

# Banner Financial Aid Release Guide

*Release 8.6.2  
February 2010*

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### Prepared by: SunGard Higher Education

4 Country View Road  
Malvern, Pennsylvania 19355  
United States of America  
(800) 522 - 4827

### Customer Support Center Website

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### Distribution Services E-mail Address

[distserv@sungardhe.com](mailto:distserv@sungardhe.com)

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# Introduction

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This Release Guide documents Release 8.6.2 of the Banner® Financial Aid System. Release 8.6.2 includes regulatory updates, and problem resolutions.

 **Note**

Any release hints, suggestions, or corrections to this release guide that comes 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 8.6.2 release?*, Solution/FAQ 1-AU9IIU, 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-AU9IIU) as you use the new release functionality. ■

This document describes the following updates for the 8.6.2 release.

## INAS

The functional and technical sections include changes for CSS' Institutional Needs Analysis System (INAS) software for 2010-2011.

## Problem Resolutions

Problem resolutions are summarized by object at the end of the release guide. For more information about a problem resolution, refer to the `finaid80602resolutions.txt` file that accompanies the Banner Financial Aid 8.6.2 release.



# 1 INAS - Functional



This section discusses the functional update for the 8.6.2 release.

The 2010-2011 final version of Institutional Needs Analysis System (INAS) supports the Federal Methodology (FM) processing. This final version includes the calculation of the FM Parent Contribution, FM Student Contribution, and the FM Expected Family Contribution, which is used to determine the Pell eligibility. Prior to the 8.6.2 release, only the beta code for Federal Methodology was available. In addition this version of INAS continues to support Institutional Methodology (IM). IM processing includes the calculation of IM Parent Contribution, IM Student Contribution, and IM Expected Family Contribution.

## INAS Global Policy

The FM INAS module has been updated with the following features for the 8.6.2 release:

- [“Allow Official FM Results” on page 7](#)
- [“Enable FM to IM Comparison” on page 7](#)
- [“Populate Global Variables” on page 7](#)

### Allow Official FM Results

The final version of INAS including FM processing was not available at the time of the 2010-2011 Winter Regulatory Release. The FM INAS results were estimated, and with the release of Final FM INAS, FM results are official except for rejected ISIR records or results of the EFM calculation based on IM information received before a Federal record.

### Enable FM to IM Comparison

Schools using IM receiving both IM (CSS) and FM (EDE) data, might want to activate the comparison report option in the INAS program. To meet the school’s requirement, the comparison report option is activated in the 8.6.2 release.

### Populate Global Variables

If schools want to change the Global Policy options from the Early Decision Release, they can overwrite their Part 1 selections. If the schools want to insert Part 2 with the default values, a script that updates the Global record Part 2 during the install process is included with the release.

In addition, the script delivered with Early Decision has been modified to reset Global Policy options Part 2, in addition to resetting Part 1. To do this, you have to run the script to restore the delivered values to the Global options.

## Changed Final FM INAS

The FM modifications are in accordance with the specification for software developers for the 2010-2011 academic year. The FM modules contain the following modifications applied to the source code to implement the following Federal Methodology functionality:

- Modified copybooks to support the U.S. Department of Education's 2010-11 ISIR record layout.
- Modified programs to implement normal yearly table updates.
- Incremented date fields in accordance with the most recent specification for software developers.
- Changed FM programs and copybooks to support 2010-11 modifications to complete assumption edits and federal reject edits.
- The following are the specific updates for the 8.6.2 release:
  - Added student and parent IRS request flags.
  - Corrected the Education Savings and Asset Protection Allowance for 28-year-old single parent of dependent students from \$300 to \$3300.
  - Added code initialize auto-zero EFC fields to zeros rather than all 9's.
  - Added code to initialize INAR-FIELDS to zeros rather than all 9's to correct possible errors in the calculation of FISAP income.
  - Added code to update the student and parent tax filer fields on the INAR.
  - Changed the default value of FC-FILER from *F* to *Y*. The initial incorrect value may have prevented some students or parents from being correctly selected as tax filers during the FM calculation.
  - The IRS Income level fields in working storage were corrected as listed below. These changes would modify the population of students selected for Reject Code 20 (a non-tax-filer is reporting an income above the IRS filing requirement):
    - Single Independents with No Dependents from *8,950* to *9,350*.
    - Single Independents with Dependents from *11,500* to *12,000*.
    - Married Independents with No Dependents from *17,900* to *18,700*.
- The edit for Reject Code 1 (family ineligible for Simplified Needs Test) was modified to check to see if any of the parent or student asset fields are equal to spaces (not reported) rather than checking to see if all of the parent and student asset fields were equal to spaces.

- Edit 1014 - If the student is over 21 years, while filing the FAFSA and all other fields, point to them being a dependent student except that one or more of the homeless fields are set to *Yes*, then the homeless fields are set to *No* - Changed the CALC-S-AGE routine to be called from multiple places as Edit 1014 needed to calculate student age from the application date instead of the award year date. However, the rest of the time student age needs to be calculated using the award year date because using the Edit 1014 age was leading to incorrect Reject C records.

## Modifications for continued IM Support

### Note

This is in accordance with the College Board INAS 2010-2011 FM Release notes published January 31, 2010: ■

The updates were also made to the IM and other INAS common modules to implement the following functionality:

- Programs and copybooks were changed to provide the INAS 2010-11 *compare* function with the latest 2010-11 business rules.
- Modified program to update variables whose values were set to *1* or *2* to a new setting of *Y* and *N* respectively.
- Updated INAS2011.pco module to allow data migration of international student applications and to provide current version control information.
- The following are the specific updates for the 8.6.2 release:
  - Modified the length of the ISIR-IM working storage field from *3700* to *4150*.
  - Added initialize of WK-EMPTY-IMR flag to insure that students with PROFILE data are properly calculated with IM results even following a student with FM only data.
  - Modified the flag which controls whether or not to perform a comparison of the age of the oldest parent from the tolerance sensitive fields group (valid values are *00000* or *99999*) to the no tolerance fields group (valid values are *Y* or *N*).
  - Added four new fields for comparison to the tolerance sensitive fields group
    - Student's Combat Pay.
    - Parents' Combat Pay.
    - Parents' untaxed IRA distributions.
    - Parents' untaxed pensions or savings distributions.
- Modified the Citizenship compare routine to treat the PROFILE value of *4* (Canadian citizen) as an ISIR value of *3* (non-citizen).
- Modified the State of Legal Residence compare routine to treat the PROFILE value of *QC* (Quebec) and the ISIR value of *PQ* as equivalent.

For the Award Year 2009-10, the condition is corrected, where the INAS sets the system date in award year 2009-10 to 1910 instead of 2010.

This functional section discusses the following topics:

- [“New Report and Process” on page 10](#)
- [“Changed Report and Process” on page 10](#)
- [“Changed Form” on page 12](#)

## New Report and Process

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The following process has been added in the Banner Financial Aid 8.6.2 release:

### Comparison Program in INAS (RNECP11)

The new Comparison Program in INAS (RNECP11) is a copy of the 2009-2010 Comparison Program in INAS (RNECP10) updated for the 2010-2011 aid year.

#### Note

This program was previously disabled and has now been enabled. ■

## Changed Report and Process

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The following process has been changed in the Banner Financial Aid 8.6.2 release:

### INAS Calculation process (RNEIN11)

All FM Results (FM-SC, FM-PC, FM-EFC, and Pell EFC) has been flagged as *Official* in this release. The following are the exceptions to the INAS Calculation process:

- The only FM results flagged as *Estimated* should be rejected ISIR records or results of the EFM calculation based on IM information received prior to the receipt of a Federal ISIR Record.
- The call to RNECP11 (FM to IM Comparison Report) has been enabled.

## Temporary resolution for the INAS issue

The following is the known INAS issue and temporary Banner workaround until an INAS technical upgrade is received.

A student who reports a marital status value of 4 - (Divorced or Widowed) on the ISIR and has the following additional criteria may be assigned an incorrect FM methodology.

- Has dependents other than a spouse
- Has answered *Yes* to one of the Federal Mean Test Benefits (TANF, SSI, Food Stamps, Free or Reduced Lunch, WIC)
- Has an income of \$30,000 or less
- Has filed a 1040 tax return but did not answer the question as to whether he or she was eligible to file a 1040A or EZ

When the student's CPS record is loaded, the student is properly listed as an Auto Zero EFC methodology on RNARS11. However, when INAS is run, the student's methodology is changed from Auto Zero EFC to Simple.

The new status value 4 - (Divorced or Widowed) was added this year for the student's marital status. Previously, divorced or widowed students were lumped into the Single status of 1. However, the INAS Simple Needs Test code was not updated to reflect this new value. As a result, the proper edits were not performed and the student was given a Simple methodology type rather than the correct Auto Zero EFC.

This issue has been reported to CSS and since this is a critical issue, Banner has implemented a temporary fix. The fix will translate a student marital status value of 4 to 1 and properly evaluate the eligibility for Auto Zero EFC. Now, the student will be identified as *Single* rather than *Div* or *Wid* on the INAR.

### Note

This temporary fix will be reversed once a solution is received from CSS. ■

# Changed Form

The following form has been changed in the Banner Financial Aid 8.6.2 release:

## INAS Global Policy options Rules (RNRGL11)

The following illustrates the INAS Global Policy options Rules:

## Comparisons Controls for FAFSA and PROFILE Information window

The following fields have been added to the Comparisons Using Tolerances block:

Field	Description
Combat Pay (Parent)	(RNRGLBL_PAR_COMBAT_PAY) Compare Parents' Combat Pay. Valid values are 0-99999.
Combat Pay (Student)	(RNRGLBL_COMBAT_PAY) Compare Student's Combat Pay. Valid values are 0-99999.

Field	Description
Untaxed IRA Distributions (Parent)	(RNRGLBL_PAR_IRA_DISTRIBUTIONS) Compare Parents' Untaxed IRA Distributions. Valid values are 0-99999.
Untaxed Pension Distributions (Parent)	(RNRGLBL_PAR_UNTAX_PENSIONS) Compare Parents' Untaxed Pension or Savings Distributions. Valid values are 0-99999.

In addition to the new fields, the following additional changes have been made to the RNRGL11 form:

- In the Options menu, the FAFSA or PROFILE Comparison Controls has been activated.
- The **Has Legal Dependents** (RNRGLBL\_HAVE\_DEP) field has been deleted.
- The **Age of Oldest Parent** field has been moved from the Comparisons Using Tolerances block to the Comparisons Not Using Tolerances block.



## 2 INAS - Technical



This section discusses the technical update for the 8.6.2 release.

### Required Data

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This section includes the following topics:

- [“INAS Global Policy options table \(rinsgl11.sql\)” on page 15](#)
- [“Global Policy Insert script for RNRGLBL\\_PART\\_2 \(rnrglblu\\_071602.sql\)” on page 17](#)

### INAS Global Policy options table (rinsgl11.sql)

The INAS Global Policy options table (RNRGLBL) is used to store the policy options maintained on the 2010-2011 INAS Global Policy options rules form (RNRGL11), which is a year-specific form.

This insert script was delivered with 8.5.2 release and again with 8.6 release as a part of the installation. The insert script inserted the Global Policy option default values into the RNRGLBL\_PART\_1 field of this table, and spaces into the comparison or tolerances values of the RNRGLBL\_PART\_2 field. This script has been modified to update Part 2 with default values, while continuing to update part 1 default values.

The following changes were made to RNRGLBL\_PART\_2 for the 8.6.2 release:

- [“Added items” on page 16](#)
- [“Relocated item” on page 16](#)
- [“Deleted items” on page 16](#)

## Added items

The following items have been added to the RNRGLBL\_PART\_2 table.

Item Name	Size	Position	Value	Comment
FILLER	1	2209	0000	
FILLER	5	2361	0000	
RNRGLBL_COMBAT_PAY		2426	0000	Student's combat pay
RNRGLBL_PAR_COMBAT_PAY		2431	0000	Parents' combat pay
RNRGLBL_PAR_IRA_DISTRIBUTIONS		2436		Parents' untaxed IRA distributions
RNRGLBL_PAR_UNTAX_PENSIONS		2441		Parents' untaxed pensions/savings distributions

## Relocated item

The following item has been relocated from Tolerance Sensitive fields group to the No Tolerance fields group.

Item Name	Size	Position	Value	Comment
RNRGLBL_AGE_PARENT	1	2211	Y	Age of oldest parent

## Deleted items

The following items have been deleted from the RNRGLBL\_PART\_2 table.

Item Name	Size	Position	Value	Comment
RNRGLBL_HAVE_DEP	1	2209	Y	Does student have legal dependents
FILLER	1	2211		
FILLER (deleted 20 bytes)	355	2446		

## **Global Policy Insert script for RNRGLBL\_PART\_2 (rnrglblu\_071602.sql)**

The `rnrglblu_071602.sql` script inserts the 2010-2011 global default values into the RNRGLBL table.

This script is run as part of the installation to update only the default values for Part 2 of the Global Default option table. These options are used to set values for the comparison report between IM and FM data.



# 3 Problem Resolutions



This section lists the problem resolutions included in the Banner Financial Aid 8.6.2 release. For details about a problem resolution, refer to the `finaid80602resolutions.txt` file that accompanies this release.

Object	Defect#	Summary
INAS.pco	1-ALGFBV	INAS Century issue affects age calculation and report dates. INAS Technical Upgrade #1 Post 4.
RCPCT11	1-ACWL6I	RCPCT11 does not translate family members for father and mother correctly for use with RNEIN11.
RCPCT11	1-AF3PHQ	RCRTP11 loads both CSS and EDE records as current record when CSS loaded after EDE.
RNEIN10	1-ASBXMM	RNEIN10 INAS Century issue affects age calculation and report dates.
RNEIN11	1-ACWL9R	The IM SC, IM PC and IM TFC totals disappear when FAFSA data is loaded and RNEIN11 is run.
RNEIN11	1-AI3HQF	The <code>rcrapp2_model_cde</code> field is nulled, when RNEIN11 is run for a FM calculation.
RNEIN11	1-ANHT38	IM Calc is not performed in INAS.
RNEIN11	1-ASPLSP	RNEIN11 is nulling the IM calculation in batch.
RNEIN11	1-AUAKA7	The FM computed data updated with IM results when student has both IM and FM data.
RNEIN11	1-AUF6S8	Student's and parents' co-op earnings are not being included in the FM calculations in INAS.
RNRTMAC	1-ADREQ8	Banner Finaid <code>rnrtmac.pc</code> segmentation fault core dump at runtime due to <code>out_type</code> variable.
RNRTMNI.pc	1-ASTDD2	RNASL10 does not populate after loading TRM/FAH files with the new January 4, 2010 layout.

Object	Defect#	Summary
ROAINST	1-71HBCX	Getting Error message and Pop up message.
rpk_common_val_ us1.sql	1-9JBFQO	RPEPELL calculates and posts a Pell Grant when a student's Citizenship Status is 4=Canadian citizen.
RPRELCT.PC	1-8O6M5N	Compiling rprelct.pc with SCT_DEBUG results in compile errors.
RPRELCT.PC	1-8RSQHH	Windows - Running RPRELCT from GJAPCTL results in rprelct.exe - Application Error.
UPGRADE ROAINST.fmb	1-AMJH3E	RNEIN11 not calculating the IM Need.