

# Banner Financial Aid Release Guide

*Release 8.8  
July 2010*

The banner features a grayscale photograph of a student writing in a notebook on the left. To the right of the photo is a black rectangular area containing the word "SUNGARD" in white, bold, uppercase letters. Further right is a blue rectangular area containing the words "HIGHER EDUCATION" in white, uppercase letters. The banner concludes with a gray rectangular area on the far right.

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# Banner Financial Aid 8.8 Release Guide

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## Section 8 Problem Resolutions

# Introduction

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This guide documents the Banner® Financial Aid 8.8 release, which includes enhancements, regulatory updates, request for process enhancements (RPEs), and problem resolutions.

The following enhancements are included in this release:

- 2009-2010 FISAP (Fiscal Operations Report and Application to Participate)
- 2010-2011 Direct Loan Compare Extract Process
- 2010-2011 Common Origination and Disbursement (COD) Processing

The functional and technical sections discuss the changes made for 2010-2011 COD processing.

- Year Round Pell Phase 3
- Miscellaneous Enhancements

## 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 `finaid80800resolutions.txt` file that accompanies the Banner Financial Aid 8.8 release.

### Note

Any release hints, suggestions, or corrections to this release guide that arise, 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 8.8?*, Solution/FAQ # 1-CGJNDW, 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-CGJNDW) as you use the new release functionality. ■



# 1 2009-2010 FISAP - Functional



## Overview

Each year, Title IV-eligible schools must report the fiscal year's final campus-based aid disbursed by fund type, as well as the number of students receiving such aid. This reporting is done through the FISAP (Fiscal Operations Report and Application to Participate), which includes data from Banner Financial Aid, Banner Student, and Banner Accounts Receivable. Banner provides your institution with the two grids needed to report this campus-based data. You can then use these reports to transfer the data to the Department of Education's FISAP Web site.

For 2009-2010, the Department of Education did not make any changes to the two required grids. These grids are:

- Part II. Application to Participate for Award Year July 1, 2011 through June 30, 2012, Section F. Information on Eligible Aid Applications for Award Year 2009-2010
- Part VI. Program Summary for Award Year July 1, 2009 through June 30, 2010, Section A. Distribution of Program Recipients and Expenditures by Type of Student.

However, the Department of Education has made changes to the Auto Zero EFC (income and eligibility) and FISAP Total Income calculations for 2009-2010.

### **Auto Zero EFC criteria:**

- The previous Auto Zero EFC income threshold of \$20,000 has been increased to \$30,000.
- Auto Zero EFC qualification has been extended to include families of dislocated workers.

### **FISAP Total Income calculations:**

- Worksheets A, B, and C have been eliminated and replaced by individual columns that reflect "Additional Financial Information" and "Untaxed Income".

# New Reports and Processes

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## FISAP Report for 2009-2010 (RORFS10)

The FISAP report is a report of Federal expenditures made by institutions between July 1 and June 30 of the particular award year. Federal work-study employment for summer terms crosses over this border. Some of the wages are earned before and some are earned after July 1. Banner does not automatically include these students on the FISAP report, because the student does not have the appropriate records in Banner Student or Financial Aid.

For example, a student who applies for aid for the 2009-2010 award year, but began their FWS job in May or June of 2009 should be included on the 2009-2010 FISAP.

In other cases, payment data needs to be corrected because of adjustments made to student's Accounts Receivable records outside of the Banner Financial Aid system.

Both of these circumstances can be handled by the FISAP process. You should manually insert these students into the temporary FISAP table by entering the data on the ROAFSAP form and let the Banner RORFS10 Process perform the necessary steps.

The FISAP separates the process into two steps.

Step 1 - Select all eligible students, calculate the data necessary to properly place the student on the grid, and store this data in a temporary FISAP table.

Step 2 - Calculate the number of students for each cell on the grid and print the report in the proper year-specific format.

Step 2 uses the data in the temporary FISAP table. The entries in that table are not deleted after Step 2 is performed. You can run steps 1 and 2 separately or you can combine the steps in a single run of the program. You can use the FISAP Person Maintenance Form (ROAFSAP) to display and update individual student data in the table. You can also use the form to insert or delete student records from the FISAP table. If you make manual changes to a record on ROAFSAP and want to prevent the loss of this data change when re-running the Create step, check the Lock field.

To be selected by the FISAP report, students must have applied for financial aid as evidenced by having need analysis data on RNANA10, which must include an official EFC. The report also requires that students be U.S. citizens (or eligible non-citizens) enrolled during the 2009-2010 academic year and have hours entered on either the student system or on the Financial Aid Enrollment Form (ROAENRL). Please note that the hours present on the Financial Aid Enrollment Form (ROAENRL) takes precedence over the Banner Student System hours. Also, the student level code on the General Student Form (SGASTDN) must match one of the level codes entered as a parameter for the process, and the student record must be associated with an eligible major. The FISAP process also

provides you with the capability of restricting this population to a subset using the parameters for population selection. This subset is still required to meet all other eligibility requirements.

## Report Parameters

A parameter for the report controls which steps are actually performed. The second parameter asks if you want to enter *C* (Create) to only generate the data, enter *P* (Print) to only print the report, or enter *B* (Both) to generate and print. You can also enter *CD* (Create and Print Detail), enter *CS* (Create and Print Summary), enter *D* (Print Detail), enter *R* (Print Auto Zero Discrepancies), or enter *S* (Print Summary). Please note that population selection only restricts the population when you choose an option which has a “create” feature since the non-create options obtain the data from the temporary FISAP table.

Another parameter for the report is a sort option. Sort options for the student listing are in *N* (Name order) or *I* (Income order). When Step 1 is run, a file called `rorfs10_XXXXX.log` is created. This is the FISAP Record Creation Log. It lists students who were selected by the program’s main select routine but eliminated later in the process. It may help explain why some students were not included on the report that you thought should have been included. Since some students may be eliminated by the main select, this listing is not all inclusive. A Control Summary is also part of this file. The Control Summary lists the parameters used when Step 1 was run and shows the number of students inserted into the temporary FISAP table. After Step 2 is run, a file called `rorfs10_XXXXX.lis` is created. This print file includes the student listing, the Eligible Applicant Income Grid, the Program Summary Grid and a Control Summary.

### Note

The job submission log file is called `rorfs10_XXXXX.log` (where `XXXXX` is a sequence number assigned by job submission). The two outputs created by the job (`rorfs10_XXXXX.log` and `rorfs10_XXXXX.lis`) will go to the directory controlled by `gurjobs`. The log file is a control report and the `lis` file is the actual FISAP data. ■

## Data Discrepancies Report (RSRDSCP)

The Data Discrepancies Report (RSRDSCP) may be useful to identify students who may have received a prior baccalaureate degree according to admissions/student system data, but did not report that information on their Financial Aid Application. The FISAP process uses the FAFSA question from the RCRAPP1 table for prior degree information. The RSRDSCP Report is used to compare data reported on the financial aid application with data reported in the Student System. To run the Data Discrepancies Report against your FISAP population you first need to create a population selection rule on the Population Selection Definition Rules Form (GLRSLCT). You then extract the population with the GLBDATA process and then run the RSRDSCP report against that Selection ID.

## FISAP Definitions

### Calculation of Automatic Zero EFC

Not every student with a zero EFC receives an automatic zero EFC. ED sets an Auto Zero EFC Flag on the ISIR record if they meet certain criteria. However, when records are recalculated and/or manually entered into the system this status can change and the flag sent from ED is not updated within Banner.

#### Note

As noted previously, starting with 2009-2010 award year, the dislocated worker status factors into the determination of Auto Zero EFC. ■

Another indicator that the student has received an Auto Zero EFC is the Methodology Type which indicates which EFC formula was used to calculate a student's EFC. The Methodology Type is received on the initial ISIR record and is also updated correctly when changes are made to the student's record and a need analysis calculation is run. Therefore, the RORFS10 process determines a student's Auto Zero EFC status by looking at the Methodology Type: RCRAPP2\_C\_1\_ANLY\_TYPE for Independent students and RCRAPP2\_C\_PAR\_1\_ANLY\_TYPE for Dependent students.

If the Methodology Type is Null, indicating that the school has not run a need analysis calculation on a manual record, the income specific criteria will be reviewed for the student to determine whether or not they are eligible for an Auto Zero EFC.

### Dependent Students

Dependent students automatically qualify for an Automatic Zero EFC if both items 1 and 2 are true:

1. The student's parents filed or were eligible to file 2008 IRS Form 1040A or EZ (they were not required to file a 2008 Form 1040) or the parents were not required to file any income tax return.

#### Note

Any of the following 2008 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ, the income tax return required by the tax code of; Guam, American Samoa, The U.S. Virgin Islands, The Republic of the Marshall Islands, The Federated States of Micronesia, or Palau. ■

OR

A person who is considered part of the parent's household size (as defined on the FAFSA) who received a means-tested Federal benefit during 2007 or 2008. This includes a benefit from any of the following Federal programs:

- Supplemental Security Income (SSI)

- Food Stamp Program
- Free and Reduced School Lunch Program
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

OR

The student's parent is a dislocated worker.

AND

2. The 2008 income of the student's parents from one of the two sources below was \$30,000 or less:

- For tax filers, the parents' adjusted gross income from 2008 Form 1040A or 1040EZ was \$30,000 or less (if 1040 is filed, the parent must indicate that they were eligible to file a 1040A/1040EZ),

 **Note**

Any of the following 2008 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ, the income tax return required by the tax code of; Guam, American Samoa, The U.S. Virgin Islands, The Republic of the Marshall Islands, The Federated States of Micronesia, or Palau. ■

OR

- For non-tax filers, the income shown on the 2008 W-2 forms of both parents (plus any other earnings from work not included on the W-2s) was \$30,000 or less.

## Independent Students

Independent students with dependents other than a spouse automatically qualify for an Automatic Zero EFC if both of the following are true:

1. Student (and student's spouse, if any) filed or was eligible to file a 2008 IRS Form 1040A or 1040EZ (they are not required to file a 2008 Form 1040); or they were not required to file any income tax return.

 **Note**

Any of the following 2008 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ, the income tax return required by the tax code of; Guam, American Samoa, The U.S. Virgin Islands, The Republic of the Marshall Islands, The Federated States of Micronesia, or Palau. ■

OR

Any person considered part of the student's household size (as defined on the FAFSA) who received a means-tested Federal benefit during 2007 or 2008. This includes a benefit from any of the following Federal programs:

- Supplemental Security Income (SSI)
- Food Stamp Program
- Free and Reduced School Lunch Program
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

OR

The student (or the student's spouse, if any) is a dislocated worker

AND

2. Student's (and spouse's) 2008 income from the two sources below is \$30,000 or less:

- For tax filers, the student's (and spouse's) adjusted gross income from 2008 Form 1040A or 1040EZ was \$30,000 or less (if a 1040 was filed, the student must indicate that they were eligible to file a 1040A/1040EZ).

 **Note**

Any of the following 2008 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ, the income tax return required by the tax code of; Guam, American Samoa, The U.S. Virgin Islands, The Republic of the Marshall Islands, The Federated States of Micronesia, or Palau. ■

OR

- For non-tax filers, the student's (and spouse's) 2008 W-2 forms (plus any other earnings from work not included on the W-2s) was \$30,000 or less.

 **Note**

The automatic eligibility criteria for a zero EFC are not applicable to a single or married independent student without dependents other than a spouse. ■

## Full-Time

The student's last term of enrollment is used to determine full or part-time status.

## Calculation of FISAP Total Income

FISAP income totals (TI, FTI, and STI) are calculated as follows:

### Note

Each of the calculations in this section use the following common variables:

UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income

AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay ■

### Dependent Student

#### 1. Total Income (TI)

##### *Tax Filer*

If parents' tax filing status is tax filer, the following information is used to determine Total Income:

$$\text{Parents' Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

##### *Non-Tax Filer*

If parents' tax filing status is non-tax filer, the following information is used to determine Total Income:

$$\text{Father's Income} + \text{Mother's Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

#### 2. Student's Total Income (STI)

##### *Student Tax Filer*

If the student's tax filing status is tax filer, the following information is used to determine Student Total Income:

$$\text{Student's Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{STI}$$

##### *Student Non-Tax Filer*

If the student's tax filing status is non-tax filer, the following information is used to determine Student Total Income:

$$\text{Student's Income} + (\text{UI}) - (\text{AFI}) = \text{STI}$$

**3. Dependent Student FISAP Total Income (FTI)**

$$TI + STI = FTI$$

**Independent Student**

**1. Total Income (TI)**

***Student Tax Filer***

If student’s tax filing status is tax filer, the following information is used to determine Total Income:

$$\text{Student’s Adjusted Gross Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

***Student Non-Tax Filer***

If student’s tax filing status is non-tax filer, the following information is used to determine Total Income:

$$\text{Student’s Income} + \text{Spouse’s Income} + (\text{UI}) - (\text{AFI}) = \text{TI}$$

**2. Independent Student FISAP Total Income (FTI)**

$$TI = FTI$$

**Creating manual records without FAFSA**

The FISAP depends on the student’s dependency status, tax filing status and income being reported in Banner Financial Aid. If you have created student records by just entering the student’s EFC on the 2009-2010 Need Analysis Result Form (RNARS10) so that the student is packaged, then Banner doesn’t have sufficient data in order to accurately place or count the student in the two income grids. At a minimum, you must enter the following on the 2009-2010 Need Analysis Form (RNANA10):

<b>Dependent Students</b>	<b>Independent Students</b>
Parent Tax Return Filed	Student Tax Return Filed
Parent Tax Return Type Form Filed	Student Tax Return Type Form Filed
Parent Eligible to File 1040A/EZ	Student Eligible to File 1040A/EZ
First Bachelor’s Degree by 01-JULY-2009	Student Have Children You Support
Parent AGI or wages	Student Have Legal Dependents
Parent SSI	First Bachelor’s Degree by 01-JULY-2009

**Dependent Students****Independent Students**

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Parent Food Stamps	Student and spouse AGI or wages
Parent Free or Reduced Lunch	Student SSI
Parent TANF	Student Food Stamps
Parent WIC	Student Free or Reduced Lunch
Parent Dislocated Worker	Student TANF
Parent Additional Financial Information	Student WIC
<ul style="list-style-type: none"><li>• Education Tax Credits</li></ul>	Student Dislocated Worker
<ul style="list-style-type: none"><li>• Child Support Paid</li></ul>	Student Additional Financial Information
<ul style="list-style-type: none"><li>• Need Based Employment</li></ul>	<ul style="list-style-type: none"><li>• Education Tax Credits</li></ul>
<ul style="list-style-type: none"><li>• Grant and Scholarship Aid</li></ul>	<ul style="list-style-type: none"><li>• Child Support Paid</li></ul>
<ul style="list-style-type: none"><li>• Combat Pay</li></ul>	<ul style="list-style-type: none"><li>• Need Based Employment</li></ul>
Parent Untaxed Income	<ul style="list-style-type: none"><li>• Grant and Scholarship Aid</li></ul>
<ul style="list-style-type: none"><li>• Tax-Deferred Pensions</li></ul>	<ul style="list-style-type: none"><li>• Combat Pay</li></ul>
<ul style="list-style-type: none"><li>• IRA and Keogh Deductions</li></ul>	Student Untaxed Income
<ul style="list-style-type: none"><li>• Child Support Received</li></ul>	<ul style="list-style-type: none"><li>• Tax-Deferred Pensions</li></ul>
<ul style="list-style-type: none"><li>• Tax-Exempt Interest</li></ul>	<ul style="list-style-type: none"><li>• IRA and Keogh Deductions</li></ul>
<ul style="list-style-type: none"><li>• Untaxed IRA Distributions</li></ul>	<ul style="list-style-type: none"><li>• Child Support Received</li></ul>
<ul style="list-style-type: none"><li>• Untaxed Pensions</li></ul>	<ul style="list-style-type: none"><li>• Tax-Exempt Interest</li></ul>
<ul style="list-style-type: none"><li>• Military and Clergy Allowance</li></ul>	<ul style="list-style-type: none"><li>• Untaxed IRA Distributions</li></ul>
<ul style="list-style-type: none"><li>• VA Non-Education Benefits</li></ul>	<ul style="list-style-type: none"><li>• Untaxed Pensions</li></ul>
<ul style="list-style-type: none"><li>• Other Untaxed Income</li></ul>	<ul style="list-style-type: none"><li>• Military and Clergy Allowance</li></ul>
	<ul style="list-style-type: none"><li>• VA Non-Education Benefits</li></ul>
	<ul style="list-style-type: none"><li>• Other Untaxed Income</li></ul>
	<ul style="list-style-type: none"><li>• Other Non-Reported Money</li></ul>

Also, for these records dependency may be directly entered on the Applicant Override Form (RNAOV10), FM-Student Dependency.

 **Note**

To be selected for inclusion in the FISAP report, a student must be a U.S. Citizen or eligible non-citizen. Also, if a need analysis calculation has been run, the student must have an official EFC. ■

## Dependency

Dependency is derived directly from the student's need analysis record. Therefore, if professional judgment was used to make a student independent, the FISAP calls that student independent.

## Level

The FISAP uses the student's level from the student system (the SGBSTDN table). The process uses the most recent level for a term in which the student was enrolled in an eligible program. Therefore, if a student was enrolled in the Fall as an undergraduate student, graduated and returned in the Spring as a Graduate student in an ineligible program, the FISAP classifies that student as an undergraduate student. If the graduate program was an eligible program, then the student would be classified as a graduate student. Any student who received an SEOG grant that needs to be reported on the FISAP is automatically classified as an undergraduate student. The Program Summary can't report SEOG recipients for graduate students. So, students who were undergraduates in the Fall and received SEOG who then graduated and returned in the Spring as a graduate student, will be classified as an undergraduate student.

Different level codes may use different definitions of full-time. Parameters for the job determine the full-time requirements for each level code. These parameters also define which level code should mean undergraduate or graduate. This allows you to define different full-time definitions for your Medical School and your Graduate Business School, for example.

 **Note**

All students who should be included on the FISAP must have their Level Code defined as one of the parameters for the report. Students with level codes that have not been defined in the parameter section will not be included in the FISAP. ■

## With or Without Bachelor's or First Prof. Degree

As stated earlier, the FISAP uses the RCRAPP1 data for Degree by July 1, 2009. The RSRDSCP report can help to verify the accuracy of that data.

## 2 2010-2011 Direct Loan Compare Extract Process Update - Functional



Direct Loan institutions are required to use the School Account Statement (SAS) report for reconciliation of funds for the Direct Loan Program. The SAS is generated by COD on a monthly basis and automatically sent to the school's SAIG mailbox. In order to assist institutions in reconciliation of records from their internal database to the SAS report, the Department of Education provides a Windows based application, *Direct Loan (DL) Tools for Windows*. For the 2010-2011 aid year, institutions must use version 10.0 of DL Tools.

### Note

The software and related user documentation for DL Tools 10.0 is available from the U.S. Department of Education's Federal Student Aid Download Web site located at <https://www.fsadownload.ed.gov>. ■

## New Processes/Reports

The following new process was created for Direct Loan processing in 2010-2011.

### 2010–2011 Direct Loan Compare Extract Process (RPRCP11)

RPRCP11 was created based upon the 2009-2010 Direct Loan Compare process (RPRCP10). RPRCP11 creates the Cash Detail Extract File (DLEXCASH), the Loan Detail Extract File (DLEXLOAN), and the Disbursement Detail Extract file (DLEXDISB) for the 2010-2011 aid year.

The comparison software provided by the Department of Education to compare data from reports to data from an external database is part of *DL Tools for Windows*. Instructions for installing, using, and support of the *DL Tools for Windows* are provided in the Install Guide as part of the download.

The Direct Loan Compare Extract Process (RPRCP11) creates data files to import into the *DL Tools for Windows* software for comparing cash, loan, and disbursement records from Banner to the data received on the School Account Statement (SAS).

The Banner Direct Loan Compare Process (RPRCP11) provides a summary of cash records existing in Banner for the aid year. The process also enables you to extract the Banner data into three different files that you can import into the *DL Tools for Windows* software for comparison with the reports supplied by COD. The files produced by the RPRCP11 Process are:

- *DLEXCASH\_jobnumber.TXT* — Provides cash detail records
- *DLEXLOAN\_jobnumber.TXT* — Provides loan detail records
- *DLEXDISB\_jobnumber.TXT* — Provides disbursement detail records

 **Note**

SunGard Higher Education supports the generation of the *DLEXCASH*, *DLEXLOAN*, and *DLEXDISB* extract files. *DL Tools for Windows* is not supported by SunGard Higher Education. ■

The Direct Loan Compare Extract includes a Matching End Date parameter to align the data records extracted from Banner with the processing date of the School Account Statement data. It is advisable to import all Direct Loan Acknowledgement files prior to running the Direct Loan Compare Extract. You can then import the files into *DL Tools for Windows* and execute different comparison reports to identify discrepancies.

# 3 Common Origination and Disbursement (COD) - Functional



This release includes the updates necessary for 2010-2011 COD processing, based upon the guidelines described in the 2010-2011 Technical Reference. The following updates, defect resolutions, and RPE are included:

- Additional processing to import new National Student Loan Data System (NSLDS) Exit Counseling files (via AHSLDEOP and EXITFFOP message classes).
- Parent Default Loan status is no longer required on Parent PLUS loan processing.
- Updated field data range or length for several PLUS application columns to conform to the 2010-2011 COD Technical Reference (this item resolves defect 1-BQS1IJ).
- A new field to capture Credit Action Option when a PLUS Application record is manually matched (this item resolves defect 1-BQS1S4).
- Modified COD import processing to ensure tracking requirements updated through the process use the appropriate XML tags when passing the satisfied date (this item resolves RPE 1-5ZU3V6).

This section provides information on the following topics:

- [“Changed Forms” on page 21](#)
- [“Changed Processes” on page 24](#)

## Changed Forms

This section describes changes to COD forms to support the Banner Financial Aid 8.8 release.

- [“Direct Loan Origination Form \(RPAORG\)” on page 22](#)
- [“Unmatched COD Records Form \(RPAUCOD\)” on page 23](#)
- [“Electronic Counseling Status Form \(RPILECS\)” on page 23](#)

## Direct Loan Origination Form (RPALORG)

This form is used to review and update important aspects of loan applications for Direct Loan programs. The RPALORG form has been modified for this release.

The screenshot shows the RPALORG form with the following fields and values:

- Aid Year:** 1011
- ID:** 781300007
- Student:** Student S Test7
- Loan ID:** 781300007P11G80006001
- Loan Type:** P=Parent PLUS
- Application Number:** 2
- Loan Sequence Number:** 1
- Lock:**
- School Code:** G80006
- Fund:** DLPLUS Federal Direct: Parent Loan
- Approved Amount:** 10,000
- Requested Amount:** 10,000
- Loan Status:** APPR Approved (highlighted with a red box)
- Loan Period:** COD11 COD Loan Period 1011
- Loan Period Start:** 02-JUL-2010
- Loan Period End:** 01-JUL-2011
- Academic Year Start:** 02-JUL-2010
- Academic Year End:** 01-JUL-2011
- Loan Fee Rate:** 4.000
- Rebate Fee Percent:** 1.500
- Year in College:** 3=3rd year/junior
- SAR Transaction Number:** 01
- HPPA:**
- Preparatory/Teacher Certification:** N=No
- Origination Status:** N=Not ready
- Date Created:** 10-MAY-2010
- Date Sent:** [calendar icon]
- Document ID:** [text field]
- Confirmation Date:** [calendar icon]
- PLUS Loan Data:**
  - Application ID:** [text field]
  - Application Complete Date:** [calendar icon]
  - Application Loan Amount:** [text field]
  - Maximum Loan Requested:**
  - Parent PLUS to Student:**
  - Deferment:**
  - Original Credit Status:** (None)
  - Current Credit Check Status:** (None)
  - Credit Check Date:** [calendar icon]
  - Credit Check Expiration Date:** [calendar icon]
  - Credit Action:** (None) (highlighted with a red box)
  - Credit Appeal Status:** (None)
  - Credit Override Code:** (None)
  - Endorser Amount:** [text field]
  - Credit/Application Document ID:** [text field]

At the bottom of the form, there is a note: "Credit action requested if the credit check has been denied" and a status bar showing "Record: 1/?" and "<OSC>".

### Main window

The following field has been added to the main window to display the contents of the new RPRLAPP\_CR\_ACTION\_OPT column:

Field	Description
Credit Action	Credit action requested if the credit check has been denied. (RPRLAPP_CR_ACTION_OPT).

To make room for the new **Credit Action** field (RPRLAPP\_CR\_ACTION\_OPT), the **Loan Status** field (RPRLAPP\_LNST\_CODE) has been moved to the form's left-hand column, directly below the **Requested Amount** field.

### Plus Loan Data block

All fields in this block have been changed to allow update.

## Parent Data window

SunGard Higher Education has received confirmation from the Department of Education that the Parent PLUS borrower certifies that they are not in default when they complete the PLUS MPN. Therefore, all edits related to the **Loan Default** indicator have been removed from the RPALORG form. Starting with the 2010-2011 Aid Year, you are no longer required to enter the Parent **Loan Default** indicator (RPRLAPP\_PAR\_IN\_DEFAULT) when saving Parent PLUS loan records.

## Unmatched COD Records Form (RPAUCOD)

Changes to RPAUCOD have been made to support longer column lengths of the updated Direct Loan Unmatched Application Temporary Table (RPTAUPP). Twenty four RPAUCOD fields have been changed to accept additional data entry space.

The form was also modified to update RPRLAPP\_CR\_ACTION\_OPT to the data from RPTUAPP\_CR\_ACTION\_OPT when a PLUS Application record is manually matched from the form.

## Electronic Counseling Status Form (RPILECS)

The RPILECS form allows you to display the status of electronic Entrance and Exit Counseling sessions completed by the student via the Direct Loan Web sites. The form's **Entrance Type** field has been changed to display the correct description based on the following criteria:

<b>Entrance Type description:</b>	<b>Display Entrance Type description if:</b>
Stafford and Grad PLUS	RPRLECS_ENTRANCE_TYPE = 'P' and RPRLECS_DOCUMENT_ID is not null
Grad PLUS	RPRLECS_ENTRANCE_TYPE = 'P' and RPRLECS_DOCUMENT_ID is null
Stafford	RPRLECS_ENTRANCE_TYPE = 'S'

# Changed Processes

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The following COD process has been updated to support the Banner Financial Aid 8.8 release.

- [“2010-2011 COD Extract Process \(REREX11\)” on page 24](#)
- [“2010-2011 COD Import Process \(RERIM11\)” on page 24](#)
- [“COD Import/Export Report \(RERIMEX\)” on page 24](#)
- [“2010-2011 DL Flat-File Upload \(RPRDU11\)” on page 25](#)

## 2010-2011 COD Extract Process (REREX11)

SunGard Higher Education has received confirmation from the Department of Education that the Parent PLUS borrower certifies that they are not in default when they complete the PLUS MPN. Therefore, the REREX11 process has been changed to no longer require the Parent Loan Default indicator (RPRLAPP\_PAR\_IN\_DEFAULT) to be populated when extracting Parent PLUS loan records (RPRLAPP\_LOAN\_TYPE = ‘P’).

## 2010-2011 COD Import Process (RERIM11)

The RERIM11 process was changed to update the new RPRLAPP\_CR\_ACTION\_OPT column with data from the <CreditActionChoice> tag when importing a matched PLUS Application record in message class CRSP11OP (Document Type = ‘SP’).

To resolve RPE 1-5ZU3V6, changes have been made to the RERIM11 program. The RERIM11 process has been changed so that tracking requirements satisfied through the process use the <CounselingCompletionDate> XML tag (if provided) as the satisfied date. If the <CounselingCompletionDate> XML tag is not provided, the <ProcessDate> XML tag is used.

### Note

The SYSDATE value was used for updates processed prior to changes associated with RPE 1-5ZU3V6. ■

## COD Import/Export Report (RERIMEX)

The RERIMEX report, used to produce output for Direct Loan Entrance Counseling (Document Type = EC), has been changed for this release. When reporting on records where RPRLECS\_ENTRANCE\_TYPE = ‘P’, the resulting output has been changed to report the status of both the Grad PLUS tracking requirement from RERIMEX (parameter 10) and

also the status of the Stafford tracking requirement, as defined in ROBINST\_TREQ\_CODE\_ENTER\_INTV.

## 2010-2011 DL Flat-File Upload (RPRDU11)

Starting in March 2010, National Student Loan Data System (NSLDS) started providing Exit Counseling for all Direct Loan (DL) and Federal Family Education Loan (FFEL) student loan borrowers. Eventually, the DL Servicing website will be phased-out for Exit Counseling and all students will be required to complete exit counseling on the NSLDS website.

Currently, schools can only receive these exit counseling files in ad hoc files, requested from the NSLDS website. These files belong to the AHSLDEOP message class and can be formatted in either an NSLDS specific fixed-length format or in the Direct Loan fixed-length format. You are expected to choose the file's format at the time of your request.

### Note

SunGard Higher Education supports only the Direct Loan fixed-length format. The Direct Loan fixed-length format is the same as the current layout for the DLFEXOP message class, supported in RPRDU11 (minus header and trailer records). ■

In the future, NSLDS plans to support an automatic reporting cycle that will report Exit Counseling records and send them to the school's SAIG mailbox. When this occurs, the file layouts will be the same as the ad hoc reports, but the message class will be EXITFFOP. In anticipation of this future functionality, SunGard Higher Education has updated RPRDU11 to recognize either the AHSLDEOP or EXITFFOP message classes for import to Banner. In both cases, SunGard Higher Education supports only the Direct Loan format of the fixed-length file. The RPRDU11 program has been updated to recognize and process the new AHSLDEOP or EXITFFOP message classes. These message classes will be imported in the same manner as the DLFEXOP message class.



# 4 Year Round Pell Phase 3 - Functional



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

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

This release, Phase 3 (Release 8.8), addresses Banner Financial Aid functionality that further enhances Banner Year Round Pell operations. This release includes the following enhancements and RPEs:

- Pell award calculation based on earned hours
- Impact of Crossover terms on:
  - Database packages
  - Title IV refunding
- Modified:
  - Seed data for Financial Aid Letter Generation variables

## Note

Refer to the *Year Round Pell Phase 3 - Technical* section for additional details regarding variable changes. ■

- Grant reporting to display amounts paid in the crossover aid year
- Maximum Pell award for Pell eligible students (via provisions for Increased Title IV Student Assistance to Children of Certain Deceased Members of the U.S. Military)

## Note

Recent legislation provides for increased Title IV student financial assistance for otherwise eligible students whose parent or guardian died as a result of U.S. military service in Iraq or Afghanistan after September 11, 2001. Full eligibility also requires the student to meet certain other age and educational criteria (discussed, in detail, later in this section). ■

- Processing additions to support Next Aid Year for Pell calculations (resolves RPEs 1-BKCH83 and RPE 1-BKCH85).

This section provides information on the following topics:

- [“Changed Forms” on page 28](#)
- [“Changed Processes” on page 39](#)

## Changed Forms

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This section describes the following changed forms to support the Banner Financial Aid 8.8 release.

- [“Applicant Pell Grant \(ROAPELL\)” on page 28](#)
- [“Financial Aid Record Maintenance \(ROARMAN\)” on page 28](#)
- [“Academic Year Rules \(RORACYR\)” on page 30](#)
- [“Package Maintenance \(RPAAPMT\)” on page 30](#)
- [“Award Maintenance \(RPAAWRD\)” on page 34](#)
- [“Return of Title IV Funds Calculation \(RPATIVC\)” on page 36](#)
- [“Fund Award Term Inquiry \(RPIFTRM\)” on page 37](#)

### Applicant Pell Grant (ROAPELL)

The ROAPELL form has been modified to use `rp_applicant_status` rather than `rb_applicant_status` for `RORSTAT_APRD_CODE_PELL`. This change has no impact on the end user.

### Financial Aid Record Maintenance (ROARMAN)

This form is used to review and update important aspects of a student’s financial aid record. The ROARMAN form has been modified for this release to display the Pell Aid Period, Crossover Aid Year and Crossover Pell Award information for a student in addition to the normal aid period. These new fields will allow you to tell if the student is receiving Pell funds from a crossover term that is not part of the Financial Aid process year.



## Academic Year Rules (RORACYR)

Introduced in Phase 2 (April 2010, Release 8.7), the RORACYR form was created to define the academic years by academic level. RORACYR has been updated to:

- Include GLOBAL\_ACYR\_CODE in key block.
- The GLOBAL\_ACYR\_CODE will now default the previously selected Academic Year into the key block rather than defaulting “STANDARD”. Currently, the only Academic Year value is “STANDARD”. Other values for Academic Year will be allowed in a future release.

## Package Maintenance (RPAAPMT)

The RPAAPMT form displays and maintains packaging information for an applicant. The RPAAPMT form’s Pell and Loan Tab is updated for this release to include the new **Post 9/11 Pell Eligibility** indicator. This new indicator is used to help manage additional financial aid assistance made available to students who meet certain, specific guidelines.

According to recent legislative changes by the U.S. Department of Education, an otherwise eligible student whose parent or guardian died as a result of U.S. military service in Iraq or Afghanistan after September 11, 2001, may be eligible to receive increased amounts of Title IV student financial assistance. Students are eligible for this increased aid, providing the student was:

- Less than 24 years of age when the parent or guardian died.

or

- 24 years of age (or older) and was enrolled at an institution of higher education at the time of the parent or guardian’s death.

For those students who are eligible for additional financial assistance (according to the rules above) and have been confirmed by the Department of Defense (DoD), you should check the Post 9/11 Pell Eligibility indicator. For students whose Pell Expected Family Contribution (EFC) is within Pell eligible limits, the school must also treat the students as having a zero EFC for the awarding of Direct Lending (DL) and other campus-based programs. Students who meet these standards require that you manually process their Post 9/11 financial assistance on an individual basis.

### **Warning**

The Department of Education has stated that the Central Processing System (CPS) will not recalculate a student’s EFC when the student’s record matches the DoD file. Schools should not make any changes to the student’s CPS record to adjust the EFC. The fact that the DoD flag is ‘Y’ and the student is receiving Pell is enough for COD to accept these records. ■

## **Processing Post 9/11 Students who do not have a Pell eligible EFC (IASG):**

COD will not be ready to accept IASG recipient data until October, 2010. In anticipation, the Post 9/11 Pell Eligibility indicator has been designed to be used for both; a) those students who have Pell eligible EFCs and, b) those students that have non Pell eligible EFCs (IASG). In addition, COD has indicated that IASG recipients cannot be sent as Pell recipients for payment. IASG awards must have a separate accounting and cannot be reported under the Pell Grant program.

Because COD is currently not ready to accept IASG, SunGard Higher Education has not included functionality to support sending IASG funds to COD.

### **Warning**

It is extremely important that you do not check the Post 9/11 Pell Eligibility for students who do not have a Pell eligible EFC (IASG) at this time. If you do, Pell will be awarded and will be permitted to be disbursed. However, Pell Grant origination will not allow the origination to be created so nothing will be sent to COD. If you feel you must award and pay these students, you can do so but once full functionality is delivered to support IASG, these students will need to have Pell reversed and properly awarded using the IASG process that will be developed. This should have very minimal impact on users because there are very few IASG recipients across the country. ■

When a RORSTAT record is created for a student for the aid year, the RORSTAT\_POST\_911\_PELL\_ELIG value from the latest aid year end year for which the student has a RORSTAT record will be passed in.

## Pell and Loan Tab

The form has been updated to include the new **Post 9/11 Pell Eligibility** indicator.

The screenshot shows the 'Pell and Loan' tab in the RPAAPMT 8.8 software. The form is for a Federal Pell Grant with a status of 'Accepted' and an amount of \$5,550.00. The 'Post 9/11 Pell Eligibility' checkbox is checked and highlighted with a red box. Other fields include 'Additional Eligibility Indicator', 'Post Bachelor's Degree Pell Override', 'HPPA', and 'Dependent without Parent Data'.

To support Phase 3 of Year Round Pell processing, the following items have been added to the RPAAPMT form:

Field	Description
Post 9/11 Pell Eligibility	Check to allow student whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001 to receive Pell (includes IASG). (RORSTAT_POST_911_PELL_ELIG)

## Student Eligibility for the 2009-2010 Award Year

If an otherwise eligible student is Federal Pell Grant (Pell Grant) eligible with a Pell eligible EFC and the student is post 9/11 Pell eligible, the student's eligibility for all Title IV aid must be based on an EFC of zero and not on the EFC calculated by the CPS.

On a regular basis, the DoD identifies and reports those individuals who have lost a parent or guardian as a result of military service in Iraq or Afghanistan. The Department of Education uses this information in an attempt to match those individuals (identified in the DoD file) with current applicant data (via FAFSA records). When a match is identified, the student's calculated EFC is evaluated (from the highest CPS transaction). If that EFC is greater than zero, the school the student attended during 2009-2010 is notified that it must make an adjustment to the student's financial aid package.

Additionally, the financial aid administrators at the schools listed on the student's FAFSA are also contacted, first by telephone and then with a follow-up e-mail. If the student's EFC is already zero, an e-mail notification is sent only to alert the school that, while there is nothing that must be done for the 2009-2010 Award Year, the student's eligibility may change in future award years.

 **Note**

The Department of Education does not recalculate a student's EFC when the student's CPS record matches the DoD file. In addition, a school should not make any changes to the student's CPS record to adjust the EFC. Instead, the school should award the student the types and amounts of Title IV aid for which the student is eligible, based upon an EFC of zero. In the phone call and e-mail to schools, the Department of Education will provide a contact name and number for handling unique 2009-2010 circumstances (subsidized and unsubsidized loans, late disbursements, student not enrolled for the full year, Return of Title IV aid).

As part of ongoing Department of Education dialog with schools with students eligible for this special 2009-2010 benefit, a password-protected file is provided, containing the student's identifying information, including the student's date of birth and the parent or guardian's date of death.

Based on this information, the Secretary of Education will send a personal letter to each student for whom a match was made, regardless of EFC. The Secretary's letter will acknowledge the loss of the student's parent or guardian and provides the student with information about a possible increase in eligibility for Title IV aid. The letter also includes additional information about the program's provisions and advises the student to contact their financial aid administrator for more information.

This process, as described for the 2009-2010 Award Year, will continue through processing of the DoD file received in September 2010. Institutions that have Post 9/11 Pell Eligibility students can use the **Post 9/11 Pell Eligibility** indicator to award maximum Pell for 2009-2010.

## **Department of Education Eligibility Processing for 2010-2011 and Beyond**

Beginning with the 2010-2011 Award Year, this increased aid may include assistance from the new Iraq and Afghanistan Service Grant Program (IASG).

Financial aid benefits available and provided under this statute for students with a calculated Pell Grant eligible EFC for the 2010-2011 (and future Award Years) are treated in the same manner as that described for the 2009-2010 Award Year. That is, all Title IV aid is to be awarded using a zero EFC. However, beginning with the 2010-2011 Award Year, students who are otherwise Pell Grant eligible (undergraduate, etc.), but whose EFC

is not Pell eligible, may receive the new IASG equal to the amount of the maximum Pell Grant for the award year, adjusted for enrollment status.

 **Note**

For these students, all other Title IV aid must be based on the EFC calculated by the CPS. ■

Going forward, the Department of Education has implemented an automated process for the 2010-2011 Award Year. This new process notifies schools when a match is made between a CPS record and that from the DoD file. Processing allows the Department of Education to evaluate DoD data whenever a student submits or corrects a FAFSA. Additionally, with each monthly DoD file, the Department of Education will evaluate all CPS records. If a DoD/CPS match is noted, a new CPS transaction is generated for the student. In either case, the resulting ISIR includes the new “DoD Match Flag”, associated comment code 298, and the parent or guardian’s date of death. The DoD Match Flag is printed with the other ISIR match flag information and can be used by schools to identify affected students. The School uses the flag and date of death (parent or guardian), along with the student’s calculated EFC, to determine whether the student is eligible for a zero EFC for all Title IV aid or for an IASG.

As in the 2009-2010 Award Year, the Secretary of Education will send a personal letter and additional program related information to each student for whom the match is made. As before, the letter informs the student of their possible increase in eligibility for Title IV aid. The student is also advised to contact their financial aid administrator for more information.

 **Note**

If the student had previously received a letter from the Secretary of Education, this subsequent correspondence does not include a letter from the Secretary, but does include the additional program related information. ■

## Award Maintenance (RPAAWRD)

 **Note**

Refer to the previous topic, Package Maintenance (RPAAPMT), for additional student eligibility details. ■

The RPAAWRD form displays and maintains packaging information for an applicant. The form has been updated to add the **Post 9/11 Eligibility** indicator.

According to recent legislative changes by the U.S. Department of Education, an otherwise eligible student whose parent or guardian died as a result of U.S. military service in Iraq or Afghanistan after September 11, 2001, may be eligible to receive increased amounts of Title IV student financial assistance. Students are eligible for this increased aid, providing the student was:

- Less than 24 years of age when the parent or guardian died.

or

- 24 years of age (or older) and was enrolled at an institution of higher education at the time of the parent or guardian's death.

For those students who are eligible for additional financial assistance (according to the rules above) and have been confirmed by the Department of Defense (DoD), you should check the Post 9/11 Pell Eligibility indicator. For students whose Pell Expected Family Contribution (EFC) is within Pell eligible limits, the school must also treat the students as having a zero EFC for the awarding of Direct Lending (DL) and other campus-based programs. Students who meet these standards require that you manually process their Post 9/11 financial assistance on an individual basis.

 **Warning**

The Department of Education has stated that the Central Processing System (CPS) will not recalculate a student's EFC when the student's record matches the DoD file. Schools should not make any changes to the student's CPS record to adjust the EFC. The fact that the DoD flag is 'Y' and the student is receiving Pell is enough for COD to accept these records. ■

### **Processing Post 9/11 Students who do not have a Pell eligible EFC (IASG):**

COD will not be ready to accept IASG recipient data until October, 2010. In anticipation, the Post 9/11 Pell Eligibility indicator has been designed to be used for both; a) those students who have Pell eligible EFCs and, b) those students that have non Pell eligible EFCs (IASG). In addition, COD has indicated that IASG recipients cannot be sent as Pell recipients for payment. IASG awards must have a separate accounting and cannot be reported under the Pell Grant program.

Because COD is currently not ready to accept IASG, SunGard Higher Education has not included functionality to support sending IASG funds to COD.

 **Warning**

It is extremely important that you do not check the Post 9/11 Pell Eligibility for students who do not have a Pell eligible EFC (IASG) at this time. If you do, Pell will be awarded and will be permitted to be disbursed. However, Pell Grant origination will not allow the origination to be created so nothing will be sent to COD. If you feel you must award and pay these students, you can do so but once full functionality is delivered to support IASG, these students will need to have Pell reversed and properly awarded using the IASG process that will be developed. This should have very minimal impact on users because there are very few IASG recipients across the country. ■

When a RORSTAT record is created for a student for the aid year, the RORSTAT\_POST\_911\_PELL\_ELIG value from the latest aid year end year for which the student has a RORSTAT record will be passed in.

The following image illustrates the **Pell and Loan** tab:

The screenshot shows the 'Award Maintenance RPAAWRD 8.8 (s10b80v)' application. At the top, the 'Aid Year' is set to 1011 and the student ID is 998110740. The 'Fund Awards' section displays a table with columns for Fund, Description, Status, Offered, Accepted, Declined or Cancelled, Memoed or Authorized, Paid, and Reschedule. A single row is visible for a Pell Grant with an amount of \$5550.00. Below this, the 'Pell and Loan' tab is active, showing various eligibility indicators. The 'Post 9/11 Pell Eligibility' checkbox is checked and highlighted with a red box.

## Pell and Loan Tab

The form has been updated to include the new **Post 9/11 Pell Eligibility** indicator.

Field	Description
Post 9/11 Pell Eligibility	Check to allow student whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001 to receive Pell (includes IASG). (RORSTAT_POST_911_PELL_ELIG)

## Return of Title IV Funds Calculation (RPATIVC)

The RPATIVC form is used to calculate a student's Title IV repayment. For this release, the **Aid Year** field has been added to the form's Summary block.



Fund Award Term Inquiry RPIFTRM 8.8 (s10b80v)					
Aid Year:	1011	2010 - 2011 aid year	Fund Code:	PELL	Federal Pell Grant
Term:	201030	Summer 1	Sort By:	ID	

  

ID	Name	Term	Offered	Award Amounts		
				Accepted	Cancelled	Declined
179440106	Good, Test2106 J	201030	2,775.00	2,775.00		
			<b>Total:</b>	2,775.00		

When entered as a crossover term on RPRCRSS, you can associate a specific term with more than one aid processing year. For example, a summer crossover term (201030 - which extends into the 1011 aid year by going beyond July 1, 2010) was associated with the 0910 aid processing year (via STVTERM). This change allows you call the 201030 term on RPIFTRM as part of the 1011 aid year. The associated 1011 Pell crossover awards are displayed.

**Note**

Only Pell crossover awards are displayed at this time. ■

If you attempt to call a non-associated term and aid year combination from RPIFTRM, a Banner error message is displayed. This error message tells you that the specified aid year has not been defined as a crossover term on RPRCRSS.

**Key Block**

The Term field’s List of Values (LOV) has been updated to allow entry of Pell crossover terms.

## Changed Processes

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The following Pell processes have been updated to support the Banner Financial Aid 8.8 release.

- [“Financial Aid New Year Roll Process \(ROPROLL\)” on page 39](#)
- [“Disbursement Process \(RPEDISB\)” on page 40](#)
- [“Pell Calculation Process \(RPEPELL\)” on page 41](#)
- [“Financial Aid Student Billing Payment \(RPRSBPR\)” on page 42](#)
- [“Return of Title IV Calculation Process \(RPRTIVC\)” on page 42](#)
- [“Return of Title IV Funds Withdrawal Calculation Report \(RPRTIVI\)” on page 43](#)
- [“Title IV Recipient Withdrawn \(RPRTIVR\)” on page 43](#)
- [“Load Calculation routine \(UCLRTN\)” on page 43](#)
- [“Pell Calculation routine \(UCPRTN\)” on page 45](#)

### Financial Aid New Year Roll Process (ROPROLL)

The ROPROLL process allows you to roll selected, aid-year specific information from one aid year to another. One change was made to ROPROLL for this release:

- The Perform roll of COMMON data (Parameter 08) was changed to add the Academic Year Rules (RORACYR) table to the roll process.

The roll process will roll aid year entries on RORACYR from the “From Aid Year Code” to the “To Aid Year Code”.

For example:

RORACYR has the following for 0910:

- Level = UG
- Academic Year Hours = 30
- Academic Year Weeks = 30
- Comments = Undergraduate

Once the Common data is rolled, RORACYR will have an entry for Aid Year 1011 with all of the above data for that aid year.

## Disbursement Process (RPEDISB)

The RPEDISB program performs disbursement processing in either batch or online mode. Changes made to the RPEDISB Process for this release include:

- Parameter 01, Aid Year was made optional.
- An additional Aid Year field is added to all detail lines of the associated report output.
- Modified Disbursement processing to address Post 9/11 eligibility.

This change ensures the Aid Year code matches the specified aid processing year (STVTERM\_FA\_PROC\_YR) for the Term Code (Parameter 03) or the Aid Year exists as a crossover year (RPRCRSS\_AIDY\_CODE\_CROSS) for the Term Code.

If the Aid Year code (Parameter 01) is not entered, disbursement processing will be performed for the Term Code in the aid year matching specified aid processing year (STVTERM\_FA\_PROC\_YR) for the term, and it will also be performed for the crossover aid year (RPRCRSS\_AIDY\_CODE\_CROSS) for the term code, if the term code exists in the Financial Aid Crossover Terms (RPRCRSS) form.

If two aid year codes are being processed, the aid year with the earliest Aid Year End Year will be processed first, followed by the second aid year. In the existing process, students with highest gross need are processed first. This is followed by processing of the students with lower gross need. This method ensures that available funds are provided to the neediest students. To preserve this order, processing will be completed for all students in the first aid year followed by processing all students in the second aid year.

The process has also been modified to automatically disburse both aid years when run from the Applicant Immediate Process (ROAIMMP) form or the Student Payment (TSASPAY) form, if the term being disbursed is a summer crossover term between the two aid years. Prior to this release, reports generated included Aid Year and Term code parameter values in the header lines of the report. An additional Aid Year code field has been added to all detail lines on the report. When processing occurs for two Aid Year codes (simultaneously), RPEDISB will generate two detail lines for each student and fund code being processed. The dual detail lines will display the Aid Year codes that were processed. The earliest Aid Year end year will be displayed first. The header lines will display both Aid Years being processed.

Disbursement processing is modified to use the maximum possible Pell scheduled award from the RORPELL table for students with the Post 9/11 Override Indicator (RORSTAT\_POST\_911\_PELL\_ELIG = 'Y'), indicating a parent or guardian, who was a member of the armed force, died as a result of U.S. military service in Iraq or Afghanistan after September 11, 2001. This method is used for each term award being calculated for the aid year being processed where RORPELL\_LOAD equals the student's enrollment for the term.

## Pell Calculation Process (RPEPELL)

The RPEPELL process performs Pell award calculations and related processing. Pell processing for Release 8.8 has been modified to address aid year crossover calculations. This change resolves two RPEs (RPE 1-BKCH83 and 1-BKCH85).

### RPE 1-BKCH83 and RPE 1-BKCH85

The RPEPELL process has been modified to automatically process both aid years when executed from online forms whenever a crossover term code is part of the student's aid period. This ensures that the most advantageous Pell amount is awarded.

### Processing Modifications

When the RPEPELL process is being run from the forms, either automatically from the budget or need analysis forms, due to changes in data, from the Applicant Immediate Process Form ROAIMMP, or when using RPEPCKG with **Calculate Pell Award** parameter = Y:

- If the student being calculated has an aid period which contains a summer crossover term

AND

- The term also exists in that student's Pell aid period for the crossover aid year,

RESULT

The student's Pell award will be calculated in both aid years.

Under these conditions, the calculation for the earlier aid year (the one with the earliest aid year end year), will be calculated first, followed by the next aid year.

The earliest aid year end year will be processed first regardless of whether the institution treats summer as a trailer or header.

### Examples:

#### *Trailer School*

Example:

0910 Aid Period is Fall 2009, Spring 2010, Summer 2010

1011 Pell Aid Period is Summer 2010, Fall 2010, Spring 2011, Summer 2011

User goes to RPAAWRD for 1011 and chooses "Pell Calculation" from the options menu. The Pell calculation is automatically run for 0910 then for 1011 because the 0910 Aid Period includes a term that crosses over with 1011.

## Header School

Example:

1011 Aid Period is Summer 2010, Fall 2010, Spring 2011

0910 Pell Aid Period is Summer 2009, Fall 2009, Spring 2010, Summer 2010

User goes to RPAAWRD for 1011 and chooses "Pell Calculation" from the options menu. The Pell calculation is automatically run for 0910 then for 1011 since the 1011 Aid Period includes a term that crosses over with 0910.

Students whose aid period does not contain a summer crossover term will only be calculated for the aid year matching the key block of the form which is performing the Pell calculation. Additionally, if a need analysis record does not exist for the student in the second aid year, the Pell calculation will not be performed.

### Note

Batch processing for crossover aid years has not been modified. The Parameter 08 - Next Aid Year Code will continue to be used to determine whether or not to calculate the next year award for students. Parameter validation has been added to RPEPELL for Parameter 08 - Next Aid Year Code. This is done to ensure that Next Aid Year Code must be ROBINST\_AIDY\_CODE that corresponds to +1 of the ROBINST\_AIDY\_END\_YEAR from Parameter 01 – Aid Year Code. ■

## Financial Aid Student Billing Payment (RPRSBPR)

The Financial Aid Student Billing Payment Report displays detailed information on any financial aid payments entered into the Accounts Receivable module of the Student System. Term code validation on RPRSBPR has been modified to include all crossover term codes.

## Return of Title IV Calculation Process (RPRTIVC)

This process calculates Title IV refund values for students who have a withdrawal status in the student module. Since the process does not have an aid year parameter, and only uses the term code parameter in processing, it will automatically calculate Title IV refund values for Pell fund codes which were awarded or disbursed in the crossover aid year and insert rows into the RPRTIIV Return of Title IV Funds Table for both the standard aid year and the crossover aid year. No changes were necessary to those calculations.

The report has been modified to display the aid year code to which the Title IV refunding information applies.

## Return of Title IV Funds Withdrawal Calculation Report (RPRTIVI)

This report prints summarized Title IV repayment information from the Return of Title IV Funds Calculation Form (RPATIVC). Since the report does not have an aid year parameter, and only uses the term code parameter in processing, it will automatically display the Title IV refund values for Pell fund codes which were awarded or disbursed in the crossover aid year.

The report has been modified to display the aid year code to which the Title IV refunding information applies.

## Title IV Recipient Withdrawn (RPRTIVR)

This report displays fund term award information for Title IV funds for students who have a withdrawal status in the student module. Aid year code is currently a required parameter. Term code is an optional parameter. If the term code parameter is left blank in the parameter list, all terms in the aid year for which a student has a withdrawal status will be printed in the report.

The report has been modified to display information from aid years in which a term is defined as a crossover term. As of this release this will be true only for Pell funds. However, in future releases this may be true of other federal funds as well. Because of this, modifications made for this release will not be written specifically for Pell fund codes.

The standard aid year (STVTERM\_FA\_PROC\_YR) for a term will continue to be the driving aid year for this report. However, any terms being selected for the report which are also defined as crossover terms will now also display the term information from the crossover aid year (RPRCRSS\_AIDY\_CODE\_CROSS).

## Load Calculation routine (UCLRTN)

The UCLRTN routine calculates enrollment hours for each term in the aid period for use by the Pell calculation routine during Pell awarding and disbursement. The routine determines the hours from billing, adjusted, expected or other values, depending on the setting of **Grant Options** on the Packaging Options Form (RPROPTS). The resulting enrollment hours are used by the Pell calculation routine to determine whether the student qualifies for a second Pell award for the year by being enrolled in at least one credit hour beyond the standard hours for the academic year.

The following changes have been made in the UCLRTN routine to support the Banner Financial Aid 8.8 release:

- Enrollment Hours (if available) are calculated using Earned Hours:

For each term in the student's aid period, the new function `rokmisc.f_calc_earned_hours` will be used to find the earned hours (`shrtgpa_earned_hours`) for the student and term code.

- If no earned hours (SHRTGPA) exist for the student and term code, the term enrollment has not been rolled to academic history yet, and earned hours cannot be determined. In that event, the process will continue to use the RPROPTS setting to determine the enrollment for the term.



#### Note

Earned hours will only be used if Enrollment Hours are set to Adjusted or Billing. ■

- Disbursement Calculation in this situation differs:

For each term in the student's aid period, the new function `rokmisc.f_calc_earned_hours` will be used to find the earned hours (`shrtgpa_earned_hours`) for the student and term code.

- Hours will continue to be calculated based on disbursement options for the term being disbursed.
- Only earned hours will be used in calculations associated with preceding terms (i.e. those terms prior to the term being disbursed).
- If total earned hours for preceding terms plus the calculated hours for the current term exceed the standard academic hours for the year, the student will be paid from the second Pell award. Otherwise, term disbursement will be limited to the remainder of the first Pell award.

Example:

0910

- RORACYR is set to 24 credit hours for an academic period
- RPROPTS is set to award based on adjusted hours for each term and is set to disburse based on adjusted hours
- Student has adjusted hours of 12 and earned 12 credit hours in the Fall 2009 term
- Student has adjusted hours of 12 for the Spring 2010 term but grades have not yet been posted so student does not have earned hours for spring
- Student has adjusted hours of 12 for the Summer 2010 term.

If the Pell calculation were run for this student with the above scenario, the student would be awarded Pell for Fall and Spring based on Adjusted hours as in the past. For the 2nd scheduled Pell award in the Summer term the student would be awarded based on 12 earned hours in the Fall + 12 adjusted hours in the Spring (because earned hours not yet available) + 12 adjusted hours in the Summer.

When the disbursement process is run, the Fall and Spring disbursements will be based on the adjusted hours. The summer will be based on the earned hours in the Fall + the earned hours in the Spring + the Adjusted hours in the Summer. So in the example, the Summer will not disburse because the student has only earned 12 hours to date (spring not yet available) + only has 12 adjusted hours for Summer (the total does not exceed 24 so Summer cannot be disbursed because the student is not in at least 1 credit hour for the next academic period).

Once the student's spring grades are available, assuming the student earned 12 hours, the summer would then be disbursed since the student would have 12 earned hours in the Fall + 12 earned hours in the spring + 12 adjusted hours in the Summer (student is taking at least 1 credit hour for the next academic period).

## Pell Calculation routine (UCPRTN)

The following changes have been made in the UCPRTN process to support the Banner Financial Aid 8.8 release:

The maximum possible Pell scheduled award from the RORPELL table is used for students with the **Post 9/11 Pell Override** indicator (`RORSTAT_POST_911_PELL_ELIG = 'Y'`), indicating a parent or guardian was a member of the US Military who died as a result of their service in Iraq or Afghanistan after September 11, 2001.

- If this is true, the process uses `MAX(RORPELL_AWARD_AMT)` from RORPELL for the aid year under consideration for the scheduled award. This method is repeated for each term award being calculated, where `RORPELL_LOAD` is equal to the student's enrollment load for the term.



# 5 Miscellaneous Enhancements - Functional



This section includes descriptions that address the following RPEs:

- COD Import Processing (RPE 1-5ZU3V6)
- Enhanced Pell Calculation (RPE 1-BKCH83 and RPE 1-BKCH85)
- Batch Java Scripts (RPE 1-BGKXTQ - Banner General)

## COD Import Processing

RPE 1-5ZU3V6 noted that certain status dates should be applied consistently. To resolve this request, changes have been made to the 2010-2011 COD Import Process (RERIM11).

The RERIM11 process has been changed so that tracking requirements satisfied through the process use the <CounselingCompletionDate> XML tag (if provided) as the satisfied date. If the <CounselingCompletionDate> XML tag is not provided, the <ProcessDate> XML tag is used.

### Note

The SYSDATE value was used for updates processed prior to changes associated with RPE 1-5ZU3V6.

## Enhanced Pell Calculation

RPEs 1-BKCH38 and 1-BKCH85 requested the need for the next aid year code in performing Pell calculations to ensure the most advantageous Pell amount is awarded.

To satisfy these requests, the Pell Calculation Process (RPEPELL) has been modified to automatically process both aid years, when executed from online forms, whenever a crossover term code is part of the student's aid period. This processing change ensures that the most advantageous Pell amount is awarded.

## Processing Modifications

When the RPEPELL process is being run from the forms, either automatically from the budget or need analysis forms, due to changes in data or from the Applicant Immediate Process Form ROAIMMP:

- If the student being calculated has an aid period which contains a summer crossover term

AND

- The term also exists in that student's aid period for the crossover aid year,

RESULT

The student's Pell award will be calculated in both aid years.

Under these conditions, the calculation for the earlier aid year (the one with the earliest aid year end year), will be calculated first, followed by the next aid year.

Students whose aid period does not contain a summer crossover term will only be calculated for the aid year matching the key block of the form which is performing the Pell calculation. Additionally, if a need analysis record does not exist for the student in the second aid year, the Pell calculation will not be performed.

### Note

Batch processing for crossover aid years will not be modified. The Parameter 08 Next Aid Year Code will continue to be used to determine whether or not to calculate the next year award for students. ■

## Batch Java Scripts

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RPE 1-BGKXTQ (Banner General) requests creation of a new script that enables the setting of Java environment variables for use in batch processing.

The Java based Banner job submission processes need to use scripts to run. There is a certain setup that needs to be done within the scripts for the Java code to run. SunGard Higher Education ships these scripts with setup that works for most clients. However, changes to various application scripts were required for the processes to run on a specific environment such as 64-bit. These changes were required for each and every one of the scripts, one per object/Java process. Whenever a new release was installed and these scripts are redelivered, the clients have had to make these changes manually.

These modifications have been centralized to a Banner General-owned script instead of product or object level scripts. A new script has been created that enables the setting of Java environment variables for use for batch processing. These scripts enable clients to define their specific environment in one script that will then be called by multiple batch

processing scripts. This eliminates the need to update every Java-based script after every install.

The following setup steps have been centralized:

- Oracle connection string - This is used by the Java process to make connection to the Oracle database.
- UNIX ONLY - Path to where the Java Virtual Machine (JVM) is located. Sets the LD\_LIBRARY\_PATH which is need by UNIX to run the JVM.
- Class path to where the connection libraries are located. Each version of the JVM uses a different set of libraries to make connection to Oracle database. This communicates to the JVM where these libraries can be found.

The following environment-specific scripts have been redelivered with Banner Financial Aid 8.8:

- UNIX - banjavaenv.shl
- Windows - banjavaenv.pm
- VMS - banjavaenv.com

 **Note**

If these scripts had been modified with site-specific changes prior to installation of this release, the install process will overwrite any previous script changes. ■

These scripts are located at <BANNER\_HOME>/general/misc for UNIX/LINUX/NT and GEN\$COM for VMS.

The following Banner Financial Aid Java based processes have had their scripts modified to use this enhancement:

- REREX11
- RERIM11
- ROPPCAT
- RPRGRNT

 **Note**

Once Banner Financial Aid 8.8 has been applied, site-specific changes that were previously made to the rerex11.shl/.pl/.com, rerim11.shl/.pl/.com, roppcat.shl/.pl/.com, and rprgrnt.shl/.pl/.com files will need to be made to the appropriate banjavaenv.shl/.pl/.com file, instead. ■



# 6 Common Origination and Disbursement (COD) - Technical



This release includes changes and updates necessary for 2010-2011 COD processing, based upon the guidelines outlined in the 2010-2011 Technical Reference.

The section discusses the technical changes made to support 2010-2011 COD processing. The following topics are included:

- [“Changed Tables” on page 51](#)
- [“Changed Packages” on page 53](#)
- [“Changed Database Triggers” on page 54](#)
- [“Required Data” on page 54](#)

## Changed Tables

The following tables have been changed in the Banner Financial Aid 8.8 release:

- [“Loan Application Table \(RPRLAPP\)” on page 51](#)
- [“Direct Loan Unmatched Application Temporary Table \(RPTUAPP\)” on page 52](#)

### Loan Application Table (RPRLAPP)

The following new column has been added to capture the Credit Action Decision for Parent PLUS Loan Application records. Prior to this update the Credit Action Option was not being captured on the PLUS origination record. This update resolves 1-BQS1S4.

Column Name	Null?	Type	Comment
RPRLAPP_CR_ACTION_OPT	Yes	VARCHAR2(1)	Credit Action Option: Indicates the action the borrower wishes to take when the credit status is denied.

## Direct Loan Unmatched Application Temporary Table (RPTUAPP)

The following columns have been updated to match the length of the corresponding column in the Loan Application Table (RPRLAPP) so that all PLUS application records can be imported correctly. Prior to this update when a tag was received with a data length longer than the corresponding column in the database, the record would not load to Banner. This resolves defect 1-BQS1IJ.

Column	Previous Value	Updated Value
RPTUAPP_LAST_NAME	VARCHAR2(16)	VARCHAR2(60)
RPTUAPP_FIRST_NAME	VARCHAR2(12)	VARCHAR2(60)
RPTUAPP_MI	VARCHAR2(1)	VARCHAR2(60)
RPTUAPP_ADDRESS	VARCHAR2(35)	VARCHAR2(75)
RPTUAPP_CITY	VARCHAR2(16)	VARCHAR2(50)
RPTUAPP_ZIP	VARCHAR2(9)	VARCHAR2(30)
RPTUAPP_NATN_CODE	VARCHAR2(3)	VARCHAR2(5)
RPTUAPP_PHONE_NO	VARCHAR2(10)	VARCHAR2(18)
RPTUAPP_LOCAL_ADDRESS	VARCHAR2(35)	VARCHAR2(75)
RPTUAPP_LOCAL_CITY	VARCHAR2(16)	VARCHAR2(50)
RPTUAPP_LOCAL_ZIP	VARCHAR2(9)	VARCHAR2(30)
RPTUAPP_LOCAL_NATN_CODE	VARCHAR2(3)	VARCHAR2(5)
RPTUAPP_BORR_LAST_NAME	VARCHAR2(16)	VARCHAR2(60)
RPTUAPP_BORR_FIRST_NAME	VARCHAR2(12)	VARCHAR2(60)
RPTUAPP_BORR_MI	VARCHAR2(1)	VARCHAR2(60)
RPTUAPP_BORR_ADDRESS	VARCHAR2(35)	VARCHAR2(75)
RPTUAPP_BORR_CITY	VARCHAR2(16)	VARCHAR2(50)
RPTUAPP_BORR_ZIP	VARCHAR2(9)	VARCHAR2(30)
RPTUAPP_BORR_NATN_CODE	VARCHAR2(3)	VARCHAR2(5)
RPTUAPP_BORR_PHONE_NO	VARCHAR2(10)	VARCHAR2(18)
RPTUAPP_BORR_LOCAL_ADDR	VARCHAR2(35)	VARCHAR2(75)
RPTUAPP_BORR_LOCAL_CITY	VARCHAR2(16)	VARCHAR2(50)
RPTUAPP_BORR_LOCAL_ZIP	VARCHAR2(9)	VARCHAR2(30)
RPTUAPP_BORR_LOCAL_NATN_CODE	VARCHAR2(3)	VARCHAR2(5)

# Changed Packages

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The following packages have been changed to support the Banner Financial Aid 8.8 release:

- [“2010-2011 COD Extract Database Package \(REKCE11\)” on page 53](#)
- [“2010-2011 COD Import Database Package \(REKCI11\)” on page 53](#)
- [“Archive/Purge Package \(ROK\\_ARCHIVE\\_DATA\)” on page 53](#)
- [“Unmatched COD Records Package \(RPKUCOD\)” on page 54](#)

## 2010-2011 COD Extract Database Package (REKCE11)

The following modifications have been made for this release:

Package specification	rekce110.sql
Package body	rekce111.sql

This package has been changed to disregard the status of the **Parent Loan Default** indicator (RPRLAPP\_PAR\_IN\_DEFAULT) when extracting Parent PLUS loan records (RPRLAPP\_LOAN\_TYPE = 'P') using the modified 2010-2011 COD Extract Process (RREX11).

## 2010-2011 COD Import Database Package (REKCI11)

The following modifications have been made for this release:

Package specification	rekci110.sql
Package body	rekci111.sql

This package has been modified to ensure that the RPRLAPP\_CR\_ACTION\_OPT column is updated when you import the <CreditActionDecision> tag to a matched origination record.

## Archive/Purge Package (ROK\_ARCHIVE\_DATA)

The following modifications have been made for this release:

Package specification	rok_archive_data0.sql
Package body	rok_archive_data1.sql

The associated `p_delete_cod_rules` procedure is updated to purge the contents of the RPTUAPP and RPTUECS temporary tables for the specified aid year when an entire aid year is being purged.

 **Note**

Data in these two temporary tables will not be archived. ■

## Unmatched COD Records Package (RPKUCOD)

The following modifications have been made for this release:

Package specification	<code>rpkuod0.sql</code>
Package body	<code>rpkuod1.sql</code>

This package has been changed to update `RPRLAPP_CR_ACTION_OPT` with the value from `RPTUAPP_CR_ACTION_OPT` when a PLUS Application record is matched to an origination in `RPRLAPP`.

## Changed Database Triggers

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### RT\_RPRLAPP\_LOG\_INSUPDDTL (`rptlapp9.sql`)

The following new column was added to this trigger so that inserts, updates and deletes to this new column can be logged.

`RPRLAPP_CR_ACTION_OPT`

## Required Data

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The following sections outline the required data in the Banner Financial Aid 8.8 release:

- [“2010-2011 SAR Comment Codes and Text” on page 55](#)
- [“Logging Control Repeating Table \(RORLOGC\)” on page 56](#)
- [“SMART Grant Qualified Course Code Table \(RPRCIPC\)” on page 56](#)
- [“Reject Validation Table \(RTVRJCT\)” on page 60](#)

## 2010-2011 SAR Comment Codes and Text

### ISIR Comment Code Validation (RTVICMT)

RTVICMT has been updated to include the following Comment Codes and descriptive text for the Banner Financial Aid 8.8 release:

Comment Code	Description
030	The Selective Service reported that you have not registered with them. If you are female or were born before 1960, registration is not required. Otherwise, if you are not yet registered, are male, and are 18 through 25 years of age, to receive aid you must do one of the following: (1) answer “Male” to Item 21 and “Register Me” to Item 22 on this SAR, (2) complete a Selective Service registration form at your local post office, or (3) register online at <a href="http://www.sss.gov">www.sss.gov</a> . If you believe you have already registered or are exempt, please check the Selective Service website at <a href="http://www.sss.gov">www.sss.gov</a> , select “registration info” and then “Who Must Register?”. If you have documentation proving an exemption, submit it to your school to save time. Contact the Selective Service at 847-688-6888 only after reviewing the SSS website information.
033	We could not send your name to Selective Service as you requested because you did not give us enough information, you are outside the age range for registration, or you did not sign your form. If you are male and at least 18 but not yet 26, to receive aid you must do one of the following: (1) answer “Male” to Item 21 and “Register Me” to Item 22 on this SAR and also provide information for Items 1, 2, and 9, (2) complete a Selective Service registration form at your local post office, or (3) register online at <a href="http://www.sss.gov">www.sss.gov</a> . If you are a male who is age 26 or older, you must check the Selective Service website at <a href="http://www.sss.gov">www.sss.gov</a> . Select “registration info” and then “Who Must Register?” for more information. Contact Selective Service at 847-688-6888 only after reviewing the SSS website information. You must resolve your registration status before you can receive federal student aid. You are exempt from registering if born before 1960.
124	Contact the following agency(ies) regarding your defaulted or fraudulent federal student loan(s):
135	To resolve your defaulted or fraudulent federal student loan(s), contact the lender associated with the loan.
136	To resolve your defaulted or fraudulent federal student loan(s), contact the school associated with the loan.

## Logging Control Repeating Table (RORLOGC)

### RORLOGCI\_080800.SQL

This new script is used to make an entry to the Logging Control Repeating Table (RORLOGC). You must execute this script as part of the Banner Financial Aid 8.8 installation before you perform any processing. The following item has been added to RORLOGC so that updates, inserts, and deletes to this new column can be logged.

RORLOGC Table Name	RORLOGC Column Name	RORLOGC Column Description	RORLOGC Log Ind.
RPRLAPP	RPRLAPP_CR_ACTION_OPT	Credit Action Option	N

## SMART Grant Qualified Course Code Table (RPRCIPC)

### RPRCIPCI\_071800.sql

This new script is used to ensure the proper codes are inserted in the RPRCIPC table. You must execute this script as part of the Banner Financial Aid 8.8 installation before you perform any processing. The codes added in this script are new valid CIP codes for the 2010-2011 aid year.

RPRCIPC_CODE	RPRCIPC_EFFECTIVE_YEAR	RPRCIPC_EFFECTIVE_YEAR	RPRCIPC_DESC	RPRCIPC_SYSTEM_REQ_IND
110104	2011	9999	Informatics	Y
110804	2011	9999	Modeling, Virtual Environments and Simulation	Y
111006	2011	9999	Computer Support Specialist	Y
140702	2011	9999	Chemical and Biomolecular Engineering	Y
140799	2011	9999	Chemical Engineering, Other	Y
141003	2011	9999	Laser and Optical Engineering	Y
141004	2011	9999	Telecommunications Engineering	Y
141099	2011	9999	Electrical, Electronics and Communications Engineering, Other	Y

<b>RPRCIPC _CODE</b>	<b>RPRCIPC _EFF_FR OM_YR</b>	<b>RPRCIPC _EFF_TO _YEAR</b>	<b>RPRCIPC_DESC</b>	<b>RPRCIPC_ SYSTEM_ REQ_IND</b>
144001	2011	9999	Paper Science and Engineering	Y
144101	2011	9999	Electromechanical Engineering	Y
144201	2011	9999	Mechatronics, Robotics, and Automation Engineering	Y
144301	2011	9999	Biochemical Engineering	Y
144401	2011	9999	Engineering Chemistry	Y
144501	2011	9999	Biological/Biosystems Engineering	Y
260508	2011	9999	Microbiology and Immunology	Y
260807	2011	9999	Genome Sciences/Genomics	Y
260912	2011	9999	Aerospace Physiology and Medicine	Y
261104	2011	9999	Computational Biology	Y
261310	2011	9999	Ecology and Evolutionary Biology	Y
261401	2011	9999	Molecular Medicine	Y
261504	2011	9999	Neurobiology and Behavior	Y
261599	2011	9999	Neurobiology and Neurosciences, Other	Y
270304	2011	9999	Computational and Applied Mathematics	Y
270305	2011	9999	Financial Mathematics	Y
270306	2011	9999	Mathematical Biology	Y
270503	2011	9999	Mathematics and Statistics	Y
400509	2011	9999	Environmental Chemistry	Y
400510	2011	9999	Forensic Chemistry	Y
400511	2011	9999	Theoretical Chemistry	Y
401002	2011	9999	Materials Chemistry	Y
401099	2011	9999	Materials Sciences, Other	Y
150306	2011	9999	Integrated Circuit Design	Y

<b>RPRCIPC _CODE</b>	<b>RPRCIPC _EFF_FR OM_YR</b>	<b>RPRCIPC _EFF_TO _YEAR</b>	<b>RPRCIPC_DESC</b>	<b>RPRCIPC_ SYSTEM_ REQ_IND</b>
150406	2011	9999	Automation Engineer Technology/Technician	Y
150614	2011	9999	Welding Engineering Technology/Technician	Y
150615	2011	9999	Chemical Engineering Technology/Technician	Y
150616	2011	9999	Semiconductor Manufacturing Technology	Y
151502	2011	9999	Engineering Design	Y
151503	2011	9999	Packaging Science	Y
151599	2011	9999	Engineering-Related Fields, Other	Y
151601	2011	9999	Nanotechnology	Y
290203	2011	9999	Signal/Geospatial Intelligence	Y
290204	2011	9999	Command and Control (C3,C41) Systems and Operations	Y
290205	2011	9999	Information Operations/Joint Information Operations	Y
290207	2011	9999	Cyber/Electronic Operations and Warfare	Y
290301	2011	9999	Combat Systems Engineering	Y
290302	2011	9999	Directed Energy Systems	Y
290303	2011	9999	Engineering Acoustics	Y
290304	2011	9999	Low-Observables and Stealth Technology	Y
290305	2011	9999	Space Systems Operations	Y
290306	2011	9999	Operational Oceanography	Y
290307	2011	9999	Undersea Warfare	Y
290399	2011	9999	Military Applied Sciences, Other	Y
290401	2011	9999	Aerospace Ground Equipment Technology	Y
290402	2011	9999	Air and Space Operations Technology	Y
290403	2011	9999	Aircraft Armament Systems Technology	Y

<b>RPRCIPC _CODE</b>	<b>RPRCIPC _EFF_FR OM_YR</b>	<b>RPRCIPC _EFF_TO _YEAR</b>	<b>RPRCIPC_DESC</b>	<b>RPRCIPC_ SYSTEM_ REQ_IND</b>
290404	2011	9999	Explosive Ordinance/Bomb Disposal	Y
290405	2011	9999	Joint command/Task Force (C3, C41) Systems	Y
290406	2011	9999	Military Information Systems Technology	Y
290407	2011	9999	Missile and Space Systems Technology	Y
290408	2011	9999	Munitions Systems/Ordinance Technology	Y
290409	2011	9999	Radar Communications and Systems Technology	Y
290499	2011	9999	Military Systems and Maintenance Technology, Other	Y
299999	2011	9999	Military Technologies and Applied Sciences	Y
410303	2011	9999	Chemical Process Technology	Y
303001	2011	9999	Computational Science	Y
303101	2011	9999	Human Computer Interaction	Y
303201	2011	9999	Marine Sciences	Y
261501	2011	9999	Neuroscience	Y
261502	2011	9999	Neuroanatomy	Y
261503	2011	9999	Neurobiology and Neurophysiology	Y
422706	2011	9999	Physiological Psychology/Psychobiology	Y
401001	2011	9999	Materials Science	Y
160908	2011	9999	Hispanic and Latin American Languages, Literatures, and Linguistics, General	Y

## RPRCIPCU\_080800.sql

This new script is used to ensure the proper codes are inserted in the RPRCIPC table. You must execute this script as part of the Banner Financial Aid 8.8 installation before you perform any processing. The codes updated through this script are those that are no longer valid as of the 2010-2011 aid year.

RPRCIPC_CODE	RPRCIPC_EFFECTIVE_START_YEAR	RPRCIPC_EFFECTIVE_END_YEAR	RPRCIPC_DESC	RPRCIPC_SYSTEM_REQUIREMENT_IND
302401	2007	2010	Neuroscience	Y
260405	2007	2010	Neuroanatomy	Y
260906	2007	2010	Neurobiology and Neurophysiology	Y
421101	2007	2010	Physiological Psychology/Psychobiology	Y
143101	2007	2010	Materials Science	Y

## Reject Validation Table (RTVRJCT)

### RTVRJCTI\_071800.SQL

This new script is used to ensure the proper codes are inserted in the RTVRJCT table. You must execute this script as part of the Banner Financial Aid 8.8 installation before you perform any processing. The codes shown here are new COD reject/edit messages received in the latest COD Technical Reference update.

RTVRJCT_TYPE	RTVRJCT_CODE	RTVRJCT_ACTIVITY_DATE	RTVRJCT_DESC	RTVRJCT_SYSTEM_REQUIREMENT_IND
F	191	SYSDATE	Incorrect HPPA Indicator	Y
F	192	SYSDATE	Pell Award submitted with IASG Indicator equal to 'true'	Y
F	193	SYSDATE	Incorrect change to the IASG Indicator	Y
F	194	SYSDATE	Funded Disb not allowed for Pell with IASG Ind equal to 'true'	Y

## RTVRJCTU\_071800.SQL

This new script is used to ensure the proper codes are inserted in the RTVRJCT table. You must execute this script as part of the Banner Financial Aid 8.8 installation before you perform any processing. The codes updated are those that have been changed by COD as of the most recent COD Technical Reference.

RTVRJCT _TYPE	RTVRJCT _CODE	RTVRJCT _ACTIVITY _DATE	RTVRJCT_DESC	RTVRJCT _SYSTEM _REQ_IND
F	140	SYSDATE	Incorrect Origination Fee or Rebate Percent on New Awards	Y
F	142	SYSDATE	Incorrect Origination Fee or Rebate Percent on Award Changes	Y



# 7 Year Round Pell Phase 3 - Technical



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

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

Year Round Pell Phase 3 (Release 8.8) addresses Banner Financial Aid functionality that expands functionality originally delivered as part of Year Round Pell, Phases 1 and 2. This release includes the following enhancements:

- Pell award calculation based on earned hours
- Impact of Year Round Pell processing on:
  - Banner table architecture
  - Database packages, triggers, and views
  - Required data

The section discusses the technical changes made to support Year Round Pell Phase 3 found in the Banner Financial Aid 8.8 release. The following updates are included:

- Table support for Post 9/11 Pell Eligibility.
- Modified seed data for Financial Aid Letter Generation variables

The following topics are included:

- [“Changed Table” on page 64](#)
- [“Changed Packages” on page 64](#)
- [“Changed Database Trigger” on page 67](#)
- [“Changed Views” on page 67](#)
- [“Required Data” on page 67](#)

## Changed Table

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The following table has been changed in the Banner Financial Aid 8.8 release:

### Applicant Status Table (RORSTAT)

The following new column has been added to RORSTAT to allow the awarding of Full Pell to a student whose parent or guardian died as a result of military service in Iraq or Afghanistan after September 11, 2001.

Column Name	Null?	Type	Comment
RORSTAT_POST_911_PELL_ELIG	No	VARCHAR2(1)	POST 9/11 PELL ELIGIBILITY INDICATOR: Indicates if student qualifies for full Pell eligibility due to a parent or guardian who died as a result of military service in Iraq or Afghanistan after September 11, 2001 (includes IASG).

## Changed Packages

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The following packages have been changed to support the Banner Financial Aid 8.8 release:

- [“RB\\_ACAD\\_YR\\_RULE” on page 64](#)
- [“RB\\_APPLICANT\\_STATUS” on page 65](#)
- [“ROKMISC \(ROKMISC.SQL\)” on page 66](#)
- [“RP\\_APPLICANT\\_STATUS” on page 66](#)
- [“ROKPVAL \(ROKPVAL1.SQL\)” on page 66](#)

### RB\_ACAD\_YR\_RULE

The `f_query_all` function of this package is modified to return records by aid year, academic year, level code, and comments. The addition of these fields to the `f_query_all` function queries the data on the Academic Year Rules (RORACYR) table from the **From Aid Year Code** so it can be rolled to the **To Aid Year Code** when **Perform roll of COMMON data = Y**. This function has been modified to be used by the New Year Roll (ROPROLL) process.

Package body rok\_b\_acad\_yr\_rule1.sql

## **RB\_APPLICANT\_STATUS**

The following RB\_APPLICANT\_STATUS API scripts have been modified to add the new column RORSTAT\_POST\_911\_PELL\_ELIG

The following are the package specifications for RB\_APPLICANT\_STATUS:

Package specification	rok_b_appl_status0.sql
Package body	rok_b_appl_status1.sql
Rules package specification	rok_b_appl_status_r0.sql
Rules package body	rok_b_appl_status_r1.sql
Strings package specification	rok_b_appl_status_s0.sql
Strings package body	rok_b_appl_status_s1.sql
DML package specification	rok_d_rorstat0.sql
DML package body	rok_d_rorstat1.sql

The new RORSTAT\_POST\_911\_PELL\_ELIG column is added to p\_create and p\_update procedures.

### **ROKB\_APPL\_STATUS1.SQL (RB\_APPLICANT\_STATUS)**

#### **P\_CREATE**

When creating a RORSTAT record for the student, if a value is passed in, it gets used. Otherwise, the value from the latest aid year end year for which the student has a RORSTAT record is used. Valid values *Y* or *N*.

#### **P\_UPDATE**

The procedure is modified to allow updates to the new column.

### **ROKB\_APPL\_STATUS\_R1.SQL (RB\_APPLICANT\_STATUS\_RULES)**

Rules package procedure p\_validate. The rules package has been modified to only allow either 'Y' and 'N' as valid values for the new column.

## ROKMISC (ROKMISC.SQL)

This script is modified to add the `f_calc_earned_hours` function which gets used by the Pell process to determine if a student qualifies for a second scheduled Pell award.

Package specification	<code>rokmisc.sql</code>
Package body	<code>rokmisc1.sql</code>

## RP\_APPLICANT\_STATUS

The following modifications have been made for this release:

Package specification	<code>rokp_appl_status0.sql</code>
Package body	<code>rokp_appl_status1.sql</code>

### P\_CREATE

The following columns have been added:

- `RORSTAT_POST_911_PELL_ELIG`
- `RORSTAT_APRD_CODE_PELL`

A default NULL is added to the following parameters:

- `RORSTAT_POST_911_PELL_ELIG`
- `RORSTAT_APRD_CODE_PELL`

### P\_UPDATE

The following columns have been added:

- `RORSTAT_POST_911_PELL_ELIG`
- `RORSTAT_APRD_CODE_PELL`

## ROKPVAL (ROKPVAL1.SQL)

The following modifications have been made for this release:

Package specification	<code>rokpval1.sql</code>
Package body	<code>rokpval11.sql</code>

Parameter validation has been added to RPEPELL for Parameter 08 – **Next Aid Year Code**. This is done to ensure that **Next Aid Year Code** must be `ROBINST_AIDY_CODE` that corresponds to +1 of the `ROBINST_AIDY_END_YEAR` from Parameter 01 – **Aid Year Code**.

## Changed Database Trigger

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### ROTSTAT9.SQL (RT\_RORSTAT\_LOG\_INSUPDDL)

This database trigger is modified to add a new RORSTAT column to the logging trigger:

- RORSTAT\_POST\_911\_PELL\_ELIG

## Changed Views

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### RPVATRM and RPVTERM

RPVATRM and RPVTERM views have been modified to return an amount for each term and fund associated with the aid year. For a crossover Pell award, the crossover term will be returned with the aid year with which the aid year is normally associated.

#### Trailer School

The summer Pell award will be returned as the trailer term.

#### Header School

The summer Pell award will be returned as the header term.

## Required Data

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The following sections outline the required data in the Banner Financial Aid 8.8 release:

- [“Letter Generation Variable Rules table \(GLRVRBL\)” on page 67](#)
- [“RORLOGCI\\_071800.SQL” on page 70](#)

### Letter Generation Variable Rules table (GLRVRBL)

The following variables have been updated to use the RPVATRM view rather than the RPRATRM table:

- \*TERM01\_TOTAL
- \*TERM02\_TOTAL
- \*TERM03\_TOTAL

## \*TERM01\_TOTAL Rules

Variable Rules Definitions GLRVRBL 8.1 (s10b80v)

Application: FINAID  
Variable: \*TERM01\_TOTAL

Variable Description  
Non-formatted Award Total Type: RORVIEW

Definition  
Sequence: 1 of 1  
Select: SUM(NVL(RPVATRM\_OFFER\_AMT,0))  
From: RPVATRM  
Order By:  
Group By:  
Description: Non-formatted Award Total - First Term

'('	Data Element	Operator	Value	)'	AND/OR
	RPVATRM_TERM_CODE	=	&First_Term		AND
	RPVATRM_AIDY_CODE	=	&aid_year_code		

Variable Description, valid values are any alpha-numeric string  
Record: 1/1 <OSC>

## \*TERM02\_TOTAL Rules

Variable Rules Definitions GLRVRBL 8.1 (s10b80v)

Application: FINAID  
Variable: \*TERM02\_TOTAL

Variable Description  
Non-formatted Award Total Type: RORVIEW

Definition  
Sequence: 1 of 1  
Select: SUM(NVL(RPVATRM\_OFFER\_AMT,0))  
From: RPVATRM  
Order By:  
Group By:  
Description: Non-formatted Award Total - Second Term

'('	Data Element	Operator	Value	)'	AND/OR
	RPVATRM_TERM_CODE	=	&Second_Term		AND
	RPVATRM_AIDY_CODE	=	&aid_year_code		

Variable Description, valid values are any alpha-numeric string  
Record: 1/1 <OSC>

## \*TERM03\_TOTAL Rules

Variable Rules Definitions GLRVRBL 8.1 (s10b80v)

Application: FINAID  
Variable: \*TERM03\_TOTAL

Variable Description  
Non-formatted Award Total Type: RORVIEW

Definition  
Sequence: 1 of 1  
Select: SUM(NVL(RPVATRM\_OFFER\_AMT,0))  
From: RPVATRM  
Order By:  
Group By:  
Description: Non-formatted Award Total - Third Term

Rules	Data Element	Operator	Value	'y'	AND/OR
	RPVATRM_TERM_CODE	=	&Third_Term		AND
	RPVATRM_AIDY_CODE	=	&aid_year_code		

Variable Description; valid values are any alpha-numeric string  
Record: 1/1 <OSC>

The following scripts have been created to make the necessary changes for the letter generation variables:

- RGLBVRBLU\_071800.SQL
- RGLRVFRMU\_071800.SQL
- RGLRVRBLD\_071800.SQL
- RGLRVRBLU\_071800.SQL

### Note

If variables have been created for additional terms, you will need to make changes to those variables to make use of the RPVATRM view. ■

## RORLOGCI\_071800.SQL

The `rorlogci_071800.sql` script has been included to make entries to the Logging Control Repeating Table (RORLOGC) for the RORSTAT table.

This script will be executed as part of the install process to ensure correct table values exist prior to user processing.

The following column has been added to the RORSTAT table for change logging:

<b>RORLOGC_</b> <b>TABLE_NAME</b>	<b>RORLOGC_COLUMN_NAME</b>	<b>RORLOGC_COLUMN_DESC</b>
RORSTAT	RORSTAT_POST_911_PELL_ELIG	POST 9/11 PELL ELIGIBILITY INDICATOR

# 8 Problem Resolutions



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

 **Note**

For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (`finaid80800resolutions.txt`) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized. ■

Object Name	Defect #	Summary
INAS	1-BEOX9W	INAS Tech Upgrade #2, Post #2 - Modified FM for students who are independent due to homelessness
job.c	1-8W1X7F	Job.c needs to be cleaned up.
RB_APPLICANT_STATUS	1-BGG571	Certain edits may not execute for Pell awards when the student's regular aid period is changed.
RCKPI110	1-BADSCQ	RNASU11 giving error, "valid values are 1900 through 2099."
RCRSUSP	1-6H0A3J	Navigation issues when using the Next Record scrollbar and Next Block button on RCRSUSP.
RCRSUSP	1-7WH6KI	RCRSUSP icons disabled after using 'Delete Temporary Records' Option
RCRSUSP,RRAAR EQ	1-8DRNBV	When leaving the RCRSUSP form and going to RRAAREQ form, the Status and Options tabs display twice.
REREX11	1-BR65V1	Grant disbursements made prior to July 1 are reported as July 1 to COD.

Object Name	Defect #	Summary
REREX11.jar	1-AVE7H7	Remove dashes from zip codes
RERIM11	1-BNC1ZT	RERIM11 Problem loading Booking Notifications, Plus Loan Applications and Credit Overrides
RERIM11	1-BQS1IJ	Plus Application errors out for existing student
RERIM11	1-BQS1MO	RERIM11 incorrectly loads crsp11op record to matching Unsent PLUS Application with different amount
RERIM11	1-BQS1S4	There is no column in RPRLAPP to capture the Credit Action Option from PLUS Application Records
RERIM11	1-BU6L46	RERIM11 fails when loading CRECMYOP entrance interview files and the block is missing
RERIM11	1-C9L223	PLUS App records in crsp11op are not loading.
RERIM11.jar	1-BGXSKH	The RERIM11 process fails with PLUS in the crpn11op The RERIM11 process fails when a PLUS loan is
RERIM11.jar	1-BMAEBN	RERIM11 may not satisfy the Stafford loan entrance interview requirement for Grad students.
RERIM3C/ RERIM11.jar	1-BSK4GD	If RERIM3C is used to load a crecmyop.dat file, a Teach entrance record may be created in error.
RERIMEX	1-B5Z9B6	The Loan Type description on the new DL PLUS Application report is too long.
RESFORM.BAT	1-BKTHUO	rnavr11 is not in resform.bat delivered in 8.7
RNANA11.fmb	1-BNK30R	RNANA11 fails with a trigger error when the "Student Resident Since" date contains only the month
RNAPR11	1-ATD0VD	RPAARSC Veterans Benefits populating from Profile

Object Name	Defect #	Summary
RNAVR11	1-9KIYP5	Changes made in the 'Student' Tab is lost and, in 'Parent' Tab user not prompted to save changes
RNEIN11	1-BGHLJC	Student's INAR-S-AGE should be student's age as of 12/31/2010 rather than age as of current date
RNEINxxS, RCBCTxx, RCBTPxx, REBCDxx, RPEDISBS, RPEPELLS	1-AZH92W	Most Banner Financial Aid COBOL programs define SQLCODE-DISPLAY as 4 characters instead of 5
RNRPINI	1-5IIE1B	7.14 rnrpini.pc compile warnings on AIX OS
ROAIMMP.fmb	1-BECSHQ	RNEIN10 online need calculations fail on ROAIMMP
ROAIMMP.fmb	1-BKPFSX	0910 Need Analysis fails from ROAIMMP
ROASMRY	1-AWR5KP	Using Options - Requirements and Loan Disbursement - on the ROASMRY form results in an error.
ROREMAL	1-C10KEI	Modify the 8x User Guide's ROREMAL description to include size limitations.
ROREMAL.pc	1-BL17EH	After FA 8.7 install ROREMAL messages may be blank.
RORPELL	1-BAGIUH	The Department of Education has release updated Pell schedules for 2010-2011 on 4/9/2010
RORPOST	1-B5TNX6	Miscellaneous Code 2 field is not nulled when the Type Code is changed.
RPAAWRD/ RPAAPMT	1-BSH4B7	Crossover Pell Award Information may not display on the bottom of RPAAWRD or RPAAPMT.
RPALORG	1-CI2BQN	RPALORG limits the Parent Plus Endorser Amount to a 0-999,999 range after 8.7.0.5 is applied.

Object Name	Defect #	Summary
RPALORG.fmb	1-BCDUY3	8.x ONLY: Cannot update Certified Hours on RPALORG
RPALORG.fmb	1-BPFXS2	RPALORG limits the Parent Plus Endorser Amount to a 0-99,999 range
RPAUCOD Plus Applications, RORMVAL	1-BXEINP	crsp11op Credit Action Choice Data Transposed
RPEDISB.cob	1-BMKBQF	Process failing when Pell crossover summer term being disbursed and prior year memos exist.
RPEDISB.cob	1-BTWPP5	RPEDISB must be updated to pass Aid Year code to A/R for year round Pell processing
RPEPELL	1-BQCU8G	Assigning a Pell Crossover Aid Period on ROAPELL may result in a \$1.00 over award
RPEPELL process	1-BWRTDL	When a student is in a single-term aid period, summer pell may be awarded in the wrong year
RPEPELL, UCLRTN.pco	1-BMDP6H	RPEPELL gives "ERROR SELECTING LOAD RULES (ROAINST/RORCRHR)" when inactive SGBSTDN record exists
RPEPELL.cob	1-BIGMW2	Issue with Year Round Pell functionality.
RPEPELL.cob	1-BSMNSL	Batch RPEPELL ignores Next Aid Year parameter if not run with a Population Selection
rpkb_award_sched1.sql	1-B4RT5P	Function fails to look on RFRDEFA for a default when there is no awd sched found on RFRASCH.
RPKPCKG RFTASPC	1-AV7AFN	The activity date in table RFTASPC is defined as NOT NULL when RFRASPC allows NULL.
RPRLORC	1-BTGVLK	When 1011 is not used as the aid year code, RPRLORC creates Loan IDs with wrong aid year identifier

Object Name	Defect #	Summary
RPRTIVC	1-BBN3ED	RPRTIVC incorrectly rounds the Title IV Earned percentage to a whole number
RPRVDIS	1-9FOA6R	RPRVDIS aborts with Oracle error ORA-01405.
RTVICMT.fmb	1-B8FUDT	Comment code and description are missing for ISIR comments 401, 402, 403, 501, 502 and 503.
UPGRADE	1-AM4Z6L	RENBTRIGS.SQL and RDISTRIGS.SQL need to be updated to reflect new triggers since 8.3/7.14
UPGRADE, FAISFCMP2.SHL, FAISFCMP2.BAT	1-BI8BFE	faisfcmp2.shl and faisfcmp2.bat files delivered with both 8.7 postings missing NLS_LENGTH_SEMANTICS

