

# Banner Financial Aid Release Guide

*Release 8.4.2  
June 2009*



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# Banner Financial Aid 8.4.2 Release Guide

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**Section 9 Problem Resolutions**



# Introduction

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This guide documents Release 8.4.2 of the Banner Financial Aid System. Release 8.4.2 includes enhancements, regulatory updates, RPEs, and problem resolutions. The Banner Financial Aid 8.4.1 release is not included in this release.

This document provides detailed information about the Banner Financial Aid 8.4.2 release only.

This document describes the following enhancements.

## ***COD Phase II Updates***

The functional and technical sections in this release guide discuss a number of modifications related to COD. Refer to the overview of this section for more information.

## ***Year Round Pell***

The Higher Education Opportunity Act (HEOA) of 2008 authorized the awarding of up to two Federal Pell Grants within an academic year. The functional and technical sections in the Year Round Pell portion address Phase 1 - which allows up to 200% of a scheduled Federal Pell Grant award within an academic year.

## ***2009-2010 COD ACG, SMART and TEACH Calculation***

The functional and technical sections in this release guide discuss the modifications made to address the changes necessary to accommodate the calculation of load-based ACG, SMART and TEACH awards for the 2009-2010 award year. The processing is modeled in a similar way to the existing Pell Grant calculations.

## ***Award Locks***

The functional and technical sections in this release guide discuss the modifications made for the Award Locks enhancement which delivers two new features. You can now allow the update of an award status on locked funds and you can now allow an award with a fund or term lock to be accepted or declined by an applicant in Banner Financial Aid Self-Service.

## ***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 `finaid80402resolutions.txt`.

**New Information:** 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, suggestions and/or corrections to release documentation for Banner Financial Aid release 8.4.2?*, Solution/FAQ 1-5XTM2E, 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 (1-5XTM2E) as you use the new release functionality.

# 1 COD Phase II Updates - Functional



## Overview

The following updates are addressed in this section

- With the Higher Education Opportunity Act (HEOA), changes were made to allow a Dependent student to file a FAFSA without providing parental data. When this scenario occurs the student can receive an Unsubsidized Stafford loan if they are no longer receiving any support from the parent(s). The ISIR record received in this scenario will be a rejected ISIR with an estimated EFC. Updates were made to Banner Financial Aid to allow you to award and disburse an Unsubsidized Stafford loan to a student in this scenario.
- HEOA also provides for Year Round Pell and provides for maximum Pell grant awards to Pell eligible students who are dependents of post 9/11 deceased veterans. Year Round Pell updates to Banner are included in the Year Round Pell sections of this release guide. Updates for awarding maximum Pell to Post 9/11 students are not being included in this release as we are still awaiting further guidance on how those funds should be awarded. However, updates have been made to the Pell Reconciliation, Year-to-Date and MRR fixed-length flat-file records to capture data related to these two scenarios. This section addresses the changes necessary to Banner Financial Aid to properly import these updated records.
- In March 2009, when COD went live for the 2009-2010 aid year, COD began sending TEACH Exit Counseling files to schools in a fixed-length, flat-file format – message class THFFEXOP. The updates to the COD Technical Reference that included these file layouts were received late in the processing cycle and SunGard Higher Education was not able to include those updates in the spring regulatory release. This section addresses the changes necessary to Banner Financial Aid to import the new TEACH Exit Counseling files.
- In May 2009, we received interim regulations for several items that were updated due to Ensuring Continued Access to Student Loans Act of 2008 (ECASLA) and HEOA. Of those changes, only one item required changes to Banner Financial Aid. This change to regulations is related to when a student has previously received a higher level grant. Previous guidance indicated that if a student had previously received a higher level grant (for example, SMART3) that they could not “go back” and receive a lower-level grant (for example, ACG1 or ACG2). We received guidance in the spring from the Department of Ed indicating that if a student

transferred institutions, that this was no longer true, and therefore removed the check to the NSLDS tables for this edit. The new interim regulations take this a step further and indicate that this is no longer valid even when the higher level grant was received at the current institution. This change in the regulations is necessary now that ACG and SMART awards are based on grade level rather than academic year. This new criteria could result in a student being reclassified to a lower grade level and therefore being eligible to receive a lower level grant. This section addresses the changes necessary to Banner Financial Aid to completely remove the higher level grant check from award and disbursement validation due to this change in regulation.

## Banner Changes Related to COD Phase II

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### Unsubsidized Loans for Dependents without Parental Data

Changes were made to Banner Financial Aid to allow a Dependent student that has filed their FAFSA, without Parent Data and with a rejected ISIR, to receive Unsubsidized Stafford. The following updates were made.

- An indicator was added to the award forms to allow you to indicate that the student is eligible to receive Unsubsidized Stafford even without parent data.
  - Award validation was updated to allow a Dependent student with this indicator set to have an Unsubsidized Stafford awarded only where the RPRFEDR\_ADDL\_STFD\_ELIG\_IND = 'D' OR 'N' even when the ISIR record is in a rejected status.
  - Award validation was updated to prevent a student with this indicator set from getting other Title IV aid awards.
  - Disbursement Validation was updated to allow a Dependent student with this indicator set to have an Unsubsidized Stafford awarded only where the RPRFEDR\_ADDL\_STFD\_ELIG\_IND = 'D' OR 'N' even when the ISIR record is in a rejected status.
  - RPRLORC was updated to ignore the *Unofficial EFC* error and allow the origination to be created if the indicator is set.
  - The RPAAWRD, RPAAPMT, and ROARMAN forms were updated to add the new indicator.

## Importing Pell Flat-File Data

Changes were made to properly import Pell Reconciliation Records, Year-to-Date Originations, and Multiple Report Records that include the new **Additional Eligibility Indicator** and **Post 9/11 Indicator** data. The following updates were made.

- New columns were added to the REBRMRR, REBYTDO, and RERREC� tables to capture this data on import.
- The RERFI10 process was updated to import the new data received in each of the affected file types.
- RERCD10 and RERGRNT reports were updated to report the Additional Eligibility Indicator data.

## Importing TEACH Exit Counseling Data

Banner Financial Aid was updated to support the import of TEACH Exit Counseling Records and to update a defined TEACH Exit Counseling Tracking Requirement when the records are imported. The following updates were made.

- RERFI10 was updated to import the new THFFEXOP message class and to add parameters to define the TEACH Exit Counseling requirement code and satisfied status.
- The RPILECS Form now displays TEACH Exit Counseling records.
- The comments for RPRLECS columns that are now used for TEACH as well as Direct Loans were changed to remove *Borrower* from the comments.

## Removal of Higher Level Grant Check

The higher level grant check was removed from award and disbursement validation. The following updates were made.

RPK\_COMMON\_VALIDATION\_US was updated to completely remove the higher level grant check for ACG and SMART.

# Changed Forms

## COD Grant Reconciliation (REIRECN)

The Pell **Additional Eligibility Indicator** and **Post 9/11 Indicator** fields were added to this form. Due to space considerations, the form now displays three columns for each record. In addition to form layout changes, the following changes were made.

- The word *Reconciliation* was removed from the **Reconciliation Process Date** field name.
- The word *Rigorous* was removed from the **Rigorous High School Program Code** field name.
- The word *Number* was removed from the **SAR Transaction Number** field name.

The screenshot shows a web browser window titled "COD Grant Reconciliation REIRECN 8.4.2 (s10b80v)". The form includes a header with "Aid Year: 0910", "ID:" followed by a dropdown menu, and "Program Type: All Grants" with a dropdown menu. Below the header, there are two identical columns of data entry fields. Each column contains the following fields: Last Name, First Name, Middle Initial, Current SSN, Campus Pell ID, Program Type (dropdown), Process Date, Batch Number, Scheduled Pell Grant, Amount Due Student, YTD Disbursement Amount, Award ID, Payment Reason Code (dropdown), High School Program Code (dropdown), CIP Code (dropdown), SAR Transaction, EFC, Grade Level, Verification Status, Potential Overpayment Flag, Additional Eligibility Indicator, and Post 9/11 Indicator. The form is displayed in a table-like layout with three columns of data.

Field	Description
Additional Eligibility Indicator	(RERREC_ADDL_ELIG_IND) Additional Eligibility Indicator (AEI). Indicates that the student is receiving a second Pell award for the aid year due to year-round Pell eligibility. You cannot update this field.
Post 9/11 Indicator	(RERREC_POST_911_IND) Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran. You cannot update this field.

## Multiple Reporting Record Inquiry (REIRMRR)

### Student Data Window

The Pell **Additional Eligibility Indicator** and **Post 9/11 Indicator** fields were added to this form.

The screenshot shows a web-based form titled "Student Data REIRMRR 8.4.2 (s10b80v)". The form is organized into two columns of fields. The left column includes fields for ID, First Name, Last Name, Batch Number, Award ID, Program Type (with a dropdown menu), Record Type, Campus Pell ID, Original SAR ID, Activity Date, Last Name, First Name, Middle Initial, Current SSN, Birth Date, Scheduled Award, Origination Award Amount, Enrollment Date, Total Disbursement Accepted, and Next Estimated Disbursement Date. The right column includes fields for Shared SAR ID, Verification Without Documentation Status, Concurrent Enrollment, Potential Overpayment, Request Code 1, Request Code 2, MRR SAR ID, MRR Institution Pell ID, SAR Transaction Number, EFC, Create Date, Last Activity Date, Percentage Eligibility Used, Total Percentage Eligibility Used, Additional Eligibility Indicator, and Post 9/11 Indicator. Each field is represented by a text box or a checkbox.

Field	Description
Additional Eligibility Indicator	(REBRMRR_ADDL_ELIG_IND) Additional Eligibility Indicator (AEI). Indicates that the student is receiving a second Pell award for the aid year due to year-round Pell eligibility. You cannot update this field.
Post 9/11 Indicator	(REBRMRR_POST_911_IND) Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran. You cannot update this field.

## COD Year to Date Grant Origination (REIYTDO)

The Pell **Additional Eligibility Indicator** and **Post 9/11 Indicator** fields were added to this form.

Field	Description
Additional Eligibility Indicator	(REBYTDO_ADDL_ELIG_IND) Additional Eligibility Indicator (AEI). Indicates that the student is receiving a second Pell award for the aid year due to year-round Pell eligibility. You cannot update this field.
Post 9/11 Indicator	(REBYTDO_POST_911_IND) Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran. You cannot update this field.

## Financial Aid Record Maintenance (ROARMAN)

### Packaging Group Information Block

The new **Dependent without Parent Data** and **Additional Eligibility Indicator** fields were added to the Packaging Group Information Block. The **Subsidized Loan Exclusion Amount** field was removed from this block as this field is already displayed on the Summary Information Block. Other fields in this block were rearranged to create space for the new fields.



Package Maintenance RPAAPMT 8.4.2 (s10b80v)

Confidential

Aid Year: 0910 ID: 171990020 Елена Сорока-Сорока

Award Maintenance Fund Awards by Term Disbursement Schedule

Fund: DIRECT Federal Direct Stafford Loan Expiration Date: 18-FEB-2009

Status: ACPT Accepted Lock: N

Status Date: 19-JAN-2009 System: M

	Amount	Date
Original Offer:	1,000.00	19-JAN-2009
Offered:	1,000.00	19-JAN-2009
Accepted:	1,000.00	19-JAN-2009
Declined:		
Cancelled:		
Memoed:		
Authorized:		
Paid:		

Reschedule  Information Access

Overrides

Unmet Need: N=No

Replace EFC: N=No

Tracking Requirement: N=No

Federal Limit: N=No

Fund Limit: N=No

Fund Award Rule: N=No

Year in College: N=No override

No Pell: N=No

Summary Packaging Group Pell and Loan

Additional Stafford: Default

Borrower Based:

Preparatory or Teacher Certification: N=No

Subsidized Loan Exclusion Amount:

Pell Origination

Additional Eligibility Indicator

Post Bachelor's Degree Pell Override

HPPA

Dependent without Parent Data

Field	Description
Dependent without Parent Data	(RORSTAT_DEP_NO_PAR_DATA) Indicates the student is a dependent student that has completed their FAFSA without parent data and is eligible for an Unsubsidized Stafford loan.  If the <b>Additional Stafford</b> field is set to Y, the form prevents you from checking this field and saving the record. You receive the following error when you attempt to save the record: <i>Dependent without Parent Data cannot = 'Y' when Additional Stafford = 'Y'</i> . (Note that the same relationship holds true if the <b>Dependent without Parent Data</b> field is checked and you attempt to set the <b>Additional Stafford</b> field to Y.)

## Award Maintenance (RPAAWRD)

### Award Maintenance Tab – Pell and Loan Subtab

The new **Dependent without Parent Data** field was added to the new Pell and Loan Subtab on the Main Window. (See the *Year Round Pell* section for more information about this new tab.)



# Changed Reports and Processes

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## 2009-2010 COD Print Process (RERCD10)

The RERCD10 Process was updated to add the Pell **Additional Eligibility Indicator** from the origination record (REBPAYV\_ADDL\_ELIG\_IND) to the Pell Origination *Sent* and *Unsent* reports.

### Sent Pell Origination Report

This report is generated when the Origination Report parameter 04 = S. The Additional Eligibility Indicator was added to this report between *Ver Stat* and *Amt Paid* with the heading *Addl Elig*.

### Unsent Pell Origination Report

This report is generated when the Origination Report parameter 04 = U. The Additional Eligibility Indicator should be added to this report between *Ver Stat* and *Amt Paid* with the heading *Addl Elig*.

## 2009-2010 Grant File Import (RERFI10)

### PGMR10OP #M – Pell Multiple Reporting Record (MRR)

The Pell Multiple Reporting Record has been updated to include new data fields for the Pell Additional Eligibility Indicator and the Post 9/11 Indicator. Both of these fields are now sent in positions of the file that were previously filler.

The REBRMRR table was updated with this data as follows:

Position In File	Length (# Of Bytes)	Field Name	Column To Load To
449-449	1	Additional Eligibility Indicator	REBRMRR_ADDL_ELIG_IND
450-450	1	Post 9/11 Deceased Veteran Dependent Indicator	REBRMRR_POST_911_IND

### PGRC10OP #C – Pell Reconciliation Record

The Pell Reconciliation Record has been updated to include new data fields for the Pell Additional Eligibility Indicator and the Post 9/11 Indicator. Both of these fields are now sent in positions of the file that were previously filler.

The RERREC� table was updated with this data as follows:

Position In File	Length (# Of Bytes)	Field Name	Column To Load To
96-96	1	Additional Eligibility Indicator	RERREC�_ADDL_ELIG_IND
97-97	1	Post 9/11 Deceased Veteran Dependent Indicator	RERREC�_POST_911_IND

### PGYR10OP #Y – Pell Year-to-Date Record

The Pell Year- to-Date Origination Record (where position 1 of the detail record = *O*) has been updated to include new data fields for the Pell Additional Eligibility Indicator and the Post 9/11 Indicator. Both of these fields are now sent in positions of the file that were previously filler.

The REBYTDO table should be updated with this data as follows:

Position In File	Length (# of Bytes)	Field Name	Column To Load To
217-217	1	Post 9/11 Deceased Veteran Dependent Indicator	REBYTDO_POST_911_IND
251-251	1	Additional Eligibility Indicator	REBYTDO_ADDL_ELIG_IND

### New THFFEXOP Message Class

The new THFFEXOP message class reports TEACH Exit Counseling records. These records are non-aid year specific but records imported through RERFI10 will be processed for the 0910 aid year.

When these records are loaded, a defined tracking requirement and tracking status for the student is updated if the tracking requirement already exists in the RRRAREQ table for the student and the aid year.

The following new parameters were added for the entry of the TEACH Exit Counseling tracking requirement code and tracking satisfied status.

Parameter Name	Required?	Description	Values
03 - TEACH Exit Requirement	No	TEACH Exit Requirement Code. When TEACH Exit Counseling records are loaded, a defined tracking requirement for the student is updated if the tracking requirement already exists in the RRRAREQ table for the student and the aid year.	Requirements Tracking Validation (RTVTREQ)
04 - Exit Satisfied Status	No	Exit Requirement Satisfied Status Code. When TEACH Exit Counseling records are loaded, a defined tracking status for the student is updated if the tracking requirement already exists in the RRRAREQ table for the student and the aid year.	Requirements Tracking Status Validation (RTVTRST)

### ROKPVAL Updates

If you enter a value for the TEACH Exit Requirement parameter, you must also enter a value for the Exit Satisfied Status parameter.

### Matching Records on Import

When the THFFEXOP file is imported, it is matched to RERSTID to find the student's PIDM.

- If no match is found, the student's name and SSN is provided in the report 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 to RPRLECS with a message in the report output to indicate that no matching exit 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. The requirements API is used to satisfy the tracking requirement code with the status specified in the parameters. Information in the report output indicates that the tracking requirement status was updated.

The data from the record is loaded to the RPRLECS table as follows:

```
RPRLECS_PIDM = matching PIDM from the RERSTID table
RPRLECS_COUNSELING_TYPE = 'X'
RPRLECS_AIDY_CODE = '0910'
RPRLECS_SOURCE = 'T'
```

Position In File	Length (# of Bytes)	Field Name	Column To Load To
1-6	9	Social Security Number	RPRLECS_SSN
10-17	8	Date of Birth	RPRLECS_BIRTH_DATE
18-33	16	Last Name	RPRLECS_LAST_NAME
34-45	12	First Name	RPRLECS_FIRST_NAME
46-46	1	Middle Initial	RPRLECS_MI
47-54	8	Exit Counseling Completion Date Format: CCYYMMDD	RPRLECS_COMP_DATE
55-62	8	Exit Counseling Completion Time Format: HHMMSSNN	RPRLECS_COMP_DATE
63-87	25	Permanent Street Address Line 1	RPRLECS_PERM_ADDR_LINE1
88-112	25	Permanent Street Address Line 2	RPRLECS_PERM_ADDR_LINE2
113-128	16	Permanent Address City	RPRLECS_PERM_CITY
129-130	2	Permanent Address State Code	RPRLECS_PERM_STAT_CODE
131-139	9	Permanent Address Zip Code	RPRLECS_PERM_ZIP
140-149	10	Permanent Home Telephone Number	RPRLECS_PERM_PHONE_NO
150-160	11	Filler	N/A

## Grant COD Miscellaneous Report (RERGRNT)

The RERGRNT Process was updated to add the Pell **Additional Eligibility Indicator** from the origination record (REBPAYV\_ADDL\_ELIG\_IND) and from the reconciliation record (RERREC\_N\_ADDL\_ELIG\_IND) to the Year-to-Date reports generated through parameter 11.

The **Additional Eligibility Indicator** was added to this report between *Verif Stat* and *Offer Amt* and is called *Addl Elig*.

## Direct Loan Record Creation (RPRLORC)

In the past, the RPRLORC Process did not allow the creation of a Direct Loan origination record if the student had an Unofficial EFC.

When a student has completed the FAFSA as a dependent student without parental information, their ISIR is rejected and the EFC is an Unofficial EFC. Once the school confirms that the student is not receiving any parental support, the school can award the student an Unsubsidized Stafford loan.

The RPRLORC Process was updated so that for a Dependent Student (RCRAPP2\_MODEL\_CDE = 'D') that has the **Dependent without Parent Data** indicator set (RORSTAT\_DEP\_NO\_PAR\_DATA = 'Y') that the Unofficial EFC edit is passed only for Unsubsidized Stafford Loans (RFRASPC\_DIRECT\_LOAN\_IND = 'U'). This allows an Unsubsidized Stafford origination to be created for a Dependent Student that has completed the FAFSA without parental data.

The RPLORC Process was also updated so that the **Additional Unsubsidized Eligibility Indicator** (RPRLAPP\_ADDL\_STFD\_ELIG\_IND) on the loan origination record is never updated to a Y on a Subsidized Stafford (RFRASPC\_DIRECT\_LOAN\_IND = 'S') loan as this value must always be N for Subsidized loans..

## 2004-2005 COD Extract Process (REREX05)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support..

## 2005-2006 COD Extract Process (REREX06)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2006-2007 COD Extract Process (REREX07)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2007-2008 COD Extract Process (REREX08)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2008-2009 COD Extract Process (REREX09)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2009-2010 COD Extract Process (REREX10)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2004-2005 COD File Import (RERIM05)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2005-2006 COD File Import (RERIM06)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2006-2007 COD File Import (RERIM07)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2007-2008 COD File Import (RERIM08)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2008-2009 COD File Import (RERIM09)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2009-2010 COD File Import (RERIM10)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2008-2009 COD 2.0e File Import (RERIM2E)

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

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

The .pl, .shl, and .com files for the process were modified to include the ojdbc5.jar and ojdbc6.jar files in the classpath for Oracle 11g support.

## 2 Year Round Pell - Functional



The Higher Education Opportunity Act (HEOA) of 2008 authorized the awarding of up to two Federal Pell Grants within an academic year. This release addresses Phase 1 which allows up to 200% of a scheduled Federal Pell Grant award within an academic year.

This release does not provide aid administrators with the ability to assign a Summer term to more than one aid year for the purposes of awarding and disbursing Year Round Pell. SunGard intends to deliver this functionality in a future release and to include the ability to award a summer, fall, spring, summer award.

### Year Round Pell Examples

The examples below refer specifically to the receipt of 200%, but the scenarios would also hold true for a student who was eligible to receive only 150% (they would only be eligible for up to ½ the second award since they are only attending three terms instead of four as used in the examples).

### Semester Examples

#### Example 1

Aid period SUMMER/FALL/SPRING/SUMMER = 200%. To make the numbers easier, let's assume a Full-time award is \$4000. At time of award, expected enrollment for all terms is Full-time, so student is awarded \$8000, \$2000 for each term. At time of disbursement, enrollment is as follows:

Summer Full Time award = \$2000 - Disburseable

Fall < ½ time award = \$500 - Disburseable

Spring Full Time award = \$2000 (this term would partially use the first award, and partially use the second award.) - Disburseable

Summer Full Time award = \$2000 - Disburseable

Total award paid = \$6500. All terms are disburseable, The Fall term which is less than ½ time is eligible for disbursement, since it is part of the first award.

## Example 2

Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000. Once again, \$8000 is awarded. At time of disbursement, enrollment is as follows:

Summer Full Time award = \$2000 - Disburseable

Fall Full Time award = \$2000 - Disburseable

Spring  $< \frac{1}{2}$  time = \$500- Reject, since it's part of the 'second' award and 'second' Pell awards can only be disbursed if  $\frac{1}{2}$  time or greater.

Summer Full Time award = \$2000 - Disburseable

## Example 3

Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000. At the time of disbursement, enrollment is as follows:

Summer  $< \frac{1}{2}$  time award = \$500 - disburseable

Fall Full Time award = \$2,000 - disburseable

Spring Full Time award = \$2,000 (\$1,500 first award. \$500 second award) - disburseable

Summer  $\frac{1}{2}$  time = \$1,000 - disburseable

If above student was  $< \frac{1}{2}$  time in second summer then would get \$0 (reject since part of second award)

## Example 4

Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000. At the time of disbursement, enrollment is as follows:

Summer  $< \frac{1}{2}$  time award = \$500 - disburseable

Fall  $< \frac{1}{2}$  time award = \$500 - disburseable

Spring  $< \frac{1}{2}$  time award = \$500 - disburseable

Summer  $< \frac{1}{2}$  time award = \$500 - disburseable

Would never reach second award in this example.

## Example 5

Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000. At the time of disbursement, enrollment is as follows:

Summer ½ time award = \$1,000 - disburseable

Fall Full Time award = \$2,000 - disburseable

Spring Full Time award = \$2,000 (\$1,000 from first year and \$1,000 from second year) - disburseable

Summer ½ time award = \$1,000 - disburseable

## Example 6 – Transfer Student

Student transfers into school in Spring semester. RNASLxx record indicates that student received 45% of \$4,000 = \$1,800 Pell award.

Spring Full Time award = \$2,000 - disburseable

Summer Full Time award = \$2000 - \$200 (remaining first award amount) and \$1,800 second award amount - disburseable

## Example 7 – Transfer Student

Student transfers into school in Fall semester after receiving Pell during summer at prior school which was part of current academic year at new school. RNASLxx record indicates that student received 25% of \$4,000 Pell award = \$1,000

Fall Full Time award = \$2,000 - disburseable

Spring Full Time award = \$2,000 (\$1,000 remaining first award amount) and \$1,000 second award amount - disburseable

Summer < ½ time = \$0 - Reject since student into second award amount

### **Note**

If the student was ½ time then would get \$1,000, if ¾ time would get \$1,500, if FT would get \$2,000. ■

# Changed Forms

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

The screenshot shows a web application window titled "2009-2010 Grant Origination/Acknowledgement REAOR10 8.4.2 (s10b80v)". The window is divided into two main sections: "Origination" and "Acknowledgement".

**Origination Section:**

- Internal Sequence Number: [Text Field]
- SAR ID: [Text Field]
- Campus Pell ID: [Text Field]
- Current SSN: [Text Field]
- Birth Date: [Date Picker]
- Attendance Cost: [Text Field]
- Verification Status: [Dropdown Menu (None)]
- Date Enrolled: [Date Picker]
- Incarcerated Student: [Dropdown Menu (None)]
- Amount Due Student: [Text Field]
- Additional Eligibility Indicator:
- Origination Lock Indicator:
- Action Code:
- Date Sent: [Text Field]
- Document ID: [Text Field]
- Edit Messages: [Icon]

**Acknowledgement Section:**

- Scheduled Pell Grant: [Text Field]
- YTD Amount Paid: [Text Field]
- Percentage Eligibility Used: [Text Field]
- Negative Pending Amount: [Text Field]
- Shared SAR ID: [Text Field]
- Concurrent Enrollment:
- Verification Without Documentation Status:
- Potential Overpayment:

The **Additional Eligibility Indicator** (REBPAYV\_ADDL\_ELIG\_IND) field and its corresponding **Acknowledgement Additional Eligibility Indicator** (REBPAYV\_ACPT\_ADDL\_ELIG\_IND) field were added to the REAOR10 Form. The **Additional Eligibility Indicator** field indicates that the student is receiving a second Pell award for the aid year. (The value for this field is derived from the RORSTAT\_ADDL\_PELL\_ELIG\_IND when the origination record is created.) The **Acknowledgement Additional Eligibility Indicator** field indicates that the student's second Pell award for the aid year has been received by Pell.

### Note

The RORSTAT\_ADDL\_PELL\_ELIG\_IND is updated, if applicable (a change is made to the award), when the Pell calculation is run. This sets the **Pell Origination** indicator to Y (if applicable). When a duplicate record is created on REAOR10, the REKOR10 package picks up the student to create a new sequence of the Pell origination based on the Pell origination indicator being Y. The process sets the REBPAYV AEI on the new sequence of the origination to the same value as the RORSTAT AEI. The new sequence of the origination can then be extracted and sent to COD.

You can update the **Additional Eligibility Indicator** field if you need to override the field due to POP situations that may arise if the student attends another institution.

There was an edit on the **Amount Due Student** field that checked the Pell maximum limit against RPRFEDR (this is a dynamic check and is based on the current year Pell maximum). This edit was modified to check the Pell maximum limit \* 2. If you try to enter an amount above the current Pell maximum \* 2, the error message for 09-10 now reads *\*ERROR\* Amount due must be in range 0-10700.*

Field	Description
(Origination) Additional Eligibility Indicator	(REBPAYV_ADDL_ELIG_IND) Additional Eligibility Indicator (AEI) A check in this field indicates that the student is receiving a second Pell award for the aid year. You can update this field.
(Acknowledgement) Additional Eligibility Indicator	(REBPAYV_ACPT_ADDL_ELIG_IND) Accepted Eligibility Indicator (AEI) A check in this field indicates that the student's second Pell award for the aid year has been received by COD. You cannot update this field.
Amount Due Student	The amount of the Pell award for the student's entire school year. The amount can be up to 200% of a scheduled Federal Pell Grant award within an academic year

## 2009 – 2010 Student Loan Data (RNASL10)

The current edit on RCRLDS7\_PELL\_PERCENT\_SCHED was updated so that you can enter up to 200 percent.

The error message if data is entered outside of the 0 to 200 range was updated to indicate the following: *Must be in range .0000 to 200.0000*

## Applicant Pell Grant Form (ROAPELL)

The **Additional Eligibility Indicator** (RORSTAT\_ADDL\_PELL\_ELIG\_IND) was added to the ROAPELL Form. The value for this field is obtained once the student is awarded an amount greater than the 100% of the scheduled Pell Grant for the aid year. When the RPEPELL process is run and calculates a new Pell award amount, this field is checked if the new award exceeds 100% of the Full Time Full Year award.

The screenshot shows a web application window titled "Applicant Pell Grant: ROAPELL 8.4.2 (s10b80v)". The form is divided into several sections:

- Confidential**: A label at the top left.
- Aid Year**: A dropdown menu with "0910" selected.
- ID**: A dropdown menu.
- Applicant Pell Grant Status**: A section containing:
  - Primary Pell EFC: [text box]
  - Primary SAR EFC: [text box]
  - Pell Budget: [text box]
  - Pell Cost of Attendance: [text box]
  - Less Than Half Time COA: [text box]
  - Scheduled Award: [text box]
  - Expected Disbursement: [text box]
  - Amount Paid to Date: [text box]
  - Secondary Pell EFC: [text box]
  - Secondary SAR EFC: [text box]
  - SAR Certified Date: [calendar icon]
  - SAR ID: [dropdown menu]
  - Transaction Number: [dropdown menu]
  - Additional Eligibility Indicator
  - Auto Zero EFC
- Verification**: A section containing:
  - Verification Message: [checkbox]
  - Status: [dropdown menu with "(None)" selected]
  - Complete: [checkbox]
  - Lock Pell Disbursement
  - Lock ACG Disbursement
  - Lock SMART Disbursement

Field	Description
Additional Eligibility Indicator	(RORSTAT_ADDL_PELL_ELIG_IND) Additional Eligibility Indicator (AEI) A check in this field indicates that the student is receiving a second Pell award for the aid year. When the RPEPELL process is run and calculates a new Pell award amount, this field is checked if the new award exceeds 100% of the Full Time Full Year award. You cannot update this field.

## Award Maintenance Form (RPAAWRD)

A new Pell and Loan tab was added to this form due to space considerations. The new **Additional Eligibility Indicator** field was added to this tab.

The following fields were moved from the Packaging tab to the Pell and Loan tab.

- **Additional Stafford**
- **Borrower Based**
- **Preparatory or Teacher Certification**
- **Subsidized Loan Exclusion Amount**
- **Pell Origination**
- **Post Bachelor's Degree Pell Override**
- **HPPA**

### Field

### Description

Additional Eligibility Indicator

(RORSTAT\_ADDL\_PELL\_ELIG\_IND) Additional Eligibility Indicator (AEI) A check in this field indicates that the student is receiving a second Pell award for the aid year. A check displays in this field once the student is awarded more than 100% of the scheduled Pell Grant for the aid year. You cannot update this field.

## Package Maintenance Form (RPAAPMT)

A new Pell and Loan tab was added to this form due to space considerations. The new **Additional Eligibility Indicator** field was added to this tab.

The following fields were moved from the Packaging tab to the Pell and Loan tab.

- **Additional Stafford**
- **Borrower Based**
- **Preparatory or Teacher Certification**
- **Subsidized Loan Exclusion Amount**
- **Pell Origination**
- **Post Bachelor's Degree Pell Override**
- **HPPA**

### Field

### Description

Additional Eligibility Indicator

(RORSTAT\_ADDL\_PELL\_ELIG\_IND) Additional Eligibility Indicator (AEI) A check in this field indicates that the student is receiving a second Pell award for the aid year. A check displays in this field once the student is awarded more than 100% of the scheduled Pell Grant for the aid year. You cannot update this field.

## Aid Period Validation Form (RTVAPRD)

The **Pell Full Year Percent** (RTVAPRD\_PELL\_FULL\_YR\_PCT) field was updated to allow you to enter a value up to 200.

Field	Description
Pell Full Year Percent	<p>(RTVAPRD_PELL_FULL_YR_PCT) Percent of full aid that this period represents for Pell award calculations. The maximum value is 200%. Use this field to calculate the maximum percentage of the Full Aid Year/Full Time Pell award that a student is eligible to receive for the aid period based on the EFC.</p> <p>The <b>Pell Full Year Percent</b> value is used by the Pell Award Calculation (RPEPELL) and the Disbursement (RPEDISB) processes to determine the Pell award and disbursement amounts respectively, when combined with the student EFC and the award percentage on either the Default Award &amp; Disbursement Schedule (RFRDEFA) or Fund Award &amp; Disbursement Schedule Rules (RFRASCH) forms.</p>

# Changed Reports and Processes

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## 2009 – 2010 Grant Orig Creation Process (REROR10)

A change is made to the award when the Pell calculation is run. This sets the Pell Origination indicator to *Y* (if applicable). When the REROR10 process is run, the REKOR10 package picks up the student to create a new sequence of the Pell origination based on the Pell origination indicator being *Y*. The REROR10 process has been updated to set the REBPAYV AEI on the new sequence of the origination to the same value as the RORSTAT AEI. The new sequence of the origination can then be extracted and sent to COD.

 **Note**

The **Additional Eligibility Indicator** (RORSTAT\_ADD\_PELL\_ELIG\_IND) field is updated, if applicable

## Disbursement Process (RPEDISB)

In the past, when disbursing Pell, any term enrollment could be less than half time and still be paid. However, with Year Round Pell, at the point in time when you are disbursing a second Pell award, enrollment must be at least ½ time. RPEDISB has been updated to verify that a student is enrolled at least 1/2 time prior to disbursing Pell funds from a second Pell award within an aid year.

## Pell Calculation Process (RPEPELL)

The RPEPELL process was modified to allow packaging beyond the 100% scheduled award as follows:

- If the student has reached 100% of the scheduled Pell award for the aid year both Banner and NSLDS (assuming the **Use NSLDS for Pell** option is checked on RPROPTS) data are checked, the student's enrollment status is checked to determine if the student is at least ½ time and the Pell Award Percent is checked to see if it supports more than 100%. If the student is not enrolled (or is not expected to be enrolled) at least ½ time for the period and the Pell Award Percent is not greater than 100%, the process does not award beyond the 100% scheduled award for the aid year and places a 0 award in the applicable term.
- If the student is enrolled at least half-time, the process awards the second scheduled Pell award based on the enrollment status.
- Once the RPEPELL process has awarded the student beyond 100% of the scheduled award, the **Additional Eligibility Indicator** (RORSTAT\_ADD\_PELL\_ELIG\_IND) field is set to *Y*.

- When a Pell origination record is created by REROR10, or manually on REAOR10, the **Additional Eligibility Indicator** (RORSTAT\_ADD\_PELL\_ELIG\_IND) is used to set the value of the **Additional Eligibility Indicator** (REBPAYV\_ADDL\_ELIG\_IND). This will alert COD upon the extraction of the record, that this student is eligible for a second scheduled award.



# 3 2009-2010 COD ACG, SMART and TEACH Calculation - Functional



## Overview

This enhancement addresses the changes necessary to accommodate the calculation of load-based ACG, SMART and TEACH awards for the 2009-2010 award year. The processing is modeled in a similar way to the existing Pell Grant calculations.

In order to accomplish this, much of the existing rules data set up to support Pell processing is used for ACG, SMART and TEACH awards. Pell Packaging Options on the Packaging Options Form (RPROPTS) which were previously used exclusively for Pell award and disbursement calculations are now also used to calculate award and disbursement amounts for ACG, SMART, and TEACH awards.

Pell Award Percent values found on the Fund Award and Disbursement Schedule Rules Form (RFRASCH) and the Default Award and Disbursement Schedule Rules Form (RFRDEFA) will now also be used in the calculation of ACG, SMART and TEACH awards.

The following updates are included in this enhancement:

- Table changes necessary to support the new calculations of ACG, SMART, and TEACH.
- New and modified database packages required to calculate term load values and term award amounts for ACG, SMART and TEACH based on term loads.
- Changes to forms and processes to use the new calculations for awarding of ACG, SMART and TEACH grants.

 **Note**

Prior to the 2009-2010 aid year, ACG, SMART, and TEACH awards could not be calculated based on term load values. They were packaged by RPEPKG and could be added and updated on the award forms just like any other fund.

Starting with the 2009-2010 aid year, the term awards can be calculated and disbursed based on a variety of award and disbursement load options from the RPROPTS form, similar to the way in which Pell awards have been calculated. In order to accomplish this, a new database package (RPK\_GRANT\_CALC) has been created, and will be used by the Packaging Process (RPEPKG) in order to calculate ACG, SMART and TEACH awards. In addition, a new Grant Calculation Process (RPRGRNT) has been created and may be used to calculate these awards outside of the packaging process.

SunGard Higher Education strongly recommends that you use the RPEPKG and RPRGRNT processes to calculate ACG, SMART and TEACH awards starting with the 2009-2010 aid year. Creating, updating, or rescheduling of these awards from the Award Maintenance windows of Award Maintenance (RPAAWRD), Package Maintenance (RPAAPMT), and Mass Offer (RPAMOFF) forms, or the creation or updating of these awards from the Batch Posting (RORBPST) process will not be prevented; however, these forms and processes will bypass the new term load calculations and use the standard Default Award Schedule (RFRDEFA) rules and Fund Award Schedule (RFRASCH) rules without regard to term load values, and may give unexpected results. ■

## Calculations

If the award option is not set on on the Grant Options window of the Packaging Options Form (RPROPTS), the calculation uses the values from the Packaging Options window of RPROPTS. If the disbursement options are not set on the Grant Options window of RPROPTS, the calculation uses the disbursement option from the Enrollment Cutoff Date Rules window of RPROPTS. If disbursement options are not set on the Enrollment Cutoff Date Rules window, the calculation uses the default Disbursement Options from the Packaging Options window of RPROPTS.

The following is an overview of how the calculations are performed.

- The new RPK\_GRANT\_CALC package calculates the correct ACG, SMART or TEACH grant award for each term based on the student's load (as defined on RPROPTS) and the Grant Percentages as defined on RFRDEFA/RFRASCH. This new package is used by Auto Packaging (RPEPKG), the new RPRGRNT Process, and Disbursement (RPEDISB).

- You can still enter ACG, SMART and TEACH awards manually on the award forms. This allows for the use of the award overrides, if needed.

When you enter awards manually, the new RPK\_GRANT\_CALC package is not used. Instead, award validation that uses the normal award percentages on RFRDEFA/RFRASCH is used. This functionality is the same as before this enhancement.

- Batch Posting of ACG, SMART and TEACH awards is allowed.

However, just as with manual awards, Batch Posting does not use the RPK\_GRANT\_CALC package and instead awards using the normal award percentages on RFRDEFA/RFRASCH. This functionality is the same as before this enhancement.

- Since the RPK\_GRANT\_CALC is used by the Disbursement Process (RPEDISB), these awards are recalculated at the time of disbursement - regardless of the method used to award the funds. This ensures that a student is not overpaid for any term of enrollment.
- You can use the Award and Term Locks on the award forms in the same way as you can for Pell. This allows you to make changes to awards for a term and lock the awards so that the awards are not recalculated at the time of disbursement.

## Examples

Below are some examples of how ACG, SMART and TEACH are calculated based on the changes in this enhancement.

### Student packaged full-time, enrolled $\frac{3}{4}$ time

Based on the options set on the Grant Options window of RPROPTS, the student is awarded full-time ACG1 for both Fall and Spring terms.

At the time of disbursement for the Fall term, the student is only enrolled  $\frac{3}{4}$  time. RPEDISB calculates the eligible disbursement amount based on the disbursement options on the Grant Options window on RPROPTS and only disburses a  $\frac{3}{4}$  amount for the term.

### Student packaged full-time, enrolled $< \frac{1}{2}$ time

Based on the options set on the Grant Options window of RPROPTS, the student is awarded full-time ACG1 for both Fall and Spring terms.

At the time of disbursement for the Fall term, the student is only enrolled  $< \frac{1}{2}$  time. RPEDISB calculates the eligible disbursement amount based on the disbursement options on the Grant Options window on RPROPTS which is 0. No disbursement is made for the term.

## Student packaged ¾ time, enrolled full-time

Based on the options set on the Grant Options window of RPROPTS, the student is awarded ¾ time ACG1 for both Fall and Spring terms.

At the time of disbursement for Fall term, the student is actually enrolled full-time. RPEDISB calculates the eligible disbursement amount based on the disbursement options on the Grant Options window on RPROPTS and disburses a full-time amount for the term.

### Note

The award is not increased, only the disbursement is increased. Award increases must be made by either running RPRGRNT or manually updating the award. ■

## Student receiving more than one TEACH grant scheduled award within the aid year

Student is packaged with TCHU1 full-time for Fall and Spring.

Institution knows that the student will also be enrolled full-time for the summer term.

On the award form, you can manually add TCHU2 and use the Federal Limits Override to award the proper amount for the second scheduled TEACH award for the aid year. This override must be updated on both the TCHU1 and TCHU2 fund codes.

### Note

Adjustments must be made on the term window to ensure the proper amount is associated with the summer term. ■

## Student with prior enrollment and payments

Student received \$200 in ACG1 at a prior institution.

The student is anticipating full-time enrollment at your institution.

The student is auto-packaged.

Based on the calculations in the RPK\_GRANT\_CALC package, the student is awarded \$375 for the Fall term, and \$175 for the Spring term.

## Student that received all Pell payments for the aid year at another institution

NSLDS shows all Pell eligibility has been paid for the aid year at another institution.

ACG1 can be awarded manually on the award form using the No Pell award override.

### Note

Adjustments must be made on the term window to ensure the proper amount is associated with the term(s). ■

## ACG1 is Batch Posted to a student using the F batch posting type

### **Warning**

This method is not recommended for ACG, SMART, and TEACH grants. ■

Student passes award validation and ACG1 is added to the student's award.

### **Note**

Adjustments must be made on the term window to ensure the proper amount is associated with the term(s). ■

When Disbursement is run, the RPK\_GRANT\_CALC package calculates whether or not the student is eligible for the scheduled disbursement and only pays the eligible disbursement amount.

## ACG1 is Batch Posted to a student using FN batch posting type

### **Warning**

This method is not recommended for ACG, SMART, and TEACH grants. ■

Award validation is not used, so the ACG1 is added to the student's award.

### **Note**

Adjustments must be made on the term window to ensure the proper amount is associated with the term(s). ■

### **Note**

The award must be reviewed to ensure that the student is actually eligible for the award. ■

When Disbursement is run, the RPK\_GRANT\_CALC package calculates whether or not the student is eligible for the scheduled disbursement and only pays the eligible disbursement amount.

## Student in a 150% aid period

Student is awarded 50% of ACG1 in the Fall term, 50% of ACG1 in the Spring Term, and 0% in the Summer term as all of ACG1 has been awarded.

## Student in a 50% aid period

Student is only awarded 50% of ACG1 as that is the maximum for the aid period.

## Awards are locked on the term window

Locks are treated by Disbursement just as the locks are for Pell.

If the award lock is *Y*, the fund pays for the term being disbursed, regardless of any recalculation by the RPK\_GRANT\_CALC package.

If the award lock is *E*, the fund is recalculated for the term being disbursed, but only for the lower enrollment.

If the term lock is *Y*, the fund pays for the locked term, regardless of any recalculation by the RPK\_GRANT\_CALC package. Any additional terms will not be affected by the lock.

If the term lock is *E*, the fund is recalculated for the locked term, but only for the lower enrollment. Any additional terms are not affected by the lock.

## Additional Examples

For the remaining examples, assume the student is in a Fall, Spring, Summer aid period and there are no other factors such as prior school awards affecting the Banner award. Also assume the following values on RPROPTS, RFRDEFA/RFRASCH, RNANA10, and ROAENRL:

### RPROPTS

Grant Award Enrollment Option is I (Estimated ISIR / FAFSA enrl) for all terms

Grant Disbursement Enrollment Option is A (Adjusted hours) for all terms

### RFRDEFA/RFRASCH

Term	Award Percent	Grant Award Percent
Fall	50	50
Spring	50	50
Summer	0	50

### RNANA10

Student's Expected Enrollment Status is 1 (Full Time)

Student's Expected Term Enrollment Status

- Fall 2 (3/4 time)
- Spring 2 (3/4 time)
- Summer 2 (3/4 time)

## ROAENRL

### Financial Aid Adjusted Hours

- Fall 6 (1/2 time)
- Spring 6 (1/2 time)
- Summer 12 (Full Time)

## Manually enter a \$4000 SMART award on RPAAWRD (Not Recommended)

The RPAAWRD form will not use the new `rpk_grant_calc` database package, which calculates grants based on term load, and will not use the RPROPTS Grant Award Enrollment Percent options.

Based on RFRDEFA/RFRASCH Award Percent values, the student receives the full \$4000, with term amounts as follows:

Fall	\$2000	(FT Expected Enrollment, 50% Award Percent)
Spring	\$2000	(FT Expected Enrollment, 50% Award Percent)
Summer	\$0	(FT Expected Enrollment, 0% Award Percent)

## Batch Post a \$4000 SMART award using RORBPST (Not Recommended)

The RPAAWRD form will not use the new `rpk_grant_calc` database package, which calculates grants based on term load, and will not use the RPROPTS Grant Award Enrollment Percent options.

Based on RFRDEFA/RFRASCH Award Percent values, the student receives the full \$4000, with term amounts as follows:

Fall	\$2000	(FT Expected Enrollment, 50% Award Percent)
Spring	\$2000	(FT Expected Enrollment, 50% Award Percent)
Summer	\$0	(FT Expected Enrollment, 0% Award Percent)

## Use the RPEPCKG or RPRGRNT process to calculate the SMART award (Recommended)

The `rpk_grant_calc` package will calculate the SMART grant by term, based on RPROPTS Grant Award Enrollment Options, RFRDEFA/RFRASCH Grant Award Percent values, and the student enrollment load for each term,

The award will be calculated as \$4000, with term amounts as follows:

Fall	\$1500	(3/4 time ISIR enrollment, 50% Grant Award Percent)
Spring	\$1500	(3/4 time ISIR enrollment, 50% Grant Award Percent)
Summer	\$1000	(3/4 time, 50% Grant Award Percent, remaining amount)

## Use the RPAAWRD Reschedule Indicator to reschedule the terms when aid period did not change (Not Recommended)

Assume the existing award is \$4000, and had been calculated by RPEPCKG as:

Fall	\$1500
Spring	\$1500
Summer	\$1000

The form will not use the new `rpk_grant_calc` database package which calculates grants based on term load and will not use the RPROPTS Grant Award Enrollment options.

The award is rescheduled based on `RFRDEFA_AWARD_PCT` or `RFRASCH_AWARD_PCT`.

Fall	\$2000
Spring	\$2000
Summer	\$0

## Use the RPAAWRD Reschedule Indicator to reschedule the terms when aid period changed (Not Recommended).

Assume the existing award is \$3000 FA/SPR and had been calculated by RPEPCKG using the new `rpk_grant_calc` package and ISIR Term expected enrollment as:

Fall	\$1500
Spring	\$1500

The student changed from FA/SPR to FA/SPR/SUMMER. The student ISIR term enrollment for summer is 2 (¾ time). RPAAWRD reschedules the award based on RFRDEFA\_AWARD\_PCT or RFRASCH\_AWARD\_PCT.

Fall	\$2000
Spring	\$2000
Summer	\$0

Use the RPRGRNT process to recalculate the award when aid period changed (Recommended).

Assume the existing award is \$3000 FA/SPR and had been calculated by RPEPCKG using the new rpk\_grant\_calc package and ISIR Term expected enrollment as:

Fall	\$1500
Spring	\$1500

The student changed from FA/SPR to FA/SPR/SUMMER. The student ISIR term enrollment for summer is 2 (¾ time). RPRGRNT reschedules the award using the rpk\_grant\_calc package and calculates the SMART grant by term, based on RPROPTS Grant Award Enrollment Options, RFRDEFA/RFRASCH Grant Award Percent values, and the student enrollment load for each term,

Fall	\$1500
Spring	\$1500
Summer	\$1000

Use the RPRGRNT process to recalculate the award when aid period changed (Recommended).

Assume existing award is \$3000 FA/SPR, and had been calculated by RPEPCKG using the new rpk\_grant\_calc package and ISIR Term expected enrollment as:

Fall	\$1500
Spring	\$1500

The student changed from FA/SPR to FA/SPR/SUMMER. The student ISIR term enrollment for summer is 2 (¾ time). Assume by the time this occurred, the school had chosen to change the RPROPTS Grant Award Enrollment Percent values to A (Adjusted hours). RPRGRNT reschedules the award using the rpk\_grant\_calc package and calculates the SMART grant by term, based on RPROPTS Grant Award Enrollment Options, RFRDEFA/RFRASCH Grant Award Percent values, and the student enrollment load for each term,

Fall	\$1000 (based on ½ time Adjusted hours)
Spring	\$1000 (based on ½ time Adjusted hours)
Summer	\$2000 (based on Full Time Adjusted hours)

### Disbursement

Assuming the RPROPTS Grant Award Disbursement Percent values were also set to A (Adjusted hours) for all terms, the student would be paid the same amounts as were awarded:

Fall	\$1000 (based on ½ time Adjusted hours)
Spring	\$1000 (based on ½ time Adjusted hours)
Summer	\$2000 (based on Full Time Adjusted hours)

Use the RPRGRNT process to recalculate the award when the aid period changed (Recommended).

Assume the existing award is \$3000 FA/SPR, and had been calculated by RPEPCKG using the new rpk\_grant\_calc package and ISIR Term expected enrollment as:

Fall	\$1500
Spring	\$1500

The student changed from FA/SPR to FA/SPR/SUMMER. The student ISIR term enrollment for summer is 2 (¾ time). Assume at the time this occurred, the school had not changed the RPROPTS Grant Award Enrollment Percent values. They are still set to I (ISIR Expected Term Enrollment). RPRGRNT reschedules the award using the rpk\_grant\_calc package and calculates the SMART grant by term, based on RPROPTS Grant Award Enrollment Options, RFRDEFA/RFRASCH Grant Award Percent values, and the student enrollment load for each term:

Fall	\$1500 (based on ¾ ISIR Term Expected enrollment)
Spring	\$1500 (based on ¾ ISIR Term Expected enrollment)
Summer	\$1000 (based on ¾ ISIR Term enrollment and remaining amount)

## Disbursement

Assuming the RPROPTS Grant Award Disbursement Percent values are set to *A* (Adjusted hours) for all terms, the student is paid based on the setting on RPROPTS for **Pay Pell if Disbursement Amount Differs from Award Amount**.

If the **Pay Pell if Disbursement Amount Differs from Award Amount** is *A* (Always Disburse):

Fall	\$1000 (based on ½ time Adjusted hours)
Spring	\$1000 (based on ½ time Adjusted hours)
Summer	\$2000 (based on Full Time Adjusted hours)

If the **Pay Pell if Disbursement Amount Differs from Award Amount** is *L* (Lesser Amount):

Fall	\$1000 (Lesser of 1500 award and 1000 calculated disbursement)
Spring	\$1000 (Lesser of 1500 award and 1000 calculated disbursement)
Summer	\$1000 (Lesser of 1000 award and 2000 calculated disbursement)

If the **Pay Pell if Disbursement Amount Differs from Award Amount** is *N* (Never Disburse):

Fall	\$0 (1500 award amount differs from 1000 calculated disbursement)
Spring	\$0 (1500 award amount differs from 1000 calculated disbursement)
Summer	\$0 (1000 award amount differs from 2000 calculated disbursement)

# Changed Forms

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## Fund Award and Disbursement Schedule Rules (RFRASCH)

The **Pell Award Percent** field has been renamed. This field is now called the **Grant Award Percent** field.

Field	Description
Grant Award Percent	(RFRASCH_PELL_AWARD_PCT) Percentage of the full aid year, full time grant that you want to award for the term. The valid values are 0 - 100.

## Default Award and Disbursement Schedule Rules (RFRDEFA)

The **Pell Award Percent** field has been renamed. This field is now called the **Grant Award Percent** field.

Field	Description
Grant Award Percent	(RFRASCH_PELL_AWARD_PCT) Percentage of the full aid year, full time grant that you want to award for the term. The valid values are 0 - 100.

## Fund Management (RFRMGMT)

### Disbursement Tab

Prior to this release, the **If Disbursement Load Code greater than Package Load Code** field (RFRASPC\_PRORATION\_IND), **Payment Percent for Three Quarter Load** (RFRASPC\_3QUARTER\_LOAD\_PCT), **Payment Percent for Half Load** (RFRASPC\_HALF\_LOAD\_PCT), **Payment Percent for less than Half Load** (RFRASPC\_LESS\_HALF\_LOAD\_PCT) and **Change Load During Term** (RFRASPC\_CHANGE\_LOAD\_IND) fields were all disabled whenever the Federal Fund ID of the fund code was *PELL*. The form was modified to also disable these items if the Federal Fund ID is *ACG*, *SMRT* or *TCH* and the aid year is greater than 2008-2009.

## Copy Tab

The processing was modified in the Copy window so that a value of *D* (Disburse 100%) is used for the **If Disbursement Load Code greater than Package Load Code** field (RFRASPC\_PRORATION\_IND) whenever the Federal Fund ID (RFRBASE\_FED\_FUND\_ID) of the fund code being created is *ACG*, *PELL*, *SMRT*, or *TCH*.

## Immediate Process (ROAIMMP)

The new **Immediate ACG, SMART, TEACH Calculation** and **Fund** fields display on the ROAIMMP Form if the aid year is greater than 2008-2009.

Field	Description
Immediate ACG, SMART, TEACH Calculation	(PERFORM_GRANT_CALC_IND (non base-table)) Check this field for an immediate ACG, SMART, TEACH grant calculation. This field initiates the Grant Calculation Process (RPRGRNT) which calculates ACG, SMART and TEACH grants for students. A fund code is required for the corresponding <b>Fund</b> field if this field is checked.
Fund	(GRANT_CALC_FUND_CODE (non base-table)) You must enter an ACG, SMART, or TEACH fund code in this field if the <b>Immediate ACG, SMART, TEACH Calculation</b> field is checked. Use the List function to select an applicable fund code.

## Fund Management (ROAMGMT)

### Disbursement Options

Prior to this release, the **If Disbursement Load Code greater than Package Load Code** field (RFRASPC\_PRORATION\_IND), **Payment Percent for Three Quarter Load** (RFRASPC\_3QUARTER\_LOAD\_PCT), **Payment Percent for Half Load** (RFRASPC\_HALF\_LOAD\_PCT), **Payment Percent for less than Half Load** (RFRASPC\_LESS\_HALF\_LOAD\_PCT) and **Change Load During Term** (RFRASPC\_CHANGE\_LOAD\_IND) fields were all disabled whenever the Federal Fund ID of the fund code was *PELL*. The form was modified to also disable these items if the Federal Fund ID is *ACG*, *SMRT* or *TCH* and the aid year is greater than 2008-2009.

## Financial Aid Referenced Object Library (ROQOLIB)

The *rtvaprdr* record group (*rtvaprdr\_rg*) and *LOV* (*rtvaprdr\_lov*) were updated to include new column *RTVAPRD\_GRANT\_FULL\_YR\_PCT*, following column *RTVAPRD\_PELL\_FULL\_YR\_PCT*.

## Package Maintenance (RPAAPMT)

### Award Maintenance Tab

#### **Note**

Starting with the 2009-2010 aid year, *ACG*, *SMART* and *TEACH* awards will be calculated based on term enrollment loads similar to the way Pell awards are calculated. Unlike Pell, no changes will be made to prevent you from creating or updating *ACG*, *SMART* or *TEACH* awards from the Award Maintenance tab of the form. Processing of these federal fund IDs from this form will not change. Refer to the Overview, Calculations, and Examples sections for more information. ■

### Fund Awards by Term Tab

You may continue to update *ACG*, *SMART*, and *TEACH* awards from the term window of *RPAAWRD*, just as Pell awards can be updated in this window. The validation of these amounts did not change.

### Disbursement Schedule Tab

The *Calculated Pell* section at the bottom of the Disbursement Schedule window was renamed to *Calculated Grant*. Prior to this enhancement, the values in this section were updated by the Disbursement process only for Pell awards. The amounts in this section are now also calculated for *ACG*, *SMART* and *TEACH* awards. You can review the amounts by navigating with the Next Item, Previous Item, and mouse.

The **Disbursement Amount** (RPRADSB\_PELL\_CALC\_DISB\_AMT) field autohint description was modified to: *Disbursement amount calculated by the disbursement process for ACG, Pell, SMART and TEACH grants.*

## Award Maintenance (RPAAWRD)

### Award Maintenance Tab

#### Note

Starting with the 2009-2010 aid year, ACG, SMART and TEACH awards will be calculated based on term enrollment loads similar to the way Pell awards are calculated. Unlike Pell, no changes will be made to prevent you from creating or updating ACG, SMART or TEACH awards from the Award Maintenance tab of the form. Processing of these federal fund IDs from this form will not change. Refer to the Overview, Calculations, and Examples sections for more information. ■

### Fund Awards by Term Tab

You may continue to update ACG, SMART, and TEACH awards from the term window of RPAAWRD, just as Pell awards can be updated in this window. The validation of these amounts did not change.

### Disbursement Schedule Tab

The *Calculated Pell* section at the bottom of the Disbursement Schedule window was renamed to *Calculated Grant*. Prior to this enhancement, the values in this section were updated by the Disbursement process only for Pell awards. The amounts in this section are now also calculated for ACG, SMART and TEACH awards. You can review the amounts by navigating with the Next Item, Previous Item, and mouse.

The **Disbursement Amount** (RPRADSB\_PELL\_CALC\_DISB\_AMT) field autohint description was modified to: *Disbursement amount calculated by the disbursement process for ACG, Pell, SMART and TEACH grants.*

## Award Acceptance Mass Entry (RPAMACC)

Prior to this release, this form allowed the acceptance of ACG, SMART, and TEACH awards - including the entry of a reduced amount. Since the award amount is calculated based on term enrollment loads starting with 2009-2010, it is no longer possible to enter a partial amount for ACG, SMART or TEACH grants. Beginning with the 2009-2010 aid year, if the Federal Fund ID of the fund code is *ACG*, *SMRT* or *TCH*, you can no longer update the **Accepted Amount** (RPRAWRD\_ACCEPT\_AMT) on this form.

## Award Offer Mass Entry (RPAMOFF)

### Note

Starting with the 2009-2010 aid year, ACG, SMART and TEACH awards will be calculated based on term enrollment loads similar to the way Pell awards are calculated. Unlike Pell, no changes will be made to prevent you from creating or updating ACG, SMART or TEACH awards from this form. Processing of these federal fund IDs from this form will not change. Refer to the Overview, Calculations, and Examples sections for more information. ■

## Packaging Options (RPROPTS)

Some of the Pell enrollment option items are now also used as ACG, SMART, and TEACH Grant enrollment options. Field names and autohints were changed accordingly.

The title of the *Pell Options* window has been renamed to *Grant Options*.

The screenshot shows the 'Grant Options RPROPTS 8.4.2 (s10b80v)' window. At the top, the 'Aid Year' is set to '0910' (2009-2010 Financial Aid year). Below this, there are several settings:

- Pay Grant if Disbursement Amount Differs from Award Amount:** A dropdown menu set to 'A= Always Disburse'.
- Default Less than Half Time Pell COA:** A text input field.
- Pay Pell if System EFC and SAR EFC are in Same Pell Payment Cell**
- Delete Pell Award if Zero**
- Use NSLDS for Pell**

The main section is titled 'Enrollment Options' and contains a table with four columns:

Term Code	Grant Award Enrollment Option	Grant Disbursement Enrollment Option	Grant ISIR Term
200935	I=Est. ISIR/FAFSA Enrl	A=Adjusted Hours	S2=Summer Term (pre F...
201010	I=Est. ISIR/FAFSA Enrl	A=Adjusted Hours	F=Fall Semester/Qtr.
201015	I=Est. ISIR/FAFSA Enrl	A=Adjusted Hours	W=Winter Quarter
201020	I=Est. ISIR/FAFSA Enrl	A=Adjusted Hours	S=Spring Semester/Qtr.
201030	I=Est. ISIR/FAFSA Enrl	A=Adjusted Hours	S1=Summer Term (post ...

The **Pay Pell if Disbursement Amount Differs from Award Amount** field has been renamed to **Pay Grant if Disbursement Amount Differs from Award Amount**.

The **Pell Award Enrollment Option** field has been renamed to **Grant Award Enrollment Option**.

The **Pell Disbursement Enrollment Option** field has been renamed to **Grant Disbursement Enrollment Option**.

The **Pell ISIR Term** field has been renamed to **Grant ISIR Term**.

Field	Description
Pay Grant if Disbursement Amount Differs from Award Amount	<p>(RPBOPTS_PELL_DISB_IND) Indicates if disbursement amount, award amount or a zero amount should be used for Pell, ACG, SMART, or TEACH disbursement when award and disbursement amounts are not equal.</p> <p><i>N - Never disburse</i></p> <p><i>A - Always disburse the calculated disbursement amount</i></p> <p><i>L - Disburse the Lesser of the award amount and calculated disbursement amount</i></p>
Grant Award Enrollment Option	<p>(RPRDATE_PELL_AWRD_ENRL_OPT) The enrollment used when awarding Pell, ACG, SMART, and TEACH grants.</p> <p><i>A Adjusted Hours</i></p> <p><i>B Billing Hours</i></p> <p><i>E Expected Enrollment</i></p> <p><i>I Est. ISIR/FAFSA Enrl</i></p> <p><i>1 Full Time</i></p> <p><i>2 3/4 Time,</i></p> <p><i>3 1/2 Time</i></p> <p><i>4 Less Than 1/2 Time</i></p> <p><i>(None)</i></p>

Field	Description
Grant Disbursement Enrollment Option	(RPRDATE_PELL_DISB_ENRL_OPT) The enrollment used when disbursing Pell, ACG, SMART, and TEACH grants.  <i>A Adjusted Hours</i> <i>B Billing Hours</i> <i>E Expected Enrollment</i> <i>I Est. ISIR/FAFSA Enrl</i> <i>1 Full Time</i> <i>2 3/4 Time,</i> <i>3 1/2 Time</i> <i>4 Less Than 1/2 Time</i> (None)
Grant ISIR Term	(RPRDATE_PELL_ISIR_TERM_IND) The ISIR Term that corresponds to the term code.  <i>S2 Summer Term (pre Fall)</i> <i>F Fall Semester/Qtr.</i> <i>W Winter quarter</i> <i>S Spring Semester/Qtr.</i> <i>S1 Summer Term (post Spring)</i> (None)

## Aid Period Validation (RTVAPRD)

The new **Grant Full Year Percent** field was added to this form.

Field	Description
Grant Full Year Percent	(RTVAPRD_GRANT_FULL_YR_PCT) The maximum percentage of the full aid year, full time ACG, SMART or TEACH grant award that the student is eligible to receive for the aid period based on their EFC maximum value of 100%. Valid values are 0 - 100.

Code	Description	Budget Full Year Percent	Pell Full Year Percent	Grant Full Year Percent	EFC Percent	Activity Date

## Changed Web Pages

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### Financial Aid Web Processing Package (BWRKRHST)

See the Financial Aid Web Processing Package (BWRKRHST) reference in the Changed Packages/Procedures/Functions area of the technical section for details.

## New Reports and Processes

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### Grant Calculation Process (RPRGRNT)

The RPRGRNT Process calculates ACG, SMART and TEACH grants for students starting with the 2009-2010 aid year.

When this process is run in batch, the process calculates an aid year award for each fund code entered for each student in the population selection.

When run online for a single student from the Immediate Process Form (ROAIMMP), the Student ID parameter is used for the grant calculation. The Student ID parameter must be left blank when you run the process in batch mode.

Parameter Name	Required?	Description	Values
01 - Aid Year Code	Yes	Enter a valid and active aid year for 2009-2010 or beyond. This parameter is validated against the Financial Aid Institution Table (ROBINST).	Aid Year Inquiry Form (ROIAIDY)
02 - Fund Code	Yes	You can only enter ACG, SMART, or TEACH grant fund codes. (The Federal Fund ID must equal ACG, SMRT, or TCH for the fund code.) The system accepts a single fund code or a multiple number of fund codes for this report parameter.	Fund Base Data Form (RFRBASE)
03 Student ID	No	The student ID from the ROAIMMP Form is used for an immediate process calculation. This parameter must be left blank when you run the process in batch mode.	
Application Code	Yes	Application code of the population selection. If you enter a value for this parameter, you must also enter a value for the Selection ID, Creator ID, and User ID parameters.	
Selection ID	Yes	Selection ID of the population selection. If you enter a value for this parameter, you must also enter a value for the Application ID, User ID, and Creator ID parameters.	
Creator ID	Yes	The Banner ID of the person that created the population selection. If you enter a value for this parameter, you must also enter a value for the Selection ID, User ID, and Application ID parameters.	
User ID	Yes	The ID of the person using the subpopulation rule. If you enter a value for this parameter, you must also enter a value for the Selection ID, Application ID, and Creator ID parameters.	

# Changed Reports and Processes

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## FA New Year Roll Process (ROPROLL)

The processing of Fund Aid Year Specific Data RFRASPC rows was updated. If the Federal Fund ID (RFRBASE\_FED\_FUND\_ID) of the fund code is *ACG*, *PELL*, *SMRT* or *TCH*, the value of the **If Disbursement Load Code greater than Package Load Code** (RFRASPC\_PRORATION\_IND) field is not copied from the From Aid Year to the To Aid Year. Instead, a value of D (Disburse 100%) is entered into the new fund record.

## Batch Posting Process (RORBPST)

There were no changes to this process. Review the note below as it pertains to the RORBPST process. Refer to the Overview of this section for more information.

### Note

Prior to the 2009-2010 aid year, ACG, SMART, and TEACH awards could not be calculated based on term load values. They were packaged by RPEPCKG and could be added and updated on the award forms just like any other fund.

Starting with the 2009-2010 aid year, the term awards can be calculated and disbursed based on a variety of award and disbursement load options from the RPROPTS form, similar to the way in which Pell awards have been calculated. In order to accomplish this, a new database package (RPK\_GRANT\_CALC) has been created, and will be used by the Packaging Process (RPEPCKG) in order to calculate ACG, SMART and TEACH awards. In addition, a new Grant Calculation Process (RPRGRNT) has been created and may be used to calculate these awards outside of the packaging process.

SunGard Higher Education strongly recommends that you use the RPEPCKG and RPRGRNT processes to calculate ACG, SMART and TEACH awards starting with the 2009-2010 aid year. Creating, updating, or rescheduling of these awards from the Award Maintenance windows of Award Maintenance (RPAAWRD), Package Maintenance (RPAAPMT), and Mass Offer (RPAMOFF) forms, or the creation or updating of these awards from the Batch Posting (RORBPST) process will not be prevented; however, these forms and processes will bypass the new term load calculations and use the standard Default Award Schedule (RFRDEFA) rules and Fund Award Schedule (RFRASCH) rules without regard to term load values, and may give unexpected results. ■

## Disbursement Process (RPEDISBS)

RPEDISBS.pco was updated to recalculate ACG, SMART, and TEACH award disbursements based on the term load in a way similar to the manner it is accomplished for Pell disbursements. The UCPRTN copybook is called to recalculate the Pell term disbursement amount based on term load.

If the aid year is 2009-2010 or beyond and the fund code has a Federal Fund ID of *ACG*, *SMRT*, or *TCH*, the new `rpk_grant_calc.p_calculate_grant` is called to calculate the term disbursement amount.

Just as the **If Disbursement Load Code greater than Package Load Code** (RFRASPC\_PRORATION\_IND) field is not used for Pell, and assumed to be *D* (Disburse 100%), the field is also not used for ACG, SMART, and TEACH awards starting with 2009-2010.

The existing option **Pay Pell if Disbursement Amount Differs from Award Amount** (RPBOPTS\_PELL\_DISB\_IND) is now also used for ACG, SMART, and TEACH awards and functions just as it does for Pell. If set to *A*, the award will disburse even if the calculated disbursement amount differs from the award amount. If set to *L*, the lesser of the two amounts will disburse. If set to *N*, the award will not pay if the calculated disbursement amount is different than the term award amount.

Because of the new options being used to calculate award amounts and disbursement amounts for ACG, SMART, and TEACH, the load options and values used to calculate disbursement may differ from the options used to calculate the term award. The existing columns RPRADSB\_PELL\_CALC\_DISB\_AMT, RPRADSB\_PELL\_DISB\_LOAD and RPRADSB\_PELL\_DISB\_LOAD\_OPT will be used to store the values which were used for disbursement, and will be displayed in the Disbursement Schedule tabs of the RPAAWRD and RPAAPMT forms, just as they are currently updated and displayed for Pell awards.

## Packaging Process (RPEPCKG)

The process was modified to calculate an award amount based on term loads whenever the fund being processed is an ACG, SMART or TEACH grant.

Prior to this release, the process packaged ACG, SMART and TEACH awards just as it packaged other awards. The process used award limits set up on the RPRGFND form, along with Gap, Equity, and Self-Help packaging rules set on forms RPRDEFR and RPRPCKR to calculate award amounts. The process then performed award validation on the calculated amount using the `rpk_award_validation` database package. For Federal funds, including ACG, SMART and TEACH, if award validation found that the calculated award amount exceeded annual or cumulative limits, the process reduced the calculated amount to the highest valid amount.

All of the above processing will still take place for ACG, SMART and TEACH awards. However, in addition, if the aid year is 2009-2010 or beyond, a new packaged procedure

`rpk_grant_calc.p_calculate_grant` is called to calculate the term awards and total award for ACG, SMART, and TEACH grants based on term load values. If processing Actual packaging, `p_calculate_grant` performs all inserts and updates to these awards rather than RPEPCKG calling `rp_award.p_create` and `rp_award.p_update`. If processing Simulated packaging, `p_calculate_grant` calculates an amount and passes the amount back to RPEPCKG, which then uses it as a maximum award amount for the fund code. Inserts and updates to simulated award records in the RPTAWRD table continue to be accomplished by calls to `rpksawd.p_create_sim_award`, `rpksawd.p_update_sim_award` directly from RPEPCKG.

## Disbursement Validation Report (RPRVDIS)

The RPRVDIS report was updated to include the additional output parameters `p_load_opt` and `p_termloadrectab` in the call to the RPKLOAD Load Calculation package.



# 4 Award Locks Enhancement - Functional



## Overview

The Award Locks Enhancement contains the following modifications.

### Allow the Update of an Award Status on Locked Funds

In the past, when you locked an award or term, you could not update any information on the record. This meant that in order to change the status of the award, you were required to first unlock the award or term record, update the status, and then re-lock the award. This enhancement will provide an option to allow the update of an award status for awards which have either an award or term lock.

### Allow an Award with a Fund or Term Lock to be Accepted or Declined by an Applicant in Self-Service

Another issue was that an applicant could not accept an award in Banner Financial Aid Self-Service due to the existence of a lock. For example, if a school locked a loan award, primarily to preserve non-standard loan distributions, the lock also prevented students from accepting these loans online.

This enhancement allows a student to accept or decline an award with a fund or term lock in Banner Financial Aid Self-Service. The student is prohibited from accepting a reduced amount (a partial acceptance) when a lock exists for the fund.

#### Note

This enhancement does not change the following functionality within Banner Financial Aid and Banner Financial Aid Self-Service. ■

- Package Lock: When a package lock exists for an applicant, no updates to awards are allowed.
- Pell: You are still not allowed to update the status of a Pell Grant fund code.

# Changed Forms

## Global Institution Financial Aid Options Form (ROAINST)

### Options Tab

The **Allow Award Status Updates When Locked** field was added to the ROAINST Form. The **Allow Award Status Updates When Locked** indicator is delivered with a default value of unchecked (No). Check this indicator (Yes) to allow the status of an award to be updated in Banner and Self-Service if an award or term lock exists for a fund. No updates to other fund criteria such as award amounts are allowed with this indicator checked.

The screenshot shows the 'Options' tab of the ROAINST form. The 'Allow Award Status Updates When Locked' checkbox is currently unchecked. Other visible fields include 'Current Term Code' (200910), 'Default Aid Period' (FA/SPR), 'Initial SAP Status' (X), 'Initial SAP Term Code' (200910), 'Exception SAP Status' (B), 'Budgeting Group' (UGINON), 'Packaging Group' (ONFRSH), 'Tracking Group' (INDVER), 'Tracking Established Status' (E), 'Methodology' (F=Federal), 'Primary Application Source' (CSS), 'Application Received Date' (C=Date Created), 'Source for Application Received Date', 'Application Requirement Code', and 'Message Expiration Days'. Checkboxes for 'International', 'Create Applicant Non Year User-Defined Data', 'Create Applicant User-Defined Data', 'Rescheduled Disbursement Date', and 'Allow Award Status Updates When Locked' are also present.

Field	Description
Allow Award Status Updates When Locked	(ROBINST_UPD_LOCKED_AWARD_IND) Indicates if you can update the award status when a fund lock or term lock exists. Check this indicator (Yes) to allow the status of an award to be updated in Banner and Self-Service if an award or term lock exists for a fund. No updates to other fund criteria such as award amounts are allowed with this indicator checked.

## Package Maintenance (RPAAPMT)

### Award Maintenance Tab

The form was changed to allow an update of the award **Status** (RPRAWRD\_AWST\_CODE) field for a fund where

1. the award **Lock** (RPRAWRD\_LOCK\_IND) field is *Y* (lock and always pay the locked amount) or *E* (adjust for lower enrollment status) or the **Term Lock** (RPRATRM\_LOCK\_IND) field is *Y* or *E*, and
2. the **Allow Award Status Updates When Locked** (ROBINST\_UPD\_LOCKED\_AWARD\_IND) field on the ROAINST Form is checked for the aid year.

You still cannot update any of the other fields when the award is locked.

All occurrences of the warning message: *\*WARNING\* Fund Award record locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award record locked*.

All occurrences of the warning message: *\*WARNING\* Fund Award Term record(s) locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award Term record(s) locked*.

### Fund Awards by Term Tab

All occurrences of the warning message: *\*WARNING\* Fund Award record locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award record locked*.

All occurrences of the warning message: *\*WARNING\* Fund Award Term record(s) locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award Term record(s) locked*.

#### **Note**

You still cannot update the status of a Pell Grant fund code on this form. Also, there were no changes to the functionality of the packaging lock. ■

## Award Maintenance (RPAAWRD)

### Award Maintenance Tab

The form was changed to allow an update of the award **Status** (RPRAWRD\_AWST\_CODE) field for a fund where

1. the award **Lock** (RPRAWRD\_LOCK\_IND) field is *Y* (lock and always pay the locked amount) or *E* (adjust for lower enrollment status) or the **Term Lock** (RPRATRM\_LOCK\_IND) field is *Y* or *E*, and
2. the **Allow Award Status Updates When Locked** (ROBINST\_UPD\_LOCKED\_AWARD\_IND) field on the ROAINST Form is checked for the aid year.

You still cannot update any of the other fields when the award is locked.

All occurrences of the warning message: *\*WARNING\* Fund Award record locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award record locked*.

All occurrences of the warning message: *\*WARNING\* Fund Award Term record(s) locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award Term record(s) locked*.

### Fund Awards by Term Tab

All occurrences of the warning message: *\*WARNING\* Fund Award record locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award record locked*.

All occurrences of the warning message: *\*WARNING\* Fund Award Term record(s) locked; only lock indicator updateable* were changed to: *\*WARNING\* Fund Award Term record(s) locked*.

#### **Note**

You still cannot update the status of a Pell Grant fund code on this form. Also, there were no changes to the functionality of the packaging lock. ■

## Award Acceptance Mass Entry (RPAMACC)

The form was changed to allow an award to be accepted or declined in its entirety when

1. the award **Lock** (RPROWRD\_LOCK\_IND) field is *Y* (lock and always pay the locked amount) or *E* (adjust for lower enrollment status) or the **Term Lock** (RPRATRM\_LOCK\_IND) field is *Y* or *E*, and
2. the **Allow Award Status Updates When Locked** (ROBINST\_UPD\_LOCKED\_AWARD\_IND) field on the ROAINST Form is checked for the aid year.

You also cannot enter an **Accepted Amount** (RPROWRD\_ACCEPT\_AMT) when an award for a fund when

1. the award **Lock** (RPROWRD\_LOCK\_IND) field is *Y* (lock and always pay the locked amount) or *E* (adjust for lower enrollment status) or the **Term Lock** (RPRATRM\_LOCK\_IND) field is *Y* or *E*, and
2. the **Allow Award Status Updates When Locked** (ROBINST\_UPD\_LOCKED\_AWARD\_IND) field on the ROAINST Form is checked for the aid year.

When you attempt to enter an accepted amount under these circumstances, the following error displays: *\*ERROR\* Fund is currently locked or has locked terms.*

### **Note**

You still cannot update the status of a Pell Grant fund code on this form. Also, there were no changes to the functionality of the packaging lock. ■

## Changed Web Pages

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

#### **Accept Award Offer Tab**

An applicant can now accept or decline an award if a lock exists for a fund (RPROWRD\_LOCK\_IND = *Y* or *E*) or if a lock exists on the fund for a term (RPRATRM\_LOCK\_IND = *Y* or *E*) when the **Allow Award Status Updates When Locked** (ROBINST\_UPD\_LOCKED\_AWARD\_IND) field on ROAINST is checked for the aid year; if a lock exists either on RPROWRD or RPRATRM for the fund, *Accept Partial Amount* does not display for the fund, preventing the applicant from accepting a partial amount for a locked fund.

# Changed Reports and Processes

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## FA New Year Roll Process (ROPROLL)

The new `ROBINST_UPD_LOCKED_AWARD_IND` column was added for when you set the Perform roll of `ROBINST` data parameter to *Y*.

# 5 COD Phase II Updates - Technical



## Changed Tables

The following tables were modified.

### Grant Multiple Reporting Record Table (REBRMRR)

The following columns were added to capture the new data included in the Pell Multiple Report Records for the Additional Eligibility indicator and the Post 9/11 indicator.

Column Name	Null?	Type	Comment
REBRMRR_ADDL_ELIG_IND	No	VARCHAR2(1)	PELL ADDITIONAL ELIGIBILITY INDICATOR: Indicates if the student is receiving additional funds due to Year Round Pell eligibility.
REBRMRR_POST_911_IND	No	VARCHAR2(1)	PELL POST 9/11 INDICATOR: Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran.

### Grant Year to Date Detail Origination Record Table (REBYTDO)

The following columns were added to capture the new data included in the Pell Year to Date Origination Records for the Additional Eligibility indicator and the Post 9/11 indicator.

Column Name	Null?	Type	Comment
REBYTDO_ADDL_ELIG_IND	No	VARCHAR2(1)	PELL ADDITIONAL ELIGIBILITY INDICATOR: Indicates if the student is receiving additional funds due to Year Round Pell eligibility.
REBYTDO_POST_911_IND	No	VARCHAR2(1)	PELL POST 9/11 INDICATOR: Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran.

## Grant COD Reconciliation Table (RERREC�)

The following columns were added to capture the new data included in the Pell Reconciliation Records for the Additional Eligibility indicator and the Post 9/11 indicator.

Column Name	Null?	Type	Comment
RERREC�_ADDL_ELIG_IND	No	VARCHAR2(1)	PELL ADDITIONAL ELIGIBILITY INDICATOR: Indicates if the student is receiving additional funds due to Year Round Pell eligibility.
RERREC�_POST_911_IND	No	VARCHAR2(1)	PELL POST 9/11 INDICATOR: Indicates if the student is receiving the maximum Pell award allowed for the aid year as a dependent of a deceased veteran.

## Applicant Status Table (RORSTAT)

The following column was added to RORSTAT to allow schools to identify a Dependent student that is not receiving any support from their parents and is eligible to receive Unsubsidized Stafford without completing any parental data on the FAFSA.

Column Name	Null?	Type	Comment
RORSTAT_DEP_NO_PAR_DATA	No	VARCHAR2(1)	DEPENDENT WITHOUT PARENT DATA: Indicates if the dependent student is eligible for unsubsidized Stafford even though parent data has not been submitted on the FAFSA.

## Electronic Counseling Table (RPRLECS)

The following comment on columns were updated to remove the references to “borrower” as the columns will now be used for both Direct Loan and TEACH exit counseling records:

Column Name	Comment
RPRLECS_PERM_ADDR_LINE1	PERMANENT ADDRESS LINE 1: Line 1 of the student’s permanent street address.
RPRLECS_PERM_ADDR_LINE2	PERMANENT ADDRESS LINE 2: Line 2 of the student’s permanent street address.
RPRLECS_PERM_CITY	PERMANENT ADDRESS CITY: The student’s permanent address city.
RPRLECS_PERM_STAT_CODE	PERMANENT ADDRESS STATE: The student’s permanent address state code.
RPRLECS_PERM_ZIP	PERMANENT ADDRESS ZIP: The student’s permanent address zip or postal code.
RPRLECS_PERM_PHONE_NO	PERMANENT ADDRESS PHONE NUMBER: The student’s permanent phone number.

# Modified Packages/Procedures/Functions

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## DML\_RORSTAT

Package specification script: rokd\_rorstat0.sql

Package specification body: rokd\_rorstat1.sql

This package was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

## RB\_APPLICANT\_STATUS

Package specification script: rokb\_appl\_status0.sql

Package specification body: rokb\_appl\_status1.sql

This package was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

## RB\_APPLICANT\_STATUS\_RULES

Package specification script: rokb\_appl\_status\_r0.sql

Package specification body: rokb\_appl\_status\_r1.sql

This package was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

The following edits were added.

If RORSTAT\_DEP\_PAR\_DATA = 'Y' then RORSTAT\_ADDL\_STFD\_ELIG\_IND CANNOT = 'Y'.

If RORSTAT\_ADDL\_STFD\_ELIG\_IND = 'Y', then RORSTAT\_DEP\_PAR\_DATA CANNOT = 'Y'.

If either of the edits are encountered, the following error is generated.

*Additional Stafford and Dependent without Parent Data cannot both = 'Y'*

## RB\_APPLICANT\_STATUS\_STRINGS

Package specification script: rokb\_appl\_status\_s0.sql

Package specification body: rokb\_appl\_status\_s1.sql

This package was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

The following error message was added to be generated when the new edits added to RB\_APPLICANT\_STATUS\_RULES are encountered:

*Additional Stafford and Dependent without Parent Data cannot both = 'Y'*

## RP\_APPLICANT\_STATUS

Package specification script:rokp\_appl\_status0.sql

Package specification body: rokp\_appl\_status1.sql

This package was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

## RPK\_AWARD\_VALIDATION Package

Validation package specification rpk\_award\_val0.sql

Validation package body rpk\_award\_val1.sql

This package was updated so that if the following is true, the Unsubsidized Stafford can be awarded to the student and the edits noted below are bypassed.

- RORSTAT\_DEP\_NO\_PAR\_DATA = 'Y'
- Fund is an Unsubsidized Stafford Loan (RFRBASE\_FED\_FUND\_ID = 'STFD' and 'RFRASPC\_REPLACE\_TFC\_IND = 'Y')
- Student is a Dependent Student (RCRAPP2\_MODEL\_CDE = 'D')

The edit below is bypassed so that it does not prevent the award:

Edit	Message
ESTIMATED_EFC	EFC is estimated

## RPK\_AWARD\_VALIDATION\_US Package

Validation package specification rpk\_award\_val\_us0.sql

Validation package body rpk\_award\_val\_us1.sql

This package was updated so that if the following is true, the Unsubsidized Stafford can be awarded to the student and the edit noted below is bypassed.

- RORSTAT\_DEP\_NO\_PAR\_DATA = 'Y'
- Fund is an Unsubsidized Stafford Loan (RFRBASE\_FED\_FUND\_ID = 'STFD' and 'RFRASPC\_REPLACE\_TFC\_IND = 'Y')
- Student is a Dependent Student (RCRAPP2\_MODEL\_CDE = 'D')

The edit below is bypassed so that it does not prevent the award:

Edit	Message
EFC_NOT_DETERMINED	Pell EFC Not Determined

This package was also updated so that if the following is true, the student cannot be awarded any other Title IV aid funds:

- RORSTAT\_DEP\_NO\_PAR\_DATA = 'Y'
- Fund is a Title IV fund (RFRRRID\_TITLE\_IV\_IND = 'Y')
- Student is a Dependent Student (RCRAPP2\_MODEL\_CDE = 'D')

When this edit is encountered, the following error is generated.

*Dependent without Parent Data = 'Y', can only award Unsubsidized Stafford.*

### Higher Level Grant ACG/SMART Edit

Interim regulations published by the Department of Ed in May 2009 indicate that a student that is reclassified to a lower level year in college due to the HEOA change in awarding ACG or SMART based on grade level, rather than on academic year, can go back and receive the a lower level grant provided they have fund eligibility remaining for the lower level grant.

Therefore, award and disbursement validation was updated so that this edit is no longer performed and that students are not prevented from receiving a lower level grant. This change ensures that students can go back and receive a lower level grant even if they have received a higher level grant at any institution.

## RPK\_AWARD\_VALIDATION\_US\_STRINGS Package

Validation package specification    rpk\_award\_val\_us\_s0.sql

Validation package body            rpk\_award\_val\_us\_s1.sql

This package was updated to add the following error message that is generated when the new edit added to RPK\_AWARD\_VALIDATION\_US is encountered:

*Dependent without Parent Data = 'Y', can only award Unsubsidized Stafford.*

## RPK\_COMMON\_VALIDATION\_US Package

Validation package specification    rpk\_common\_val\_us0.sql

Validation package body            rpk\_common\_val\_us1.sql

## Higher Level Grant ACG/SMART Edit

Interim regulations published by the Department of Ed in May 2009 indicate that a student that is reclassified to a lower level year in college due to the HEOA change in awarding ACG or SMART based on grade level rather than on academic year can go back and receive the a lower level grant provided they have fund eligibility remaining for the lower level grant.

Therefore, award and disbursement validation was updated so that this edit is no longer performed and that students are not prevented from receiving a lower level grant. This change ensures that students can go back and receive a lower level grant even if they have received a higher level grant at any institution.

## RPK\_DISB\_VALIDATION\_US Package

Validation package specification     `rpk_disb_val_us0.sql`

Validation package body             `rpk_disb_val_us1.sql`

This package was also updated so that if the following is true, the Unsubsidized Stafford can be disbursed to the student and the edits noted below are bypassed.

- `RORSTAT_DEP_NO_PAR_DATA = 'Y'`
- Fund is an Unsubsidized Stafford Loan (`RFRBASE_FED_FUND_ID = 'STFD'` and `'RFRASPC_REPLACE_TFC_IND = 'Y'`)
- Student is a Dependent Student (`RCRAPP2_MODEL_CDE = 'D'`)

The edits below are bypassed so that they do not prevent disbursement.

Edit	Message
<code>UNOFFICIAL_SOURCE</code>	Unofficial Source for Title IV funds
<code>EFC_ESTIMATED</code>	Student/parent contrib. is estimated
<code>EFC_NOT_DETERMINED</code>	Pell EFC has not been determined

## Higher Level Grant ACG/SMART Edit

Interim regulations published by the Department of Ed in May 2009 indicate that a student that is reclassified to a lower level year in college due to the HEOA change in awarding ACG or SMART based on grade level rather than on academic year can go back and receive the a lower level grant provided they have fund eligibility remaining for the lower level grant.

Therefore, award and disbursement validation was updated so that this edit is no longer performed and that students are not prevented from receiving a lower level grant. This change ensures that students can go back and receive a lower level grant even if they have received a higher level grant at any institution.

## Changed Database Triggers

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### RT\_REBRMRR\_LOG\_INSUPDDTL (retrmrr9.sql)

This trigger was updated to add the new REBRMRR\_ADDL\_ELIG\_IND and REBRMRR\_POST\_911\_IND columns.

### RT\_REBYTDO\_LOG\_INSUPDDTL (retytdo9.sql)

This trigger was updated to add the new REBYTDO\_ADDL\_ELIG\_IND and REBYTDO\_POST\_911\_IND columns.

### RT\_RERREC\_N\_LOG\_INSUPDDTL (retrecn9.sql)

This trigger was updated to add the new RERREC\_N\_ADDL\_ELIG\_IND and RERREC\_N\_POST\_911\_IND columns.

### RT\_RORSTAT\_LOG\_INSUPDDTL (rotstat9.sql)

This trigger was updated to add the new RORSTAT\_DEP\_NO\_PAR\_DATA column.

## Required Data

---

### Logging Control Repeating Table (RORLOGC)

The norlogci\_071401.sql script was created to add entries to the Logging Control Repeating Table (RORLOGC) for the following new column:

RORLOGC_TABLE_NAME	RORLOGC_COLUMN_NAME	RORLOGC_COLUMN_DESC	RORLOGC_LOG_IND
RORSTAT	RORSTAT_DEP_NO_PAR_DATA	DEPENDENT WITHOUT PARENT DATA	N

The norlogci\_080402.sql script was created to add entries to the Logging Control Repeating Table (RORLOGC) for the following new columns:

<b>RORLOGC_TABLE _NAME</b>	<b>RORLOGC_COLUMN _NAME</b>	<b>RORLOGC_COLUMN_DESC</b>	<b>RORLOGC _LOG_IND</b>
REBRMRR	REBRMRR_ADDL_ELIG_ IND	PELL ADDITIONAL ELIGIBILITY INDICATOR	N
REBRMRR	REBRMRR_POST_911_ IND	POST 9/11 INDICATOR	N
REBYTDO	REBYTDO_ADDL_ELIG_ IND	PELL ADDITIONAL ELIGIBILITY INDICATOR	N
REBYTDO	REBYTDO_POST_911_ IND	POST 9/11 INDICATOR	N
RERREC�	RERREC�_ADDL_ELIG_ IND	PELL ADDITIONAL ELIGIBILITY INDICATOR	N
RERREC�	RERREC�_POST_911_ IND	POST 9/11 INDICATOR	N



# 6 Year Round Pell - Technical



## Changed Table

The following table was modified for this enhancement.

Column Name	Null?	Type	Comment
RORSTAT_ADDL_PELL_ELIG_IND	No	VARCHAR2(1)	PELL ADDITIONAL ELIGIBILITY INDICATOR: Indicates if the student is receiving a second Pell award for the aid year.

## Changed Packages/Procedures/Functions

### RB\_PELL\_ORIGINATIONS\_RULES - rekb\_pellorig\_r1 - used by REAORXX and RERORXX

In the past, the `f_amount_valid` function checked that the amount due is between `rprfedr_min_annual_limit` and `rprfedr_max_annual_limit`. The function was modified as follows:

The amount due must be between `rprfedr_min_annual_limit` and `2 * rprfedr_max_annual_limit`.

### REKOR10

The `rekor10.p_get_rorstat_data` procedure was modified to fetch and return the `REBPAYV_ADDL_ELIG_IND` based on the `RORSTAT_ADDL_PELL_ELIG_IND`.

Package spec: `rekor100.sql`

Package body: `rekor101.sql`

## RB\_APPLICANT\_STATUS Package

The following scripts were modified to include the new RORSTAT\_ADDL\_PELL\_ELIG\_IND column.

```
rokb_app1_status0.sql
rokb_app1_status1.sql
rokb_app1_status_r0.sql
rokb_app1_status_r1.sql
rokb_app1_status_s0.sql
rokb_app1_status_s1.sql
rok_d_rorstat0.sql
rok_d_rorstat1.sql
```

## ROK\_ARCHIVE\_DATA Package

Package specification: rok\_archive\_data0.sql

Package body: rok\_archive\_data1.sql

### P\_CREATE\_ARCHIVE\_DOC

The RORSTAT\_ADDL\_PELL\_ELIG\_IND was added to the Archive XML document in the Status Information Tag after the SARInitials as follows:

XML TAG	Database Column
AdditionalPellEligibilityIndicator	RORSTAT_ADDL_PELL_ELIG_IND

### RPK\_AWARD\_VALIDATION\_US

The p\_award\_exceeds\_ann\_limit procedure in the rpk\_award\_val\_us1.sql script was modified to determine if the award exceeds the Pell Grant limit as follows:

```
If RFRBASE_FED_FUND_ID = 'PELL' and RORSTAT_ADDL_PELL_ELIG_IND = 'Y' then
p_max_annual_limit_out = 2 * lv_max_annual_limit
(RPRFEDR_MAX_ANNUAL_LIMIT).
```

# Changed Database Triggers

---

## RT\_RORSTAT\_LOG\_INSUPDDTL (rotstat9.sql)

This trigger was updated to add the new RORSTAT\_ADDL\_PELL\_ELIG\_IND column.

## Required Data

---

### Logging Control Repeating Table (RORLOGC)

Create the rorlogci\_071401.sql script to add a new entry to the Logging Control Repeating Table (RORLOGC) for the following new column:

RORLOGC_TABLE_NAME	RORLOGC_COLUMN_NAME	RORLOGC_COLUMN_DESC	RORLOGC_LOG_IND
RORSTAT	RORSTAT_ADDL_PELL_ELIG_IND	Additional Pell Eligibility Indicator	N

### Reject Validation Table (RTVRJCT)

The rtvrjcti\_71401.sql script inserts the following new COD Edit Messages. This script is executed during the installation process.

RTVRJCT_TYPE	RTVRJCT_CODE	RTVRJCT_ACTIVITY_DATE	RTVRJCT_DESC	RTVRJCT_SYSTEM_REQ_IND
F	168	SYSDATE	Post 9-11 Deceased Veteran Dep Indicator is true on COD system	Y
F	171	SYSDATE	School is not eligible for two Pell awards within the same year	Y
F	172	SYSDATE	Incorrect award amount when AEI is true	Y
F	173	SYSDATE	AEI changed to false and award amount exceeds the max limit	Y

<b>RTVRJCT _TYPE</b>	<b>RTVRJCT _CODE</b>	<b>RTVRJCT_ ACTIVITY_ DATE</b>	<b>RTVRJCT_DESC</b>	<b>RTVRJCT_ SYSTEM_ REQ_IND</b>
F	174	SYSDATE	AEI changed to false and the award is now in overpaid status	Y
F	175	SYSDATE	AEI changed to false and the PTEU exceeds 100 at all schools	Y
F	176	SYSDATE	PTEU exceeds 200 when the AEI is true	Y
F	177	SYSDATE	LPEU is near the lifetime limit	Y
F	178	SYSDATE	LPEU has exceeded the lifetime limit	Y

# 7 2009-2010 COD ACG, SMART and TEACH Calculation - Technical



## New Table

### Grant Rules Table (RPRGRNT)

The Grant Rules Table is a new table with the following characteristics.

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

RPRGRNT\_AIDY\_CODE  
RPRGRNT\_FED\_FUND\_ID  
RPRGRNT\_CLAS\_CODE  
RPRGRNT\_LOAD

Column Name	Null?	Type	Comment
RPRGRNT_AIDY_CODE	No	VARCHAR2(4)	AID YEAR CODE: The aid year associated with the information in this record.
RPRGRNT_FED_FUND_ID	No	VARCHAR2(4)	FEDERAL FUND ID: The federal fund identification of the federal funds.
RPRGRNT_CLAS_CODE	No	VARCHAR2(1)	CLASS CODE: The financial aid class code for which the award amount is being determined.
RPRGRNT_LOAD	No	VARCHAR2(1)	LOAD: The enrollment load for which the award amount is being determined.

Column Name	Null?	Type	Comment
RPRGRNT_AWARD_AMT	No	NUMBER(11,2)	AWARD AMOUNT: The maximum annual award amount for the federal fund id, class level and enrollment load.
RPRGRNT_SYSTEM_REQ_IND	No	VARCHAR2(1)	SYSTEM REQUIRED INDICATOR: Indicates whether this row is required by the system and may not be deleted by the user.
RPRGRNT_USER_ID	Yes	VARCHAR2(30)	USER ID: The user ID of the person who inserted or last updated this record.
RPRGRNT_ACTIVITY_DATE	Yes	DATE	ACTIVITY DATE: The date that information in this record was entered or last updated.
RPRGRNT_DATA_ORIGIN	Yes	VARCHAR2(30)	DATA ORIGIN: Source system that created or updated the data.

## Changed Tables

The following tables were modified for this enhancement.

### Packaging Options Table (RPBOPTS)

The Comment on Columns was changed for the following column:

Column Name	Comment
RPBOPTS_PELL_DISB_IND	GRANT DISBURSEMENT INDICATOR: Indicates if disbursement amount, award amount or a zero amount should be used for ACG, PELL, SMART and TEACH disbursement when award and disbursement amounts are not equal.

## Backout Award Table (RPRBAKO)

The following column was added to this table:

Column Name	Null?	Type	Comment
RPRBAKO_CALLING_PROCESS	Yes	VARCHAR2(1)	CALLING PROCESS: Indicates that this award backout record was created by a batch process.

## Applicant Award Disbursement Table (RPRADSB)

The Comment on Columns were changed for the following columns:

Column Name	Comment
RPRADSB_PELL_CALC_DISB_AMT	CALCULATED GRANT DISBURSEMENT AMOUNT: The calculated amount of the ACG, Pell, SMART, or TEACH award, as a result of the disbursement process, before the disbursement options are considered.
RPRADSB_PELL_C_DISB_LOAD	CALCULATED GRANT LOAD: The calculated enrollment load for the ACG, Pell, SMART, or TEACH award, as a result of the disbursement process, before the disbursement options are considered.
RPRADSB_PELL_C_DISB_LOAD_OPT	CALCULATED GRANT LOAD OPTION: The source of the calculated enrollment load for the ACG, Pell, SMART, or TEACH award, as a result of the disbursement process, before the disbursement options are considered.

## Enrollment Options by Term Table (RPRDATE)

The Comment on Columns were changed for the following columns:

Column Name	Comment
RPRDATE_PELL_AWRD_ENRL_OPT	TERM GRANT AWARDING ENROLLMENT OPTION: The enrollment option used to calculate ACG, Pell, SMART, and TEACH enrollment loads when awarding these funds.
RPRDATE_PELL_DISB_ENRL_OPT	TERM GRANT DISBURSING ENROLLMENT OPTION: The enrollment option used to calculate ACG, Pell, SMART, and TEACH enrollment loads when disbursing these funds.
RPRDATE_PELL_ISIR_TERM_IND	TERM GRANT ISIR MAPPING INDICATOR: This indicator maps the grant awarding and disbursing enrollment options term code to a specific ISIR term enrollment field from the student's current need analysis record.

## Aid Period Validation Table (RTVAPRD)

A new column was added to the RTVAPRD table. A script which is run as part of the install process copies existing RTVAPRD\_PELL\_FULL\_YR\_PCT records to RTVAPRD\_GRANT\_FULL\_YR\_PCT for all existing rows in the table.

Column Name	Null?	Type	Comment
RTVAPRD_GRANT_FULL_YR_PCT	No	NUMBER(6,3)	FULL YEAR PERCENT FOR GRANTS: The maximum percentage of the full aid year full time ACG, SMART or TEACH grant award that the student is eligible to receive for the aid period based on their EFC Maximum value of 100%.

## New Packages/Procedures/Functions

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### Grant Calculation Package (RPK\_GRANT\_CALC)

Package specification:	rpk_grant_calc0.sql
Package body:	rpk_grant_calc1.sql
Strings package specification:	rpk_grant_calc_s0.sql
Strings package body:	rpk_grant_calc_s1.sql

This package calculates award amounts for ACG, SMART, and TEACH Grants. the package calculates term award amounts and total award amounts for an aid year, student and fund code based on a table of term load values. If the package is called for awarding, `rpk_award_validation` will be called to validate the award, and if it is Actual Awarding and not Simulated Packaging, the awards will be inserted or updated by this package. If the package is called for Simulated Packaging or is called from the Disbursement process, no awards will be updated. Instead, the calculated award amount or disbursement amount will be passed back to the calling process.

## Changed Packages/Procedures/Functions

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### Financial Aid Web Processing Package (BWRKRHST)

Package body:	bwrkrhs1.sql
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Starting with aid year 2009-2010 (`ROBINST_AIDY_END_YEAR > 2009`), you can no longer perform a partial acceptance of ACG, SMART, and TEACH awards from Banner Financial Aid Self-Service. If the Federal Fund ID is *ACG*, *SMRT*, or *TCH*, a student can accept the full award, but cannot accept a partial award on the Accept Award Offer tab.

### RB\_AWARD Award API

Package body:	rpkb_award1.sql
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#### **P\_delete**

If existing parameter `p_calling_process = 'G'`, bypass the check for award lock (`r_lock_ind`) and term lock (`rb_award_schedule.f_award_term_locked`). Do not bypass the check for package lock (`f_package_locked`).

## P\_update

If existing parameter `p_calling_process = 'G'`, bypass the check for award lock (`lv_new_rec.rprawrd_lock_ind`) and term lock (`rb_award_schedule.f_award_term_locked`). Do not bypass the check for package lock (`f_package_locked`).

## RB\_AWARD\_SCHEDULE Award by Term API

Package body                      `rpkb_award_sched1.sql`

### P\_create

If existing parameter `p_calling_process = 'G'`, bypass the check for award lock (`rb_award_schedule.f_get_award_lock`)

### P\_delete

If existing parameter `p_calling_process = 'G'`, bypass the check for award lock (`rb_award_schedule.f_get_award_lock`) and bypass the check for disbursement schedule (`rb_award_schedule.f_disb_sched_exists`). Do not bypass the check for package lock (`rb_award_schedule.f_get_pckg_lock`).

### P\_update

If existing parameter `p_calling_process = 'G'`, bypass the check for award lock (`rb_award_schedule.f_get_award_lock`) and bypass the check for term locks (`lv_my_rpratr_rec.rpratr_lock_ind`). Do not bypass the check for package lock (`rb_award_schedule.f_get_pckg_lock`).

## ROK\_ARCHIVE\_DATA Package

Package specification:            `rok_archive_data0.sql`

Package body:                    `rok_archive_data1.sql`

### P\_DELETE\_PACKAGING\_RULES

The procedure `p_delete_rprgrnt` was added to package `p_delete_packaging_rules`. This procedure will delete all `rprgrnt` Grant Rules rows for the aid year being archived.

## RPKAFRM Award Support Processes Package

Package specification:      rpkafrm0.sql

Package body:                rpkafrm1.sql

### **Procedure p\_insert\_rrbako**

A new optional parameter p\_calling\_process was added to this procedure.

### **Procedure p\_process\_online\_terms**

Processing for the new rrbako column rrbako\_calling\_process was added to this procedure.

## RP\_AWARD\_SCHEDULE Award by Term Business Process API

Package specification:      rpkp\_award\_sched0.sql

Package body:                rpkp\_award\_sched1.sql

### **Procedure p\_create**

A check to see whether a context indicating Grant processing was set by the calling process (rpkafrm) was added.

### **Procedure p\_delete**

A check to see whether a context indicating Grant processing was set by the calling process (rpkafrm) was added.

### **Procedure p\_update**

A check to see whether a context indicating Grant processing was set by the calling process (rpkafrm) was added.

## RPK\_AWARD\_VALIDATION Award Validation Package

Package body:                rpk\_award\_val1.sql

This package bypasses SAP validation for ACG, SMART, and TEACH. Rpk\_grant\_calc will do term by term validation and award calculations for SAP.

## RPK\_AWARD\_VALIDATION\_US Award Validation US Package

Package body: `rpk_award_val_us1.sql`

### Function `f_get_federal_rules`

#### *Cursor `teach_rules_c`*

If `robinst_aidy_end_yr < 2010`, use the existing cursor. Otherwise use a new cursor which is based on the new data in the table for TEACH grants which is not load specific.

### Procedure `p_validate_award`

The procedure bypasses In Default, Owes Refund, and Aggregate Limit flag validation for ACG, SMART, and TEACH. `Rpk_grant_calc` will do term by term validation and award calculations for these NSLDS edits.

## RPK\_DISB\_VALIDATION Disbursement Validation Package

Package body: `rpk_disb_val1.sql`

Procedure `p_validate_disbursement`

Overrides the load edit for ACG, SMART and TEACH since disbursement is now calculated based on load, and `RFRASPC_PRORATION_IND` can be ignored. Starting with 2009-2010, if the federal fund ID is ACG, SMRT, or TEACH, bypass error `DISB_LOAD_GT_PCKG_LOAD`.

## RPK\_DISB\_VALIDATION\_US Disbursement Validation US Package

Package body: `rpk_disb_val_us1.sql`

### Function `f_val_fed_limits_teach`

If `robinst_aidy_end_yr < 2010`, use the existing cursor. Otherwise use a new cursor which is based on the new data in the table for TEACH grants which is not load specific.

### Function `f_val_load`.

Use `rprfedr_min_load` instead of forcing a min load of '1' Full-time for ACG and SMART. Use the award year in college override (`rprawrd_override_yr_in_coll`) or

FAFSA year in college (rcrapp1\_yr\_in\_coll) for load validation, rather than the financial aid class code calculated from the student's level and class.

## RPKLOAD Load Calculation Package

Package specification:	rpkload0.sql
Package body:	rpkload1.sql
Strings package specification:	rpkload_s0.sql
Strings package body:	rpkload_s1.sql

This package was originally converted from the UCLRTN Load Calculation copybook. However, it only calculated a load value for a student and aid year. The package was modified to additionally calculate a table of term load values for the student and aid period.

## New Database Triggers

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### RT\_RPRGRNT\_USERACTIVIT\_INSUPD (rprgrnt0.sql)

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

### RT\_RPRGRNT\_LOG\_INSUPDDL (rprgrnt9.sql)

Triggers were created to perform logging for RPRGRNT.

## Changed Database Triggers

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### RT\_RTVAPRD\_LOG\_INSUPDDL (rttgrnt9.sql)

A new column RTVAPRD\_GRANT\_FULL\_YR\_PCT was added.

# Required Data

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## Logging Control Base Table (ROBLOGC)

roblogci\_080402.sql

The roblogci\_080402.sql script was modified to add entries to the Logging Control Base Table (ROBLOGC) for the RPRGRNT table.

## RORLOGC Logging Control Repeating Table

The norlogci\_080402.sql script adds entries to the Logging Control Repeating Table (RORLOGC) for the following new columns:

RORLOGC_ TABLE_NAME	RORLOGC_COLUMN_ NAME	RORLOGC_COLUMN_ DESC	RORLOGC _LOG_IND
RPRGRNT	RPRGRNT_AIDY_CODE	AID YEAR CODE	N
RPRGRNT	RPRGRNT_FED_FUND_ID	FEDERAL FUND ID	N
RPRGRNT	RPRGRNT_CLAS_CODE	FINANCIAL AID CLASS CODE	N
RPRGRNT	RPRGRNT_LOAD	LOAD CODE	N
RPRGRNT	RPRGRNT_AWARD_AMT	AWARD AMOUNT	N
RPRGRNT	RPRGRNT_SYSTEM_REQ_IND	SYSTEM REQUIRED INDICATOR	N
RPRGRNT	RPRGRNT_USER_ID	USER ID	N
RPRGRNT	RPRGRNT_ACTIVITY_DATE	ACTIVITY DATE	N
RPRGRNT	RPRGRNT_DATA_ORIGIN	DATA ORIGIN	N
RTVAPRD	RTVAPRD_GRANT_FULL_YR_PCT	FULL YEAR PERCENT FOR ACG, SMART AND TEACH GRANTS	N

## RPRFEDR Federal Rules Table

Previously, the RPRFEDR table contained a row for Teach (TCH) for each class code and enrollment load level in order to use the table to calculate maximum award amounts by load. The new RPRGRNT table will now be used to determine maximum awards by load, so it will only be necessary to have a single RPRFEDR row for each Teach class code.

The rprfedrd\_071401.sql script was added to delete all existing RPRFEDR rows for Aid Year '0910' and RPRFEDR\_FED\_FUND\_ID = 'TCH'.

The rprfedri\_071401.sql script was added to insert the new values in RPRFEDR for TEACH grants.

These scripts are executed as part of the 8.4.2 install.

The insert script will insert an RPRFEDR row for TEACH for each of the following Class Codes:

RPRFEDR_CLAS_CODE	RPRFEDR_MAX_CUM_LIMIT
1	16000
2	16000
3	16000
4	16000
5	16000
6	16000
7	8000
8	8000
9	8000
0	8000

For each row inserted, the following columns will contain the same value:

RPRFEDR Column	Value
RPRFEDR_AIDY_CODE	0910
RPRFEDR_FED_FUND_ID	TCH

RPRFEDR Column	Value
RPRFEDR_ACTIVITY_DATE	SYSDATE
RPRFEDR_MIN_LOAD	4
RPRFEDR_MIN_ANNUAL_LIMIT	Null
RPRFEDR_MAX_ANNUAL_LIMIT	4000
RPRFEDR_MIN_CUM_LIMIT	Null
RPRFEDR_SYSTEM_REQ_IND	Y
RPRFEDR_ADDL_STFD_ELIG_IND	Null
RPRFEDR_FORMER_HEAL_IND	Null
RPRFEDR_PREP_OR_TEACH_IND	N

## RPRGRNT Grant Rules Table

the `rprgrnti_071401.sql` script was created to insert values into RPRGRNT for ACG, SMART, and TEACH grants. This script is executed as part of the install.

RPRGRNT rows are inserted for Federal Fund IDs ACG, SMRT and TCH as follows:

RPRGRNT_FED_FUND_ID	RPRGRNT_CLAS_CODE	RPRGRNT_LOAD	RPRGRNT_AWARD_AMT
ACG	1	1	750
ACG	1	2	563
ACG	1	3	375
ACG	2	1	750
ACG	2	2	563
ACG	2	3	375
ACG	3	1	1300
ACG	3	2	975
ACG	3	3	650

RPRGRNT_FED _FUND_ID	RPRGRNT_CLAS _CODE	RPRGRNT_LOAD	RPRGRNT_ AWARD_AMT
SMRT	4	1	4000
SMRT	4	2	3000
SMRT	4	3	2000
SMRT	5	1	4000
SMRT	5	2	3000
SMRT	5	3	2000
SMRT	6	1	4000
SMRT	6	2	3000
SMRT	6	3	2000
TCH	1	1	4000
TCH	1	2	3000
TCH	1	3	2000
TCH	1	4	1000
TCH	2	1	4000
TCH	2	2	3000
TCH	2	3	2000
TCH	2	4	1000
TCH	3	1	4000
TCH	3	2	3000
TCH	3	3	2000
TCH	3	4	1000
TCH	4	1	4000
TCH	4	2	3000
TCH	4	3	2000

RPRGRNT_FED _FUND_ID	RPRGRNT_CLAS _CODE	RPRGRNT_LOAD	RPRGRNT_ AWARD_AMT
TCH	4	4	1000
TCH	5	1	4000
TCH	5	2	3000
TCH	5	3	2000
TCH	5	4	1000
TCH	6	1	4000
TCH	6	2	3000
TCH	6	3	2000
TCH	6	4	1000
TCH	7	1	4000
TCH	7	2	3000
TCH	7	3	2000
TCH	7	4	1000
TCH	8	1	4000
TCH	8	2	3000
TCH	8	3	2000
TCH	8	4	1000
TCH	9	1	4000
TCH	9	2	3000
TCH	9	3	2000
TCH	9	4	1000
TCH	0	1	4000
TCH	0	2	3000

RPRGRNT_FED _FUND_ID	RPRGRNT_CLAS _CODE	RPRGRNT_LOAD	RPRGRNT_ AWARD_AMT
TCH	0	3	2000
TCH	0	4	1000

For each row inserted, the following columns will contain the same value:

RPRGRNT Column	Value
RPRGRNT_AIDY_CODE	'0910'
RPRGRNT_ACTIVITY_DATE	SYSDATE
RPRGRNT_USER_ID	USER
RPRGRNT_SYSTEM_REQ_IND	'Y'
RPRGRNT_DATA_ORIGIN	'Banner'



# 8 Award Locks Enhancement - Technical



## Changed Tables

The following table was modified for this enhancement.

Column Name	Null?	Type	Comment
ROBINST_UPD_LOCKED_AWARD_IND	No	VARCHAR2(1)	UPDATE LOCKED AWARD INDICATOR: Indicates if updates to the award status may be made when a fund lock or term lock exists.

## Changed Packages/Procedures/Functions

### RB\_AWARD

Package specification    rpkb\_award0.sql

Package body            rpkb\_award1.sql

### P\_UPDATE

The test was modified for the award being locked to bypass the edit if `p_calling_process` is 'P' or 'L'.

The test was modified for an award schedule being locked to bypass the edit if `p_calling_process` is 'P' or 'L'.

## RB\_AWARD\_SCHEDULE

Package specification      rpkb\_award\_sched0.sql

Package body                rpkb\_award\_sched1.sql

### P\_UPDATE

The test was modified for skipping the lock edits if p\_calling\_process is 'P' or 'L'.

## RPKATRM

Package specification      rpkatrm0.sql

Package body                rpkatrm1.sql

### P\_SCHEDULE\_LOCKED\_AWARDS

A new procedure added to take the existing award schedule and process the award status change.

## RP\_AWARD

Package specification      rpkp\_award0.sql

Package body                rpkp\_award1.sql

### F\_GET\_CALLING\_PROCESS

A new function was added to pass back whether changing the status of a locked award/award schedule should be processed.

### P\_UPDATE

Before the call to rb\_award.p\_update, a call was added to the f\_get\_calling\_process function.

The call to rb\_award.p\_update was modified to include the p\_calling\_process.

## P\_ACCEPT\_AWARD

The `p_calling_process` was added to the parameter list as an IN parameter.

When the `p_calling_process = 'L'`, use `rpkatrm.p_schedule_locked_awards` to update the award schedule.

## P\_CANCEL\_AWARD

The `p_calling_process` was added to the parameter list as an IN parameter.

When the `p_calling_process = 'L'`, use `rpkatrm.p_schedule_locked_awards` to update the award schedule.

## P\_DECLINE\_AWARD

The `p_calling_process` was added to the parameter list as an IN parameter.

When the `p_calling_process = 'L'`, use `rpkatrm.p_schedule_locked_awards` to update the award schedule.

# Changed Web Packages

---

## BWRKRHST Package

Package specification      `bwrkrhst.sql`

Package body                `bwrkrhs1.sql`

## F\_AllowWebUpdate

The select was modified so locked awards (`rprawrd_lock_ind IN ('Y','E')`) or awards with locked award schedule entries (`rpratrm_lock_ind IN ('Y','E')`) where the `robinst_upd_locked_award_ind = 'Y'` will allow updates.

## P\_AwardOfferSubmitOption

If the award is locked (`rprawrd_lock_ind IN ('Y','E')`) or has locked award schedule entries (`rpratrm_lock_ind IN ('Y','E')`) and the `robinst_upd_locked_award_ind = 'Y'` do not allow partial amounts.

## Changed Database Triggers

---

### RT\_ROBINST\_LOG\_INSUPDDTL (rprawrd9.sql)

This trigger was updated to add the new ROBINST column.

## Required Data

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### Logging Control Repeating Table (RORLOGC)

The `rorlogci_071401.sql` script was updated to add a new entry to the Logging Control Repeating Table (RORLOGC) for the following new column.

RORLOGC_ TABLE_NAME	RORLOGC_COLUMN_ NAME	RORLOGC_COLUMN_ DESC	RORLOGC_ LOG_IND
ROBINST	ROBINST_UPD_LOCKED_AW ARD_IND	UPDATE LOCKED AWARD INDICATOR	N

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# 9 Problem Resolutions



The following is a summary of the problem resolutions included in Release 8.4.2. The detailed description, impact, and resolution information for each problem resolution is delivered in a separate .txt file. The file for this release is named `finaid80402resolutions.txt`.

Object Name	Defect #	Summary
RBAABUD	1-5ONLS8	Once a RORSTAT record is created the aid period cannot be changed on RBAABUD without a Budget Group.
RCRTP09/10	1-5DX4AV	CSS datafiles will not load when loading user defined data.
RERIS10	1-5E6UCH	Banner 7x and 8x. The housing code showing on the Printed ISIR is incorrect.
RNANA10	1-4XVOGS	Error received when entering manual records
RNAPR10	1-506FZH	RNAPR10 Simulation requires save when Calculate Need is selected
RNAVR10/RNRVRFY	1-4FR6A7	The new federal means test benefit question for Dislocated Worker is not included on RNAVR10.
RNEIN10	1-4CQIXA	INAS issue: The Total Income/FM Estimated Student field on RNINAIQ may incorrectly display as null.
ROAENRL	1-52D4A1	Financial Aid Attending hours cannot be viewed on ROAENRL unless Enrollment Record exists.
ROK_ARCHIVE_DATA	1-5D8EWJ	Process aborts when error is encountered
ROK_ARCHIVE_DATA	1-5KQQE7	For some VPD'd institutions, the ROK_ARVCHIVE_DATA package fails during the 8.4 upgrade

Object Name	Defect #	Summary
ROREMAL	1-544EDM	Special characters such as accent marks and tildes on RORELTF are omitted from the ROREMAL email
RORHSDP	1-5C6QFJ	Inactive state codes are inserted for High School
RORSTAT_API	1-5IEBAX	RORGRPS, RORBPST may fail with error: 'Aid Year Code is prior to the 2003-2004 aid year'
RPAINFO	1-5E6USL	RPAINFO returns the error "*ERROR* Unable to update RORMESG record." when saving as reviewed.
RPEDISBS.pco	1-5ELWEZ	RPEDISBS.pco will not compile in a VMS environment
RPILECS	1-5CAVSZ	8.x Only: Auto Hint for Data Source column should be "D=Direct Loan, T=TEACH"
RPKAFRM	1-3T1NHX	Error when awarding Direct Loan on RPAAWRD in MEP environment(INST2)
RPROAWDB	1-38D9J9	The RPROAWDB process is not including some students
RPRLNDR	1-54F2KT	Unable to enter 255 characters for Lender URL
RPRLPRD,RPROPTS	1-5LRHZB	Forms RPRLPRD and RPROPTS may give errors when using Direct Navigation (F5).
RPROPTS	1-5ONLRL	Once updated to a value, the RPROPTS Pell ISIR Term cannot be reset to "None"
RP_APPLICANT_STATUS API	1-4C6ND8	ROAPELL SAR Certified Date not updating RRAAREQ
RP_APPLICANT_STATUS API	1-5RYJXX	Incorrect statement in the Banner Financial Aid 7.14 and 8.4 Upgrade Guide