July 1, 2009. The updates to the Rebate Fee Percent and Loan Fee Rate on RPALORG must be performed prior to sending the origination record to COD.

### **Option #2**

Create two fund codes, one with the 1.5% Rebate Fee Percentage and 2.0% Loan Fee Percentage on RFRMGMT for loans that will disburse prior to July 1, 2009 and a second fund code with a 1.0% Rebate Fee Percentage and 1.5% Loan Fee Percentage on RFRMGMT for loans that will disburse on or after July 1, 2009. Awarding the appropriate loan fund code will ensure that all loan originations created by RPRLORC will be created with the correct Rebate Fee Percent and Loan Fee Percent associated with each fund code on RFRMGMT.

#### **Note**

If a loan record has been created, sent and accepted at COD with the 1.5% Rebate Fee Percent and the 2.0% Loan Fee Percent with an anticipated disbursement prior to July 1, 2009, but for some reason the loan does not actually disburse for the first time until after July 1, 2009, then the Rebate Fee Percent for that loan must be changed to 1.0% and the Loan Fee Percent must be changed to 1.5%. According to COD, the preferred method for this situation is for the school to cancel the first loan and re-originate a new loan for the student with the 1.0% Rebate Fee Percent and 1.5% Loan Fee Percent.

This does not happen automatically in Banner. On July 1, 2009 you must identify those loans that have the 1.5% Rebate Fee Percent and 2.0% Loan Fee Rate that have not yet disbursed and then cancel and re-originate those loans. ■

<b>Field</b>	<b>Description</b>
Rebate Fee Percent	(RPRLAPP_DL_REBATE_PERCENT) Direct Loan borrowers, in anticipation of making their first 12 consecutive payments on time, receive a rebate on their origination fee when the loan is disbursed. An adjustment is made during repayment if the payments are not made on time. You can update the value in this field. The rebate fee percent field that determines the default for this field is maintained on the RFRMGMT Form.

## PLUS Parent or Endorser Data Window

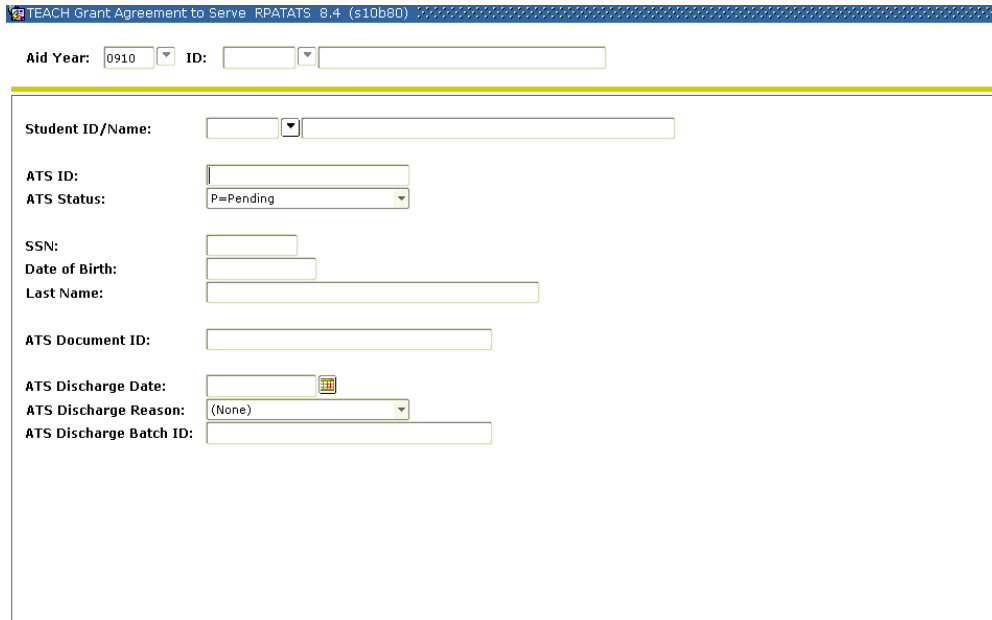
The logic on the window was modified to prevent address information from being changed to a blank value after the origination has been sent to COD. The address fields modified were **Address, City, State or Province, Zip or Postal Code, and Nation.**

### Note

The logic requiring State and Zip Code for US Nation codes remains the same. ■

## TEACH Grant Agreement to Serve Form (RPATATS)

The ATS Discharge Report contains data on ATSs that have become inactive within the last 30 days due to discharges for death, unauthorized signature, or identity theft. The new **Discharge Date, Discharge Reason Code, and Discharge Batch ID** fields have been added to the RPATATS Form to capture this information when it is imported from the ATSDISOP message class through the RERFI10 process.



TEACH Grant Agreement to Serve RPATATS 8.4 (s10b80)

Aid Year: 0910 ID: [ ] [ ]

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Student ID/Name: [ ] [ ]

ATS ID: [ ]

ATS Status: P=Pending

SSN: [ ]

Date of Birth: [ ]

Last Name: [ ]

ATS Document ID: [ ]

ATS Discharge Date: [ ]

ATS Discharge Reason: (None)

ATS Discharge Batch ID: [ ]

Field	Description
ATS Discharge Date	(RPRTATS_DISCHARGE_DATE) Agreement To Serve discharge date.
ATS Discharge Reason	(RPRTATS_DISCHARGE_REASON_CDE) Agreement To Serve reason code indicating the reason for the discharge. The allowable values for this field are as follows.  <i>D=Death</i>  <i>G=Unauthorized Signature</i>  <i>I=Identity Theft</i>  <i>(None)</i>
ATS Discharge Batch ID	(RPRTATS_DISCHARGE_BATCH_ID) Agreement To Serve batch ID.

## Electronic Counseling Status Form (RPILECS)

The form name was changed from *Loan Electronic Counseling Status Form* to *Electronic Counseling Status Form*.

### Main Window

Electronic Counseling Status RPILECS 8.4 (s10b80v)

Confidential

ID: 171990020 | Лена Сорока-Сорока

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**Entrance or Exit Interview Data**

Counseling Type:

Entrance Type:

Associated Aid Year:

Data Source:

Date Completed:

Sequence Number:

SSN:

Last Name:

First Name:

Middle Initial:

Date of Birth:

Document ID:

Rights and Responsibilities Acknowledged by Borrower

**Exit Interview Only Data**

Current | Permanent | Reference 1 | Reference 2 | Next of Kin | Employer

Address Line 1:

Address Line 2:

City:

State or Province:

Zip or Postal Code:

Home Telephone Number:

Type:

Driver License Number:

Driver's License State:

The **Entrance Type** field was updated so that the field could display a TEACH Entrance Counseling record.

The **Data Source** field autohint was updated to: *D=Direct Loan, T=TEACH*.

This window was updated to add the **Borrower SSN, Last Name, First Name, Middle Initial**, and **Date of Birth** fields from the Current Borrower Data Provided window. The Current Borrower Data Provided window was completely removed from this form.

The new **Sequence Number** and **Document ID** fields received in the TEACH Grant Entrance Counseling records have been added to this form.

Current and Permanent tabs have been added to the *Exit Interview Only Data* section of the form to consolidate space. This section stores address, telephone number, and driver license information.

Field	Description
Entrance Type	(RPRLECS_ENTRANCE_TYPE) Indicates whether the Entrance Counseling completed by the student was for Stafford, Grad PLUS, or TEACH Entrance Counseling.
Data Source	(RPRLECS_SOURCE) This field indicates the source of the data. The valid values are <i>D</i> (Direct Loan counseling results) for files loaded from DECFENOP/DLFFEXOP, <i>T</i> (TEACH counseling results) for files loaded from CRACxxOP, or blank.
Sequence Number	(RPRLECS_SEQUENCE_NO) Counseling record sequence number that is received in the TEACH Grant Entrance Counseling records.
Document ID	(RPRLECS_DOCUMENT_ID) The COD document identification number associated with the counseling results received in the TEACH Grant Entrance Counseling records.

## Financial Aid Major Rules Form (RPRMAJR)

All SMART eligible majors are not eligible for 5th Year SMART. In order for a major to be eligible for 5th Year SMART, it must be a major that requires five years for completion. Therefore, the RPRMAJR Form was updated to include a new **5th Year SMART Eligible** field to identify those majors at your institution that are eligible for 5th Year SMART.

Field	Description
5th Year SMART Eligible	(RPRMAJR_YEAR_5_SMART_ELIG_IND) Check this checkbox if the major code is eligible for the 5th Year SMART Grant.

# Changed Menus

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## 2009-2010 Electronic Data Exchange Menu (\*RESEDE10)

The following forms were added to the \*RESEDE10 menu:

2009-2010 Grant Origination/Acknowledgement	REAOR10
2009-2010 Grant Disbursement/Acknowledgement	READI10
TEACH Grant Agreement to Serve	RPATATS
COD Year to Date Grant Origination	REIYTDO
COD Year to Date Grant Disbursement	REIYTDD
COD Grant Reconciliation	REIRECN
COD Entity ID Rules	RORCODI
Electronic Counseling Status	RPILECS

The entire \*RESEDE10 menu now appears as follows:

ISIR Correction/Request Form	REACORR
Batch Control Form	RPIBATC
COD Document Control	REICODD
2009-2010 Miscellaneous Results Inquiry	RNIMS10
2009-2010 Grant Origination Acknowledgement	REAOR10
2009-2010 Grant Disbursement/Acknowledgement	READI10
TEACH Grant Agreement to Serve	RPATATS
Rejection Code Validation Form	RTVRJCT
Summary Statement of Account Inquiry Form	REISSOA
Detail Statement of Account Inquiry Form	REIDSOA
Data Request Record Form	RERRDRQ
Multiple Reporting Record Inquiry Form	REIRMRR
COD Year to Date Grant Summary	REIYTDS
COD Year to Date Grant Origination	REIYTDO
COD Year to Date Grant Disbursement	REIYTDD
COD Grant Reconciliation	REIRECN
NSLDS Transfer Monitoring Application Form	RNATMNT
COD Identifier	REASTID
COD Entity ID Rules	RORCODI
Financial Aid CIP Code Rules	RPICIPC
State Advanced/Honors Program Codes	RPISAHP
Electronic Counseling Status	RPILECS

# New Reports and Processes

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Year-specific versions of the following reports and processes were added for 2009-2010 COD processing. These were based upon 2008-2009 versions and modified for the new award year. Any modifications beyond the year-specific updates are noted below, under the name of the process.

## 2009-2010 COD Print Process (RERCD10)

Year-specific updates were made within the process, to parameter descriptions, and to the output.

## 2009-2010 COD Extract Process (REREX10)

Year-specific updates were made within the process, to parameter descriptions, and to the output.

### 3.0b Schema Updates:

REREX10 was updated to extract files in the 3.0b schema. The new tag related to the extract is the *<AdditionalEligibilityIndicator>* tag - for use with Year Round Pell.

### Addresses – Defect #1-4JDWK0/1-4KR327

The address selection logic was updated so that if a student does not have any Direct Loan records and their address in RCRAPP1 contains a foreign country state code (RCRAPP1\_STAT\_CODE = 'CN', 'MX', 'FC'), that the entire address for the student is instead selected from SPRADDR. The address selected is the most recent active address with a foreign nation code where SPRADDR\_CITY = RCRAPP1\_CITY.

If no active address exists where the cities match, the records are not extracted and an invalid address error is generated.

### Advance Pay for ACG and SMART

REREX10 was updated so that ACG and SMART disbursements are extracted like Pell Just in Time (JIT)/Advance Pay disbursements when the Pell Just In Time/Advance Pay Indicator (ROBINST\_JUST\_IN\_TIME) = 'Y'. If you want to process ACG and SMART disbursements as Advance Pay, the ACG and SMART Advance Pay Indicator (ROBINST\_GRANT\_ADVANCE\_PAY\_IND) must = 'Y' for the aid year.

### ACG and SMART Citizenship Edit

REREX10 code was updated to remove an edit that prevents ACG and SMART Grants from being extracted if the student is not a U.S. Citizen.

## New Tags for Pell Award Complex

COD has added the following new tag in the Pell Award complex in anticipation for Year Round Pell processing:

<AdditionalEligibilityIndicator>

COD has determined that there will continue to only be one Pell origination for the student for the aid year at a school. A student that is receiving more than one full Pell Grant award within the aid year will be identified on the origination record by having the <AdditionalEligibilityIndicator> tag set to "true".

COD has not yet updated their systems for Year Round Pell processing. Therefore, the value in this tag will be "false" for all students until those updates have been made at COD and within Banner. When those updates are made, the REBPAYV\_ADDL\_ELIG\_IND field will be added to the REAOR10 form.

To be prepared for Year Round Pell processing, REREX10 was updated to extract the new REBPAYV\_ADDL\_ELIG\_IND field into the <AdditionalEligibilityIndicator> tag.

If REBPAYV\_ADDL\_ELIG\_IND = 'N', set <AdditionalEligibilityIndicator> = 'false'.

If REBPAYV\_ADDL\_ELIG\_IND = 'Y', set <AdditionalEligibilityIndicator> = 'true'.

## 2009-2010 Grant File Import (RERFI10)

RERFI10 was updated to support the import of flat-files that are received by Pell, ACG, SMART, and TEACH COD Full participants for the 2009-2010 aid year.

Files that are received in a flat-file format for the 2009-2010 aid year are listed below. Note that there is one new TEACH flat-file message class (ATSDISOP) starting with the 0910 aid year:

The following file types are supported by RERFI10 for 2009-2010 COD processing.

<b>File Name</b>	<b>Code</b>	<b>Description</b>
PGRA10OP	#R	Pell Data Request Response
PGAS10OP	#A	Pell Electronic Statement of Account (ESOA)
PGMR10OP	#M	Pell Multiple Reporting Record (MRR)
PGRC10OP	#C	Pell Reconciliation Record

PGYR10OP	#Y	Pell Year-to-Date Record
AGRA10OP	AR	ACG Data Request Response
AGAS10OP	AA	ACG Electronic Statement of Account (ESOA)
AGMR10OP	AM	ACG Multiple Reporting Record (MRR)
AGRC10OP	AC	ACG Reconciliation Record
AGYR10OP	AY	ACG Year-to-Date Record
SGRA10OP	SR	SMART Data Request Response
SGAS10OP	SA	SMART Electronic Statement of Account (ESOA)
SGMR10OP	SM	SMART Multiple Reporting Record (MRR)
SGRC10OP	SC	SMART Reconciliation Record
SGYR10OP	SY	SMART Year-to-Date Record
THMR10OP	TM	TEACH Multiple Reporting Record (MRR)
ATSDISOP	TD	TEACH ATS Discharge Report

## 2009-2010 COD File Import (RERIM10)

### 3.0b Schema Updates

In addition to year-specific updates, RERIM10 has been modified to only import files received in the 3.0b schema.

### New TEACH Entrance Requirement and Entrance Satisfied Status Parameters

With the 3.0b schema, COD will begin sending the new CRAC10OP message class for TEACH Grant Entrance Counseling records. This information is imported by the RERIM10 process and displays on the Electronic Counseling Status Form (RPILECS).

The TEACH Entrance Requirement and Entrance Satisfied Status parameters were added to RERIM10 to identify the tracking requirement and status for TEACH Entrance Counseling records.

When a CRAC10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH Entrance Requirement parameter to the status specified in the Entrance Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).

Report output provides the details in which records were updated - as displayed on the Applicant Requirements (RRAAREQ) and Electronic Counseling Status Form (RPILECS), as well as any records that were not matched to a student COD Identifier (REASTID).

### **New CRAC10OP TEACH Entrance Counseling File**

The RERIM10 process was updated to import the new system-generated TEACH Entrance Counseling files where the *<DocumentType>* = 'AC'.

When this file is received, data about the entrance counseling is included in the new *<Counseling>* Financial Award Type Element. Within the *<Counseling>* block, the following tags are received:

*<CounselingType>*  
*<CounselingSequenceNumber>*  
*<CounselingCompleteDate>*

When these records are received, the entrance counseling information is imported to RPRLECS. The TEACH Entrance Counseling requirement code is also updated in RRRAREQ.

The two new (04) TEACH Entrance Requirement and (05) Entrance Satisfied Status parameters allow you to define the requirement code and status that RERIM10 uses for this purpose.

If there are no values for parameters 04 and 05 and the *<DocumentType>* = 'AC', the file is not processed. Instead, the process stops and provides the following error in the report output:

*TEACH Requirement Parameter not entered*

If values are populated for parameters 04 and 05, the file is processed and the records are inserted into RPRLECS as indicated below:

<b>Column</b>	<b>Update</b>
RPRLECS_PIDM	PIDM as matched from RERSTID
RPRLECS_AIDY_CODE	Aid Year from parameter 01
RPRLECS_COUNSELING_TYPE	'E' for Entrance Counseling
RPRLECS_ENTRANCE_TYPE	<CounselingType> = TEACHCounseling – update to 'T'
RPRLECS_SOURCE	<CounselingType> = TEACHCounseling – update to 'T'
RPRLECS_COMP_DATE	<CounselingCompleteDate>
RPRLECS_SEQUENCE_NO	<CounselingSequenceNumber>
RPRLECS_SSN	<SSN>
RPRLECS_BIRTH_DATE	<BirthDate>
RPRLECS_LAST_NAME	<LastName>
RPRLECS_FIRST_NAME	<FirstName>
RPRLECS_MI	<MiddleInitial>
RPRLECS_ACTIVITY_DATE	SYSDATE
RPRLECS_USER_ID	USER
RPRLECS_DOCUMENT_ID	<DocumentID>

## **TEACH Entrance Counseling File Matching**

The RERIM10 process matches Entrance Counseling records in the following way.

- When the file is imported, the file is matched with RERSTID to try and find the student's PIDM. If a match is not found, the student's name and SSN are listed in the output with an error indicating that no match was found in Banner.
- If the student is matched to a PIDM in RERSTID, but the specified requirement code does not exist in RRRAREQ for the aid year, the data is still imported into RPRLECS. A message in the RERIMEX report informs you that no matching entrance requirement code was found for the student.
- If the student is matched to a PIDM in RERSTID and the specified requirement code does exist in RRRAREQ for the aid year, the data is inserted into RPRLECS and the requirements api is used to satisfy the tracking requirement code with the status specified in the parameters.

## New TEACH ATS Requirement and ATS Satisfied Status Parameters

RERIM10 imports TEACH Agreement to Serve (ATS) records. These records are imported in message classes where the Document Type is *AT* (CRAT10OP) or *RS* (CRTH10OP and CRAA10OP)

The TEACH ATS Requirement and ATS Satisfied Status parameters were added to RERIM10 to identify the tracking requirement and status for TEACH Agreement to Serve (ATS) records.

When a CRAT10OP, CRTH10OP, or CRAA10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH ATS Requirement parameter to the status specified in the ATS Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).

### ATS Record Matching

The RERIM10 process matches ATS records in the following way.

- When the file is imported, the file is matched with RERSTID to try and find the student's PIDM. If a match is not found, which should only occur in the case of CRAT10OP files, then no tracking requirements are updated, but the ATS is still inserted into RPRTATS with a Null PIDM. This is current functionality within RERIMxx.
- If the student is matched to a PIDM in RERSTID, but the specified requirement code does not exist in RRRAREQ for the aid year, or no requirement code was defined in the parameters, the data is still imported into RPRTATS. A message in the RERIMEX report informs you that no matching ATS requirement code was found for the student.
- If the student is matched to a PIDM in RERSTID and the specified requirement code does exist in RRRAREQ for the aid year, the data is inserted into RPRTATS and the requirements api is used to satisfy the tracking requirement code with the status specified in the parameters.

This enhancement resolves RPE 1-41AXBH.

Name	Required?	Description	Values
04 - TEACH Entrance Requirement	No	TEACH Entrance Requirements Tracking Code. When a CRAC10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH Entrance Requirement parameter to the status specified in the Entrance Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).	Requirements Tracking Validation (RTVTREQ)
05 - Entrance Satisfied Status	No	TEACH Entrance Tracking Status Code. When a CRAC10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH Entrance Requirement parameter to the status specified in the Entrance Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).	Requirements Tracking Status Validation (RTVTRST)
06 - TEACH ATS Requirement	No	TEACH ATS Requirement Code. When a CRAT10OP, CRTH10OP, or CRAA10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH ATS Requirement parameter to the status specified in the ATS Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).	Requirements Tracking Validation (RTVTREQ)
07 - ATS Satisfied Status	No	TEACH ATS Satisfied Status. When a CRAT10OP, CRTH10OP, or CRAA10OP file is imported, the RERIM10 process updates the defined requirement code in the TEACH ATS Requirement parameter to the status specified in the ATS Satisfied Status parameter if that tracking requirement has already been assigned to the student on the Applicant Requirements Form (RRAAREQ).	Requirements Tracking Status Validation (RTVTRST)

## Advance Pay for ACG and SMART

The RERIM10 process was updated so that ACG and SMART disbursements are imported like Pell JIT/Advance Pay disbursements when the Pell Just In Time/Advance Pay Indicator (ROBINST\_JUST\_IN\_TIME) = 'Y'. If you want to process ACG and SMART

disbursements as Advance Pay, the ACG and SMART Advance Pay Indicator (ROBINST\_GRANT\_ADVANCE\_PAY\_IND) must = 'Y' for the aid year.

The new **(Advance Pay for ACG and SMART) Indicator** (ROBINST\_GRANT\_ADVANCE\_PAY\_IND) and **(Advance Pay for ACG and SMART) Number of Days** (ROBINST\_GRANT\_AP\_NO\_DAYS) fields display this information.

## New Tags for Pell Awards

COD has added the following new tag in the Pell Award complex in anticipation of Year Round Pell processing:

*<AdditionalEligibilityIndicator>*

COD has determined that there will continue to only be one Pell origination for the student for the aid year at a school. A student that is receiving more than one full Pell Grant award within the aid year will be identified on the origination record by having the *<AdditionalEligibilityIndicator>* tag set to "true".

In preparation for Year Round Pell processing, RERIM10 was modified to update the new REBPAYV\_ACPT\_ADDL\_ELIG\_IND field based on the value received in the *<AdditionalEligibilityIndicator>* tag.

If *<AdditionalEligibilityIndicator>* = 'true', the REBPAYV\_ACPT\_ADDL\_ELIG\_IND is set to 'Y'.

If *<AdditionalEligibilityIndicator>* = 'false', REBPAYV\_ACPT\_ADDL\_ELIG\_IND is set to 'N'.

## New MPN Status Code Valid Values

The 3.0b schema includes two new valid values for the *<MPNStatusCode>* tag.

*I = Inactive*

*C = Closed*

The RERIM10 process was updated so that in all instances where 'MPN Status' (RPRLAPP\_MPN\_STATUS\_IND) is updated with the value from *<MPNStatusCode>* that it is updated with the actual value received in the tag.

The RERIM10 process was also updated so that in all instances where **Promissory Note Status** (RFRPROM\_DL\_SERV\_NOTE\_STATUS) is updated by the value from *<MPNStatusCode>* that it is updated with *I* or the *C* value when received in the tag regardless of the current value in **School PN Status** (RFRPROM\_DL\_NOTE\_STATUS).

## 2008-2009 COD 3.0b File Import (RERIM3B)

All 2008-2009 extract and response files in Banner will continue to use the 3.0a schema. Schools will continue to import all response files from COD for 2008-2009 through RERIM09 as those will continue to be sent in the 3.0a Schema used in the extract files.

However, system-generated files for 2008-2009 will be sent in either the new 3.0b schema or the 2.0e schema. The option for which of these two schemas you want to receive your system-generated files can be updated on the COD website.

This new process - RERIM3B - is being delivered with this release to provide a way to import 2008-2009 system-generated files received in the 3.0b schema. If you choose to receive your 2008-2009 system-generated files in the 3.0b schema you will use this new process to import the 3.0b files. If you continue to receive system-generated files in the 2.0e schema, you can continue to the RERIM2E process to import the 2.0e files.

Since RERIM3B was created only so that system-generated files received from COD in the 3.0b schema for the 2008-2009 aid year can be imported, the new TEACH entrance and ATS parameters (4, 5, 6 & 7) associated with the RERIM10 process are not relevant with respect to the RERIM3B process and are marked as *Not Used* in job submission.

## 2009-2010 Grant Origination Creation (REROR10)

The REROR10 process has been created based upon last year's version, REROR09.

## 2009-2010 Direct Loan Flat-File Upload (RPRDU10)

The process was updated for the new aid year. You can only import the following file types with the RPRDU10 process.

DSDf10OP:	AS – Import School Account Statement (Fixed-Length, Disbursement Level Loan Detail)
DSLf10OP:	AS – Import School Account Statement (Fixed-Length, Loan Level Loan Detail)
DECFENOP:	EC – Entrance Counseling Results (Fixed-Length)
DLFFEXOP:	XC – Exit Counseling Results (Fixed-Length)
MPNDISOP:	MPN Discharge Report (Fixed-Length)
MPNINAOP:	MPN Expired Report (Fixed-Length)
MPNEXPOP:	MPNs Due to Expire Report (Fixed-Length)

# Changed Reports and Processes

The following reports and processes were updated with this release.

## Disbursement Process (RPEDISBS)

The RPEDISBS.pco was updated to process ACG and SMART Advance Pay disbursements in the same manner as Pell JIT/Advance Pay disbursements.

## Grant COD Miscellaneous Report (RERGRNT)

The RERGRNT process was modified so that the Select JIT No Disb Acknowledge and Select JIT No Charge Accept parameters can also be used to generate reports for ACG and SMART Grant Advance Pay disbursements.

Name	Required?	Description	Values
07 - Select AP No Disb Ack	Yes	A check in the <b>Just in Time or Advance Pay for Pell or Advance Pay for ACG and SMART</b> fields and an entry in the <b>Number of Days</b> field on the ROAUSIO form determines the number of days to be used for Just In Time/Advance Pay students. This field is the number of days prior to the scheduled disbursement date that a disbursement can be extracted.  Based on the value in this field, the REREX10 process allows a JIT/Advance Pay school's Pell funds or a school's ACG or SMART funds to be extracted within the specified number of days prior to the scheduled disbursement date.	<p><i>Y</i> Select all Advance Pay records with disbursement error code 047.</p> <p><i>N</i> Do not select all Advance Pay records with disbursement error code 047.</p> <p>Since the Disbursement Process (RPEDISB) requires COD approval under these conditions, disbursement reject code 047 - Disbursement requires approval from COD is issued when approval has not yet been received from COD.</p> <p>You can set this parameter to <i>Y</i> if the Grant Type parameter is set to <i>PL, AG, or SG</i>.</p>

Name	Required?	Description	Values
08 - Select AP No Charge Accept	Yes	Disbursement does not occur until a student accepts the charges if the <b>Disburse if Charges Not Accepted</b> option is checked on the RPROPTS form. Since the Disbursement Process (RPEDISB) requires student approval under JIT/AP conditions, disbursement reject code 045 - <i>Charges have not been accepted</i> is issued if the student has not yet accepted the charges.	Y <i>Select all AP records with disbursement error code 045.</i> N <i>Do not select all AP records with disbursement error code 045.</i>  You can set this parameter to Y if the Grant Type parameter is set to PL AG, or SG.

## COD Import/Export Report (RERIMEX)

### New Parameters

The following new parameters were added to the RERIMEX Report to identify the tracking requirements for Teach Entrance Counseling and TEACH ATS document reports.

Name	Required?	Description	Values
08 - TEACH Entrance Require- ment	No	Enter a TEACH Entrance Requirement Code. If the Records to report parameter is <i>I</i> (Imported Only) or <i>B</i> (Both extracted/imported), RERIMEX produces a TEACH Entrance Counseling Report based on the imported counseling files	Requirements Tracking Validation (RTVTREQ)
09 - TEACH ATS Require- ment	No	Enter a TEACH Entrance Requirement Code. The TEACH ATS report will print the student ATS requirement codes and statuses.	Requirements Tracking Validation (RTVTREQ)

## FA New Year Roll Process (ROPROLL)

The ROPROLL process was updated so that it rolls the following new columns.

- Parameter 07 – Packaging Data:  
RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND
- Parameter 11 – ROBINST Data:  
ROBINST\_GRANT\_ADVANCE\_PAY\_IND  
ROBINST\_GRANT\_AP\_NO\_DAYS

## FA HS/Admission Data Posting Process (RORHSDP)

RORHSDP totals in the Control Summary were incorrect when parameter 10 (Update Admission Test Ind) was set to Y.

The process was modified so that the totals in the control summary are correct.

This resolves defects 1-485201/1-4FR60H.

## Disclosure Statement Printing (RPRDSPT)

Beginning in March 2009, COD masks the following items on all non-legal documents:

*SSN: xxx-xx-0294*

*Loan ID: xxxxx0294S09G09811001*

*MPN ID: xxxxx0294M09G09811001*

Therefore, COD has changed their print layout for the Disclosure Statements to mask the Loan ID and the SSN. RPRDSPT was updated so that the Disclosure Statement printed from Banner conforms to the new Department of ED standards and also masks these fields.

On the Stafford Disclosure Statement, the following is now masked:

- Loan Information Section:  
The “Loan Identification Number(s)” field is masked so that the first 5 numbers are displayed as ‘xxxxx’.

On the PLUS Disclosure Statement, the following is now masked:

- Student Information Section  
The “Student’s Social Security Number” field is masked so that the first 5 numbers are displayed as “xxx-xx”.

- Loan Information Section

The “Loan Identification Number(s)” field is masked so that the first 5 numbers are displayed as ‘xxxxx’.

Refer to the report samples on the following pages.

BORROWER INFORMATION-----

1. Name and Address  
 Student, Test0001  
 4 Country View  
 Malvern, PA 19355

2. Date of Disclosure Statement  
 01/27/2009

3. Area Code/Telephone Number

SCHOOL INFORMATION-----

4. School Name and Address  
 BANNER University  
 Financial Aid Office  
 123 Main Street  
 Spring, TX 77388

5. School Code/Branch  
 G80006

LOAN INFORMATION-----

6. Loan Identification Number(s)  
 xxxxx0001S09G80006001  
 xxxxx0001U09G80006001

7. Loan Period(s)  
 09/01/2008 - 05/31/2009  
 09/01/2008 - 05/31/2009

8. Loan Fee %  
 2.500 %  
 2.500 %

9. Information about the loan(s) that your school plans to disburse (payout) follows. This information is explained in detail on the back. The actual disbursement dates and amounts may be different than the dates and amounts shown below. Your school and the Direct Loan Servicing Center will notify you of the actual disbursement dates and amounts.

Direct Gross Loan Amount - Loan Fee Amount + Interest Rebate Amount = Net Loan Amount  
 Unsubsidized \$ 555.00 - \$ 12.00 + \$ 8.00 = \$ 551.00  
 Loan

Your school plans to disburse the Net Loan Amount as follows:

Date	Net Disbursement Amount	Date	Net Disbursement Amount
10/01/2008	\$ 276.00		
05/01/2009	\$ 275.00		

BORROWER INFORMATION-----

1. Name and Address	2. Date of Disclosure Statement
Student, Test0001 4 Country View Road Malvern, PA 19355	01/27/2009
	3. Area Code/Telephone Number ( ) -

SCHOOL INFORMATION-----

4. School Name and Address BANNER University Financial Aid Office 123 Main Street Spring, TX 77388	5. School Code/Branch G80006
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STUDENT INFORMATION-----

6. Student's Name Student, Test0001	7. Student's Social Security Number xxx-xx-0001
8. Student's Date of Birth 03/01/1990	

LOAN INFORMATION-----

9. Loan Identification Number xxxxx0001P09G80006001	10. Loan Period 09/01/2008 - 05/31/2009	11. Loan Fee % 4.000 %
--	--	---------------------------

12. Information about the loan that your school plans to disburse (payout) follows. This information is explained in detail on the back. The actual disbursement dates and amounts may be different than the dates and amounts shown below. The school and the Direct Loan Servicing Center will notify you of the actual disbursement dates and amounts.

Direct Gross Loan Amount - Loan Fee Amount + Interest Rebate Amount = Net Loan Amount  
 PLUS \$ 505.00 - \$ 20.00 + \$ 8.00 = \$ 493.00  
 Loan

Your school plans to disburse the Net Amount as follows:

Date	Net Disbursement Amount
12/12/2007	\$ 247.00
05/01/2009	\$ 246.00

## Direct Loan Record Creation (RPRLORC)

Prior to this release, the RPRLORC process produced the same *Invalid SAR Trans. Number* error in the output for both of the following conditions:

1. When a student did not have a SAR transaction number on ROAPELL and it was required for the origination record.
2. When the student had an Unofficial EFC on RNARSxx.

The process was updated to provide a separate error message "Unofficial EFC" in the output when the student has an unofficial EFC on RNARSxx.

## SMART Grant Eligibility Report (RPRSMRT)

This report was be updated so that it will identify those students that are eligible for 5th Year SMART Grants. The report will identify 5th Year SMART eligible students based on the eligible 5th Year SMART majors defined on the RPRMAJR form.



# 2 2009-2010 INAS Technical Upgrade #2, Post #3 - Functional



## Introduction

On March 20, 2009, the College Board released INAS Technical Upgrade #2, Post #3. Banner Financial Aid has been updated to accommodate the following INAS changes.

- Missing fields were added to the College Board Compare tables.
- Copybook IWKGLB10, group Y-N-OPTIONS definition, was updated to bring it into alignment with its corresponding block (GLB-COMPARE-RQSTS) in the GLOBAL10 layout module.
- There was a version control update to the INAS2010.pco module.

### Note

All INAS upgrades distributed by SunGard Higher Education prior to this release are included in the Banner Financial Aid 8.4 release. This includes the following upgrades:

- 2009-2010 INAS Technical Upgrade #2
- 2009-2010 Final INAS
- 2008-2009 INAS Technical Upgrade #3

# Changed Forms

## 2009-2010 Need Analysis Global Policy Options Rules (RNRGL10)

### Comparison Controls for FAFSA and PROFILE Information Window

The following fields, and all references to these fields, were deleted from the form.

**Veteran** RNRGLBL\_VET\_STAT

**Student's Veteran Benefits** RNRGLBL\_VA\_BEN

**Number of Months of Benefits** RNRGLBL\_NUM\_MTHS\_VA

Due to space considerations, the items on the form were re-arranged.

The screenshot shows a window titled "Comparison Controls for FAFSA and PROFILE Information RNRGL10 8.4 (s10b80)". It contains two main sections: "Comparisons Not Using Tolerances" and "Comparisons Using Tolerances".

**Comparisons Not Using Tolerances:**

	Parent	Student
Marital Status:	<input type="checkbox"/>	<input type="checkbox"/>
State of Residence:	<input type="checkbox"/>	<input type="checkbox"/>
1040 Type:	<input type="checkbox"/>	<input type="checkbox"/>
Year in College:		<input type="checkbox"/>
Ward of Court:		<input type="checkbox"/>
Has Legal Dependents:		<input type="checkbox"/>
Citizenship:		<input type="checkbox"/>
Date of Birth:		<input type="checkbox"/>
Homeless:		<input type="checkbox"/>
Dislocated Worker:	<input type="checkbox"/>	<input type="checkbox"/>
Adopted After 13:		<input type="checkbox"/>

**Comparisons Using Tolerances:**

	Parent	Student
Number in College:	<input type="text" value="0"/>	<input type="text" value="0"/>
Family size:	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Exemptions:	<input type="text" value="0"/>	<input type="text" value="0"/>
Reported IRS Adjusted Gross Income:	<input type="text" value="0"/>	<input type="text" value="0"/>
US Income Tax Paid:	<input type="text" value="0"/>	<input type="text" value="0"/>
Father/Student Wages:	<input type="text" value="0"/>	<input type="text" value="0"/>
Mother/Spouse Wages:	<input type="text" value="0"/>	<input type="text" value="0"/>
Cash/Savings/Checking:	<input type="text" value="1"/>	<input type="text" value="2"/>
Investments Net Worth:	<input type="text" value="3"/>	<input type="text" value="4"/>
Business and Farm Value:	<input type="text" value="0"/>	<input type="text" value="0"/>
Age of Oldest Parent:	<input type="text" value=""/>	<input type="text" value=""/>
Other Untaxed Income:	<input type="text" value="0"/>	<input type="text" value="0"/>
Child Support Paid:	<input type="text" value="0"/>	<input type="text" value="0"/>
Child Support Received:	<input type="text" value="0"/>	<input type="text" value="0"/>
Education Tax Credits:	<input type="text" value="0"/>	<input type="text" value="0"/>
IRA and Keogh Deductions:	<input type="text" value="0"/>	<input type="text" value="0"/>
Tax-Deferred Pensions:	<input type="text" value="0"/>	<input type="text" value="0"/>
Military and Clergy Allowance:	<input type="text" value="0"/>	<input type="text" value="0"/>
Tax-Exempt Interest:	<input type="text" value="0"/>	<input type="text" value="0"/>

### New Fields

Field	Description
Homeless	(RNRGLBL_HOMELESS) Compare 'Is student homeless'; Y=yes; N=no.
Dislocated Worker	(RNRGLBL_PAR_DISL_WRK) Compare 'Is parent a dislocated worker'; Y=yes; N=no.
Dislocated Worker	(RNRGLBL_DISL_WRK) Compare 'Is student a dislocated worker'; Y=yes; N=no.

<b>Field</b>	<b>Description</b>
Adopted After 13	(RNRGLBL_ADOPTED_AFTER_13) Compare 'Is student adopted after age 13'; Y=yes; N=no.
Other Untaxed Income	(RNRGLBL_PAR_OTH_UNTAX_INC) Compare Parents' Other Untaxed Income; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Other Untaxed Income	(RNRGLBL_OTH_UNTAX_INC) Compare Student's Other Untaxed Income; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Child Support Paid	(RNRGLBL_PAR_CHILD_SUPP_PAID) Compare amount of child support paid by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Child Support Paid	(RNRGLBL_CHILD_SUPP_PAID) Compare amount of child support paid by student; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Child Support Received	(RNRGLBL_PAR_CHILD_SUPP) Compare amount of child support received by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Child Support Received	(RNRGLBL_CHILD_SUPP) Compare amount of child support received by student; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Education Tax Credits	(RNRGLBL_PAR_HOPE_LL_CREDIT) Compare amount of education credits received by parent; valid values 0-99999; 0=report any discrepancy; 99999 = do not compare.
Education Tax Credits	(RNRGLBL_HOPE_LL_CREDIT) Compare amount of education credits received by student; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
IRA and Keogh Deductions	(RNRGLBL_PAR_IRA_KEOUGH) Compare amount of IRA payments made by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Tax-Deferred Pensions	(RNRGLBL_PAR_TAX_DEF_PENSION) Compare amount of tax-deferred pension payments made by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.

Field	Description
Military and Clergy Allowance	(RNRGLBL_PAR_HOUSE_FOOD_OTH) Compare amount of military or clergy allowances received by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.
Tax-Exempt Interest	(RNRGLBL_PAR_TE_INT_INC) Compare amount of tax-exempt interest income received by parent; valid values 0-99999; 0=report any discrepancy; 99999=do not compare.

## Changed Reports and Processes

### 2009-2010 Need Analysis Calculation Process (INAS) (RNEIN10)

The IWKGLB10 copybook was updated with the latest version from the College Board.

The INAS2010.pco was updated with the latest version from the College Board.

# 3 Financial Aid Archive and Data Purge Enhancement - Functional



## Overview

The Archive and Data Purge enhancement allows you to archive/purge Banner Financial Aid records when processing is complete.

Three new C processes allow you to archive/purge Financial Aid records.

- The Applicant Purge Process (RORAPRG) removes records for the applicant for an aid year. This process purges information for applicants that never completed the financial aid process and did not register for classes. Award, loan, or non-VA Education Benefit resources cannot exist for the applicant for the aid year if you want to purge applicant information. Also, the applicant may not have an entry on the Student Registration Table (SFBETRM) for any term within their aid period for the aid year. Only aid years prior to the current aid year are eligible for this process. This new process resolves RPE CMS-RPE27339.
- The Archive/Purge Applicant Process (RORARCH) removes records for the applicant for an aid year. This process purges information for applicants in years where financial aid processing is complete and the retention policy has expired. You have the option to create an XML document preserving selected information. This new process resolves RPE CMS-RPE1377.
- The Rules Purge Process (RORRPRG) removes records for the aid year. This process purges rules after all applicants are purged. Application status, award, loan, or non-VA Education Benefit resources cannot exist for the aid year. This process purges information when financial aid processing is complete and the retention policy has expired.

## Federal Regulations and Specific Tables

To allow your institution to preserve an applicant's award and disbursement history, records in the Applicant Award Table (RPRAWRD), Applicant Award by Term Table (RPRATRM) and the Applicant Award Disbursement Table (RPRADSB) are not removed. Instead, the `RPRAWRD_SYS_IND` and the `RPRADSB_SYS_IND` are updated to `A`. The change to the system indicator means that you cannot make changes to the records, but the records still display on the award forms.

## New Applicant Saved Requirements Table (RORSREQ)

Due to Perkins Loan regulations, the information for an unexpired Perkins MPN is now stored in the new Applicant Saved Requirements Table (RORSREQ) when the requirements are removed. The Requirements API has been modified to check this new table when adding a Perkins MPN tracking requirement. In addition, requirements designated as once-only requirements are stored in the Applicant Saved Requirements Table to allow the Requirements API to process these types of requirements should the applicant return.

## Financial Aid Tables and Archive/Purge Availability

The table that follows lists all of the tables within Banner Financial Aid. The *Process* column indicates the archive and/or purge process that may be applied to the table. In the absence of an archive/purge process, the *Process* column may also inform you that the table has been excluded from an archive or purge process, or that the table is obsolete.

Process	Purpose
RORAPRG	The RORAPRG Process may be applied to this table.
RORARCH	The RORARCH Process may be applied to this table.
RORRPRG	The RORRPRG Process may be applied to this table.
EXCLUDED	You cannot use the RORAPRG, RORARCH or RORRPRG process with this table. Refer to the Table Exclusions Legend for the specific reason.
OBSOLETE	Obsolete tables are no longer used by Banner Financial Aid. An optional 8.4.1 release will be delivered that will truncate the tables and drop all constraints and indexes. The comments on the tables and columns will be modified to indicate the tables are obsolete. The 8.4.1 release will be optional and will not be included in any future release of Financial Aid. If your institution does not apply the 8.4.1 release, the data in the tables indicated below as obsolete will remain and will not be included in the RORAPRG, RORARCH, or RORRPRG processes.

### Table Exclusions Legend

If a table has been excluded from the archive purge process, refer to the following legend for the reason for that exclusion.

EXCLUDED1	No aid year or pidm, the table is excluded.
EXCLUDED2	Voice Response Tables are excluded.
EXCLUDED3	Temporary Tables are excluded.
EXCLUDED4	Logging Tables are excluded.
EXCLUDED5	FISAP Tables are excluded.
EXCLUDED6	Validation tables without an aid year are excluded.

EXCLUDED7	Aid year is optional, the table is excluded.
EXCLUDED8	Term code with no aid year, the table is excluded.
EXCLUDED9	Athletics are excluded.

Table	Name	Process
RARAAWD	Financial Aid Athletic Awards Table	EXCLUDED9
RARACEX	Financial Aid Athletic Contracts and Exemptions Table	EXCLUDED9
RARARSC	Financial Aid Athletic Resources Table	EXCLUDED9
RARPAGD	Potential Athletic Grant Default Table	EXCLUDED9
RARPAGS	Potential Athletic Grant By Sport Table	EXCLUDED9
RARSPTM	Financial Aid Sport by Term Table	EXCLUDED9
RBBABUD	Applicant Budget Table	RORAPRG RORARCH
RBRACMP	Applicant Budget Component Table	RORAPRG RORARCH
RBRCOMP	Budget Component Rules Table	RORRPRG
RBRGMSG	Budget Group Message Rules Table	RORRPRG
RBRGTYP	Budget Group/Budget Type Rules Table	EXCLUDED1
RBRMIXD	Applicant Mixed Enrollment Table	RORAPRG RORARCH
RCRAIDY	Telephone Financial Aid Award Year Table	EXCLUDED2
RCRAPP1	Financial Aid Application Table - Part 1	RORAPRG RORARCH
RCRAPP2	Financial Aid Application Table - Part 2	RORAPRG RORARCH
RCRAPP3	Financial Aid Application Table - Part 3	RORAPRG RORARCH
RCRAPP4	Financial Aid Application Table - Part 4	RORAPRG RORARCH
RCRESAR	Financial Aid Application Table - ESAR Data	RORAPRG RORARCH

Table	Name	Process
RCRIMP1	Additional CSS PROFILE Data	RORAPRG RORARCH
RCRINFC	Interface Data Aid Year Rule Table.	RORRPRG
RCRINFR	Matching Rules Table	RORRPRG
RCRLDS1	Applicant NSLDS Table Part 1	OBSOLETE
RCRLDS2	Applicant NSLDS Table Part 2	OBSOLETE
RCRLDS3	Applicant NSLDS Table Part 3	OBSOLETE
RCRLDS4	Applicant NSLDS Table Part 1	RORAPRG RORARCH RORRPRG
RCRLDS5	Applicant NSLDS Table Part 2	OBSOLETE
RCRLDS6	Applicant NSLDS Table Part 3	RORAPRG RORARCH RORRPRG
RCRLDS7	NSLDS Pell Payment Repeating Table	RORAPRG RORARCH RORRPRG
RCRLDS8	NSLDS Name History Table	RORAPRG RORARCH RORRPRG
RCRLDSA	NSLDS ACG Payment Permanent Table.	RORAPRG RORARCH RORRPRG
RCRLDSS	NSLDS SMART Payment Permanent Table.	RORAPRG RORARCH RORRPRG
RCRLDST	NSLDS TEACH Payment Permanent Table	RORAPRG RORARCH RORRPRG
RCRNAME	First Name Translation Rules Table.	OBSOLETE
RCRTERM	Telephone Financial Aid Term Table.	EXCLUDED2
RCRTMP1	Financial Aid Temp. Appl. Table - Part 1	EXCLUDED3

Table	Name	Process
RCRTMP2	Financial Aid Temp. Appl. Table - Part 2	EXCLUDED3
RCRTMP3	Financial Aid Temp. Appl. Table - Part 3	EXCLUDED3
RCRTMP4	Financial Aid Temp. Appl. Table - Part 4	EXCLUDED3
RCRTMP5	Additional CSS PROFILE Data	EXCLUDED3
RCRTMP6	Financial Aid Temp. Appl. Table - Part 6	EXCLUDED3
RCRTPTR	Financial Aid Tape Translation Table	EXCLUDED3
RCTESAR	Financial Aid Application Table - ESAR Data	EXCLUDED3
RCTINFR	Temporary Tape Load ID Table	EXCLUDED3
RCTLDS1	Applicant NSLDS Temp Table Part 1	OBSOLETE
RCTLDS2	Applicant NSLDS Temp Table Part 2	OBSOLETE
RCTLDS3	Applicant NSLDS Temp Table Part 3	OBSOLETE
RCTLDS4	Applicant NSLDS Temporary Table Part 1	EXCLUDED3
RCTLDS5	Applicant NSLDS Temp Table Part 2	OBSOLETE
RCTLDS6	Applicant NSLDS Temp Table Part 3	EXCLUDED3
RCTLDS7	NSLDS Pell Payment Repeating Table	EXCLUDED3
RCTLDSA	NSLDS ACG Payment Temporary Table.	EXCLUDED3
RCTLDSS	NSLDS SMART Payment Temporary Table.	EXCLUDED3
RCTLDST	NSLDS TEACH Payment Temporary Table	EXCLUDED3
RCTRECR	Finaid Temporary SRBRECR Table	EXCLUDED3
RCTROUT	Finaid Temporary SRRROUT Table	EXCLUDED3
RCTRSRC	Temporary Recruiting Source Table	EXCLUDED3
RCTXMLD	Temporary XML Document Table.	EXCLUDED3
REBDRCT	EDE Directory Table	RORRPRG
REBDSOA	Detail Statement of Account Table	RORRPRG

Table	Name	Process
REBORIG	Federal Grant Origination Table	RORAPRG RORARCH
REBPAYV	Pell Origination Table	RORAPRG RORARCH
REBRDRQ	Grant Data Request Table.	RORRPRG
REBRMRR	Grant Multiple Reporting Record Table.	RORRPRG
REBSSOA	Summary Statement of Account Table	RORRPRG
REBTCHO	TEACH Grant Origination Table	RORAPRG RORARCH
REBYTDD	Grant Year to Date Detail Disbursement Record Table.	RORAPRG RORARCH RORRPRG
REBYTDO	Grant Year to Date Detail Origination Record Table.	RORAPRG RORARCH RORRPRG
REBYTDS	Grant Year to Date Summary Table	RORRPRG
RERCODD	COD Document Control Table	RORRPRG
RERREC�	Grant COD Reconciliation Table.	RORAPRG RORARCH RORRPRG
RERSTID	COD Identifier Table	RORAPRG RORARCH
RFRASCH	Fund Award Schedule Rules Table	RORRPRG
RFRASPC	Fund Aid Year Specific Data	RORRPRG
RFRBASE	Fund Base Data Table	EXCLUDED1
RFRBCMP	Fund / Budget Component Table	RORRPRG
RFRCOMM	Fund Comments	RORRPRG
RFRDEFA	Default Fund Award Schedule Rules Table	RORRPRG
RFRDEFD	Default Fund Disbursement Schedule Rules Table	RORRPRG
RFRDETC	Fund / Detail Code Rules Table	RORRPRG

Table	Name	Process
RFRDLCK	Fund Disbursement Lock Table	RORRPRG
RFRDNRD	Donor Demographics Table	EXCLUDED9
RFRDSCH	Fund Disbursement Schedule Rules Table	RORRPRG
RFRFCAT	Fund Category Table	EXCLUDED1
RFRFFID	Federal Fund Id Table	EXCLUDED1
RFRMESG	Fund / Message Assignment Rules Table	RORRPRG
RFRPROM	Promissory Note Requirement Table	RORAPRG RORARCH
RFRSDEM	Scholarship Demographics Table	EXCLUDED9
RFRSTCD	State Fund Code Table	EXCLUDED1
RFRTRREQ	Fund / Requirements Assignment Rules Table	RORRPRG
RFTASPC	Temporary Fund Aid Year Specific Data	EXCLUDED3
RHBDFLT	Transcript Default Table	OBSOLETE
RHBTINF	Institution Transcript Information Table	OBSOLETE
RHBTRNS	Prior Institution Transcript Base Table	OBSOLETE
RHRAWRD	Prior Institution Transcript Award Table	OBSOLETE
RHRCOMM	Applicants Comments	RORAPRG RORARCH
RHRFUND	Transcript Rules Table	OBSOLETE
RHRLOAN	Prior Institution Transcript Loan Table	OBSOLETE
RHRPCMT	Prior Institution Transcript Comment Table	OBSOLETE
RHRPCOL	Prior Institution Transcript Prior College Table	OBSOLETE
RHRRQST	Transcript Request Table	OBSOLETE
RHRTCMT	Transcript Comment Table	OBSOLETE
RJBJOBT	Job Title Table	EXCLUDED1
RJBPLBD	Placement Base Data Table	EXCLUDED1

Table	Name	Process
RJBSEDR	Student Employment Default Rules Table	RORRPRG
RJRPAYL	Payroll Load Rules Table	RORRPRG
RJRPLRL	Placement Rules Table	RORRPRG
RJRSEAR	Student Employment Authorization Table	RORAPRG RORARCH
RJRSERF	Student Employment Referral Table	RORAPRG RORARCH
RJRSEWH	Student Employment Work History Table	RORAPRG RORARCH
RLRAPP1	Financial Aid Application Log Table - Part 1	EXCLUDED4
RLRAPP2	Financial Aid Application Log Table - Part 2	EXCLUDED4
RLRAPP3	Financial Aid Application Log Table - Part 3	EXCLUDED4
RLRAPP4	Financial Aid Application Log Table - Part 4	EXCLUDED4
RLRIMP1	Logging Additional CSS PROFILE Data	OBSOLETE
RLRLDS1	Applicant NSLDS Log Table Part 1	OBSOLETE
RLRLDS2	Applicant NSLDS Log Table Part 2	OBSOLETE
RLRLDS3	Applicant NSLDS Log Table Part 3	OBSOLETE
RLRLDS4	Applicant NSLDS Logging Table Part 1	OBSOLETE
RLRLDS5	Applicant NSLDS LOG Table Part 2	OBSOLETE
RLRLDS6	Applicant NSLDS Log Table Part 3	OBSOLETE
RLRLDS7	NSLDS Pell Payment Repeating Table	OBSOLETE
RLRLDS8	NSLDS Name History Logging Table	OBSOLETE
RLRLDSA	RLRLDSA	OBSOLETE
RLRLDSS	NSLDS SMART Payment Logging Table.	OBSOLETE
RLRLDST	NSLDS TEACH Payment Logging Table.	OBSOLETE
RLROVRD	Logging override field	EXCLUDED4

Table	Name	Process
RLRSTAT	Applicant Status Log Table	OBSOLETE
RNRACMT	Financial Aid Application Comments	RORAPRG RORARCH
RNRGLBL	INAS Global Policy Options Table	RORRPRG
RNROCMT	Financial Aid Application Override Comments	RORAPRG RORARCH
RNROVRD	Applicant Need Analysis Override Table	RORAPRG RORARCH
RNRTMNT	NSLDS Transfer Monitoring Process Table	RORAPRG RORARCH
RNRVRFY	Needs Analysis Verification Table	RORAPRG RORARCH
ROALOGD	Archive Data Log Activity Detail Table	EXCLUDED4
ROALOGM	Archive Data Log Activity Master Table	EXCLUDED4
ROBALOG	Audit Log Table	EXCLUDED4
ROBEXTR	Report Extract Base Table	OBSOLETE
ROBFSAP	FISAP report interim processing table.	EXCLUDED5
ROBINST	Financial Aid Institution Table	EXCLUDED
ROBLOGC	Logging Control Base Table	EXCLUDED4
ROBNYUD	Applicant Non Year User-Defined Data Table	RORAPRG RORARCH
ROBUSDF	Applicant User-Defined Data Table	RORAPRG RORARCH
RORAPEL	Pell Grant Alternate Schedule Table.	RORRPRG
RORATND	Financial Aid Enrollment Attending Hours Table	RORAPRG RORARCH
RORAUDT	Audit Grading Mode Table	RORRPRG
RORCAMP	Financial Aid Campus Table	RORRPRG
RORCLVE	Course Level Exclusion Table	RORRPRG

Table	Name	Process
RORCMPL	Selection Identifier Compiled Statements	RORRPRG
RORCODI	COD Entity ID Rules Table.	RORRPRG
RORCOLS	All Financial Aid columns Table	EXCLUDED1
RORCRHR	Credit Hours Table	RORRPRG
RORDATA	Data Dictionary Table	RORRPRG
RORDSUP	Supplemental Log Data	OBSOLETE
RORDVAL	Audit Log Form/Data Code Table	EXCLUDED1
RORELTF	E-Mail Letter Format Rules Table	EXCLUDED1
RORELTR	E-Mail Letter Rules Table	EXCLUDED1
RORENRL	Financial Aid Enrollment Table	RORAPRG RORARCH
RORGDAT	Group Selection Rules Base Table	RORRPRG
RORGSQL	Generated SQL Selection Identifier Table	RORRPRG
RORHOLD	Applicant Holds Table	RORAPRG RORARCH
RORHSDT	Applicant High School and Admission Data Table	RORAPRG RORARCH
RORINID	Financial Aid College Codes Table	RORRPRG
RORLEXM	Local Exit Mapping Table	EXCLUDED1
RORLOGC	Logging Control Repeating Table	EXCLUDED4
RORLOGD	Data Log Activity Detail Table	EXCLUDED4
RORLOGM	Data Log Activity Master Table	EXCLUDED4
RORMESG	Financial Aid Messages	RORAPRG RORARCH
RORMVAL	Miscellaneous Validation Rules Table	RORRPRG
RORNYVD	Non Year User-Defined Variables Description Table	EXCLUDED1
RORPELL	PELL Grant Payment Schedule Table	RORRPRG

<b>Table</b>	<b>Name</b>	<b>Process</b>
RORPOST	Batch Posting Rules Table	RORRPRG
RORSAPR	Satisfactory Academic Progress Rules Table	RORAPRG RORARCH
RORSECT	Course Sections Unavailable for Aid Table	EXCLUDED8
RORSLOG	Audit Log Supplemental Data Table	EXCLUDED4
RORSTAT	Applicant Status Table	RORAPRG RORARCH
RORSTRF	SAP Translation Rules Table	EXCLUDED1
RORSYMB	Letter Generation Variable Table	OBSOLETE
RORTPRD	Aid Period/Term Code Table	RORRPRG
RORUSER	User-Defined Variables Description Table	RORRPRG
RORVIEW	View Selection Table	EXCLUDED3
RORWBQA	Web Question Answers Rules Table	RORRPRG
RORWEBA	Web Accept Tracking Rules Table	RORRPRG
RORWEBQ	Web Questions Rules Table	RORRPRG
RORWEBR	Web Rules Table	RORRPRG
RORWKST	Campus/Verification Worksheet Table	OBSOLETE
RORWSQL	Web Text SQL Rules Table	RORRPRG
RORWTAB	Web Tab Rules Table	RORRPRG
RORWTXT	Web Text Rules Table	RORRPRG
RORWVAR	Web Variable Table	EXCLUDED1
ROTADDR	Finaid Temporary SPRADDR Table	EXCLUDED3
ROTEMAL	Temporary E-Mail Address Table	EXCLUDED3
ROTENRL	Temporary FISAP Enrollment Table	EXCLUDED3
ROTFSAP	Temporary Table for FISAP	EXCLUDED3
ROTIDEN	Finaid Temporary SPRIDEN Table	EXCLUDED3

Table	Name	Process
ROTPERS	Finaid Temporary SPBPERS Table	EXCLUDED3
ROTSAPR	Temporary Satisfactory Academic Progress Rules Table	OBSOLETE
ROTSTAT	Temporary Applicant Status Table	EXCLUDED3
ROTSTTS	Packaging Simulation Applicant Status Table	EXCLUDED3
ROTWFAE	Web for Executives - Financial Aid Extract.	EXCLUDED3
RPBLNDA	Lenders and Disbursing Agents Base Table	EXCLUDED1
RPBLNDR	Lender Base Data Table	EXCLUDED1
RPBLOPT	Loan Options Table	RORRPRG
RPBLPRD	Loan Period Base Data Table	RORRPRG
RPBOPTS	Packaging Options Table	RORRPRG
RPBSTAB	Short-Term Credit Account Base Table	EXCLUDED1
RPRADSB	Applicant Award Disbursement Table	RORAPRG RORARCH
RPRALGR	Algorithmic Packaging Rules Table	RORRPRG
RPRARSC	Applicant Resource Table	RORAPRG RORARCH
RPRASTC	Applicant Short-Term Credit Comments	RORAPRG RORARCH
RPRASTD	Applicant Short-Term Credit Table	RORAPRG RORARCH
RPRATRM	Applicant Award by Term Table	RORAPRG RORARCH
RPRAUTH	Financial Aid Authorization Table	RORAPRG RORARCH
RPRAWRD	Applicant Award Table	RORAPRG RORARCH
RPRBAKO	Backout Award Table	EXCLUDED3
RPRCASH	Direct Lending Cash Detail	EXCLUDED7

Table	Name	Process
RPRCIPC	SMART Grant Qualified Course Code Table	EXCLUDED1
RPRCLSS	Class Code Translation Table	RORRPRG
RPRCLVL	Campus Undergraduate Level Code Rules Table	OBSOLETE
RPRCNCL	Award Cancellation Process Table	EXCLUDED3
RPRCOLR	Packaging Collector Table	EXCLUDED3
RPRCONT	Third Party Contract Rules Table	EXCLUDED8
RPRDATE	Enrollment Options by Term Table	RORRPRG
RPRDEFE	Default Equity Packaging Rules Table	RORRPRG
RPRDEFG	Default Gap Packaging Rules Table	RORRPRG
RPRDEFS	Default Self-Help Packaging Rules Table	RORRPRG
RPRDEGR	Financial Aid Degree Rules	RORRPRG
RPRDLAS	Direct Loan Account Statement Table	RORAPRG RORARCH
RPRDSAS	Direct Lending School Account Statement Summary Record	RORRPRG
RPREFTD	EFT Disbursement Table	RORAPRG RORARCH
RPREPMT	Electronic Payment Receipt	EXCLUDED1
RPREXPT	Exemption Rules Table	EXCLUDED8
RPRFCAT	Packaging Group Fund Category Maximums Rules Table	RORRPRG
RPRFEDR	Federal Rules Table	RORRPRG
RPRFSRC	Maximum Amount Per Fund Source	RORRPRG
RPRFUND	Packaging Fund Total Table	EXCLUDED3
RPRGEQY	Packaging Group Equity Packaging Rules Table	RORRPRG
RPRGFND	Packaging Group/Fund Rules Table	RORRPRG
RPRGGAP	Packaging Group Gap Packaging Rules Table	RORRPRG

Table	Name	Process
RPRGSHP	Packaging Group Self-Help Packaging Rules Table	RORRPRG
RPRINFO	Self-Service Student Supplied Information Table	RORAPRG RORARCH
RPRLADB	Loan Disbursement Schedule	RORAPRG RORARCH
RPRLAPP	Loan Application Table	RORAPRG RORARCH
RPRLARF	Loan Application Reference Table	RORAPRG RORARCH
RPRLATR	Loan Term Schedule Rules Table	RORAPRG RORARCH
RPRLCRT	Loan Certification Table	RORAPRG RORARCH
RPRLDSB	Loan Period / Disbursement Schedule Rules Table	RORRPRG
RPRLECS	Loan Electronic Counseling Status Table	RORAPRG RORARCH
RPRLNDP	Lender Participation Table	EXCLUDED1
RPRLPAP	Loan Period / Aid Period Rules Table	RORRPRG
RPRLTRM	Loan Period / Term Schedule Rules Table	RORRPRG
RPRMAJR	Financial Aid Major Rules Table	RORRPRG
RPRREC�	Direct Lending Cash Reconciliation Summary	OBSOLETE
RPRRFND	Direct Loan Refund Table	RORAPRG RORARCH
RPRRSLT	Disbursement Message Table	RORAPRG RORARCH
RPRSADS	DL Statement of Account Disbursement Summary.	RORRPRG
RPRSAHP	ACG Rigorous High School Program Code Table.	EXCLUDED1
RPRSLND	Student Lender History Table	RORAPRG RORARCH
RPRSSUM	Scholarship Summary Table	EXCLUDED9

<b>Table</b>	<b>Name</b>	<b>Process</b>
RPRSTAC	Short-Term Credit Account Comments	EXCLUDED1
RPRTATS	TEACH Grant Agreement to Serve Table	RORRPRG
RPRTIIV	Return of Title IV Funds Table	RORAPRG RORARCH
RPRVRS	Online Validation Results Table	OBSOLETE
RPTAWRD	Temporary Applicant Award Table	EXCLUDED3
RPTCONT	Temporary Recruiting Contact Table	EXCLUDED3
RPTNEED	Temporary Packaging Need Table	EXCLUDED3
RRRAREQ	Applicant Requirements Table	RORAPRG RORARCH
RRRGREQ	Tracking Group/Requirements Rules Table	RORRPRG
RRRTMSG	Tracking Requirement Message Rules Table	RORRPRG
RTVAATP	Athletic Aid Type Validation Table	EXCLUDED6
RTVALGR	Algorithmic Packaging Rule Code Validation Table	EXCLUDED6
RTVAPRD	Aid Period Validation Table	EXCLUDED6
RTVARSC	Financial Aid Resource Codes	EXCLUDED6
RTVAUST	Employment Authorization Status Validation Table	EXCLUDED6
RTVAWST	Award Status Validation Table	EXCLUDED6
RTVBGRP	Budget Group Validation Table	EXCLUDED6
RTVBTYP	Budget Type Validation Table	EXCLUDED6
RTVCCOM	Comment Category Code Validation Table	EXCLUDED6
RTVCDNT	COD Nation Code Rules Table	EXCLUDED6
RTVCDST	COD State Code Rules Table	EXCLUDED6
RTVCINT	Certification Initials Validation Table	EXCLUDED6
RTVCOMP	Budget Component Validation Table	EXCLUDED6
RTVDLBT	Batch Type Validation Table	EXCLUDED6

Table	Name	Process
RTVELTM	E-Mail Letter Module Validation Table	EXCLUDED6
RTVFASP	Financial Aid Sport Validation Table	EXCLUDED6
RTVFCAT	Fund Category Validation Table	EXCLUDED6
RTVFSRC	Fund Source Validation Table	EXCLUDED6
RTVFTYP	Fund Type Validation Table	EXCLUDED6
RTVGRDD	Grades to Donor Validation Table	EXCLUDED6
RTVHOLD	Financial Aid Hold Type Validation Table	EXCLUDED6
RTVICMT	ISIR Comment Code Text Validation Table	RORRPRG
RTVINFC	Source Code Validation Table	EXCLUDED6
RTVINTL	International Translation Rules	EXCLUDED6
RTVLNST	Loan Status Validation Table	EXCLUDED6
RTVMESG	Message Validation Table	EXCLUDED6
RTVPGRP	Packaging Group Validation Table	EXCLUDED6
RTVPHAS	CommonLine Loan Application Phase Code Validation Table	EXCLUDED6
RTVPRCD	Program Code validation table for NSLDS	EXCLUDED6
RTVPTYP	Batch Posting Type Validation Table	EXCLUDED6
RTVREVV	Reviewed Validation Table	EXCLUDED6
RTVRFST	Referral Status Validation Table	EXCLUDED6
RTVRJCT	Reject Validation Table	EXCLUDED6
RTVRPSR	Repayment Source Validation Table	EXCLUDED6
RTVSAPR	Satisfactory Academic Progress Validation Table	EXCLUDED6
RTVSSRC	Scholarship Source Validation Table	EXCLUDED6
RTVTGRP	Tracking Group Validation Table	EXCLUDED6
RTVTREQ	Tracking Requirements Validation Table	EXCLUDED6

Table	Name	Process
RTVTRST	Tracking Requirements Status Validation Table	EXCLUDED6
RTVTYLT	Thank You Letter Validation Table	EXCLUDED6
RTVUSER	This table is no longer used by Banner. It has been replaced by the RORUSER table.	OBSOLETE
RTVWEBQ	Web Questions Validation Table	EXCLUDED6
RTVWTXT	Web Text Rule Code Validation Table	EXCLUDED6
RTVWVAR	Web Variable Validation Table	EXCLUDED6
RTVYICD	Year in College Description Table	EXCLUDED6

## Changed Forms

### Fund Sequence History Inquiry (RHIAFSH)

The RHIAFSH Form was modified as follows:

#### Transfer Award window

The Transfer Award block/window was removed from this form.

#### Transfer Loan window

The Transfer Loan block/window was removed from this form.

#### Options menu

The Transfer Award option was removed.

The Transfer Loan option was removed.

# Global Institution Financial Aid Options (ROAINST)

## Aid Year Definition Tab

The **Retention Expired**, **Expiration Date**, and **Archive Date** fields have been added to this tab. Once your institution has determined record retention has passed for an aid year, you will need to mark the aid year as inactive. You may then indicate the retention period has passed by checking the **Retention Expired** indicator. Once the **Retention Expired** indicator has been checked, and the RORARCH process has been run, you will no longer be able to re-activate an aid year. The Archive/Purge Applicant process (RORARCH) may now be run to purge applicant data for the aid year.

Field	Description
Retention Expired	<p>(ROBINST_RETENTION_EXPIRED_IND) Check this field to allow archiving. The retention policy must be expired for the aid year in order to allow archiving. The current system date year minus 6 must be greater than the starting year for the aid year. For example, if the year is 2009 and the current aid year is 2009-2010, the earliest aid year for which you can set this field is the 2003-2004 aid year.</p> <p>Once you check this field, the Archive/Purge Applicant Process (RORARCH) process allows you to purge applicant data for an aid year.</p>

Field	Description
Expiration Date	(ROBINST_RETENTION_DATE) The date the retention policy expired. This field is updated with the system date when you check the <b>Retention Expired</b> field to allow archiving.
Archive Date	(ROBINST_ARCHIVE_DATE) The first date on which data was archived for the aid year.

## Applicant Status Inquiry (ROIASIQ)

### Archived Financial Aid Summary Block

The Archived Financial Aid Summary Block (RORARCH) is new with this release and includes the new archived **Aid Year** and **Creation Date** fields.

Applicant Status Inquiry ROIASIQ 8.4 (s10b80)

Confidential

ID: 171990020 | Лена Сорока-Сорока

Current Financial Aid Summary		
Aid Year	Need Analysis	Awarded
0910	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0809	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0708	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0607	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0506	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0405	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Archived Financial Aid Summary	
Aid Year	Creation Date
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Student System Summary

<input checked="" type="checkbox"/> Recruiting	<input checked="" type="checkbox"/> General Student	<input checked="" type="checkbox"/> Accounts Receivable
<input checked="" type="checkbox"/> Admissions	<input checked="" type="checkbox"/> Registration	
<input type="checkbox"/> Transfer Work	<input type="checkbox"/> Housing	

Field	Description
Aid Year	(RORARCH_AIDY_CODE) Displays the aid year archived by the Archive/Purge Applicant Process (RORARCH). The RORARCH process removes records for the applicant for an aid year. This process purges information for applicants in years where financial aid processing is complete and the retention policy has expired.
Creation Date	(RORARCH_CREATION_DATE) Displays the system date of the aid year archive.

## Additional Forms

The following additional forms were delivered with this release for technical changes to remove code associated with supplemental logging or references to tables which are no longer valid.

- Financial Aid Suspended Records Maintenance (RCRSUSP)
- 2004-2005 Applicant Override (RNAOV05)
- 2005-2006 Applicant Override (RNAOV06)
- 2006-2007 Applicant Override (RNAOV07)
- 2007-2008 Applicant Override (RNAOV08)
- 2008-2009 Applicant Override (RNAOV09)
- 2009-2010 Applicant Override (RNAOV10)
- 2004-2005 Need Analysis Processing (RNAPR05)
- 2005-2006 Need Analysis Processing (RNAPR06)
- 2006-2007 Need Analysis Processing (RNAPR07)
- 2007-2008 Need Analysis Processing (RNAPR08)
- Application Purge (RNAPURG)
- 2004-2005 Student Loan Data (RNASL05)
- 2005-2006 Student Loan Data (RNASL06)
- 2006-2007 Student Loan Data (RNASL07)
- 2007-2008 Student Loan Data (RNASL08)
- Applicant Status (ROASTAT)
- Applicant User-Defined Data (ROAUSDF)

- Electronic Loan Application (RPAELAP)
- Direct Loan Origination (RPALORG)

## Changed Menus

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### History and Transcripts (\*RESHIST)

The following forms were removed from the \*RESHIST menu.

- Transcript Rules (RHRTRNS)
- Prior Institution Transcript (RHAPTRN)
- Transcript Information (RHATINF)
- Financial Aid Transcript Request (RHARQST)

## New Reports and Processes

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The three new processes have been delivered with the security role of BAN\_DEFAULT\_M.



### Warning

Since you cannot restore data that was subjected to the archiving and purging processes, SunGard Higher Education recommends that you restrict user access to these new processes and establish institutional guidelines for their use.

### Applicant Purge Process (RORAPRG)

The RORAPRG process enables you to purge applicant data for those who have not completed the financial aid process for an aid year. You may only run this process once the aid year has ended as determined by the aid year end date entered on ROAINST. The purge takes place provided the applicant does not have:

- an award record,
- a resource entered on the Resource Maintenance Form (RPAARSC) (Note that VA benefits loaded from the ISIR record as part of Dataload Part 3 are not included in the determination of whether applicant resources exist.),
- a loan record for the aid year, or
- an entry on the Student Registration Table (SFBETRM) for any term within their aid period.

Some requirements are required once (RTVTREQ\_ONCE\_IND = 'Y'). If a future required once requirement does not exist, a record will be inserted into the Applicants Saved Requirements (RORSREQ) Table. If the applicant should return, this record will be used to populate the new required once requirement.

If a hold exists for an applicant which is not associated with an aid year or a term, the hold will not be purged unless the hold is expired.

Satisfactory Academic Progress: The most recent term SAP status for an applicant will not be purged.

## Audit Mode

You can run the process in audit mode. No data is purged for the applicant, but a report is generated that lists all applicants that could not have their data purged. You can also generate an optional report that lists all applicants that could have been purged.

## Archive/Purge Logging Records Parameter Settings

You can archive or purge Data Log Activity Master Table (RORLOGM) and Data Log Activity Detail Table (RORLOGD) entries for the applicant based on a parameter.

- If you set the Archive/Purge Logging Records parameter to *A*, the logging entries are archived (moved to the Archive Data Log Activity Master Table (ROALOGM) and the Archive Data Log Activity Detail Table (ROALOGD)) and then deleted.
- If you set the Archive/Purge Logging Records parameter to *P*, the logging entries are deleted.
- If you set the Archive/Purge Logging Records parameter to *N*, no processing on the logging entries takes place. Logging records not associated with an aid year will not be deleted or archived. For example, if a hold has been logged without an aid year, the logging entries will remain even when the original hold will be purged.

### Note

If logging records are Archived, it is necessary to export the ROALOGM and ROALOGD tables using Oracle's exp functionality to prevent the archived records from being lost the next time RORLOGA or RORAPRG is run. ■

### Note

Refer to the Archive/Purge Applicant Process (RORARCH) for the list of tables that are included in the Applicant Purge Process. ■

## Parameters

Name	Required?	Description	Values
01 - Aid Year Code	Yes	Aid Year Code for which you want to purge applicant data.	Aid Year Inquiry (ROIAIDY)
02 - Audit Mode	Yes	In audit mode, no data is purged for the applicant, but a report is generated that lists all applicants that could not have their data purged. You can also use the Applicants Purged Report parameter to generate a report that lists all applicants that could have potentially been purged.	<i>Y</i> Yes, run in audit mode. <i>N</i> No, do not run in audit mode.
03 - Applicants Purged Report	Yes	Use this parameter to generate a report that lists all applicants that have been purged.	<i>Y</i> Yes, produce the Applicants Purged Report. <i>N</i> No, do not produce the Applicants Purged Report.
04 - Report Sort	Yes	This parameter determines the report sort order.	<i>I</i> Sort the report by ID. <i>N</i> Sort the report by student name.
05 - Archive/Purge Logging Records	Yes	You can archive or purge Data Log Activity Master Table (RORLOGM) and Data Log Activity Detail Table (RORLOGD) entries for the applicant based on this parameter.	<i>A</i> The logging entries are archived and then deleted. <i>P</i> The logging entries are deleted. <i>N</i> No processing on the logging entries takes place.
06 - Application ID	Yes	General area for which the selection ID was defined.	
07 - Selection ID	Yes	Code that identifies the population with which to work.	
08 - Creator ID	Yes	ID of the person who created the population rules.	

Name	Required?	Description	Values
09 - User ID	Yes	ID of the person who used the population rules.	

## Archive/Purge Applicant Process (RORARCH)

The RORARCH process allows you to purge applicant data for an aid year where the record retention date, which is established by the institution, has passed. An option to archive summary, award, disbursement, and loan data in an XML document is provided. The data that has been archived is stored in the RORARCH table in XML format.

### Note

If the applicant did not complete the financial aid process, you may wish to purge their information using the Applicant Purge Process (RORAPRG), rather than including them in the Archive/Purge Applicant Process. This is especially true if select the option to create the XML document. ■

A Perkins MPN can be valid for 10 years. If a future Perkins MPN does not exist and the current Perkins MPN is not expired, a record is inserted into the Applicants Saved Requirements (RORSREQ) Table. If the applicant should return and receive additional Perkins funds, this record will be used to populate the Perkins MPN Requirement.

Some requirements are required once (RTVTREQ\_ONCE\_IND = 'Y'). If a future required once requirement does not exist, a record will be inserted into the Applicants Saved Requirements (RORSREQ) Table. If the applicant should return, this record will be used to populate the new required once requirement.

If a hold exists for an applicant which is not associated with an aid year or a term, the hold will not be purged. A non-aid year hold which has expired will be purged.

Satisfactory Academic Progress: The most recent term SAP status for an applicant will not be purged.

The following is a list of the tables that are included in the Archive/Purge Applicant Process.

Table	Name	Notes
RBBABUD	Applicant Budget Table	
RBRACMP	Applicant Budget Component Table	

Table	Name	Notes
RBRMIXD	Applicant Mixed Enrollment Table	
RCRAPP1	Financial Aid Application Table - Part 1	
RCRAPP2	Financial Aid Application Table - Part 2	
RCRAPP3	Financial Aid Application Table - Part 3	
RCRAPP4	Financial Aid Application Table - Part 4	
RCRESAR	Financial Aid Application Table - ESAR Data	
RCRIMP1	Additional CSS PROFILE Data	
RCRLDS4	Applicant NSLDS Table Part 1	
RCRLDS6	Applicant NSLDS Table Part 3	
RCRLDS7	NSLDS Pell Payment Repeating Table	
RCRLDS8	NSLDS Name History Table	
RCRLDSA	NSLDS ACG Payment Permanent Table.	
RCRLDSS	NSLDS SMART Payment Permanent Table.	
RCRLDST	NSLDS TEACH Payment Permanent Table	
REBORIG	Federal Grant Origination Table	
REBPAYV	Pell Origination Table	
REBTCHO	TEACH Grant Origination Table	

Table	Name	Notes
REBTYDD	Grant Year to Date Detail Disbursement Record Table	
REBTYDO	Year to Date Detail Origination Record Table	
RERSTID	COD Identifier Table	
RFRPROM	Promissory Note Requirement Table	
RHRCOMM	Applicants Comments	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RJRSEAR	Student Employment Authorization Table	
RJRSERF	Student Employment Referral Table	
RJRSEWH	Student Employment Work History Table	
RNRACMT	Financial Aid Application Comments	
RNROCMT	Financial Aid Application Override Comments	
RNROVRD	Applicant Need Analysis Override Table	
RNRTMNT	NSLDS Transfer Monitoring Process Table	
RNRVRFY	Needs Analysis Verification Table	
ROBNYUD	Applicant Non Year User-Defined Data Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
ROBUSDF	Applicant User-Defined Data Table	

Table	Name	Notes
RORATND	Financial Aid Enrollment Attending Hours Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RORENRL	Financial Aid Enrollment Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RORHOLD	Applicant Holds Table	Purged using pidm and aid year. If no other RORSTAT exists for any aid year for the pidm, purge rows where RORHOLD_TERM_CODE is not null. Rows where RORHOLD_AIDY_CODE is null and the hold_to date has not passed, and RORHOLD_TERM_CODE is null will never be purged.
RORHSDT	Applicant High School and Admission Data Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RORSREQ	Applicant Saved Requirements Table (New table for this release)	Requirements which are once only will not be deleted. Perkins MPN data will be deleted once the MPN expiration date has passed.
RORMESG	Financial Aid Messages	
RORSAPR	Satisfactory Academic Progress Rules Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete. The row with the highest term code will not be purged.
RORSTAT	Applicant Status Table	
RPRADSB	Applicant Award Disbursement Table	Update rpradbsb_sys_ind to 'A' for all disbursements. No rows will be purged
RPRARSC	Applicant Resource Table	

Table	Name	Notes
RPRASTC	Applicant Short-Term Credit Comments	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RPRASTD	Applicant Short-Term Credit Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RPRATRM	Applicant Award by Term Table	No rows will be purged.
RPRAUTH	Financial Aid Authorization Table	
RPRAWRD	Applicant Award Table	Update rprawrd_sys_ind to 'A' for all awards where rprawrd_sys_ind <> 'P'. No rows will be purged
RPRDLAS	Direct Loan Account Statement Table	Purged using rprdlas_dl_loan_id
RPREFTD	EFT Disbursement Table	Purged using rpreftd_el_loan_id
RPRINFO	Self-Service Student Supplied Information Table	
RPRLADB	Loan Disbursement Schedule	Purged using rprladb_pidm rprladb_fund_code rprladb_appl_no
RPRLAPP	Loan Application Table	Controlling tables for purging loans
RPRLARF	Loan Application Reference Table	Purged using rprlarf_pidm rprlarf_fund_code rprlarf_appl_no
RPRLATR	Loan Term Schedule Rules Table	Purged using rprlatr_pidm rprlatr_fund_code rprlatr_appl_no
RPRLCRT	Loan Certification Table	Purged using rprlcrt_pidm rprlcrt_fund_code rprlcrt_appl_no

Table	Name	Notes
RPRLECS	Loan Electronic Counseling Status Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RPRRFND	Direct Loan Refund Table	Purged using rprrfnd_pidm rprrfnd_dl_loan_id
RPRRSLT	Disbursement Message Table	
RPRSLND	Student Lender History Table	Rows will only be purged if no RORSTAT exists for any year for the pidm after aid year and pidm processing is complete.
RPRSTATS	TEACH Grant Agreement to Serve Table	
RPRTIIV	Return of Title IV Funds Table	
RRRAREQ	Applicant Requirements Table	If an unexpired Perkins MPN does not exist in subsequent aid years, it will be inserted into the Applicant Saved Requirements (RORSREQ) Table. If a satisfied satisfies once requirement does not exist in subsequent aid years, it will be inserted into the Applicant Saved Requirements (RORSREQ) Table.

## Parameters

Name	Required?	Description	Values
01 - Aid Year Code	Yes	Aid Year Code for which you want to archive applicant data.	Aid Year Inquiry (ROIADY)
02 - Create Archive Document	Yes	Determines whether you want to create an archive document. The data that has been archived is stored in the RORARCH table in XML format.	Y Yes, create the archive document. N No, do not create the archive document.

Name	Required?	Description	Values
03 - Applicants Purged Report	Yes	Use this parameter to generate a report that lists all applicants that have been purged.	<i>Y</i> Yes, produce the Applicants Purged Report. <i>N</i> No, do not produce the Applicants Purged Report.
04 - Report Sort	Yes	This parameter determines the report sort order.	<i>I</i> Sort the report by ID. <i>N</i> Sort the report by student name.
05 - Application ID	No	General area for which the selection ID was defined.	
06 - Selection ID	No	Code that identifies the population with which to work.	
07 - Creator ID	No	ID of the person who created the population rules.	
08 - User ID	No	ID of the person who used the population rules.	

## Archive Document

- The selection criteria for awards is “all awards”.
- The selection criteria for award disbursements is all disbursements for the selected awards.
- The selection criteria for loans is “all active loans” (RTVLNST\_INACTIVE\_IND = ‘N’ or null).
- The selection criteria for loan disbursements is all disbursements for the selected loans.

## Archive Document XML Tag to Database Mapping

XML Tag	Database Column
ArchiveInformation	
PersonInformation	
PersonIdentifier	SPRIDEN_ID

XML Tag	Database Column
PersonName	
LastName	SPRIDEN_LAST_NAME
FirstName	SPRIDEN_FIRST_NAME
MiddleName	SPRIDEN_MI
/PersonName	
/PersonInformation	
StatusInformation	
AidYearCode	RORSTAT_AIDY_CODE
VerificationComplete	RORSTAT_VER_COMPLETE
VerificationStatusCode	RORSTAT_VER_PAY_IND
DateVerificationCompleteWasUpdated	RORSTAT_VER_DATE
SARTransactionNumber	RORSTAT_SAR_TRAN_NO
SARSocialSecurityNumber	RORSTAT_SAR_SSN
SARInitials	RORSTAT_SAR_INIT
/StatusInformation	
SummaryInformation	
BudgetAmount	LV_BUDGET (calculated value from function)
ResourceAmount	LV_RESOURCE_AMT (calculated value from function)
OfferAmount	LV_OFFER_AMT (calculated value from function)
EFC	LV_EFC (calculated value from function)
GrossNeed	LV_GROSS_NEED (calculated value from function)
UnmetNeed	LV_UNMET_NEED (calculated value from function)

XML Tag	Database Column
IMEFC	LV_IM_EFC (calculated value from function)
IMGrossNeed	LV_IM_GROSS_NEED (calculated value from function)
IMUnmetNeed	LV_IM_UNMET_NEED (calculated value from function)
/SummaryInformation	
AwardInformation	
Award	
AwardKey	
@Fund	RPRAWRD_FUND_CODE
/AwardKey	
AwardDetail	
StatusCode	RPRAWRD_AWST_CODE
SystemIndicator	RPRAWRD_SYS_IND
LockIndicator	RPRAWRD_LOCK_IND
UnmetNeedOverrideIndicator	RPRAWRD_UNMET_NEED_OVRDE_IND
ReplaceEFCOverrideindicator	RPRAWRD_REPLACE_TFC_OVRDE_IND
TrackingRequirementsOverrideIndicator	RPRAWRD_TREQ_OVRDE_IND
FederalLimitOverrideIndicator	RPRAWRD_FED_LIMIT_OVRDE_IND
FundLimitOverrideIndicator	RPRAWRD_FUND_LIMIT_OVRDE_IND
AcceptAmount	RPRAWRD_ACCEPT_AMT
AcceptDate	RPRAWRD_ACCEPT_DATE
PaidAmount	RPRAWRD_PAID_AMT
PaidDate	RPRAWRD_PAID_DATE
OriginalOfferAmount	RPRAWRD_ORIG_OFFER_AMT
OriginalOfferDate	RPRAWRD_ORIG_OFFER_DATE

<b>XML Tag</b>	<b>Database Column</b>
OfferAmount	RPRAWRD_OFFER_AMT
OfferDate	RPRAWRD_OFFER_DATE
DeclineAmount	RPRAWRD_DECLINE_AMT
DeclineDate	RPRAWRD_DECLINE_DATE
CancelAmount	RPRAWRD_CANCEL_AMT
CancelDate	RPRAWRD_CANCEL_DATE
OverrideYearInCollege	RPRAWRD_OVERRIDE_YR_IN_COLL
DataOrigin	RPRAWRD_DATA_ORIGIN
OverrideNoPell	RPRAWRD_OVERRIDE_NO_PELL
OverrideFundAwardRule	RPRAWRD_OVERRIDE_FUND_RULE
<b>DisbursementInformation</b>	
<b>Disbursement</b>	
EnrollmentPeriod	RPRADSB_TERM_CODE
DisbursedDate	RPRADSB_DISBURSE_DATE
DisbursedAmount	RPRADSB_DISBURSE_AMT
TransactionNumber	RPRADSB_TRAN_NUMBER
Percentage	RPRADSB_DISBURSE_PCT
Load	RPRADSB_DISBURSE_LOAD
EnrollmentOption	RPRADSB_DISBURSE_LOAD_OPT
ApplicantCalculatedPellDisbursementAmount	RPRADSB_PELL_CALC_DISB_AMT
ApplicantCalculatedPellLoad	RPRADSB_PELL_CALC_DISB_LOAD
ApplicantCalculatedPellLoadOption	RPRADSB_PELL_CALC_DISB_LOAD_OPT
DataOrigin	RPRADSB_DATA_ORIGIN
<b>/Disbursement</b>	
<b>/DisbursementInformation</b>	

XML Tag	Database Column
/AwardDetail	
LoanInformation	
Loan	
LoanKey	
@Fund	RPRLAPP_FUND_CODE
@ApplicationNumber	RPRLAPP_APPL_NO
LoanDetail	
Name	
LastName	RPRLAPP_LAST_NAME
FirstName	RPRLAPP_FIRST_NAME
MiddleInitial	RPRLAPP_MI
/Name	
Address	
AddressLine1	RPRLAPP_ADDRESS
AddressLine2	RPRLAPP_ADDR_LINE2
AddressLine3	RPRLAPP_ADDR_LINE3
AddressLine4	RPRLAPP_ADDR_LINE4
City	RPRLAPP_CITY
State	RPRLAPP_STATE
ZipCode	RPRLAPP_ZIP
NationCode	RPRLAPP_NATN_CODE
HouseNumber	RPRLAPP_HOUSE_NUMBER
/Address	
LocalAddress	
AddressLine1	RPRLAPP_LOCAL_ADDRESS

<b>XML Tag</b>	<b>Database Column</b>
AddressLine2	RPRLAPP_LOCAL_ADDR_LINE2
AddressLine3	RPRLAPP_LOCAL_ADDR_LINE3
AddressLine4	RPRLAPP_LOCAL_ADDR_LINE4
City	RPRLAPP_LOCAL_CITY
StateCode	RPRLAPP_LOCAL_STAT_CODE
ZipCode	RPRLAPP_LOCAL_ZIP
NationCode	RPRLAPP_LOCAL_NATN_CODE
HouseNumber	RPRLAPP_LOCAL_HOUSE_NUMBER
/LocalAddress	
Phone	
PhoneNumber	RPRLAPP_PHONE_NO
TelephoneCountryCode	RPRLAPP_CTRY_CODE_PHONE
/Phone	
LocalPhone	
PhoneNumber	RPRLAPP_LOCAL_PHONE_NO
TelephoneCountryCode	RPRLAPP_CTRY_CODE_LOCAL_PHONE
/LocalPhone	
LoanPeriod	RPRLAPP_LOAN_PERIOD
LoanStatusCode	RPRLAPP_LNST_CODE
LenderId	RPRLAPP_LENDER_ID
FeePercent	RPRLAPP_FEE_PCT
ExpectedAmount	RPRLAPP_EXPECT_AMT
CertificationDate	RPRLAPP_CERT_DATE
SubmissionDate	RPRLAPP_SUB_DATE
ApproveDate	RPRLAPP_APPROVE_DATE

<b>XML Tag</b>	<b>Database Column</b>
ApproveAmount	RPRLAPP_APPROVE_AMT
SocialSecurityNumber	RPRLAPP_SSN
BirthDate	RPRLAPP_BIRTH_DATE
AlienRegistrationNumber	RPRLAPP_ALIEN_REG_NO
DriverLicenseNumber	RPRLAPP_DRIVER_LIC_NO
DriverLicenseStateCode	RPRLAPP_STAT_CODE_LIC
InDefault	RPRLAPP_IN_DEFAULT
OwesRefund	RPRLAPP_OWES_REFUND
DLLoanID	RPRLAPP_DL_LOAN_ID
DLSequenceNumber	RPRLAPP_DL_SEQ_NO
DLStatus	RPRLAPP_DL_STATUS
DLSentDate	RPRLAPP_DL_SENT_DATE
YearInCollege	RPRLAPP_YR_IN_COLL
CreditCheckIndicator	RPRLAPP_CREDIT_CHECK_IND
CreditCheckDate	RPRLAPP_CREDIT_CHECK_DATE
BatchNumber	RPRLAPP_BATCH_NO
PLUStoStudent	RPRLAPP_PLUS_TO_STUDENT
GradeLevel	RPRLAPP_GRADE_LEVEL
ModelCode	RPRLAPP_MODEL_CDE
CreateDate	RPRLAPP_CREATE_DATE
ReturnPidm	RPRLAPP_RETURN_PIDM
LenderPidm	RPRLAPP_LENDER_PIDM
GuarantorPidm	RPRLAPP_GUAR_PIDM
ELLoanId	RPRLAPP_EL_LOAN_ID
ELSequenceNumber	RPRLAPP_EL_SEQ_NO

<b>XML Tag</b>	<b>Database Column</b>
ELStatus	RPRLAPP_EL_STATUS
ELDateSent	RPRLAPP_EL_DATE_SENT
ELProcessType	RPRLAPP_EL_PROCESS_TYPE
ELRecordType	RPRLAPP_RECORD_TYPE
EFTAuthorization	RPRLAPP_EFT_AUTH
ReconciliationStatus	RPRLAPP_DL_RECON_STATUS
OriginationCenterTotalNetLoanAmount	RPRLAPP_LOC_TOT_NET_LOAN_AMT
CrossReferenceLoanId	RPRLAPP_XREF_LOAN_ID
HealthProfessionProgramsAmountIndicator	RPRLAPP_FORMER_HEAL_IND
AdditionalStaffordEligibilityIndicator	RPRLAPP_ADDL_STFD_ELIG_IND
MPNStatusIndicator	RPRLAPP_MPN_STATUS_IND
AcademicYearStartDate	RPRLAPP_ACAD_YR_START_DATE
AcademicYearEndDate	RPRLAPP_ACAD_YR_END_DATE
PromissoryNoteDeliveryCode	RPRLAPP_PN_DELIVERY_CDE
DisclosureStatementPrintIndicator	RPRLAPP_DISC_PRINT_IND
DisclosureStatementNeedsPrintingFlag	RPRLAPP_DISC_NEED_PRINT_FLAG
DisclosureStatementPrintDate	RPRLAPP_DISC_PRINT_DATE
MasterPromissoryNoteID	RPRLAPP_MPN_ID
MPNBatchID	RPRLAPP_MPN_BATCH_ID
CreditInDifferentNameCode	RPRLAPP_CRED_DIF_NM_IND
EmailAddress	RPRLAPP_STU_EMAIL
RebateFeePercent	RPRLAPP_DL_REBATE_PERCENT
BookingBatchNumber	RPRLAPP_BOOK_BATCH_NO
BookingDate	RPRLAPP_BOOK_DATE
SARTransactionNumber	RPRLAPP_SAR_TRAN_NO

<b>XML Tag</b>	<b>Database Column</b>
CODDocumentIDForTheDirectLoanAwardRecord	RPRLAPP_DOCUMENT_ID
CODDocumentIDForTheBookingNotificationRecord	RPRLAPP_BOOK_DOCUMENT_ID
CODDocumentIDForTheMasterPromNoteRecord	RPRLAPP_MPN_DOCUMENT_ID
PLUSRequestedAmountIndicator	RPRLAPP_EL_PLUS_REQ_AMT_IND
PLUSBorrowerIdentifierNumber	RPRLAPP_PLUS_BORROWER_ID_NO
DataOrigin	RPRLAPP_DATA_ORIGIN
MPNExpirationDate	RPRLAPP_MPN_EXP_DATE
MPNExpirationReasonCode	RPRLAPP_MPN_EXP_CODE
MPNExpirationReasonDescription	RPRLAPP_MPN_EXP_DESC
BorrowerEmailAddress	RPRLAPP_BORROWER_EMAIL
PreparatoryOrTeacherCertificationCourseworkIndicator	RPRLAPP_PREP_OR_TEACH_IND
CreditStatusDocumentID	RPRLAPP_CREDIT_DOCUMENT_ID
Parent	
Name	
LastName	RPRLAPP_PAR_LAST_NAME
FirstName	RPRLAPP_PAR_FIRST_NAME
MiddleInitial	RPRLAPP_PAR_MI
SurnamePrefix	RPRLAPP_PAR_SURNAME_PREFIX
/Name	
SocialSecurityNumber	RPRLAPP_PAR_SSN
CitizenshipIndicator	RPRLAPP_PAR_CITZ_IND
BirthDate	RPRLAPP_PAR_BIRTH_DATE
DriverLicenseStateCode	RPRLAPP_PAR_STAT_CODE_LIC

<b>XML Tag</b>	<b>Database Column</b>
DriverLicenseNumber	RPRLAPP_PAR_DRIVER_LIC_NO
AlienRegistrationNumber	RPRLAPP_PAR_ALIEN_REG_NO
InDefault	RPRLAPP_PAR_IN_DEFAULT
StateCodeResidence	RPRLAPP_PAR_STAT_CODE_RES
EndorserAmount	RPRLAPP_PAR_ENDORSER_AMT
Address	
AddressLine1	RPRLAPP_PAR_ADDRESS
AddressLine2	RPRLAPP_PAR_ADDR_LINE2
AddressLine3	RPRLAPP_PAR_ADDR_LINE3
AddressLine4	RPRLAPP_PAR_ADDR_LINE4
City	RPRLAPP_PAR_CITY
State	RPRLAPP_PAR_STATE
ZipCode	RPRLAPP_PAR_ZIP
NationCode	RPRLAPP_PAR_NATN_CODE
HouseNumber	RPRLAPP_PAR_HOUSE_NUMBER
/Address	
LocalAddress	
AddressLine1	RPRLAPP_PAR_LOCAL_ADDRESS
AddressLine2	RPRLAPP_PAR_LOCAL_ADDR_LINE2
AddressLine3	RPRLAPP_PAR_LOCAL_ADDR_LINE3
AddressLine4	RPRLAPP_PAR_LOCAL_ADDR_LINE4
City	RPRLAPP_PAR_LOCAL_CITY
StateCode	RPRLAPP_PAR_LOCAL_STAT_CODE
ZipCode	RPRLAPP_PAR_LOCAL_ZIP
NationCode	RPRLAPP_PAR_LOCAL_NATN_CODE

XML Tag	Database Column
HouseNumber	RPRLAPP_PAR_LOCAL_HOUSE_NUMBER
/LocalAddress	
Phone	
PhoneNumber	RPRLAPP_PAR_PHONE_NO
TelephoneCountryCode	RPRLAPP_CTRY_CODE_PAR_PHONE
/Phone	
/Parent	
Cosigner1	
Name	
LastName	RPRLAPP_COSIGN1_LAST_NAME
FirstName	RPRLAPP_COSIGN1_FIRST_NAME
MiddleInitial	RPRLAPP_COSIGN1_MI
SurnamePrefix	RPRLAPP_COSIGN1_SURNAME_PREFI X
/Name	
SSN	RPRLAPP_COSIGN1_SSN
DateOfBirth	RPRLAPP_COSIGN1_BIRTH_DATE
DriverLicenseState	RPRLAPP_COSIGN1_STAT_CODE_LIC
DriverLicenseNumber	RPRLAPP_COSIGN1_DRIVER_LIC_NO
RelationshipToStudent	RPRLAPP_COSIGN1_RELATION_IND
Address	
Address	RPRLAPP_COSIGN1_ADDR
AddressLine1	RPRLAPP_COSIGN1_ADDR_LINE1
AddressLine2	RPRLAPP_COSIGN1_ADDR_LINE2
AddressLine3	RPRLAPP_COSIGN1_ADDR_LINE3

XML Tag	Database Column
AddressLine4	RPRLAPP_COSIGN1_ADDR_LINE4
City	RPRLAPP_COSIGN1_CITY
State	RPRLAPP_COSIGN1_STAT_CODE
ZipCode	RPRLAPP_COSIGN1_ZIP
ForeignPostalCode	RPRLAPP_COSIGN1_FOR_POST_CDE
HouseNumber	RPRLAPP_COSIGN1_HOUSE_NUMBER
/Address	
Phone	
PhoneNumber	RPRLAPP_COSIGN1_PHONE_NO
TelephoneCountryCode	RPRLAPP_CTRY_CODE_COSIGN1_PHONE
/Phone	
/Cosigner1	
Cosigner2	
Name	
LastName	RPRLAPP_COSIGN2_LAST_NAME
FirstName	RPRLAPP_COSIGN2_FIRST_NAME
MiddleInitial	RPRLAPP_COSIGN2_MI
SurnamePrefix	RPRLAPP_COSIGN2_SURNAME_PREFIX
/Name	
SSN	RPRLAPP_COSIGN2_SSN
CitizenshipCode	RPRLAPP_COSIGN2_CITZ_IND
DateOfBirth	RPRLAPP_COSIGN2_BIRTH_DATE
DriverLicenseState	RPRLAPP_COSIGN2_STAT_CODE_LIC
DriverLicenseNumber	RPRLAPP_COSIGN2_DRIVER_LIC_NO

<b>XML Tag</b>	<b>Database Column</b>
RelationshipToStudent	RPRLAPP_COSIGN2_RELATION_IND
Address	
Address	RPRLAPP_COSIGN2_ADDR
AddressLine1	RPRLAPP_COSIGN2_ADDR_LINE1
AddressLine2	RPRLAPP_COSIGN2_ADDR_LINE2
AddressLine3	RPRLAPP_COSIGN2_ADDR_LINE3
AddressLine4	RPRLAPP_COSIGN2_ADDR_LINE4
City	RPRLAPP_COSIGN2_CITY
State	RPRLAPP_COSIGN2_STAT_CODE
ZipCode	RPRLAPP_COSIGN2_ZIP_CODE
ForeignPostalCode	RPRLAPP_COSIGN2_FOR_POST_CDE
HouseNumber	RPRLAPP_COSIGN2_HOUSE_NUMBER
/Address	
Phone	
PhoneNumber	RPRLAPP_COSIGN2_PHONE_NO
TelephoneCountryCode	RPRLAPP_CTRY_CODE_COSIGN2_PHONE
/Phone	
/Cosigner2	
LoanDisbursementInformation	
LoanDisbursement	
DisburseDate	RPRLADB_DISBURSE_DATE
EnrollmentPeriod	RPRLADB_TERM_CODE
SequenceNumber	RPRLADB_SEQ_NO
LoanPercentage	RPRLADB_LOAN_PCT
FeedIndicator	RPRLADB_FEED_IND

<b>XML Tag</b>	<b>Database Column</b>
NetCheckAmount	RPRLADB_CHECK_AMT
CheckDate	RPRLADB_CHECK_DATE
StudentReceivedDate	RPRLADB_STU_RECEIVE_DATE
PaidDate	RPRLADB_FEED_DATE
ReturnedAmount	RPRLADB_CHECK_RETURN_AMT
ReturnedDate	RPRLADB_CHECK_RETURN_DATE
TransactionNumber	RPRLADB_TRAN_NUMBER
Load	RPRLADB_DISBURSE_LOAD
AidYearCode	RPRLADB_AIDY_CODE
DLSequenceNumber	RPRLADB_DL_SEQ_NO
StatusCode	RPRLADB_DISB_STATUS
BatchNumber	RPRLADB_BATCH_NO
RefundAmount	RPRLADB_REFUND_AMT
RefundDate	RPRLADB_REFUND_DATE
DLGrossAmount	RPRLADB_DL_GROSS_AMT
FeeAmount	RPRLADB_DL_FEE_AMT
PromissoryNoteDisbursementDate	RPRLADB_PN_DISB_DATE
DLDisbursementNumber	RPRLADB_DL_DISB_NO
ReconciliationBatchNumbe	RPRLADB_RECON_BATCH_NO
GrossAmount	RPRLADB_SERV_GROSS_AMT
Fees	RPRLADB_SERV_FEE_AMT
NetDisbursement	RPRLADB_SERV_NET_AMT
NetAdjustment	RPRLADB_SERV_NET_ADJ_AMT
ReferenceID	RPRLADB_REF_ID
ReturnedToLenderDate	RPRLADB_RET_LNDR_DATE

<b>XML Tag</b>	<b>Database Column</b>
EFTIndicator	RPRLADB_EFT_IND
Comment	RPRLADB_COMMENT
BypassDisbursement	RPRLADB_DISB_BYPASS
DLLoanAcknowledgement	RPRLADB_DL_ACKN_DATE
SchoolAmountStatementEndDate	RPRLADB_SAS_END_DATE
SchoolAmountStatementProcessDate	RPRLADB_SAS_PROCESS_DATE
SchoolCode	RPRLADB_SCHOOL_CODE
RecordCountSequence	RPRLADB_SAS_RECORD_COUNT_SEQ
FeesPaid	RPRLADB_FEES_PAID
RevisedDisbursementAmount	RPRLADB_REV_DISB_AMT
PriorDisbursementDate	RPRLADB_PRIOR_DISB_DATE
OverrideIndicator	RPRLADB_DISB_OVERRIDE_IND
ActualInterestRebateAmount	RPRLADB_DL_REBATE_AMT
Rebate	RPRLADB_SERV_REBATE_AMT
ServicerBookedStatus	RPRLADB_SERV_BOOKED_STATUS
ServicerBookedDate	RPRLADB_SERV_BOOKED_DATE
RevisedGrossDisbursementAmount	RPRLADB_EL_REV_GROSS_AMT
ELDisbursementNumber	RPRLADB_EL_DISB_NO
CODDocumentID	RPRLADB_DOCUMENT_ID
PreviousDisbursementSequenceNumber	RPRLADB_PREV_DISB_SEQ_NO
DataOrigin	RPRLADB_DATA_ORIGIN
DirectDisbursementToBorrowerIndicator	RPRLADB_EL_BOR_DIRECT_DISB_IND
DirectDisbursementToBorrowerCheckAmount	RPRLADB_EL_DIRECT_CHECK_AMT
/LoanDisbursement	
/LoanDisbursementInformation	

XML Tag	Database Column
/LoanDetail	
/Loan	
/LoanInformation	
/ArchiveInformation	

## Rules Purge Process (RORRPRG)

The RORRPRG process enables you to purge rules for an aid year after the applicant data has been archived/purged. The purge takes place provided there are no records in the following tables for the aid year:

- Applicant Status Table (RORSTAT)
- Applicant Award Table (RPRAWRD) - where the system indicator is not equal to *P* (Pre-Banner) or *A* (Archived)
- Applicant Resource Table (RPRARSC)
- Loan Application Table (RPRLAPP)

The following is a list of the tables that are included in the Rules Purge Process.

### Note

Loan period rules will only be purged if the loan period has been associated with an aid year and aid period on RPRLPRD. You may optionally choose to remove loan periods manually from RPRLPRD once all applicant data has been purged using the RORARCH process. ■

Table	Name	Notes
RBRCOMP	Budget Component Rules Table	
RBRGMSG	Budget Group Message Rules Table	
RCRINFC	Interface Data Aid Year Rule Table.	
RCRINFR	Matching Rules Table	
RCRLDS4	Applicant NSLDS Table Part 1	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.

Table	Name	Notes
RCRLDS6	Applicant NSLDS Table Part 3	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
RCRLDS7	NSLDS Pell Payment Repeating Table	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
RCRLDS8	NSLDS Name History Table	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
RCRLDSA	NSLDS ACG Payment Permanent Table	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
RCRLDSS	NSLDS SMART Payment Permanent Table	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
RCRLDST	NSLDS TEACH Payment Permanent Table	Rows added without an Applicant Status (RORSTAT) Table entry for the aid year will be deleted.
REBDRCT	EDE Directory Table	
REBDSOA	Detail Statement of Account Table	
REBRDRQ	Grant Data Request Table.	
REBRMRR	Grant Multiple Reporting Record Table.	
REBSSOA	Summary Statement of Account Table	
REBYTDD	Grant Year to Date Detail Disbursement Record Table.	Rows added without a pidm for the aid year will be deleted.
REBYTDO	Grant Year to Date Detail Origination Record Table.	Rows added without a pidm for the aid year will be deleted.
REBYTDS	Grant Year to Date Summary Table	
RERCODD	COD Document Control Table	
RERRECEN	Grant COD Reconciliation Table.	Rows added without a pidm for the aid year will be deleted.

Table	Name	Notes
RFRASCH	Fund Award Schedule Rules Table	
RFRASPC	Fund Aid Year Specific Data	
RFRBCMP	Fund / Budget Component Table	
RFRCOMM	Fund Comments	
RFRDEFA	Default Fund Award Schedule Rules Table	
RFRDEFD	Default Fund Disbursement Schedule Rules Table	
RFRDETC	Fund / Detail Code Rules Table	
RFRDLCK	Fund Disbursement Lock Table	
RFRDSCH	Fund Disbursement Schedule Rules Table	
RFRMESG	Fund / Message Assignment Rules Table	
RFRREQ	Fund / Requirements Assignment Rules Table	
RJBSEDR	Student Employment Default Rules Table	
RJRPAYL	Payroll Load Rules Table	
RJRPLRL	Placement Rules Table	
RNRGLBL	INAS Global Policy Options Table	
RORAPEL	Pell Grant Alternate Schedule Table.	
RORAUDT	Audit Grading Mode Table	
RORCAMP	Financial Aid Campus Table	
RORCLVE	Course Level Exclusion Table	
RORCMPL	Selection Identifier Compiled Statements	Purge using <code>rorcmpl_s1ct</code>
RORCODI	COD Entity ID Rules Table.	

Table	Name	Notes
RORCRHR	Credit Hours Table	
RORDATA	Data Dictionary Table	
RORGDAT	Group Selection Rules Base Table	Base table for deleting rules
RORGSQL	Generated SQL Selection Identifier Table	Purge using <code>rorgsql_slct</code>
RORINID	Financial Aid College Codes Table	
RORMVAL	Miscellaneous Validation Rules Table	<code>normval_key_1 = aid year</code>
RORPELL	PELL Grant Payment Schedule Table	
RORPOST	Batch Posting Rules Table	
RORTPRD	Aid Period/Term Code Table	
RORUSER	User-Defined Variables Description Table	
RORWBQA	Web Question Answers Rules Table	
RORWEBA	Web Accept Tracking Rules Table	
RORWEBQ	Web Questions Rules Table	
RORWEBR	Web Rules Table	
RORWSQL	Web Text SQL Rules Table	
RORWTAB	Web Tab Rules Table	
RORWTXT	Web Text Rules Table	
RPBLOPT	Loan Options Table	
RPBLPRD	Loan Period Base Data Table	Purge using <code>rpblprd_loan_period</code>
RPBOPTS	Packaging Options Table	
RPRALGR	Algorithmic Packaging Rules Table	
RPRCLSS	Class Code Translation Table	
RPRDATE	Enrollment Options by Term Table	

Table	Name	Notes
RPRDEFE	Default Equity Packaging Rules Table	
RPRDEFG	Default Gap Packaging Rules Table	
RPRDEFS	Default Self-Help Packaging Rules Table	
RPRDEGR	Financial Aid Degree Rules	
RPRDSAS	Direct Lending School Account Statement Summary Record	
RPRFCAT	Packaging Group Fund Category Maximums Rules Table	
RPRFEDR	Federal Rules Table	
RPRFSRC	Maximum Amount Per Fund Source	
RPRGEQY	Packaging Group Equity Packaging Rules Table	
RPRGFND	Packaging Group/Fund Rules Table	
RPRGGAP	Packaging Group Gap Packaging Rules Table	
RPRGSHP	Packaging Group Self-Help Packaging Rules Table	
RPRLDSB	Loan Period / Disbursement Schedule Rules Table	Purge using rprldsb_loan_period
RPRLPAP	Loan Period / Aid Period Rules Table	Base table for deleting loan periods
RPRLTRM	Loan Period / Term Schedule Rules Table	Purge using rprltrm_loan_period
RPRMAJR	Financial Aid Major Rules Table	
RPRSADS	DL Statement of Account Disbursement Summary.	
RPRTATS	TEACH Grant Agreement to Serve Table	Rows added without a pidm for the aid year will be deleted.

Table	Name	Notes
RRRGREQ	Tracking Group/Requirements Rules Table	
RRRTMSG	Tracking Requirement Message Rules Table	
RTVICMT	ISIR Comment Code Text Validation Table	

## Parameters

Name	Required?	Description	Values
01 - Aid Year Code	Yes	Aid Year Code for which you want to purge rules data.	Aid Year Inquiry (ROIADY)
02 - Keep Fund Aid Year Data	No	Determines whether you want to retain fund-related data for the aid year.	<i>Y</i> Yes, keep fund-related data for the aid year. <i>N</i> No, do not keep fund-related data for the aid year.

## Changed Reports and Processes

The following reports and processes have been delivered to remove logic and references no longer needed. Dataload processes were modified to use the RORSTAT API for creating the RORSAPR records. Further information can be found in the Technical section.

- 2004-2005 FA CSS Dataload Part 1 (RCBCT05)
- 2005-2006 FA CSS Dataload Part 1 (RCBCT06)
- 2006-2007 FA CSS Dataload Part 1 (RCBCT07)
- 2007-2008 FA CSS Dataload Part 1 (RCBCT08)
- 2008-2009 FA CSS Dataload Part 1 (RCBCT09)
- 2009-2010 FA CSS Dataload Part 1 (RCBCT10)
- 2004-2005 FA EDE Dataload Part 1 (RCBTP05)
- 2005-2006 FA EDE Dataload Part 1 (RCBTP06)
- 2006-2007 FA EDE Dataload Part 1 (RCBTP07)

- 2007-2008 FA EDE Dataload Part 1 (RCBTP08)
- Financial Aid Data Load Table Deletes (RCPDTMP)
- 2004-2005 FA Dataload Part 3 (RCRTP05)
- 2005-2006 FA Dataload Part 3 (RCRTP06)
- 2005-2006 FA Dataload Part 3 (RCRTP07)
- 2007-2008 FA Dataload Part 3 (RCRTP08)
- 2008-2009 FA Dataload Part 3 (RCRTP09)
- 2009-2010 FA Dataload Part 3 (RCRTP10)
- Need Analysis Logging Report (RLRLOGG)



# 4 2009-2010 COD Updates - Technical



This section addresses the technical changes that were made for 2009-2010 COD updates.

## Changed Tables

The following section lists the table changes necessary for 2009-2010 COD processing.

### Pell Origination Table (REBPAYV)

The following new columns were added to REBPAYV for later use with Year Round Pell COD reporting.

Column Name	Null?	Type	Comment
REBPAYV_ADDL_ELIG_IND	No	VARCHAR2(1)	PELL ADDITIONAL ELIGIBILITY INDICATOR: Indicates if the origination reflects additional funds due to Year Round Pell eligibility.
REBPAYV_ACPT_ADDL_ELIG_IND	No	VARCHAR2(1)	ACCEPTED PELL ADDITIONAL ELIGIBILITY INDICATOR: Additional Eligibility Indicator as accepted by Pell.

### Financial Aid Institution Table (ROBINST)

The following new columns were added to ROBINST to allow schools to indicate if they want to use Advance Pay for ACG and SMART disbursements.

Column Name	Null?	Type	Comment
ROBINST_GRANT_ADVANCE_PAY_IND	No	VARCHAR2(1)	ACG AND SMART ADVANCE PAY INDICATOR: Indicates if the school wants Advance Pay disbursement edits applied to ACG and SMART disbursements.
ROBINST_GRANT_AP_NO_DAYS	Yes	NUMBER(2)	ACG AND SMART ADVANCE PAY NUMBER OF DAYS: The number of days prior to the scheduled disbursement date that an authorized ACG or SMART disbursement can be extracted when using Advance Pay disbursement edits.

The following comment on columns have been modified for this release.

Column Name	Comment on Column
ROBINST_JUST_IN_TIME_IND	PELL JIT AND ADVANCE PAY INDICATOR: Indicates if the school wants JIT/Advance Pay disbursement edits applied to Pell disbursements.
ROBINST_JIT_NO_DAYS	JIT AND ADVANCE PAY NUMBER OF DAYS: The number of days prior to the scheduled disbursement date that an authorized Pell disbursement can be extracted when using JIT or Advance Pay disbursement edits.

## SMART Grant Qualified Course Code Table (RPRCIPC)

The following comment on columns was updated to reflect the changed logic for the CIP Code effective period.

Column Name	Comment on Column
RPRCIPC_EFF_FROM_YR	CIP CODE EFFECTIVE FROM YEAR: The CIP code is active for aid years beginning with this year or later.
RPRCIPC_EFF_TO_YR	CIP CODE EFFECTIVE TO YEAR: The CIP code is active for aid years ending with this year or earlier.

## Electronic Counseling Table (RPRLECS)

The name of this table was changed from *Loan Electronic Counseling Status Table* to the *Electronic Counseling Table*.

Two new columns were added to RPRLECS to capture the TEACH Entrance Counseling sequence number and Document ID.

Column Name	Null?	Type	Comment
RPRLECS_SEQUENCE_NO	Yes	NUMBER(3)	SEQUENCE NUMBER: Counseling results sequence number.
RPRLECS_DOCUMENT_ID	Yes	VARCHAR2(30)	COD DOCUMENT ID: The document identification number associated with the counseling results.

The comments for the followings fields have changed since these fields will now also be used for TEACH entrance counseling data.

Column Name	Comment on Column
RPRLECS_PIDM	PIDM: The PIDM associated with the counseling detail.
RPRLECS_SOURCE	COUNSELING SOURCE: Displays the source of the electronic counseling data.
RPRLECS_SSN	SSN: Student's social security number.
RPRLECS_BIRTH_DATE	BIRTH DATE: Student's date of birth.

Column Name	Comment on Column
RPRLECS_LAST_NAME	LAST NAME: Student's last name.
RPRLECS_FIRST_NAME	FIRST NAME: Student's first name.
RPRLECS_MI	MIDDLE INITIAL: Student's middle initial.

## Financial Aid Major Rules Table (RPRMAJR)

The following new column was added to RPRMAJR to allow schools to define which majors are eligible 5-year programs for 5th year SMART Grants.

Column Name	Null?	Type	Comment
RPRMAJR_YEAR_5_SMART_ELIG_IND	No	VARCHAR2(1)	FIFTH YEAR SMART ELIGIBILITY INDICATOR: Indicates whether the major code is eligible for the 5th Year SMART Grant.

## ACG Rigorous High School Program Code Table (RPRSAHP)

The following comments were updated to reflect the changed logic for the High School Program Code effective period.

Column Name	Comment on Column
RPRSAHP_EFF_FROM_YR	HIGH SCHOOL PROGRAM CODE EFFECTIVE FROM YEAR: The high school program code is active for aid years beginning with this year or later.
RPRSAHP_EFF_TO_YR	HIGH SCHOOL PROGRAM CODE EFFECTIVE TO YEAR: The high school program code is active for aid years ending with this year or earlier.

## TEACH Grant Agreement to Serve Table (RPRTATS)

The following new columns were added to RPRTATS to capture the ATS Discharge Date and Reason Code received in the new ATS Discharge Report (ATSDISOP).

Column Name	Null?	Type	Comment
RPRTATS_DISCHARGE_DATE	Yes	DATE	AGREEMENT TO SERVE DISCHARGE DATE: Date the ATS was discharged.
RPRTATS_DISCHARGE_REASON_CODE	Yes	VARCHAR2(1)	AGREEMENT TO SERVE DISCHARGE REASON CODE: Reason code indicating why the ATS was discharged.
RPRTATS_DISCHARGE_BATCH_ID	Yes	VARCHAR2(26)	AGREEMENT TO SERVE DISCHARGE BATCH ID: The Batch ID used to report the ATS discharge status.

## New Packages

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### 2009-2010 COD Extract Database Package (REKCE10)

- Package specification: rekce100.sql
- Package body: rekce101.sql

This package is based on the existing 2008-2009 version and has been updated for the new aid year.

Please see the REREX10 entry in the functional section of this release guide for the required functional changes.

### 2009-2010 COD Import Database Package (REKCI10)

- Package specification: rekci100.sql
- Package body: rekci101.sql

This package is based on the existing 2008-2009 version and has been updated for the new aid year.

Please see the RERIM10 entry in the functional section of this release guide for the required functional changes.

## 2008-2009 COD 3.0b Import Database Package (REKCI3B)

- Package specification:rekci3b0.sql
- Package body: rekci3b1.sql

These new packages are used by the new RERIM3B process for importing 2008-2009 system-generated files in the 3.0b schema received by the school. RERIM09 will continue to use the 3.0a schema and will continue to be used for importing all response documents.

## 2009-2010 Grant Origination Package (REKOR10)

- Package specification:rekor100.sql
- Package body: rekor101.sql

This new aid year specific package creates grant origination records.This new package is used by the REROR10 process and the REAOR10 form in place of the rekorig package.

### CIP Code Logic Updates

The `f_cip_code_valid` function was removed and replaced by the `rpk_common_validation_us.f_cip_code_valid` function.

## Changed Packages

---

### DML\_REBPAYV Package

- Package specification:rekd\_rebpayv0.sql
- Package body: rekd\_rebpayv1.sql

This package was updated to include the new `REBPAYV_ADDL_ELIG_IND` and `REBPAYV_ACPT_ADDL_ELIG_IND` columns in the `REBPAYV` table.

### DML\_RPRMAJR Package

- Package specification:rpkd\_rprmajr0.sql
- Package body: rpkd\_rprmajr1.sql

This package was updated to include the new `RPRMAJR_YEAR_5_SMART_ELIG_IND` column in the `RPRMAJR` table.

## DML\_RPRTATS Package

- Package specification: rpkd\_rprtats0.sql
- Package body: rpkd\_rprtats1.sql

This package was updated to include the new RPRTATS\_DISCHARGE\_DATE, RPRTATS\_DISCHARGE\_REASON\_CDE, and RPRTATS\_DISCHARGE\_BATCH\_ID columns in the RPRTATS table.

## RB\_COMMON Package

- Package specification: rokb\_common0.sql
- Package body: rokb\_common1.sql

The existing rokpval.f\_sel\_robinst\_aidy\_end\_year function was copied to this package.

The following is a list of objects that use rokpval.f\_sel\_robinst\_aidy\_end\_year. These objects were modified to use the new rb\_common version of the function.

```
REKCE09 (rekce091.sql)
REKORIG (rekorig1.sql)
RB_APPLICANT_STATUS_RULES (rokb_app1_status_r1.sql)
RB_AWARD_RULES (rpkb_award_r1.sql)
RB_AWARD_SCHEDULE_RULES (rpkb_award_sched_r1.sql)
```

## RB\_APPLICANT\_STATUS\_RULES

- Package specification: rokb\_app1\_status\_r0.sql
- Package body: rokb\_app1\_status\_r1.sql

The rokpval version of f\_sel\_robinst\_aidy\_end\_year was replaced with the rb\_common version.

## RB\_AWARD\_DISBURSEMENT\_RULES

- Rules package specification: rpkb\_awd\_disb\_r0.sql
- Rules package body: rpkb\_awd\_disb\_r1.sql

### CIP Code Logic Updates

The cursor cip\_exists\_c and associated logic was removed from p\_validate and instead uses rpk\_common\_validation\_us.f\_cip\_code\_valid to perform the validation.

## RB\_AWARD\_RULES

- Package specification: rpkb\_award\_r0.sql
- Package body: rpkb\_award\_r1.sql

The rokpvval version of f\_sel\_robinst\_aidy\_end\_year was replaced with the rb\_common version.

## RB\_AWARD\_SCHEDULE\_RULES

- Package specification: rpkb\_award\_sched\_r0.sql
- Package body: rpkb\_award\_sched\_r1.sql

The existing INVALID\_MAJR\_OVERRIDE\_CODE edit was replaced with two new ones so that the major override can also be used for 5th year SMART grants:

### Edit

If not null, and the fund is a TEACH fund code, the value entered must have the TEACH eligible indicator checked.

If not null, and the fund is a 5th Year SMART fund code, the value entered must have the 5th Year SMART eligible indicator checked.

### Error message

Major Override Code is not valid; Major does not qualify for TEACH.

Major Override Code is not valid; Major does not qualify for 5th Year SMART.

## RB\_AWARD\_SCHEDULE\_STRINGS

- Package specification: rpkb\_award\_sched\_s0.sql
- Package body: rpkb\_award\_sched\_s1.sql

The following error messages for the **Major Code Override** were added:

*Major Override Code is not valid; Major does not qualify for TEACH*

*Major Override Code is not valid; Major does not qualify for 5th Year SMART.*

## RB\_COD\_DOCUMENT\_RULES

- Package specification: rekb\_cod\_doc\_r0.sql
- Package body: rekb\_cod\_doc\_r1.sql

The new AC TEACH Grant Counseling document type was added to the document type validation.

## RB\_GRANT\_ORIGINATION\_RULES

- Rules package body: rekb\_grant\_orig\_r1.sql

### CIP Code Logic Updates

The function `f_cip_code_valid` was removed and all calls were replaced to use `rpk_common_validation_us.f_cip_code_valid`.

## RBPELL\_ORIGINATION

- Package specification: rekb\_pellorig0.sql
- Package body: rekb\_pell\_rig1.sql

The version number of the API was updated by 1. There was also an update to add the new `REBPAYV_ADDL_ELIG_IND` and `REBPAYV_ACPT_ADDL_ELIG_IND` columns.

## RBPELL\_ORIGINATION\_RULES

- Rules package specification: rekb\_pellorig\_r0.sql
- Rules package body: rekb\_pellorig\_r1.sql

The `RBPELL_ORIGINATION_RULES` were updated for the following edit on the new `REBPAYV_ADDL_ELIG_IND` and `REBPAYV_ACPT_ADDL_ELIG_IND` columns:

### Edit

Valid values for `REBPAYV_ADDL_ELIG_IND` = 'Y'es or 'N'o.

Valid values for `REBPAYV_ACPT_ADDL_ELIG_IND` = 'Y'es or 'N'o.

### Error message

Pell additional Eligibility Indicator is missing.

Accepted Pell Additional Eligibility Indicator is invalid.

An edit was added in the `p_validate` procedure to prevent blank values from being explicitly passed into the API for the eligibility indicators. If blank values are passed to the API for the new fields, the API returns the invalid value errors listed above.

## RBPELL\_ORIGINATION\_STRINGS

- Strings package specification: rekb\_pellorig\_r0.sql
- Strings package body: rekb\_pellorig\_r1.sql

An update adds the following error messages for the new REBPAYV\_ADDL\_ELIG\_IND and REBPAYV\_ACPT\_ADDL\_ELIG\_IND columns:

- Pell Additional Eligibility Indicator is invalid.*
- Accepted Pell Additional Eligibility Indicator is invalid.*

## RB\_MAJOR\_RULES

- Package specification: rpkb\_major\_rules0.sql
- Package body: rpkb\_major\_rules1.sql

The version number of the API was updated by 1. The new RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND column was added.

## RB\_MAJOR\_RULES\_RULES

- Rules package specification: rpkb\_major\_rules\_r0.sql
- Rules package body: rpkb\_major\_rules\_r1.sql

RB\_MAJOR\_RULES\_RULES was updated to include the following edits on the new RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND column:

<b>Edit</b>	<b>Error message</b>
RPRMAJR_YEAR_5_SMART_ELIG_IND is required.	5TH Year SMART Eligible Indicator is missing.
RPRMAJR_YEAR_5_SMART_ELIG_IND cannot be null.	
RPRMAJR_YEAR_5_SMART_ELIG_IND must be 'Y' or 'N'	5TH Year SMART Eligible Indicator is not valid.

## RB\_MAJOR\_STRINGS

- Strings package specification: rpkb\_major\_rules\_s0.sql
- Strings package body: rpkb\_major\_rules\_s1.sql

The following error messages were added for the new RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND column:

- 5th Year SMART Eligible Indicator is missing.*
- 5th Year SMART Eligible Indicator is not valid.*

## RB\_TEACH\_ATS

- Package specification: rpkb\_teach\_ats0.sql
- Package body: rpkb\_teach\_ats1.sql

The API was updated to increase the version number by 1. This API was also updated to add the following new RPRTATS columns:

```
RPRTATS_DISCHARGE_DATE  
RPRTATS_DISCHARGE_REASON_CDE  
RPRTATS_DISCHARGE_BATCH_ID
```

## RB\_TEACH\_ATS\_RULES

- Rules package specification: rpkb\_teach\_ats\_r0.sql
- Rules package body: rpkb\_teach\_ats\_r1.sql

RB\_TEACH\_ATS\_RULES was updated to remove the following edit so that multiple ATS records for the same student can be inserted for the aid year. Each record must continue to have a unique ATS ID.

### Edit

A NOT NULL RPRTATS\_PIDM must be unique for the aid year.

### Error message

ATS already exists for the PIDM and aid year.

RB\_TEACH\_ATS\_RULES was also updated to add the following edit for the new RPRTATS\_DISCHARGE\_REASON\_CDE column in RPRTATS:

### Edit

RPRTATS\_DISCHARGE\_REASON\_CDE is invalid. Valid values are 'D', 'G', 'I' or NULL. Call rb\_normval.f\_code\_exists for validation.

### Error message

Discharge Reason Code is invalid.

## RB\_TEACH\_ATS\_STRINGS

- Strings package specification: rpkb\_teach\_ats\_s0.sql
- Strings package body: rpkb\_teach\_ats\_s1.sql

The following error message was removed: *ATS already exists for the PIDM and aid year.*

The following error message was added for the new RPRTATS\_DISCHARGE\_REASON\_CDE column: *Discharge Reason Code is invalid.*

## REKCE09 Package

- Package body: rekce091.sql

The rokpv1 version of f\_sel\_robinst\_aidy\_end\_year was replaced with the rb\_common version.

## REKCI09 Package

- Package specification:rekci09.sql
- Package body: rekci091.sql

This package was updated and compiled due to changes in the RB\_TEACH\_ATS API.

## REKORIG Package

- Package body: rekorig1.sql

The rokpv1 version of f\_sel\_robinst\_aidy\_end\_year was replaced with the rb\_common version.

### CIP Code Logic Updates

The f\_cip\_code\_valid function was updated to call the new rpk\_common\_validation\_us.f\_cip\_code\_valid.

## RPK\_AWARD\_VALIDATION\_US Package

- Validation package specification rpk\_award\_val\_us0.sql
- Validation package body rpk\_award\_val\_us1.sql

### 5th Year SMART Grant Validation

f\_valid\_smrt\_yr\_in\_coll was updated to add validation for the new 5th year SMART. For 5th Year SMART, where RFRASPC\_SMART\_YEAR = '5', the RCRAPP1\_YR\_IN\_COLL or the RPROWRD\_OVERRIDE\_YR\_IN\_COLL must be '6'.

The prior\_max\_limit\_c cursor in p\_acg\_smart\_exceeds\_limit was updated to allow for an RPRFEDR\_CLAS\_CODE = '6' for 5th Year SMART.

## TEACH Aggregate Validation

`p_teach_exceeds_cum_limit` was updated so that it no longer looks at prior year Banner awards or sums the specific detail TEACH awards in RCRLDST, but instead looks at the following columns to determine if the student has reached their aggregate max:

```
Undergraduate where RFRASPC_TEACH_LEVEL = 'U':  
RCRLDS4_AGT_TEACH_UG_DISB_AMT  
Graduate where RFRASPC_TEACH_LEVEL = 'G':  
RCRLDS4_AGT_TEACH_GR_DISB_AMT
```

## TEACH Level Validation

A disbursement edit has been added to validate that at the time the disbursement is paid the student's financial aid class code matches the TEACH grant level associated with the fund code being disbursed.

## Rigorous HS Program Code Logic Updates

The `f_valid_rigorous_prog` function in `p_validate_award` was updated to include `rprsahp_eff_to_yr` in the comparison.

## RPK\_COMMON\_VALIDATION\_US

- Validation package specification `rpkm_common_val_us0.sql`
- Validation package body `rpkm_common_val_us1.sql`

## Citizenship Validation

`f_is_citizen` in this package was updated so that the ACG and SMART specific check for U.S. Citizenship is only done when `ROBINST_AIDY_END_YEAR <= 2009`.

Starting with the 2009-2010 aid year, the citizenship requirements for ACG and SMART are the same as all other federal funds.

## NSLDS/Prior Year Grant Check

Updates were made to the NSLDS/Prior Year Grant validation that verifies a student has not received a prior ACG or SMART grant at a higher grade level.

We have received verification from the Department of Ed that a student that transfers to another institution that is reclassified to a lower level year in college can go back and receive a lower level grant provided they have fund eligibility remaining for the lower level grant.

Therefore, award validation was updated so that it no longer checks the NSLDS record for this edit (RCRLDSA and RCRLDSS tables). Instead, only prior year Banner awards are checked for higher level grants.

This change ensures that transfer students can go back and receive a lower level grant even if they have received a higher level grant at another institution. However, it will also ensure that a student is not awarded a lower level grant if they have already received a higher level grant at the Banner school.

## CIP Code and Rigorous HS Program Code Logic Updates

`rpk_common_validation_us` was modified to include functions for cip code and state advanced/honors program code validation.

## RPK\_DISB\_VALIDATION\_US Package

- Validation package specification `rpk_disb_val_us0.sql`
- Validation package body `rpk_disb_val_us1.sql`

## ACG/SMART Citizenship Validation

`p_validate_disbursement_us` was updated so that if 'N' is returned by `rpk_common_validation_us.f_is_citizen` that the *063 – NOT\_CITIZEN* error is only returned for ACG and SMART if the `ROBINST_AIDY_END_YEAR <= 2009`.

Starting with the 2009-2010 aid year, the *006 – NOT\_ELIG\_CITIZEN* error is returned for ACG and SMART verifying that the student is either a U.S. citizen or an eligible non-citizen.

## 5th Year SMART Grant Validation

The `current_rprfedr_c` and `prior_rprfedr_c` cursors were updated in `f_val_fed_limits` to allow for an `RPRFEDR_CLAS_CODE = '6'` for 5th Year SMART.

## 5th Year SMART Major Validation

A 5th Year SMART valid major check was added that is similar to the validation that already existed for TEACH. This validation occurs when the `RFRBASE_FED_FUND_ID = 'SMRT'` and `RFRASPC_SMART_YEAR = '5'` for the fund code.

All SMART grants must also have a valid CIP Code. This is still the case for 5th Year SMART. This additional Major check allows the school to specifically define those majors that are valid for 5th Year SMART.

To determine whether or not a student is enrolled in a major valid for the 5th Year SMART Grant three items must be checked.

- The **Major Override Code** is first checked for the term (RPRATRM\_MAJR\_OVERRIDE\_CODE) if one exists.
- If there is no override code, the student's major code is checked from SGBSTDN\_MAJR\_CODE\_1 for the most recent term <= the current term code.
- If the major in SGBSTDN\_MAJR\_CODE\_1 is not a valid 5th Year SMART major, SGBSTDN\_MAJR\_CODE\_1\_2 is checked for the same SGBSTDN record.

A major is considered to be a valid 5th Year SMART major if the major exists in RPRMAJR\_MAJR\_CODE and the RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND = 'Y' for the major.

If the student is not enrolled in a valid major, the new INVALID\_MAJR\_CODE\_SMART error is generated and a disbursement is not allowed: *Major not eligible for 5th Year SMART grant.*

### TEACH Aggregate Validation

f\_val\_fed\_limits\_teach was updated so that it no longer looks at prior year Banner awards or the sums the specific detail TEACH awards in RCRLDST, but instead looks at the following columns to determine if the student has reached their aggregate max:

Undergraduate where RFRASPC\_TEACH\_LEVEL = 'U':  
 RCRLDS4\_AGT\_TEACH\_UG\_DISB\_AMT  
 Graduate where RFRASPC\_TEACH\_LEVEL = 'G':  
 RCRLDS4\_AGT\_TEACH\_GR\_DISB\_AMT

### CIP Code and Rigorous HS Program Code Logic Updates

The f\_val\_cipc function was updated to use rpk\_common\_validation\_us.f\_cip\_code\_valid for validating the cip codes.

### TEACH Level Validation

A disbursement edit was added which validates that at the time a disbursement is paid, the student's financial aid class code matches the TEACH level associated with the fund code being disbursed.

## RPK\_DISB\_VAL\_STRINGS\_US Package

- Strings package specification rpk\_disb\_val\_us\_s0.sql
- Strings package body rpk\_disb\_val\_us\_s1.sql

The following error messages were added for 5th Year SMART and TEACH grants.

**Edit**

INVALID\_MAJR\_CODE\_SMART

INVALID\_CLASS\_TEACH

**Error message**

Major not eligible for 5th Year SMART grant.

Class level invalid for TEACH level.

## Changed Database Triggers

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### RT\_REBPAYV\_LOG\_INSUPDDTL (retpayv9.sql)

This trigger was updated to add the new REBPAYV\_ADDL\_ELIG\_IND and REBPAYV\_ACPT\_ADDL\_ELIG\_IND columns.

### RT\_ROBINST\_LOG\_INSUPDDTL (rotinst9.sql)

This trigger was updated to add the new ROBINST\_GRANT\_ADVANCE\_PAY\_IND and ROBINST\_GRANT\_AP\_NO\_DAYS columns.

### RT\_RPRLECS\_LOG\_INSUPDDTL (rptlecs9.sql)

This trigger was updated to add the new RPRLECS\_SEQUENCE\_NO and RPRLECS\_DOCUMENT\_ID columns.

### RT\_RPRMAJR\_LOG\_INSUPDDTL (rptmajr9.sql)

This trigger was updated to add the new RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND column.

### RT\_RPRTATS\_LOG\_INSUPDDTL (rpttats9.sql)

This trigger was updated to add the new RPRTATS\_DISCHARGE\_DATE and RPRTATS\_DISCHARGE\_REASON\_CDE, and RPRTATS\_DISCHARGE\_BATCH\_ID columns.

# Required Data

---

## Data Dictionary Table (RORDATA)

The `rordatai_071400.sql` script is part of the install process and inserts the new column listed below so that it can be logged as a DL change.

A record was inserted into RORDATA for this update for both the 0809 and the 0910 aid years: `RORDATA_AIDY_CODE = '0809' OR '0910'`.

<b>RORDATA _CDE</b>	<b>RORDATA _DL_IND</b>	<b>RORDATA _DL_FIELD _NO</b>	<b>RORDATA_DL _PLUS_FIELD _NO</b>	<b>RORDATA _DL_ TYPE</b>	<b>RORDATA _DL_ LENGTH</b>	<b>RORDATA _ACTIVITY _DATE</b>
RPRLAPP_ DL_REBATE _PERCENT	Y	S999	S999	NULL	NULL	SYSDATE

## Audit Log Form/Data Code Table (RORDVAL)

The `rordvali_071400.sql` script is part of the install process and inserts the new column listed below so that it can be logged as a DL change.

<b>RORDVAL_FORM</b>	<b>RORDVAL_DATA_CDE</b>	<b>RORDVAL_ BLK_NAME</b>	<b>RORDVAL_SYSTEM_ REQ_IND</b>
RPALORG	RPRLAPP_DL_REBATE_PERCENT	RPRLAPP	Y

## Logging Control Repeating Table (RORLOGC)

The rorlogci\_080400.sql script adds entries to the Logging Control Repeating Table (RORLOGC) for the following new columns.

<b>RORLOGC_</b> <b>TABLE_NAME</b>	<b>RORLOGC_COLUMN_NAME</b>	<b>RORLOGC_CO</b> <b>LUMN_DESC</b>	<b>RORLOGC_</b> <b>LOG_IND</b>
RPRMAJR	RPRMAJR_YEAR_5_SMART_ELIG_IND	5TH YEAR SMART ELIGIBILITY INDICATOR	N
REBPAYV	REBPAYV_ADDL_ELIG_IND	ADDITIONAL PELL ELIGIBILITY INDICATOR	N
REBPAYV	REBPAYV_ACPT_ADDL_ELIG_IND	ACCEPTED ADDITIONAL PELL ELIGIBILITY INDICATOR	N
ROBINST	ROBINST_GRANT_ADVANCE_PAY_IND	ADVANCE PAY INDICATOR	N
ROBINST	ROBINST_GRANT_AP_NO_DAYS	ADVANCE PAY NUMBER OF DAYS	N
RPRTATS	RPRTATS_DISCHARGE_DATE	ATS DISCHARGE DATE	N
RPRTATS	RPRTATS_DISCHARGE_REASON_CDE	ATS DISCHARGE REASON CODE	N
RPRTATS	RPRTATS_DISCHARGE_BATCH_ID	ATS DISCHARGE BATCH ID	N

RORLOGC_ TABLE_NAME	RORLOGC_COLUMN_NAME	RORLOGC_COLUMN_DESC	RORLOGC_LOG_IND
RPRLECS	RPRLECS_SEQUENCE_NO	COUNSELING SEQUENCE NUMBER	N
RPRLECS	RPRLECS_DOCUMENT_ID	COUNSELING DOCUMENT ID	N

## Miscellaneous Validation Rules Table (RORMVAL)

The `romvali_071400.sql` script is part of the install process and inserts the following new values into RORMVAL.

### Note

These new rows for the RORMVAL Table contain the following common values for the `RORMVAL_SYSTEM_REQ_IND`, `RORMVAL_DATA_ORIGIN`, `RORMVAL_USER_ID`, and `RORMVAL_ACTIVITY_DATE` fields. In other words, these same values apply for all rows in this section. The other columns—`RORMVAL_COLUMN`, `RORMVAL_KEY_1`, `RORMVAL_KEY_2`, `RORMVAL_CODE`, `RORMVAL_DESC`, `RORMVAL_TRANS_CODE`, `RORMVAL_TRANS_COMMENT`—vary for each required data row. ■

System Required Indicator	Data Origin	User ID	Activity Date
Y	Banner	USER	SYSDATE

## REBORIG\_GRANT\_TYPE

The following data was added to the RORMVAL table for use on the REAOR10 Form for the 0910 aid year.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
REBORIG_GRANT_TYPE	0910		S5	SMART Year 5		

## REBORIG\_YR\_IN\_COLL

The following data was added to the RORMVAL table for use on the REAOR10 Form for the 0910 aid year.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
REBORIG_YR_IN_COLL	0910		5	5th year undergrad	S5	REBORIG_GRANT_TYPE

## RFRPROM\_DL\_SERV\_NOTE\_STATUS

The following data was added to the RORMVAL table for use on the RPALORG Form for both the 0809 and 0910 aid years.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
RFRPROM_DL_SERV_NOTE_STATUS	0809	COD	C	Closed		
RFRPROM_DL_SERV_NOTE_STATUS	0910	COD	I	Inactive		

## RPRAWRD\_OVERRIDE\_YR\_IN\_COLL

The following data was added to the RORMVAL table for use on the RPAAWRD and RPAAPMT forms.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
RPRAWRD_OVERRIDE_YR_IN_COLL			6	5th year undergrad	5	REBORIG_YR_IN_COLL

## RPRLAPP\_MPN\_STATUS\_IND

The following data was added to the RORMVAL table for use on the RPALORG Form for the 0607, 0708, 0809, and 0910 aid years.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
RPRLAPP_MPN_STATUS_IND	0607	COD	X	Pending		
RPRLAPP_MPN_STATUS_IND	0708	COD	X	Pending		
RPRLAPP_MPN_STATUS_IND	0809	COD	X	Pending		
RPRLAPP_MPN_STATUS_IND	0910	COD	X	Pending		

## RPRTATS\_DISCHARGE\_REASON\_CDE

The following data was added to the RORMVAL table for use on the RPATATS Form for both the 0809 and 0910 aid years.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
RPRTATS_DISCHARGE_REASON_CDE	0809		D	Death		
RPRTATS_DISCHARGE_REASON_CDE	0809		G	Unauthorized Signature		
RPRTATS_DISCHARGE_REASON_CDE	0809		I	Identity Theft		
RPRTATS_DISCHARGE_REASON_CDE	0910		D	Death		
RPRTATS_DISCHARGE_REASON_CDE	0910		G	Unauthorized Signature		
RPRTATS_DISCHARGE_REASON_CDE	0910		I	Identity Theft		

## RPRTATS\_STATUS

The following data was added to the RORMVAL table for use on the RPATATS Form for both the 0809 and 0910 aid years.

Column	Key 1	Key 2	Code	Description	Translation Code	Translation Comment
RPRTATS_STATUS	0809		C	Closed		
RPRTATS_STATUS	0910		C	Closed		

## Federal Rules Table (RPRFEDR)

The `rprfedri_071400.sql` script is part of the install process and inserts the following new values to RPRFEDR.

RPRFEDR\_MIN\_LOAD was updated so that it = '3' (half-time) for all rows in RPRFEDR where RPRFEDR\_FED\_FUND\_ID = 'ACG' or 'SMRT'.

The following data was also added to support the 5th year SMART Grant:

<b>Field Name</b>	<b>Rec. #1</b>
RPRFEDR_AIDY_CODE	0910
RPRFEDR_FED_FUND_ID	SMRT
RPRFEDR_CLAS_CODE	6
RPRFEDR_ACTIVITY_DATE	SYSDATE
RPRFEDR_MIN_LOAD	3
RPRFEDR_MIN_ANNUAL_LIMIT	Null
RPRFEDR_MAX_ANNUAL_LIMI	4000
RPRFEDR_MIN_CUM_LIMIT	Null
RPRFEDR_MAX_CUM_LIMIT	12000
RPRFEDR_SYSTEM_REQ_IND	Y
RPRFEDR_ADDL_STFD_ELIG_IND	Null
RPRFEDR_FORMER_HEAL_IND	Null
RPRFEDR_PREP_OR_TEACH_IND	N

## ACG Rigorous High School Program Code Table (RPRSAHP)

The `rprsahti_071400.sql` script is part of the install process and inserts the new codes noted in the tables below.

The following new Rigorous High School Program Codes were added:

RPRSAHP_EFF_FROM_YR:	2009
RPRSAHP_EFF_TO_YR:	9999
RPRSAHP_SAHP_COD_CODE:	01
RPRSAHP_SYSTEM_REQ_IND:	Y
RPRSAHP_USER_ID:	USER
RPRSAHP_ACTIVITY_DATE:	SYSDATE

RPRSAHP\_DATA\_ORIGIN: BANNER

RPRSAHP_STATE_CODE	RPRSAHP_CODE	RPRSAHP_DESC
HI	HI0002	Hawaii B Plus Scholarship Program
MA	MA0003	MassCore
NJ	NJ0001	NJ Stars Program
NC	NC0002	NC Academic Scholars Program

## Reject Validation Table (RTVRJCT)

The `rtvrjcti_071400.sql` script is part of the install process and inserts the new codes noted in the tables below.

The following new COD Edit Message was added

RTVRJCT_ TYPE	RTVRJCT_ _CODE	RTVRJCT_ ACTIVITY_ DATE	RTVRJCT_DESC	RTVRJCT_ SYSTEM_ REQ_IND
F	167	SYSDATE	Sum of Subsidized Awards exceeds the Subsidized Loan Limit	Y

The following new Disbursement Error Message was added.

RTVRJCT_ TYPE	RTVRJCT_ _CODE	RTVRJCT_ ACTIVITY_ DATE	RTVRJCT_DESC	RTVRJCT_ SYSTEM_ REQ_IND
D	080	SYSDATE	Major not eligible for 5th Year SMART grant	Y
D	081	SYSDATE	Class level invalid for TEACH level	Y

The `rtvrjcttu_071400.sql` script is part of the install process and updates the following code noted in the table below.

The following Grant Batch Edit/Reject code was updated to reference COD rather than RFMS:

RTVRJCT_ TYPE	RTVRJCT _CODE	RTVRJCT_ ACTIVITY_ DATE	RTVRJCT_DESC	RTVRJCT_ SYSTEM_ REQ_IND
Q	222	SYSDATE	Institution is currently ineligible upon receipt of batch at COD	Y

## Changed Form

---

### Form Library (ROQOLIB)

The List of Values (RPRMAJR\_LOV) used on the RPAAWRD and RPAAPMT forms for the **Major Code Override** field now includes the new RPRMAJR\_YEAR\_5\_SMART\_ELIG\_IND column.

# 5 2009-2010 INAS Technical Upgrade #2, Post #3 - Technical



## Required Data

### INAS Global Policy Options Table script (RNRGLBL) – rinsgl10.sql

The INAS Global Policy Options Table (RNRGLBL) is used to store the policy options maintained on the 2009-2010 INAS Global Policy Options Rules Form (RNRGL10), which is a year-specific form.

The required changes to RNRGLBL\_PART\_2, based on CSS 2009-2010 INAS Technical Upgrade #2, Post #3, are listed below.

Item Name	Size	Pos.	Value	Comment	Change
FILLER	200	2001			
RNRGLBL_S_MARTL_STAT	1	2201	Y	Student's marital status	
RNRGLBL_P_MARTL_STAT	1	2202	Y	Parents' marital status	
RNRGLBL_S_RES_STATE	1	2203	Y	Student's state of legal residence	
RNRGLBL_P_RES_STATE	1	2204	Y	Parents' state of legal residence	
RNRGLBL_S_TAX_FORM	1	2205	Y	Student's federal tax form used	
RNRGLBL_P_TAX_FORM	1	2206	Y	Parents' federal tax form used	

Item Name	Size	Pos.	Value	Comment	Change
RNRGLBL_S_YR_IN_COLL	1	2207	Y	Student's year in college	
RNRGLBL_WARD_OF_CT	1	2208	Y	Is student ward of court	
RNRGLBL_HAVE_DEP	1	2209	Y	Does student have legal dependents	
RNRGLBL_CIT_STAT	1	2210	Y	Student's citizenship status	
RNRGLBL_VET_STAT	<del>1</del>	<del>2211</del>	<del>Y</del>	<del>Student's veteran status</del>	Deleted
FILLER	1	2211			Added
RNRGLBL_DOB	1	2212	Y	Student's date of birth	
RNRGLBL_HOMELESS	1	2213	Y	Is Student Homeless	Added
RNRGLBL_DISL_WRK	1	2214	Y	Is Student Dislocated Worker	Added
RNRGLBL_PAR_DISL_WRK	1	2215	Y	Is Parent Dislocated Worker	Added
RNRGLBL_ADOPTED_AFTER_13	1	2216	Y	Is Student adopted after age 13	Added
FILLER	34	2217			Length changed
RNRGLBL_S_NUM_IN_COLL	5	2251	00000	Student's number in college	
RNRGLBL_P_NUM_IN_COLL	5	2256	00000	Parents' number in college	
RNRGLBL_S_FAM_SIZE	5	2261	00000	Student's family size	
RNRGLBL_P_FAM_SIZE	5	2266	00000	Parents' family size	
RNRGLBL_S_NUM_EXEMPT	5	2271	00000	Student's number of exemptions	
RNRGLBL_P_NUM_EXEMPT	5	2276	00000	Parents' number of exemptions	
RNRGLBL_S_AGI	5	2281	00000	Student's AGI	
RNRGLBL_P_AGI	5	2286	00000	Parents' AGI	

Item Name	Size	Pos.	Value	Comment	Change
RNRGLBL_S_FED_TAX	5	2291	00000	Student's federal taxes paid	
RNRGLBL_P_FED_TAX	5	2296	00000	Parents' federal taxes paid	
RNRGLBL_S_WAGE_INC	5	2301	00000	Student's income from wages	
RNRGLBL_FTTHR_WAGE_INC	5	2306	00000	Father's income from wages	
RNRGLBL_S_SP_WAGE_INC	5	2311	00000	Student's spouse's income from wages	
RNRGLBL_MTHR_WAGE_INC	5	2316	00000	Mother's income from wages	
FILLER	10	2321			
RNRGLBL_S_CASH	5	2331	00000	Student's cash	
RNRGLBL_P_CASH	5	2336	00000	Parents' cash	
RNRGLBL_S_INVST_WRTH	5	2341	00000	Student's investment net worth	
RNRGLBL_P_INVST_WRTH	5	2346	00000	Parents' investment net worth	
RNRGLBL_S_FRM_BUS_WRTH	5	2351	00000	Student's bus./farm invest. net worth	
RNRGLBL_P_FRM_BUS_WRTH	5	2356	00000	Parents' bus./farm invest. Net worth	
RNRGLBL_AGE_PARENT	5	2361	00000	Age of oldest parent	
RNRGLBL_VA_BEN	<del>5</del>	<del>2366</del>	<del>00000</del>	<del>Student's monthly VA benefits</del>	Deleted
RNRGLBL_NUM_MTHS_VA	<del>5</del>	<del>2371</del>	<del>00000</del>	<del>Student's no. of months of VA benefits</del>	Deleted
RNRGLBL_OTH_UNTAX_INC	5	2366	00000	Student's Other Untaxed Income	Added

Item Name	Size	Pos.	Value	Comment	Change
RNRGLBL_PAR_OTH_UNTAX_ INC	5	2371	00000	Parents' Other Untaxed Income	Added
RNRGLBL_CHILD_SUPP_ PAID	5	2376	00000	Child Support paid by Student	Added
RNRGLBL_PAR_CHILD_SUPP _PAID	5	2381	00000	Child Support paid by Parent	Added
RNRGLBL_CHILD_SUPP	5	2386	00000	Child Support received by Student	Added
RNRGLBL_PAR_CHILD_SUPP	5	2391	00000	Child Support received by Parent	Added
RNRGLBL_HOPE_LL_CREDIT	5	2396	00000	Student's Educational Credits	Added
RNRGLBL_PAR_HOPE_LL_ CREDIT	5	2401	00000	Parents' Educational Credits	Added
RNRGLBL_PAR_IRA_KEOUGH	5	2406	00000	IRA payments made by parent	Added
RNRGLBL_PAR_TAX_DEF_ PENSION	5	2411	00000	Tax-deferred pension payments made by parent	Added
RNRGLBL_PAR_HOUSE_FOOD _OTH	5	2416	00000	Military or clergy allowances received by parent	Added
RNRGLBL_PAR_TE_INT_INC	5	2421	00000	Tax-exempt interest income received by parent	Added
FILLER	375	2426			Length changed
FILLER	1000	2801			
FILLER	200	3801		Area reserved for CSS development use and/or Inter Program Communication	

## New rnrgrlblu\_071401.sql Script

The rnrgrlblu\_071401.sql script was created to update the CSS default values for the global overrides in RNRGLBL\_Part\_2. This script is run as part of the installation to update only the default values for Part 2 of the Global Default Option table that have changed as part of the INAS Technical Upgrade #2 Post #3. These options are used to set values for the comparison report between IM and FM data.



# 6 Financial Aid Archive and Data Purge Enhancement - Technical



## New Tables

The following tables are new with this enhancement.

### Applicant Archive Table (RORARCH)

The Applicant Archive Table is a new table with the following characteristics.

The Primary Key (PK\_RORARCH) uses the following columns:

RORARCH\_PIDM  
RORARCH\_AIDY\_CODE

Column Name	Null?	Type	Comment
RORARCH_PIDM	No	NUMBER(8)	PIDM: The internal system student identification number.
RORARCH_AIDY_CODE	No	VARCHAR2(4)	AID YEAR CODE: The aid year associated with information in this record.
RORARCH_DOC	No	XMLTYPE	ARCHIVE XML DOC: The XML Document created during the Applicant Archive Process.
RORARCH_CREATION_DATE	No	DATE	CREATION DATE: The date this record was inserted.
RORARCH_CREATION_USER_ID	No	VARCHAR2(30)	CREATION USER ID: The user ID of the person who inserted this record.

Column Name	Null?	Type	Comment
RORARCH_USER_ID	Yes	VARCHAR2(30)	USER ID: The user ID of the person who inserted or last updated this record.
RORARCH_ACTIVITY_DATE	Yes	DATE	ACTIVITY DATE: The date that information in this record was entered or last updated.

## Applicant Saved Requirements Table (RORSREQ)

The Applicant Saved Requirements Table is a new table with the following characteristics.

The following unique index has been created:

Unique index (RORSREQ\_KEY\_INDEX) on RORSREQ on the following columns:

```
RORSREQ_PIDM,
RORSREQ_TREQ_CODE,
RORSREQ_FUND_CODE,
RORSREQ_SBG_CODE);
```

Column Name	Null?	Type	Comment
RORSREQ_PIDM	NO	NUMBER(8)	PIDM: The internal system-generated student identification number for the student in this record.
RORSREQ_TREQ_CODE	NO	VARCHAR2(6)	TRACKING REQUIREMENTS CODE: The code associated with the tracking requirement.
RORSREQ_FUND_CODE	YES	VARCHAR2(6)	FUND CODE: The fund associated with the tracking requirement.
RORSREQ_SAT_IND	YES	VARCHAR2(1)	SATISFIED INDICATOR: Indicates if the tracking requirement has been satisfied.

Column Name	Null?	Type	Comment
RORSREQ_STAT_DATE	YES	DATE	STATUS DATE: The last date on which the status of this requirement was updated.
RORSREQ_EST_DATE	YES	DATE	ESTABLISHED DATE: The date the tracking requirement was established.
RORSREQ_TRST_CODE	YES	VARCHAR2(1)	TRACKING STATUS CODE: The status of the tracking requirement.
RORSREQ_SYS_IND	YES	VARCHAR2(1)	SYSTEM INDICATOR: Indicates how the tracking requirement was created or updated.
RORSREQ_SBG_CODE	YES	VARCHAR2(6)	SOURCE OR BACKGROUND INSTITUTION CODE: The institution associated with the tracking requirement.
RORSREQ_PERK_MPN_EXP_DATE	YES	DATE	MULTI-AWARD YEARS PERKINS MPN EXPIRATION DATE: The expiration date of the Perkins multi-award year Master Promissory Note.
RORSREQ_SATISFIED_DATE	YES	DATE	DATE MPN REQUIREMENT SATISFIED: The date the Perkins Master Promissory Note tracking requirement was satisfied.
RORSREQ_MPN_FIRST_DISB_DATE	YES	DATE	DATE OF FIRST DISBURSEMENT FOR MPN: The date of the first Perkins disbursement made for this Perkins Master Promissory Note.
RORSREQ_MPN_SIGNED_DATE	YES	DATE	DATE OF SIGNATURE ON MPN: The date the student signed the Perkins Master Promissory Note.

# Changed Tables

---

## Pell Origination Table (REBPAYV)

The following columns were marked as unused.

REBPAYV\_RECOVERY\_IND  
REBPAYV\_JUL\_PAY  
REBPAYV\_AUG\_PAY  
REBPAYV\_SEP\_PAY  
REBPAYV\_OCT\_PAY  
REBPAYV\_NOV\_PAY  
REBPAYV\_DEC\_PAY  
REBPAYV\_JAN\_PAY  
REBPAYV\_FEB\_PAY  
REBPAYV\_MAR\_PAY  
REBPAYV\_APR\_PAY  
REBPAYV\_MAY\_PAY  
REBPAYV\_JUN\_PAY  
REBPAYV\_WORKSHEET  
REBPAYV\_ENROLL\_DATE  
REBPAYV\_ACTION\_CODE  
REBPAYV\_PRISON\_STATE  
REBPAYV\_PAY\_AMT\_CALC\_IND  
REBPAYV\_CHANGE\_DATE

## Financial Aid Institution Table (ROBINST)

The following columns were added to this table.

Column Name	Null?	Type	Comment
ROBINST_RETENTION_EXPIRED_IND	NO	VARCHAR2(1) DEFAULT 'N'	RETENTION POLICY EXPIRED INDICATOR: Indicates whether the retention policy has expired for the aid year.
ROBINST_RETENTION_DATE	YES	DATE	RETENTION POLICY DATE: The date the retention policy expired.
ROBINST_ARCHIVE_DATE	YES	DATE	ARCHIVE DATE: The first date data was archived for the aid year.

## Applicant Status Table (RORSTAT)

The following columns were marked as unused.

RORSTAT\_PCKG\_PROC\_IND  
 RORSTAT\_PCKG\_STATUS\_IND  
 RORSTAT\_AUTH\_DISB\_AID\_IND  
 RORSTAT\_DISB\_DATE  
 RORSTAT\_AUTH\_DISB\_AID\_DATE  
 RORSTAT\_AUTH\_DISB\_AID\_TERM  
 RORSTAT\_MAX\_YRS\_ELIG  
 RORSTAT\_NO\_YRS\_USED  
 RORSTAT\_SAR\_PGI\_LOCK\_IND  
 RORSTAT\_SLCT\_IND  
 RORSTAT\_INAS\_OPTION  
 RORSTAT\_LAST\_CYCLE\_ELIGIBLE  
 RORSTAT\_DL\_EPNOTE\_IND

## Temporary Applicant Status Table (ROTSTAT)

The following columns were marked as unused.

ROTSTAT\_PCKG\_PROC\_IND  
ROTSTAT\_PCKG\_STATUS\_IND  
ROTSTAT\_AUTH\_DISB\_AID\_IND  
ROTSTAT\_DISB\_DATE  
ROTSTAT\_AUTH\_DISB\_AID\_DATE  
ROTSTAT\_AUTH\_DISB\_AID\_TERM  
ROTSTAT\_MAX\_YRS\_ELIG  
ROTSTAT\_NO\_YRS\_USED  
ROTSTAT\_SAR\_PGI\_LOCK\_IND  
ROTSTAT\_SLCT\_IND  
ROTSTAT\_INAS\_OPTION  
ROTSTAT\_LAST\_CYCLE\_ELIGIBLE  
ROTSTAT\_DL\_EPNOTE\_IND

## Packaging Simulation Applicant Status Table (ROTSTTS)

The following columns were marked as unused.

ROTSTTS\_PCKG\_PROC\_IND  
ROTSTTS\_PCKG\_STATUS\_IND  
ROTSTTS\_AUTH\_DISB\_AID\_IND  
ROTSTTS\_DISB\_DATE  
ROTSTTS\_AUTH\_DISB\_AID\_DATE  
ROTSTTS\_AUTH\_DISB\_AID\_TERM  
ROTSTTS\_MAX\_YRS\_ELIG  
ROTSTTS\_NO\_YRS\_USED  
ROTSTTS\_SAR\_PGI\_LOCK\_IND  
ROTSTTS\_SLCT\_IND  
ROTSTTS\_INAS\_OPTION  
ROTSTTS\_LAST\_CYCLE\_ELIGIBLE

## Applicant Award Disbursement Table (RPRADSB)

The following columns were marked as unused.

RPRADSB\_PAY\_PD\_NUMBER  
RPRADSB\_PAY\_PD\_END\_DATE  
RPRADSB\_NBR\_MTHS\_PAY  
RPRADSB\_PAY\_PD\_TOTAL  
RPRADSB\_PAY\_PD\_ACAD\_CAL  
RPRADSB\_PAY\_PD\_PMT\_METH  
RPRADSB\_PAY\_PD\_ATTEND\_COST  
RPRADSB\_PAY\_PD\_ENRL\_STAT  
RPRADSB\_PAY\_PD\_EXPECT\_WKS  
RPRADSB\_WKS\_IN\_YR  
RPRADSB\_PAY\_PD\_EXPECT\_HRS  
RPRADSB\_HRS\_IN\_YR  
RPRADSB\_ACPT\_PAY\_PD\_NUMBER  
RPRADSB\_ACPT\_PAY\_PD\_END\_DATE  
RPRADSB\_ACPT\_NBR\_MTHS\_PAY  
RPRADSB\_ACPT\_PAY\_PD\_TOTAL  
RPRADSB\_ACPT\_PAY\_PD\_ACAD\_CAL  
RPRADSB\_ACPT\_PAY\_PD\_PMT\_METH  
RPRADSB\_ACPT\_PAY\_PD\_ATTEND\_CST  
RPRADSB\_ACPT\_PAY\_PD\_ENRL\_STAT  
RPRADSB\_ACPT\_PAY\_PD\_EXPECT\_WKS  
RPRADSB\_ACPT\_WKS\_IN\_YR  
RPRADSB\_ACPT\_PAY\_PD\_EXPECT\_HRS  
RPRADSB\_ACPT\_HRS\_IN\_YR

# New Packages/Procedures/Functions

---

## ROK\_ARCHIVE\_DATA Package

Package specification: rok\_archive\_data0.sql

Package body: rok\_archive\_data1.sql

This is a new package to support archive/purge processing.

The following are the public functions and procedures included in the package. The private functions and procedures are not included.

### F\_AWARDS\_EXIST

Function to check if awards exist for the pidm and aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Returns
  - 'Y' if awards exist
  - 'N' if awards do not exist
- Processing.

Select 'Y' if any awards (RPRAWRD) exist for the aid year and pidm where RPRAWRD\_SYS\_IND is not 'A' or 'P'.

### F\_LOANS\_EXIST

Function to check if loans exist for the pidm and aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Returns
  - 'Y' if loans exist
  - 'N' if loans do not exist
- Processing.
  - Select 'Y' if any loans (RPRLAPP) exist for the aid year and pidm.

## F\_RESOURCES\_EXIST

Function to check if resources exist for the pidm and aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Returns
  - 'Y' if resources exist
  - 'N' if resources do not exist
- Processing.
  - Select 'Y' if any non-VA Education Benefits (RPRARSC\_TYPE\_IND = '0' and RPRARSC\_RESOURCE\_NUMBER <> 0) resources (RPRARSC) exist for the aid year and pidm.

## F\_STUDENT\_DATA\_EXISTS

Function to check if student data exist for the pidm and aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Returns
  - 'Y' if student data, Student Registration Table (SFBETRM), exists
  - 'N' if student data (SFBETRM) do not exist
- Processing.
  - Select 'Y' if any student data, Student Registration Table (SFBETRM), exists for the pidm and any term code connected to the applicant's aid period.

## F\_YEAR\_AWARDS\_EXIST

Function to check if awards exist for the aid year.

- Parameters:
  - P\_AIDY\_CODE
- Returns
  - 'Y' if awards exist
  - 'N' if awards do not exist
- Processing.
  - Select 'Y' if any awards (RPRAWRD) exist for the aid year where RPRAWRD\_SYS\_IND is not 'A' or 'P'.

## F\_YEAR\_LOANS\_EXIST

Function to check if loans exist for the aid year.

- Parameters:
  - P\_AIDY\_CODE
- Returns
  - 'Y' if loans exist
  - 'N' if loans do not exist
- Processing.
  - Select 'Y' if any loans (RPRLAPP) exist for the aid year.

## F\_YEAR\_RESOURCES\_EXIST

Function to check if resources exist for the aid year.

- Parameters:
  - P\_AIDY\_CODE
- Returns
  - 'Y' if resources exist
  - 'N' if resources do not exist
- Processing.
  - Select 'Y' resources (RPRARSC) exist for the aid year.

## F\_YEAR\_STATUSES\_EXIST

Function to check if statuses exist for the aid year.

- Parameters:
  - P\_AIDY\_CODE
- Returns
  - 'Y' if statuses exist
  - 'N' if statuses do not exist
- Processing.
  - Select 'Y' if any statuses (RORSTAT) exist for the aid year.

## P\_CREATE\_ARCHIVE\_DOC

Procedure to create the XML Archive Document for a person for an aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Processing.
  - Create the XML Archive Document for the pidm and aid year.
  - Insert the document into the Applicant Archive Table.

## P\_PURGE\_PERSON

Procedure to archive/purge data for a person for an aid year.

- Parameters:
  - P\_AIDY\_CODE
  - P\_PIDM
- Processing.
  - When deleting from the Applicant Requirements (RRRAREQ) Table, if the requirement is a Perkins MPN (RRRAREQ\_PERK\_MPN\_EXP\_DATE is not null)
 

If the Perkins MPN requirement does not exist in a subsequent aid year and has not expired (RRRAREQ\_PERK\_MPN\_EXP\_DATE is greater than sysdate), insert an entry into the Applicant Saved Requirements (RORSREQ) Table if an entry does not already exist.
  - When deleting from the Applicant Requirements (RRRAREQ) Table, if the requirement is a satisfied (RRRAREQ\_SAT\_IND = 'Y') required once (RTVTREQ\_ONCE\_IND = 'Y')
 

If the requirement does not exist in a subsequent aid year, insert an entry into the Applicant Saved Requirements (RORSREQ) Table if an entry does not already exist.
  - When purging the Applicant Award (RPRAWRD) Table, the rows will not be physically deleted. The RPRAWRD\_SYS\_IND will be updated to 'A'.
  - Entries in the Applicant Award by Term (RPRATRM) Table will not be physically deleted.
  - When purging the Applicant Award Disbursement (RPRADSB), the rows will not be physically deleted. The RPRADSB\_SYS\_IND will be updated to 'A'.
  - Holds that do not have an aid year or a term code will not be purged.

## P\_PURGE\_RULES

Procedure to purge rules for an aid year.

- Parameters:
  - P\_AIDY\_CODE

- P\_KEEP\_RFRASPC
- Processing.
  - If p\_keep\_rfraspc = 'Y', do not delete Fund Aid Year Specific Data (RFRASPC).

## Changed Packages/Procedures/Functions

---

### RB\_AWARD\_DISBURSEMENT

Package specification: rpkb\_awd\_disb0.sql

Package body: rpkp\_awd\_disb1.sql

The p\_create procedure was modified as follows.

If RPRADSB\_SYS\_IND = 'A', generate an error (*Cannot create/update/delete archived disbursement*).

The p\_update procedure was modified as follows.

If RPRADSB\_SYS\_IND = 'A', generate an error (*Cannot create/update/delete archived disbursement.*).

The p\_delete procedure was modified as follows.

If RPRADSB\_SYS\_IND = 'A', generate an error (*Cannot create/update/delete archived disbursement*).

### RB\_REQUIREMENTS

Package specification: rrkb\_requirement0.sql

Package body: rrkb\_requirement1.sql

The p\_get\_mpn procedure was modified as follows.

If the select\_prior\_mpn cursor does not return a row, select the data from the Applicant Saved Requirements Table (RORSREQ) and then delete it.

The p\_get\_satisfy\_once was modified as follows.

If the `select_prior_once` cursor does not return a row, select the data from the Applicant Saved Requirements Table (RORSREQ) and then delete it.

## RP\_AWARD\_SCHEDULE

Package specification: `rpkp_award_sched0.sql`

Package body: `rpkp_award_sched1.sql`

The `p_create` procedure was modified as follows.

If `RPRAWRD_SYS_IND = 'A'`, generate an error (*Cannot create/update/delete archived award schedule*).

The `p_update` procedure was modified as follows.

If `RPRAWRD_SYS_IND = 'A'`, generate an error (*Cannot create/update/delete archived award schedule*).

The `p_delete` procedure was modified as follows.

If `RPRAWRD_SYS_IND = 'A'`, generate an error (*Cannot create/update/delete archived award schedule*).

## Changed Plus Procedures

---

### Disable Referential Integrity Script - RDISCON

The following information was deleted from this script.

```
ALTER TABLE RHBTRNS
    DISABLE CONSTRAINT FK1_RHBTRNS_INV_ROBINST_CODE;
ALTER TABLE RHRPCMT
    DISABLE CONSTRAINT FK1_RHRPCMT_INV_RHBTRNS_KEY;
```

## New Database Triggers

---

### RT\_RORARCH\_USERACTIVIT\_INSUPD (rotarch0.sql)

A trigger was created to maintain the user id and activity date for the table.

The trigger is owned by FAISMGR not by BANINST1.

```
CREATE OR REPLACE TRIGGER RT_RORARCH_USERACTIVIT_INSUPD
--
BEFORE INSERT OR UPDATE ON RORARCH
FOR EACH ROW
BEGIN
:new.rorarch_user_id := USER;
:new.rorarch_activity_date := SYSDATE;
END;
```

## Changed Views

---

### Financial Aid Applications View (RCVAPPL)

All references to the Applicant NSLDS Table Part 1 (RCRLDS1) were deleted.

### Prior College Selection View (ROVPCOL)

All references to the Prior Institution Transcript Base (RHBTRNS) Table were deleted.

All references to the Prior Institution Transcript Prior College (RHRPCOL) Table were deleted.

## Obsolete Objects

---

The following is a list of objects that have become obsolete as a result of this enhancement.

### View

ROVUSDF	User View
---------	-----------

### Forms

RHAPTRN	Prior Institution Transcript
RHARQST	Financial Aid Transcript Request
RHATINF	Transcript Information
RHRTRNS	Transcript Rules
RORDSUP	Supplemental Log Data Rules
RPRCLVL	Campus Undergraduate Level Code Rules

### C Processes

RHRTRAN	Financial Aid Transcript
RRRTRAN	Admissions Transfer/Financial Aid Transcript Report

### COBOL COPYLIBS

INSSAPR	Insert Into rotsapr
INSSAPR1	Insert Into rotsapr
INSSTAT	Insert into rotstat
INSSTAT2	Insert into rotstat
INSSTAT3	Insert into rotstat

## Other Interfaces

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### Cross-Product Relationship (STURESG)

The following tables were removed from this script which grants permissions on Financial Aid Tables to Student Users.

RHBTINF	Institution Transcript Information Table
RHBTRNS	Prior Institution Transcript Base Table
RHRAWRD	Prior Institution Transcript Award Table
RHRLOAN	Prior Institution Transcript Loan Table
RORDSUP	Supplemental Log Data

### Cross-Product Relationship (TRARESG)

The following tables were removed from this script which grants permissions on Financial Aid Tables to Account Receivable Users.

RHBTINF	Institution Transcript Information Table
RHBTRNS	Prior Institution Transcript Base Table
RHRAWRD	Prior Institution Transcript Award Table
RHRLOAN	Prior Institution Transcript Loan Table
RORDSUP	Supplemental Log Data

# 7 Problem Resolutions



The following is a summary of the problem resolutions included in Release 8.4. 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 `finaid80400resolutions.txt`.

Object Name	Defect #	Summary
RBAABUD	1-497TAD	Budget components cannot be inserted on RBAABUD
RCRTP10	1-52W4R2	Correction Flag and HIGHLIGHT Flags show all zero's in RCRTP10 discrepancy report
REAOR09	1-4N4ELH	TEACH origination can't be accessed after award is cancelled.
REKORIG	1-4Q8FUM	The REROR09 process gives "*ERROR* New record matches previous record." for TEACH origination.
REREX09	1-4KR327	Grant Originations may extract with a Foreign Country Code on a US Address
REREX09	1-54G5WD	DL PLUS Borrower Email Address Changes do not extract correctly.
REREX09	1-54G618	REREX09 will not resend initial TEACH origination records.
RERFI09	1-4Q8YBJ	RERGRNT YTD report may incorrectly calculate the COD Acpt Amt and YTD Amt.
RERIM09	1-51C30A	RERIM09 was redelivered with Banner Financial Aid 8.3, but still lists version 8.2 in <code>rerim09.lis</code>
REROR09	1-50UMAO	7x and 8x. REROR09 may generate an error message when run for Teach Grant.

Object Name	Defect #	Summary
RNANA09	1-4Q8YCL	On RNANA09 the RCRAPP1_CREATE_DATE may populate with an incorrect date.
RNANA10	1-50XQFM	RNANA10 requires multiple Saves when Calculate Need is selected.
RNAOV09/RNAOV10	1-4Z2PQ9	RNAOV09/RNAOV10 cannot handle a long full name with more than 60 characters.
RNAPR10.fmb	1-4W5BKL	FM fields not mapping to IM
RNASL09	1-4GW79U	When creating a MANUAL record from a record that includes TEACH, the TEACH record will not be copied
RNASL10	1-4GW79N	Current record indicator on RCRLDST no updated correctly when a MANUAL record created.
rnavr10.fmb	1-4YHGEZ	Corrections to EDE records result in changes to ISIR records.
RNEIN10	1-4X3342	RNEIN10 gives Error During UPDT4 Update.. Aborting. ORA-12899: value too large for column
RNEIN10	1-516MI6	RNEIN10 fails with the error: Error During RCRAPP2 UPDTCMPC Update.. Aborting
RNRPINI	1-56P8VZ	Under stricter C compiler, the process is compiled with a warning message.
ROAIMMP	1-4U9SJV	ROAIMMP Budgeting Group Assignment option displays the Pell Calculation message erroneously
rokmisc1.sql	1-4Z2835	RPEDISB, ROAENRL and RSRENRL performance issues
ROKPVAL.sql	1-4H2TXJ	8.x ONLY: ROKPVAL prevents printing the NSLDS Summary in RRREXIT for TEACH Exit Counseling.
ROPSAPR	1-4RSM2T	Banner 8 only: The ROPSAPR process is updating all activity dates.

Object Name	Defect #	Summary
ROREMAL	1-547E4E	7x and 8x. ROREMAL From Email Parameter
RORHSDP	1-4FR60H	RORHSDP totals are incorrect
RORHSDP.pc	1-4FR613	RORHSDP is not consistently updating ROAHSDT for all in popsel
RORRULE	1-4FR61P	The RORRULE EXECUTE Group function fails when a rule consists of more than 3992 characters.
rotalog0.sql (RT_ROBALOG_USE RACTIVIT_INSUPD trigger)	1-4XVOGN	Banner 8 Only - Logging multiple EDE corrections for the same field
RPEDISB	1-4FR64F	RPEDISB will memo remaining amounts after disbursement is made under certain conditions.
RPEDISB	1-4FR65B	When a Fund pays only specific charges, RPEDISB alternately inserts and removes memos.
RPEDISB	1-4FR65X	Pell will not disburse remaining \$1 under certain conditions.
RPEDISB	1-4FR69L	Disbursement for combined Check Amt and Return to Lender Amt using wrong tran number for RPRLADB
RPEDISB	1-4HYNCD	Memo tran number is not reinitialized in RPEDISB
RPEPELL	1-4FR66J	RPEPELL may overaward Pell Grant by \$1 under certain conditions or award \$1 in a term.
RPEPELL	1-558OXU	For some transfer students, RPEPELL is overawarding Pell by less than a dollar.
RPRADSB	1-4FR675	RPRADSB may omit the student's name from the report under certain conditions.
RPRADSB	1-54E29R	RPRADSB Award Column repeats amount on each line

Object Name	Defect #	Summary
RPREFTP	1-4Q8YEJ	RPREFTP may post duplicate check amounts to loan disbursement records if run consecutively.
RRREXIT.pc	1-4H2TXB	Grad PLUS aggregate data is not reported in the output when Print NSLDS Summary option is set to Y.