



Banner Financial Aid - Release Notes


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Banner Financial Aid, Release Notes

These release notes describe new features, enhancements, and updates in the Banner Financial Aid 8.x and 9.x releases.

To download more documents to support the installation or upgrade of a release, such as the installation reference and page list, click **More**  and then **Attachment** to select a zip file associated with the release.

For previous version release documentation not available on the Documentation site, go to the Ellucian Customer Center and search for the content pack with the product name and version number you are seeking.


Release 9.3.25 and 8.40

These release notes contain descriptions of Banner Financial Aid 9.3.25/8.40 regulatory updates, defect resolutions, and bases itself upon Banner Admin Common 9.3.23.1 (January 2021).

This cumulative Banner Financial Aid 9.3.25/8.40 release:

- Redelivers all Banner Financial Aid patches and interim releases delivered after Banner Financial Aid 8.39.
- Describes regulatory updates and changes associated with 2021/2022 Common Origination and Disbursement (COD) processing.

Note: Banner Financial Aid release 8.40 redelivers Banner Financial Aid 8.39.2 code (College Financing Plan updates). This earlier code impacts Banner Financial Aid 8.x Self-Service operations. For institutions that use Banner Financial Aid Self-Service 8.x and who have not already applied Banner Financial Aid Self-Service 8.39.2, apply Banner Financial Aid Self-Service 8.39.2, following Banner Financial Aid 8.40. This accommodates redelivered College Financing Plan changes as part of Banner Financial Aid 8.39.2. Institutions that use Banner Student Self-Service 9x for Banner Financial Aid who did not apply Banner Student Self-Service 9.16 together with Banner Financial Aid 8.39.2 must apply Banner Student Self-Service 9.16 following Banner Financial Aid 8.40.

To download supporting documentation for this release, click **More**  and then **Attachment** to select the release zip file. The zip file contains the following files:

- Banner_Financial_Aid_903250001_Installation_Reference.txt
- Banner_Financial_Aid_COD_Cross_Reference_2021_2022_9.3.25_8.40_April_2021.xlsx
- Banner_Financial_Aid_Object_List_8.40_April_2021.pdf
- Banner_Financial_Aid_Page_List_9.3.25_April_2021.pdf
- Banner_Financial_Aid_readme_8.40.txt
- Banner_Financial_Aid_Release_Notes_9.3.25_8.40_April_2021.pdf
- Banner_Financial_Aid_Reports_9.3.25_8.40_April_2021.pdf
- Banner_Financial_Aid_Upgrade_Guide_8.40_April_2021.pdf

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- Banner_Financial_Aid_Use_9.3.25_8.40_April_2021.pdf

Enhancements

2021/2022 Common Origination and Disbursement (COD)

Updated Banner Financial Aid COD processing supports 2021/2022 aid year regulatory changes. Program objects listed here support COD processing for the 2021/2022 aid year.

Changed tables

Each of the following tables includes an additional column, Relationship to Student:

- Direct Loan PLUS Application Table (RLRPAPP) - Added column (RLRPAPP_RELATIONSHIP).
- Direct Loan PLUS Information Table (RLRPLUS) - Added column (RLRPLUS_RELATIONSHIP).
- Direct Loan PLUS Unmatched Application Temporary Table (RPTUAPP) - Added column (RPTUAPP_RELATIONSHIP).

Changed packages

Changed packages include:

- 2021/2022 Grant Origination Package (RB_DL_PLUS API) - Script modified to process Relationship to Student column (RLRPLUS_RELATIONSHIP), added for this release.
- 2021/2022 COD Extract Database Package (REKCE21) - Updated to support extract processing.
- 2021/2022 COD Import Database Package (REKCI21) - Updated to support import processing.
- 2021/2022 Grant Origination Package (REKOR21) - Updated to process Relationship to Student column (RLRPLUS_RELATIONSHIP), added for this release.
- Unmatched Direct Loan Applications Package (RPKUCOD) - Updated to process Relationship to Student columns (RLRPAPP_RELATIONSHIP and RPTUAPP_RELATIONSHIP), added for this release.

Changed database trigger

Changed database triggers include:

- RT_RLTPAPP_LOG_INSUPDDTL (*r1tppapp9.sql*) - Supports processing of the Relationship to Student column (RLRPAPP_RELATIONSHIP) added to the Direct Loan PLUS Application Table (RLRPAPP).
- RT_RLTPPLUS_LOG_INSUPDDTL (*r1tppplus9.sql*) - Supports processing of the Relationship to Student column (RLRPLUS_RELATIONSHIP) added to the Direct Loan PLUS Information Table (RLRPLUS).

New pages

New pages include:

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- 2021/2022 Grant Disbursement/Acknowledgement (READI22) - Page updates include aid year specific changes.

Note: The Disbursement/Acknowledgement section of READI22 includes an updated field name as a result of the resolution of CR-000176717 (which involves both READI21 and READI22). The updated **Pell AP Disbursement Date or Enrollment Change** label replaces the previous **Pell AP Disbursement Date Change** field name.

- 2021/2022 Grant Origination/Acknowledgement (REAOR22) - Page updates include aid year specific changes.

Changed pages

Changed pages include:

- Unmatched COD Records (REAUCOD) - The Application Data section includes the addition of the **Relationship to Student** field (RPTUAPP_RELATIONSHIP).
- Direct Loan Origination (RLADLOR) - The Credit Data area of the PLUS Data section includes the addition of the **Relationship to Student** field (RLRPLUS_RELATIONSHIP).
- Applicant PLUS Application Form (RLAPAPP) - The Application Data area of the Application Detail section includes the addition of the **Relationship to Student** field (RLRPAPP_RELATIONSHIP).

New processes

These new processes replace the previous aid year based versions (delivered each year with the COD release). Use these new processes for this, and all future aid years. Ellucian no longer plans to deliver aid year based versions of these processes.

Note: The GORFEOB page includes an entry for each new process, excluding the process from VBS FGAC.

New processes included with this release:

- COD Print Process (RERCODP) - Replaces the aid year specific RERCDxx process. Supports COD print processing for 2021/2022 and beyond.
- COD 4.0e Extract Process (REREX4E) - Replaces the aid year specific REREXxx process. Supports COD (4.0e) extract processing for 2021/2022 and beyond.
- Grant File Import (RERGRIM) - Replaces the aid year specific RERFlxx process. Supports grant file import processing for 2021/2022 and beyond.
- Grant Origination Creation (RERORIG) - Replaces the aid year specific RERORxx process. Supports grant origination processing for 2021/2022 and beyond.

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- Direct Loan File Import (RLRD LIM) - Replaces the aid year specific RLRDUxx process. Supports direct loan file import processing for 2021/2022 and beyond. File types supported:
 - DSDF22OP: AS – Import School Account Statement (Fixed-Length, Loan Detail, Disbursement Level)
 - DSLF22OP: AS – Import School Account Statement (Fixed-Length, Loan Detail, Loan Level)
 - AHSLDEOP: Ad-hoc Loan Exit Counseling Results (Fixed-Length)
 - EXITFFOP: Exit Counseling Results (Fixed-Length)
 - DSMF22OP: AS – DL Import Month-to-Date School Account Statement (Fixed-Length, Disbursement Detail Only)
 - DSRF22OP: AS – DL Date Range School Account Statement (Fixed-Length, Disbursement Detail Only)
 - DSYF22OP: AS – DL Year-to-Date School Account Statement (Fixed-Length, Disbursement Detail Only)

Changed process

The modified COD 4.0e File Import (RERIM4E) provides updated file import processing for the 2021/2022 aid year, and beyond.

Note: You should continue to use RERIM4E to import COD system-generated files for the 2020/2021 and earlier aid years (files received on or after March 21, 2021).

Changed Menu

The Electronic Data Exchange Menu (*RESEDE22) supports new 2021/2022 aid year pages to include:

- 2021/2022 Grant Disbursement/Acknowledgement (READI22)
- 2021/2022 Grant Origination/Acknowledgement (REAOR22)

SQL scripts

Upgrade SQL scripts include:

- rgjrjbm oi_084000.sql - JobSub Output Definition (GJJBMO)
- rgjbj jobsi_084000.sql - Report/Process Definition Table (GJBJOBS)
- rgjbp defi_084000.sql - Parameter Definition Table (GJBPDF)
- rgjbp dfti_084000.sql - Default Parameters Table (GJBPDFT)
- rgjbp vali_084000.sql - Parameter Validation Table (GJBPVAL)
- rgobfeobi_084000.sql - FGAC Objects Excluded From FGAC Processing Rules Table (GOBFEOB)
- rgubobjsi_084000.sql - General Object Base Table (GUBOBS)
- rguroptmi_084000.sql - Page Options Table (GUROPTM)
- rlrddlci_084000.sql - Direct Loan Logging Control Table (RLRDLLC)

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- `rorlogci_084000.sql` - Logging Control Repeating Table (RORLOGC)
 - `normvali_084000.sql` - Miscellaneous Validation Rules Table Data (RORMVAL)

Note: Execute these scripts as part of the Banner Financial Aid 8.40 installation to ensure that correct values exist in each table.

Updates

Resolutions

For a list of change requests resolved in Banner Financial Aid 8.40, see the [Release Banner Financial Aid 8.40](#) in Ellucian Customer Center.

As of this publication, there are no Banner Financial Aid 9.3.25 resolved change requests.


Release 9.3.24 and 8.39.2

These release notes contain descriptions of Banner Financial Aid 9.3.24/8.39.2 and Banner Financial Aid Self-Service 8.39.2 regulatory updates and defect resolutions, and bases itself upon Banner Admin Common 9.3.23.1 (January 2021).

Regulatory updates support changes associated with 2021/2022 College Financing Plan, Banner Financial Aid Accessibility improvements, and Return of Title IV Funds (R2T4).

Banner Financial Aid 9.3.24/8.39.2 is a cumulative release that includes patches delivered after Banner Financial Aid 9.3.23/8.39.1. Ellucian recommends that you review the associated Resolutions Reports to determine the full impact of the Banner Financial Aid 9.3.24/8.39.2 and Banner Financial Aid Self-Service 8.39.2 releases.

Note: For institutions that use Banner Financial Aid Self-Service 8.x, you must apply Banner Financial Aid Self-Service 8.38.1 before installing Banner Financial Aid 8.39.2 and Banner Financial Aid Self-Service 8.39.2. Institutions that use Banner Student Self-Service 9.x for Banner Financial Aid must apply Banner Student Self-Service 9.16 together with Banner Financial Aid 8.39.2 to make use of 2021/2022 College Financing Plan features included in this release.

To download supporting documentation for this release, click **More**  and then **Attachment** to select the zip file associated with the release. The zip file contains the following files:

- `Banner_Financial_Aid_903240003_Installation_Reference.txt`
- `Banner_Financial_Aid_Installation_Guide_8.39.2_lang_April_2021.pdf`
- `Banner_Financial_Aid_ISIR_Functional_and_Technical_Cross_Reference_2021_2022.xlsx`

Note: File republication. This replacement file includes updated content that replaces the previously published version. Disregard the similarly named file found in the `Banner_Financial_Aid_9.3.22_8.39.zip` attachment.

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- Banner_Financial_Aid_Object_List_8.39.2_March_2021.pdf
 - Banner_Financial_Aid_Page_List_9.3.24_March_2021.pdf
 - Banner_Financial_Aid_readme_8.39.2.txt
 - Banner_Financial_Aid_Release_Notes_9.3.24_8.39.2_April_2021.pdf
 - Banner_Financial_Aid_Reports_9.3.24_8.39.2_March_2021.pdf
 - Banner_Financial_Aid_Self_Service_Object_List_8.39.2_March_2021.pdf
 - Banner_Financial_Aid_Self_Service_readme_8.39.2.txt
 - Banner_Financial_Aid_Self_Service_Upgrade_Guide_8.39.2_March_2021.pdf
 - Banner_Financial_Aid_Upgrade_Guide_8.39.2_March_2021.pdf
 - Banner_Financial_Aid_Use_9.3.24_8.39.2_March_2021.pdf

Enhancements

2021/2022 College Financing Plan updates

On November 12, 2020, the U.S. Department of Education (ED) announced the addition of a new College Financing Plan template (formerly known as the Financial Aid Shopping Sheet) to more accurately address the needs of graduate and professional school students.

This release summarizes layout and processing changes associated with both the existing Undergraduate and new Graduate/Professional College Financing Plan templates.

The following Banner Financial Aid objects support updated College Financing Plan processing for the 2021/2022 aid year:

Changed tables

Table column comments updated:

- Fund Aid Year Specific Data (RFRASPC) - Rebate Fee Percent (RFRASPC_REBATE_PERCENT) column comment includes a change to store and reflect the Interest Rate for Graduate Direct Loans.
- Default College Financing Plan Setup Table (ROBDFPS) - Institution Group (ROBDFPS_INSTITUTION_GROUP) column comment includes a change to store and reflect the template type.
- Institution Group (RPRSSCS_INSTITUTION_GROUP) column comment includes a change to store and reflect the template type.

Changed packages

Packages updated to address template selection and displayed content:

- BWRKSHOP
- RPK_SHOPPING_SHEET

Changed pages

Changed pages include:

- Fund Management (RFRMGMT) and Funds Management (ROAMGMT) - The Packaging section of each page includes the following changes in the Loan Rules area:
 - The existing **Manual Loan Indicator** field includes an added option (H=HRSA) to identify funds associated with Health Resources and Services Administration (HRSA) loans.
 - The former **Rebate Fee Percentage** field is now labeled **Graduate Interest Rate** and is repurposed to identify the interest rate for Graduate Direct Loans.
 - The existing **Loan Fee Percentage** field includes updates to store Origination Fee Percent data, which supports creation of College Financing Plan output.
- College Financing Plan Setup (RPRSHOP):
 - Default Setup and Campus Setup sections include changes to the **Institution Group** field in each section for the 2021/2022 aid year, onward. Four newly-added options allow you to determine the College Financing Plan type; 1 Always use undergraduate template, 2 Always use graduate template, 3 Undergraduate when not found, or 4 Graduate when not found.
 - Changes to the Fund Setup section include re-organization of existing items and the addition of four new items listed under three new category headings:
 - Scholarships Setup - Scholarships from School (existing), Scholarships from State (existing), Other Scholarships (existing), School-paid tuition benefits (new), and Tuition remission/waiver (new).
 - Grants Setup - Grants from School/Institutional Grants (existing), Grants from State (existing), Other Grants (existing), and Scholarships for Disadvantaged Students (new).
 - Loan & Work Study Setup - Work Study (Federal, State, or Institutional) (existing), Institutional Loan (existing), Other Aid that must be Repaid (existing), and Assistantships (new).

Changed process

The updated College Financing Plan Batch Process (RPRSSBP) includes changes to:

- Support proper template determination (Graduate and Undergraduate).
- Allow the use of a population selection and aid year (as parameters).
- Generate one or more PDF files containing the College Financing Plan content for each student in a population.

From the 2021/2022 aid year onward, PDF files will be generated based on the student's level (Graduate or Undergraduate). Generated PDF files use the following naming standards:

- Graduate template: `rprssbp_grad_pdf_oneupnumber.pdf`
- Undergraduate template: `rprssbp_undergrad_pdf_oneupnumber.pdf`

Note: Generated PDF files include two pages per student.

SQL script

This release includes the `rormvali_083902.sql` script to configure the Miscellaneous Validation Rules Table (RORMVAL).

Note: Execute this script as part of the Banner Financial Aid 8.39.2 installation to ensure that correct values exist.

Accessibility improvements

As part of Ellucian's continued efforts to maintain accessible applications, Ellucian is updating several pages to address known issues around screen reader interactions with button navigation.

The *Banner Financial Aid 9.3.24 Page List* includes a list of the pages changed in this release.

These updates provide support for *CR-000169099*.

Return of Title IV Funds update

Banner products have incorporated functionality that allows you to automatically process Return of Title IV Funds (R2T4) for students who have withdrawn from a Student Centric Period (SCP).

Note: When processing by Student Centric Period, it is important to associate your financial aid period to the corresponding SCP on Student Centric Period Term Control (SOASCPT).

The following Banner Financial Aid objects support updated R2T4 processing:

Changed table

The Return of Title IV Funds Table (RPRTIIV) includes additional data (RPRTIIV_SCPS_CODE) that supports R2T4 processing of students who have withdrawn from an SCP.

Changed database trigger

The RPRTIIV table's logging database trigger has been modified to add logging functionality for the new RPRTIIV_SCPS_CODE column.

Changed pages

The main windows of the Return of Title IV Funds Calculation (RPATIVC) and Return of Title IV Funds Calculation Inquiry (RPITIVC) pages include a field label change. In each case, the former **Term Code** field is now labeled **Term Code or Student Centric Period** and supports updated R2T4 functionality.

Additionally, both RPATIVC and RPITIVC include links to the following associated pages:

- Direct Loan Origination (RLADLOR)
- Financial Aid Enrollment (ROAENRL)
- Applicant Status (ROASTAT)
- Award Maintenance (RPAAWRD)

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- Applicant Requirements (RRAAREQ)
 - Student Centric Registration History (SFASCPR)

Changed processes

Changed processes include:

- Title IV Funds Return Calculation (RPRTIVC) - Updated to process SCP withdrawals using the new Student Centric Period Code (10) parameter. Associated output also includes SCP related data.
- Return of Title IV Funds Withdrawal Calculation Report (RPRTIVI) - Updated to display students with Return of Title IV Funds performed for an SCP. Associated output also includes SCP related data.
- Title IV Recipient Withdrawn (RPRTIVR) - Updated to display student with Withdrawn Codes using the new Student Centric Period Code (13) parameter. Report parameter combinations determine records displayed. Associated output also includes SCP related data.

SQL scripts

Upgrade SQL scripts include:

- `roblogci_083902.sql` - Logging Control Base Table (ROBLOGC)
- `rorlogci_083902.sql` - Logging Control Repeating Table (RORLOGC)

Note: Execute these scripts as part of the Banner Financial Aid 8.39.2 installation to ensure that correct values exist in each table.

Updates

Technical currency update - COD 4.0e File Import (RERIM4E) usage

SQL script updates ensure the RERIM4E process is free from duplicate Job submission default entries, as part of the Banner Financial Aid 8.39.2 upgrade/installation.

This can result in the inability to run the RERIM4E process without removing the duplicate entries from GJAPDFT.

This update corrects an issue associated with a SQL script delivered as part of [Release 8.39.1.1](#) (January 21, 2021).

To avoid processing issues, this release includes the following SQL scripts that delete and re-insert the GJBPDFD records to ensure normal RERIM4E processing:

- `rgjbpdfdt_083902.sql`
- `rgjbpdfdti_083902.sql`

Note: Execute these scripts as part of the Banner Financial Aid 8.39.2 installation to ensure that the job submission records for RERIM4E remain accurate.

Resolutions

For a list of change requests resolved in Banner Financial Aid 9.3.24, see the [Release Banner Financial Aid 9.3.24](#) in Ellucian Customer Center.

For a list of change requests resolved in Banner Financial Aid 8.39.2, see the [Release Banner Financial Aid 8.39.2](#) in Ellucian Customer Center.

As of this publication, there are no Banner Financial Aid Self-Service 8.39.2 resolved change requests.

Release 8.39.1.2

For a list of change requests resolved in Banner Financial Aid 8.39.1.2, see the release page for [Release 8.39.1.2](#) in the Ellucian Customer Center.

Release 8.39.1.1

For a list of change requests resolved in Banner Financial Aid 8.39.1.1, see the release page for [Release 8.39.1.1](#) in the Ellucian Customer Center.

2020 Releases

Banner Financial Aid releases in 2020.

- Banner Financial Aid 9.3.23/8.39.1
- Banner Financial Aid 8.39.0.3
- Banner Financial Aid 9.3.22.1
- Banner Financial Aid 8.39.0.2
- Banner Financial Aid IM Need Analysis 8.39.0.1
- Banner Financial Aid 8.39.0.1
- Banner Financial Aid 9.3.22/8.39


Release 9.3.23 and 8.39.1

This release contains descriptions of Banner Financial Aid 9.3.23/8.39.1 regulatory updates and defect resolutions and bases itself upon Banner Admin Common 9.3.22 (August 2020).

This summary provides information about the Banner Financial Aid 9.3.23/8.39.1 release. Banner Financial Aid 9.3.23/8.39.1 is a cumulative release that includes patches delivered after Banner Financial Aid 9.3.22/8.39.

Regulatory updates support changes associated with 2020/2021 Common Origination and Distribution (COD) and 2021/2022 California Dataload. These updates include only Banner Financial Aid 8.x objects. Ellucian recommends that you review the associated Resolutions Reports (8.x and 9.x) to determine the full impact of the Banner Financial Aid 9.3.23/8.39.1 release.

Note: Banner Financial Aid 9.x objects delivered as part of this release support CR Defect resolutions only.

To download supporting documentation for this release, click **More**  and then **Attachment** to select the zip file associated with the release. The zip file contains the following files:

- Banner_Financial_Aid_903230001_Installation_Reference.txt
- Banner_Financial_Aid_Object_List_8.39.1_December_2020.pdf
- Banner_Financial_Aid_Page_List_9.3.23_December_2020.pdf
- Banner_Financial_Aid_Release_Notes_9.3.23_8.39.1_December_2020.pdf
- Banner_Financial_Aid_Reports_9.3.23_8.39.1_December_2020.pdf
- Banner_Financial_Aid_Resolutions_Report_8.39.1_December_2020.txt
- Banner_Financial_Aid_Resolutions_Report_9.3.23_December_2020.txt
- Banner_Financial_Aid_Upgrade_Guide_8.39.1_December_2020.pdf
- Banner_Financial_Aid_Use_9.3.23_8.39.1_December_2020.pdf

Enhancements

2020/2021 Common Origination and Disbursement (COD) update

Updated Banner Financial Aid COD processing supports 2020/2021 aid year regulatory changes.

The program object listed here supports updated COD processing for the 2020/2021 aid year and addresses the addition of a new COD reject edit associated with Coronavirus Disaster Relief.

SQL script

This release includes the `rtvrjcti_083901.sql` script to configure the Reject Validation Table (RTVRJCT).

Note: Execute this script as part of the Banner Financial Aid 8.39.1 installation to ensure that correct values exist.

2021/2022 California Dataload

Regulatory updates associated with the 2021/2022 California Dataload include a number of processing changes.

California Dream Act student processing includes updates for the 2021/2022 aid year.

New process

A new Banner Financial Aid California Application Dataload Part 1 (RCPCA22) imports the California ISIR data for the 2021/2022 aid year. Temporary tables store this information, along with EDE and CSS data.

Note: RCPCA22 has been added to the GORFEOB page, excluding the process from VBS FGAC.

Changes for the 2021/2022 aid year include a number of field related updates to support specific processing requirements. All existing aid-year-specific fields include updates to allow 2021/2022 aid year processing.

Modified package

The modified RCKCA21 package provides support for the RCPCA22 process for the 2021/2022 aid year.

SQL scripts

Upgrade SQL scripts include:

- `rgjbjjobsi_083901.sql` - Report/Process Definition Table (GJBJOBS)
- `rgjbpdefi_083901.sql` - Parameter Definition Table (GJBPDEF)
- `rgjbpdfi_083901.sql` - Default Parameters Table (GJBPDEF)
- `rgjbpvali_083901.sql` - Parameter Validation Table (GJBPVAL)
- `rgjrjbmoi_083901.sql` - JobSub Output Definition (GJJBMO)
- `rgubobjsi_083901.sql` - General Object Base Table (GUBOBS)
- `rorloadi_083901.sql` - Project specific setup for dataload processing (RORLOAD)
- `rtvicmti_083901.sql` - 2021/2022 ISIR Comment Code Validation Table (RTVICMT)
- `rtvicmtu_083901.sql` - 2021/2022 ISIR Comment Code Validation Table (RTVICMT)
- `rguraobji_083901.sql` - Banner Security (GURAOBJ)
- `rguruobji_083901.sql` - User/Class Privilege Table (GURUOBJ)
- `rgobfeobi_083901.sql` - FGAC Processing Rules Table (GOBFEOB)


Note: Execute these scripts as part of the Banner Financial Aid 8.39.1 installation to ensure that correct values exist in each table.

Updates

Resolutions

A *Resolutions Report* contains comprehensive and detailed resolution information for a release.

Each change request has a listed URL. Copy and paste the URL into a web browser to see more details about the change request on the Ellucian Customer Center. For resolution information in this

release, click **More**  and then **Attachment** to select a zip file associated with the release. The zip file includes the Banner Financial Aid Resolutions Report.

Release 8.39.0.3

For a list of change requests resolved in Banner Financial Aid 8.39.0.3, see the release page for [Release 8.39.0.3](#) in the Ellucian Customer Center.

Release 9.3.22.1

For a list of change requests resolved in Banner Financial Aid 9.3.22.1, see the release page for [Release 9.3.22.1](#) in the Ellucian Customer Center.

Release 8.39.0.2

For a list of change requests resolved in Banner Financial Aid 8.39.0.2, see the release page for [Release 8.39.0.2](#) in the Ellucian Customer Center.

Release IM Need Analysis 8.39.0.1

For a list of change requests resolved in Banner Financial Aid IM Need Analysis 8.39.0.1, see the release page for [Release IM Need Analysis 8.39.0.1](#) in the Ellucian Customer Center.

Release 8.39.0.1

For a list of change requests resolved in Banner Financial Aid 8.39.0.1, see the release page for [Release 8.39.0.1](#) in the Ellucian Customer Center.

Release 9.3.22 and 8.39

This release contains descriptions of Banner Financial Aid 9.3.22/8.39

This release is based upon Banner Admin Common 9.3.21 (June 2020). Banner Admin Common 9.3.22 (August 2020) includes updates that allow users to access Reference content (formerly known as online help) on the Ellucian Documentation site directly from Banner. However, until implementation of Banner Admin Common 9.3.22 (August 2020), Banner users can access updated field-based help content through search and navigation of the Ellucian Documentation site.

This document provides summarized information about the Banner Financial Aid 9.3.22/8.39 and Banner Financial Aid Self-Service 8.38.1 releases. Banner Financial Aid 9.3.22/8.39 is a cumulative release that includes patches delivered after Banner Financial Aid 8.38.1/9.3.21. The Banner Financial Aid Self-Service 8.38.1 release also includes changes originally delivered as part of the Banner Financial Aid Self-Service 8.37.3 release.

Note: For institutions that use Banner Financial Aid Self-Service 8.x and who have not already applied Banner Financial Aid Self-Service 8.38.1, apply Banner Financial Aid Self-Service 8.38.1 together with Banner Financial Aid 8.39. This accommodates the College Financing Plan changes redelivered in Banner Financial Aid 8.39. Institutions that use Banner Student Self-Service 9.x for Banner Financial Aid must apply Banner Student Self-Service 9.12 together with Banner Financial Aid 8.39. This accommodates the Banner Financial Aid 8.38.1 changes redelivered in Banner Financial Aid 8.39.

Regulatory updates support changes associated with the following:


- 2019/2020 Federal Student Aid Fiscal Operations Report and Application to Participate (FISAP).
- 2021/2022 College Scholarship Service (CSS) PROFILE Updates.
- 2021/2022 EDE Dataload, Correction Processing, and ISIR.
- 2021/2022 Federal Methodology (FM) Need Analysis updates.
- Institutional Need Analysis System (INAS), IM Only.
- Obsolete objects.

Supporting documentation for this release includes the following files:

- 2122_CSS_Profile_mapping_from_existing_columns_to_new_columns.xlsx
- 2122_EDE_Data_Load_mapping_from_existing_columns_to_new_columns.xlsx
- Banner_Financial_Aid_903220005_Installation_Reference.txt
- Banner_Financial_Aid_BANINAS_Resolutions_Report_8.39_September_2020.txt
- Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx
- Banner_Financial_Aid_ISIR_Functional_and_Technical_Cross_Reference_2020_2021.xlsx

Note: Updated version of the 2020/2021 Banner Financial Aid ISIR Functional and Technical Cross Reference spreadsheet that resolves CR-000170345. This updated version corrects data associated with the Children of Fallen Heroes Indicator.

- Banner_Financial_Aid_ISIR_Functional_and_Technical_Cross_Reference_2021_2022.xlsx
- Banner_Financial_Aid_Object_List_8.39_September_2020.pdf
- Banner_Financial_Aid_Page_List_9.3.22_September_2020.pdf
- Banner_Financial_Aid_Release_Notes_8.39_9.3.22.pdf
- Banner_Financial_Aid_Reports_8.39_9.3.22.pdf
- Banner_Financial_Aid_Resolutions_Report_8.39_September_2020.txt
- Banner_Financial_Aid_Resolutions_Report_9.3.22_September_2020.txt
- Banner_Financial_Aid_Upgrade_Guide_8.39_September_2020.pdf
- Banner_Financial_Aid_Use_8.39_9.3.22_September_2020.pdf

To download these files, click **More**  and then **Attachment** to select the zip file associated with the release.

Enhancements

2019/2020 Federal Student Aid Fiscal Operations Report and Application to Participate (FISAP) - RORFS20

Regulatory updates associated with the 2019/2020 FISAP provide guidelines for participation in 2021/2022 Campus-Based programs.

Note: The FISAP includes the Fiscal Operations Report for 2019/2020 and Application to Participate for 2021/2022 in the Campus-Based programs.

The FISAP allows institutions to:

- Apply for Campus-Based Program funding for the upcoming award year
- Report Campus-Based Program expenditures for the previous award year

On August 3, 2020, the Department of Education finalized the *Fiscal Operations Report for 2019–20 and Application to Participate for 2021–22 (FISAP)*. As noted in the correspondence, the deadline for the electronic submission of the FISAP is 11:59 p.m. Eastern time (ET) on November 2, 2020. Transmission must be completed by midnight.

New process

A new Banner Financial Aid FISAP Report for 2019-20 year (RORFS20) properly generates the FISAP. This new version of the process includes updated aid year specific references and processing.

Summarized FISAP Changes for 2021/2022

2021/2022 FISAP changes include:

- Supplemental FISAP Reporting Instructions due to the CARES Act/COVID-19 Emergency.
- Updated instructions to address award year and date references.
- Updated Automatic Zero EFC income threshold to \$27,000.

SQL scripts

Upgrade SQL scripts included with FISAP:

- `rgjbjjobsi_08380103.sql` - Report/Process Definition Table (GJBJOBS)
- `rgjbpdefi_08380103.sql` - Parameter Definition Table (GJBPDF)
- `rgjbpdfi_08380103.sql` - Default Parameters Table (GJBPDF)
- `rgjbpvali_08380103.sql` - Parameter Validation Table (GJBPV)
- `rgjrjbmoi_08380103.sql` - JobSub Output Definition (GJBMO)
- `rgobfeobi_08380103.sql` - FGAC Processing Rules Table (GOBFE)

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- `rgubobjsi_08380103.sql` - General Object Base Table (GUBOBS)
 - `rlrdfee_i_083900.sql` - Direct Loan Origination Fee Table (RLRDFFEE)

Note: The Banner Financial Aid utility (plus) scripts, `rdistrigs.sql` and `renbtrigs.sql`, used to disable and re-enable Banner Financial Aid database triggers to baseline settings include updates for the following newly delivered database triggers:

- `RT_RCRHOMC_LOG_INSUPDDTL`
- `RT_RCRHOME_LOG_INSUPDDTL`
- `RT_RCRIRSF_LOG_INSUPDDTL`
- `RT_RNROVR2_LOG_INSUPDDTL`
- `RT_RCRPALC_LOG_INSUPDDTL`
- `RT_RCRPALM_LOG_INSUPDDTL`
- `RT_RCRPARC_LOG_INSUPDDTL`
- `RT_RCRPARI_LOG_INSUPDDTL`
- `RT_RCRSARC_LOG_INSUPDDTL`
- `RT_RCRSARI_LOG_INSUPDDTL`
- `RT_RCRSPCI_LOG_INSUPDDTL`
- `RT_RCRTRUC_LOG_INSUPDDTL`
- `RT_RCRTRUS_LOG_INSUPDDTL`

These scripts include updates to remove SQL*Plus prompts for the `faismgr` login credentials to comply with the latest Ellucian coding standards. Institutions that use SQL*Plus to run these scripts must implement one of the two solutions below to continue using these scripts.

- Uncomment the following two lines by removing the “—” from the beginning of each of the following two lines:
 - `prompt "The value entered for the FAISMGR password will not display."`
 - `accept faismgr_password char prompt "Enter the password for FAISMGR: " hide.`
- Add the `faismgr` credentials to the `login.sql` file.

2021/2022 College Scholarship Service (CSS) PROFILE Updates

Banner Financial Aid CSS PROFILE processing is updated to support 2021/2022 regulatory changes.

Information provided by the College Board using the CSS PROFILE assists institutions in managing financial aid processing for students.

RNPIMxx calls the CSS Institutional Need Analysis System (INAS) software to process CSS PROFILE data and calculate an Institutional Methodology (IM) Expected Family Contribution (EFC), which institutions use to determine institutional financial aid eligibility. Clients that use IM might or might not subscribe to the CSS PROFILE service. Those Banner clients who do not receive PROFILE data from CSS must populate the PROFILE data, either manually or by copying data from the Federal Methodology (FM) record, to calculate an IM EFC.

For the 2021/2022 aid year (as in 2020/2021), only those institutions who license College Board IM Need Analysis and have identified themselves as INAS IM clients can download and use the IM need analysis calculation (INAS). This INAS IM only material is made available for download separately from the 9.3.22/8.39 release.

Note: Ellucian provides instructions for accessing the INAS IM only code to eligible institutions.

The 2021/2022 aid year includes the following CSS PROFILE record additions:

- **Spouse Expected Earned Income**
- **Spouse Expected Other Taxed Income**
- **Spouse Expected Untaxed Income**
- **Trust Type**
- **Schedule 1 Indicator**
- **Deductible Alimony Paid**
- **Total Alimony Received**
- **Untaxed IRA Distribution**
- **Untaxed Pensions Annuities Distribution**
- **Home Primary Debt**
- **Total Alimony Paid**
- **Anticipated Changes**
- **Covid-19**

The 2021/2022 aid year includes the following CSS PROFILE record changes:

- **Alimony Received is now Taxable Alimony Received**
- **IRA and Keogh Deductions is now IRA and SEP Deductions**
- **IRA and KEOGH Account Value is now Retirement Asset Value**
- **Parent 1 IRA/KEOGH Account Value is now Parent 1 Retirement Asset Value**
- **Parent 2 IRA/KEOGH Account Value is now Parent 2 Retirement Asset Value**

The 2021/2022 aid year removes the following from the CSS PROFILE record:

- **Spouse Summer Earned Income**
- **Spouse School Year Earned Income**
- **Siblings in Private College**
- **Untaxed IRAs Pensions Annuities Distributions**

To support these updated requirements, a series of Banner Financial Aid program objects combine to support updated CSS PROFILE processing.

New tables

Tables include:

- **Financial Aid Home Equity Comment Table (RCRHOMC)**

- Financial Aid Home Equity Table (RCRHOME)
- Financial Aid Parent Alimony Comment Table (RCRPALC)
- Financial Aid Parent Alimony Table (RCRPALM)
- Financial Aid Parent Anticipated Resources and Income Comment Table (RCRPARC)
- Financial Aid Parent Anticipated Resources and Income Table (RCRPARI)
- Financial Aid Student Anticipated Resources and Income Comment Table (RCRSARC)
- Financial Aid Student Anticipated Resources and Income Table (RCRSARI)
- Financial Aid Special Circumstances Table (RCRSPCI)
- Financial Aid Trust Comment Table (RCRTRUC)
- Financial Aid Trust Table (RCRTRUS)
- Financial Aid Home Equity Temporary Table (RCTHOME)
- Financial Aid Parent Alimony Temporary Table (RCTPALM)
- Financial Aid Parent Anticipated Income and Resources Temporary Table (RCTPARI)
- Financial Aid Student Anticipated Income and Resources Temporary Table (RCTSARI)
- Financial Aid Special Circumstances Temporary Table (RCTSPCI)
- Financial Aid Trust Temporary Table (RCTTRUS)

Changed tables

Tables updated:

- Additional CSS PROFILE Data (RCRIMP1)
- Financial Aid Temp. Appl. Table - Part 5 (RCRTMP5)

New packages

The RCKPI22 package acts as an interface between the RCPCT22 Java process and the database. Additionally, RCKPI22 supports record insertion in RCTHOME, RCTPALM, RCTPARI, RCTSARI, RCTSPCI, RCTTRUS tables when loading a student through CSS data load.

New database triggers

Database triggers include:

- RT_RCRHOMC_LOG_INSUPDDTL (rcthomc9.sql)
- RT_RCRHOMC_SURROGATE_ID (rt_rcrhomc_surrogate_id.sql)
- RT_RCRHOME_LOG_INSUPDDTL (rcthome9.sql)
- RT_RCRHOME_SURROGATE_ID (rt_rcrhome_surrogate_id.sql)
- RT_RCRPALC_LOG_INSUPDDTL (rctpalc9.sql)
- RT_RCRPALC_SURROGATE_ID (rt_rcrpalc_surrogate_id.sql)
- RT_RCRPALM_LOG_INSUPDDTL (rctpalm9.sql)
- RT_RCRPALM_SURROGATE_ID (rt_rcrpalm_surrogate_id.sql)
- RT_RCRPARC_LOG_INSUPDDTL (rctparc9.sql)

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- RT_RCRPARC_SURROGATE_ID (rt_rcrparc_surrogate_id.sql)
 - RT_RCRPARI_LOG_INSUPDDTL (rctpari9.sql)
 - RT_RCRPARI_SURROGATE_ID (rt_rcrpari_surrogate_id.sql)
 - RT_RCRSARC_LOG_INSUPDDTL (rct sarc9.sql)
 - RT_RCRSARC_SURROGATE_ID (rt_rcrsarc_surrogate_id.sql)
 - RT_RCRSARI_LOG_INSUPDDTL (rct sari9.sql)
 - RT_RCRSARI_SURROGATE_ID (rt_rcrsari_surrogate_id.sql)
 - RT_RCRSPCI_LOG_INSUPDDTL (rcttspci9.sql)
 - RT_RCRSPCI_SURROGATE_ID (rt_rcrspci_surrogate_id.sql)
 - RT_RCRTRUC_LOG_INSUPDDTL (rcttruc9.sql)
 - RT_RCRTRUC_SURROGATE_ID (rt_rcrtruc_surrogate_id.sql)
 - RT_RCRTRUS_LOG_INSUPDDTL (rcttrus9.sql)
 - RT_RCRTRUS_SURROGATE_ID (rt_rcrtrus_surrogate_id.sql)
 - RT_RCTHOME_SURROGATE_ID (rt_rcthome_surrogate_id.sql)
 - RT_RCTPALM_SURROGATE_ID (rt_rctpalm_surrogate_id.sql)
 - RT_RCTPARI_SURROGATE_ID (rt_rctpari_surrogate_id.sql)
 - RT_RCTSARI_SURROGATE_ID (rt_rctsari_surrogate_id.sql)
 - RT_RCTSPCI_SURROGATE_ID (rt_rctspci_surrogate_id.sql)
 - RT_RCTTRUS_SURROGATE_ID (rt_rcttrus_surrogate_id.sql)

New views

New views include:

- 2021-2022 Admissions Application View - Including Students without Admissions Decisions (ROVA222)
- 2021-2022 Admissions Applications View (ROVAD22)
- 2021-2022 Current Year Only Admissions Applications View (ROVAM22)
- 2021-2022 Admissions Application View - Current Year Only Including Students without Admissions Decisions (ROVAY22)
- 2021-2022 Max Term SAP Status View (ROVSA22)
- 2021-2022 Aid Year Specific Student View (ROVST22)

New pages

Note: This release re-organizes Banner Financial Aid table structures and introduces a number of new table objects. Institutions may need to update RORRULE rules, Algorithmic rules, Population Selection rules, and custom Variable rules to reference the new tables and columns. Refer to the appropriate documents within the attached `Banner_Financial_Aid_9.3.22_8.39.zip`, for specific cross reference and field/column mapping details:

- `2122_CSS_Profile_mapping_from_existing_columns_to_new_columns.xlsx`
- `Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx`

New pages include:

- 2021-2022 Applicant Override (RNAOV22) - Page updates include aid year specific changes.
- 2021-2022 Need Analysis Processing (RNAPR22) - Page updates include aid year specific changes, along with the following:

- Income and Benefits section - Added the **Filed Schedule 1** (IM Parent and IM Comment), **Deductible Alimony Paid** (IM Parent and IM Comment), **Total Alimony Received** (IM Parent and IM Comment), **Untaxed IRA Distributions** (IM Parent and IM Comment), and **Untaxed Pensions and Annuities** (IM Parent and IM Comment) fields. Removed the **Untaxed IRA and Pensions** (IM Parent) field.

The former **Alimony Received** (IM Parent and IM Comment) field is now labeled **Taxable Alimony Received** (IM Parent and IM Comment) and the **IRA and Keogh Deductions** (IM Student) field is now labeled **IRA and SEP Deductions** (IM Student).

- Expenses section - Added the **Total Alimony Paid** (IM Parent and IM Comment) field.
- Assets section - Added the **Home Primary Debt** (IM Parent and IM Comment) field.

The former **IRA and KEOGH Account Value** (IM Student) field is now labeled **Retirement Asset Value** (IM Student), **Parent 1 IRA/KEOGH Account Value** (IM Parent) field is now labeled **Parent 1 Retirement Asset Value** (IM Parent), and the **Parent 2 IRA/KEOGH Account Value** (IM Parent) field is now labeled **Parent 2 Retirement Asset Value** (IM Parent).

Also, column/comment relationships include adjustments for the following fields; **Home Worth** (IM Parent, IM Student, and IM Comment), **Home Owed** (IM Parent, IM Student, and IM Comment), **Year Purchased** (IM Parent, IM Student, and IM Comment), and **Purchase Price** (IM Parent, IM Student, and IM Comment).

- Anticipated Resources and Income section - Added the **Spouse Income Earned from Work** (IM Student and IM Comment), **Spouse Other Taxed Income** (IM Student and IM Comment), **Spouse Other Untaxed Income** (IM Student and IM Comment), and **Trust Type** (IM Student and IM Comment) fields. Removed the **Spouse Summer Wages and Tips** and **Spouse School Year Wages and Tips** fields.

Also, column/comment relationships include adjustments for the following fields; **Value of Student's Trusts** (IM Student and IM Comment), **Trust Income or Principal Available** (IM Student and IM Comment), **Trusts Established By** (IM Student and IM Comment), **Student Summer Wages and Tips** (IM Student and IM Comment), **Other Summer Taxable Income** (IM Student and IM Comment), **Other Summer Untaxable Income and Benefits** (IM Student and IM Comment), **Student School Year Wages and Tips**

(IM Student and IM Comment), **Other School Year Taxable Income** (IM Student and IM Comment), **Other School Year Untaxable** (IM Student and IM Comment), **Other Grants and Scholarships** (IM Student and IM Comment), **Tuition Benefits from Employer** (IM Student and IM Comment), **Contributions from Parents** (IM Student and IM Comment), and **Contributions from Other Sources** (IM Student and IM Comment).

- Parent's Anticipated Year Income and Benefits area - Added the **Anticipated Changes** (IM Parent and IM Comment) field.

Also, column/comment relationships include adjustments for the following fields; **Parent 1 Earned Income** (IM Parent and IM Comment), **Parent 2 Earned Income** (IM Parent and IM Comment), **Other Taxable Income** (IM Parent and IM Comment), and **Other Untaxed Income** (IM Parent and IM Comment).

- 2021-2022 Need Analysis Result (RNARS22) - Page updates include aid year specific changes.
- 2021-2022 Supplemental Need Analysis (RNASU22) - Page updates include aid year specific changes, along with other related changes.

Additional Supplemental Data window - Added the **Covid-19** field. Removed the **Siblings Private School** field.

Also, column/comment relationships include adjustments for the following fields; **Change in Employment Scholarships, Medical and Dental Expenses, Catastrophic Event, Elder Care, Nonrecurring Income, Financial Support, None, and Other**. Additionally, column/comment relationships include adjustments for the following Trust Information sub section fields: **Principal/Income Available** and **Established by**.

- 2021-2022 Need Analysis Global Policy Options Rules (RNRGL22) - Page updates include aid year specific changes.

Changed pages

Note: This release re-organizes Banner Financial Aid table structures and introduces a number of new table objects. Institutions may need to update RORRULE rules, Algorithmic rules, Population Selection rules, and custom Variable rules to reference the new tables and columns. Refer to the appropriate documents within the attached `Banner_Financial_Aid_9.3.22_8.39.zip`, for specific cross reference and field/column mapping details:

- `2122_CSS_Profile_mapping_from_existing_columns_to_new_columns.xlsx`
- `Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx`

Changed pages include:

- Application Purge (RNAPURG) - Allows you to delete all non-current EDE records for a student by aid year. When saved, deletes all data stored in the new columns for that student.
- Financial Aid PL/SQL Library (ROQLPLS) - Page updates include aid year specific changes (9.3.22 only).

Changed menus

Changed menus:

- 2021-2022 Applicant Processing (*RESAPPL22)

- 2021-2022 Need Analysis Menu (*RESNEED22)
- Applicant Processing (*RESAPPL)
- Need Analysis (*RESNEED)

New processes

New processes include:

- 2021-2022 FA CSS Data Load Part 1 (RCPCT22)
- 2021-2022 FA Dataload Part 3 (RCRTP22)
- Copy IM Data to FM Process (RCPIMFM)

Changed process

The changed IM to FM Copy process (RCPIMFM) copies the new unique IM fields to the current FM record for use during rules processing.

SQL scripts

Upgrade SQL scripts related to CSS and EDE Dataload Processing:

- rcrasmpi_083900.sql - CSS INAS Assumption Codes (RCRASMP)
- rgjbjjobsi_083900.sql - GJAJOBJS Process Maintenance (RCPCT22 and RCRTP22)
- rgjbpdefi_083900.sql - GJAPDEF Parameter Definitions (RCPCT22 and RCRTP22)
- rgjbpdfsti_083900.sql - GJAPDFT Default Parameter Value Validations (RCPCT22 and RCRTP22)
- rgjbpvali_083900.sql - GJAPVAL Parameter Value Validations (RCPCT22 and RCRTP22)
- rgjrjbmoi_083900.sql - GJJBMO (RCPCT22 and RCRTP22)
- rgobfeobi_083900.sql - FGAC objects excluded from GOBFEOB FGAC processing rules table (RCPCT22 and RCRTP22)
- rgurmenui_083900.sql - General Menu Repeating Table (GURMENU)
- rgubobjsi_083900.sql - GUBOBS (RCPCT22 and RCRTP22)
- rnrglbli_083900.sql - INAS Global Policy Options Table (RNRGLBL)
- robinsti_083800.sql - Financial Aid Institution Table (ROBINST)

Note: The robinsti_083800.sql script was originally delivered with Banner Financial Aid 8.38 release but is redelivered with Banner Financial Aid 8.39.

- roblogci_083900.sql - Logging Control Base Table (ROBLOGC)
- rordatai_083900.sql - Data Dictionary Table (RORDATA)
- rordvali_083900.sql - Logging Rules Table Data (RORDVAL)
- rorlogci_083900.sql - Logging Control Repeating Table (RORLOGC)
- rormvali_083900.sql - Miscellaneous Validation Rules Table Data (RORMVAL)
- rorpelli_083900.sql - Pell Payment Schedule Table (RORPELL)
- rprfedri_083900.sql - Federal Rules Inquiry Table (RPRFEDR)

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- `rprgrnti_083900.sql` - Grant Rules Table (RPRGRNT)
 - `rtvccoei_083900.sql` - CSS Country Coefficient and Crosswalk Validation Table (RTVCCOE)

2021/2022 EDE Dataload, Correction Processing, and ISIR

Updates associated with Banner Financial Aid EDE Dataload Correction and ISIR print processing support 2021/2022 regulatory changes.

Banner clients use this release to receive federally processed information for the purpose of awarding and disbursing monies in accordance with federal regulations. You can download an electronic copy of the final EDE Technical Reference for the 2021/2022 Award Year from the Federal Student Aid - IFAP: iLibrary.

New tables

Tables include:

- Financial Aid Application IRS DRT Flag Table (RCRIRSF)
- Financial Aid Temporary IRS DRT Flag Table (RCTIRSF)

New packages

Packages include:

- RCKED220 - Acts as an interface between the RCPTP22 Java process and the database for 2021/2022 aid year.
- RCKPI22 - Supports the 2021-2022 FA CSS Data Load Part 1 (RCPCT22) process for record insertion in RCTIRSF tables, when loading a student through CSS data load.

Changed package

The ROKPVAL package includes a new validation label (REPICXX_VALIDATION, a copy of REBCDXX_VALIDATION) which follows the process name change from REBCDxx to REPICxx.

New pages

Note: This release re-organizes Banner Financial Aid table structures and introduces a number of new table objects. Institutions may need to update RORRULE rules, Algorithmic rules, Population Selection rules, and custom Variable rules to reference the new tables and columns. Refer to the appropriate documents within the attached `Banner_Financial_Aid_9.3.22_8.39.zip`, for specific cross reference and field/column mapping details:

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- `2122_EDE_Data_Load_mapping_from_existing_columns_to_new_columns.xlsx`
- `Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx`

New pages include:

- 2021-2022 Need Analysis (RNANA22) - Page updates include aid year specific changes, along with the following:
 - Demographic section -Aid year specific fields (**Resident Since**, **Date of Birth**, **Legal Resident Before 01-JAN-2016**, **Date of Status**, and **1st Bachelor's Degree by 01-JUL-2021**) include updates to support 2021/2022 regulatory changes.
 - Status section - Aid year specific fields (**Born before 01-JAN-1998**, **Date of Status**, **Since**, and **Parent Legal Resident Before 01-JAN-2016**) include updates to support 2021/2022 regulatory changes. Additionally, autohints for **Date of Birth** (Parent 1 and Parent 2) also include updates to support 2021/2022 regulatory changes.
 - IRS DRT Flags - Updates include the addition of **Filed Schedule 1 Flag** (Parent and Student) fields.

Also, column relationships include adjustments for the following fields; **Request** (Parent and Student), **Display Flag** (Parent and Student), **AGI Flag** (Parent and Student), **FIT Flag** (Parent and Student), **Type of Tax Return Flag** (Parent and Student), **Education Credits Flag** (Parent and Student), **IRA Payments Flag** (Parent and Student), **Interest Income Flag** (Parent and Student), **Untaxed IRA and Pensions Flag** (Parent and Student), and **Filing Status Flag** (Parent and Student).

 - Information Release section - Aid year specific fields (**Date Application Completed**, **Received by Processor**, and **Processed by Processor**) include updates to support 2021/2022 regulatory changes.
- 2021-2022 Student Loan Data (RNASL22) - Page updates include aid year specific changes.
- 2021-2022 Need Analysis Document Verification (RNAVR22) - Updates include aid year specific changes.
- 2021-2022 Miscellaneous Results Inquiry (RNIMS22) - Page updates include aid year specific changes, along with the following:
 - Assumptions section - The following aid year specific fields include updates to support 2021/2022 regulatory changes: **2019 Adjusted Gross Income** (Parent Assumptions and Student Assumptions), **2019 Taxes Paid** (Parent Assumptions and Student Assumptions), **2019 Parent 1 Wages** (Parent), **2019 Parent 2 Wages** (Parent), **Born Before 01-JAN-1998** (Student), **2019 Student Wages** (Student), and **2019 Spouse Wages** (Student).
 - Reject Overrides section - The **Year of Birth between 1900 - 1946** field includes an update to support 2020/2021 regulatory changes.

Changed pages

Note: This release re-organizes Banner Financial Aid table structures and introduces a number of new table objects. Institutions may need to update RORRULE rules, Algorithmic rules, Population Selection rules, and custom Variable rules to reference the new tables and columns. Refer to the appropriate documents within the attached `Banner_Financial_Aid_9.3.22_8.39.zip`, for specific cross reference and field/column mapping details:

- `2122_CSS_Profile_mapping_from_existing_columns_to_new_columns.xlsx`
- `Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx`

Changed pages include:

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- 2021-2022 Applicant Override (RNAOV22) - The **Year of Birth between 1900 - 1946 Reject Code** field of the **EDE Correction Overrides** window includes an update to support 2021/2022 regulatory changes.
 - 2021-2022 Need Analysis Processing (RNAPR22) - Page updates include aid year specific changes, along with column relationship adjustments.
 - Application Purge (RNAPURG) - Page updates include aid year specific changes, along with column relationship adjustments.
 - 2021-2022 Need Analysis Results (RNARS22) - The **DOD Parent Date of Death** field of the **Federal Match Indicators** window includes an update to support 2021/2022 regulatory changes.
 - 2021-2022 Supplemental Need Analysis (RNASU22) - Page updates include aid year specific changes. Also updated to insert a record in the RCRIRSF table when creating a Manual IM record from RNASU22.
 - 2021-2022 Need Analysis Global Policy Options Rules (RNRGL22) - Page updates include aid year specific changes, along with column relationship adjustments.
 - Financial Aid PL/SQL Library (ROQLPLS) - Page updates include column relationship adjustments (9.3.22 only).

Changed menus

Changed menus include:

- Applicant Processing (*RESAPPL)
- 2021-2022 Applicant Processing (*RESAPPL22)
- Electronic Data Exchange (*RESEDE)
- 2021-2022 Electronic Data Exchange Menu (*RESEDE22)
- Need Analysis (*RESNEED)
- 2021-2022 Need Analysis Menu (*RESNEED22)

New processes

New processes include:

- 2021-2022 FA CSS Data Load Part 1 (RCPCT22)
- 2021-2022 FA EDE Dataload Part 1 (RCPTP22)
- 2021-2022 FA Dataload Part 3 (RCRTP22) - Including updates to the following functionality:
 - Need Analysis Discrepancy Report
 - FM to IM merge processing
 - Deletion from Temp table
- 2021-2022 ISIR Corr/Request Process (REPIC22)
- 2021-2022 Correction Error Report (RERCE22)
- 2021-2022 ISIR Print Process (RERIS22)
- FM to IM Comparison Program in INAS (RNRCP22)
- 2021-2022 Need Analysis Report (RNRNA22)

Changed processes

Changed processes include:

- Need Analysis Logging (RLRLOGG)
- FA Data Load Table Deletes (RCPDTMP)

SQL scripts

Upgrade SQL scripts related to Financial Aid application data processing:

- rgjbjjobsi_083900.sql - Report/Process Definition Table (GJBJOBS)
- rgjbpdefi_083900.sql - Parameter Definition Table (GJBPDEF)
- rgjbpvali_083900.sql - Parameter Value Validations (GJAPVAL)
- rgjbpdfsti_083900.sql - Default Parameters Table (GJBPDFT)
- rgjrjbmoi_083900.sql - JobSub Output Definition (GJBJBMO)
- rgubobjsi_083900.sql - General Object Base Table (GUBOBS)
- rguraobji_083900.sql - Banner Security (GURAOBJ)
- rguroptmu_083900.sql - Options Menu (GUROPTM)
- rguruobji_083900.sql - Banner Security (GURUOBJ)
- roblogci_083900.sql - Logging Control Base Table (ROBLOGC)
- rordatai_083900.sql - Data Dictionary Table (RORDATA)
- rordvald_083900.sql - Audit Log Form/Data Code Table (RORDVAL)
- rorloadi_083900.sql - Project specific setup for dataload processing (RORLOAD)
- rorlogci_083900.sql - Logging Control Repeating Table (RORLOGC)
- rormvali_083900.sql - Miscellaneous Validation Rules Table (RORMVAL)
- rtvicmti_083900.sql - 2021-2022 ISIR Comment Code Validation Table (RTVICMT)

2021/2022 Federal Methodology (FM) Need Analysis updates

The Banner Financial Aid Federal Methodology (FM) Need Analysis calculation includes updates that support 2021/2022 aid year regulatory changes.

Changes to the FM calculation for the 2021/2022 aid year includes updates to formula values and processing.

New package

The RNKFM22 package includes an update to the Born Before date value for the 2021/2022 aid year. Package changes also include processing support for a number of new columns.

New process

This release includes the 2021-2022 FM Need Analysis (RNPFM22) process which accurately calculates Expected Family Contribution (EFC) for the 2021/2022 aid year.

SQL scripts

Upgrade SQL scripts related to FM Need Analysis:

- `rcrasmpi_083900.sql` - Financial Aid Assumption Rules Table (RCRASMP)
- `rgjbjjobsi_083900.sql` - Report/Process Definition Table (GJBJOBS)
- `rgjbpdefi_083900.sql` - Parameter Definition Table (GJBPDEF)
- `rgjbpvali_083900.sql` - Parameter Validation Table (GJBPVAL)
- `rgjrjbmoi_083900.sql` - JobSub Output Definition (GJJBMO)
- `rgtvsdaxi_083900.sql` - SDA Crosswalk/Conversion Table (GTVSDAX)
- `rgubobjsi_083900.sql` - General Object Base Table (GUBOBS)
- `robinstu_083900.sql` - Financial Aid Institution Table (ROBINST)
- `rqueuec_083900.sql` - AQ Queue Creation Table (RQUEUEC)

Miscellaneous

This release includes an updated `fm_ellucian.cer` (Ellucian certificate) used by the FM and IM Need Analysis batch processes.

2021/2022 Institutional Need Analysis System (INAS), IM Only

For institutions that license College Board IM Need Analysis, Banner Financial Aid INAS IM only processing includes updates that support 2021/2022 aid year regulatory changes.

As in previous aid years, only institutions who have licensed College Board IM Need Analysis and have identified themselves as IM clients will execute the IM/EFM Calculation (RNPI22) process. This new process extracts IM/EFM information and runs it through the cloud-based IM Need Analysis (BSINAS) calculator. Banner receives the resulting data. The following describes the objects associated with this IM Only functionality.

Note: A separate download provides access to this IM Only code.

As with the 2020/2021 aid year, Ellucian provides both Parts 1 and 2 of the Global Options table and enables the IM to FM Compare process with the 9.3.22/8.39 release.

The following objects are either new or include updates to support IM processing. Your institution must license the IM solution to allow use of this functionality.

New table

The Applicant Need Analysis Override Table (RNROVR2) includes the ability to capture newly added data.

Changed table

The Applicant Need Analysis Override Table (RNROVRD) includes updates for this release.

New package

The new RNKIM22 package supports IM processing for the 2021/2022 aid year.

New database triggers

Database triggers include:

- RT_RNROVR2_LOG_INSUPDDTL (rntovr29.sql)
- RT_RNROVR2_SURROGATE_ID (rt_rnrovr2_surrogate_id.sql)

Changed pages

Note: This release re-organizes Banner Financial Aid table structures and introduces a number of new table objects. Institutions may need to update RORRULE rules, Algorithmic rules, Population Selection rules, and custom Variable rules to reference the new tables and columns. Refer to the appropriate documents within the attached `Banner_Financial_Aid_9.3.22_8.39.zip`, for specific cross reference and field/column mapping details:

- 2122_CSS_Profile_mapping_from_existing_columns_to_new_columns.xlsx
- Banner_Financial_Aid_CSS_PROFILE_Cross_Reference_2021_2022_8.39_9.3.22_September_2020.xlsx

Changed pages include:

- 2021-2022 Need Analysis (RNANA22) - Updates include aid year specific changes.
- 2021-2022 Applicant Override (RNAOV22) - Updates include aid year specific changes, along with the following:
 - Applicant Override - Updates include new valid values for **US Tax Calculation Options** (IM Parent and IM Student).
 - Additional Applicant Overrides - Updates include the addition of the **Turn Off Home Value Cap** (IM Parent and IM Student) and **Cost of Living Percent** (IM Student) fields. Additionally, the 9.3.22/8.39 release removes the **Employment Allowance** field.

The former **Use Anticipated Year Income** (IM Parent and IM Student) field is now labeled **Select Income** (IM Parent and IM Student) and the **Percent IRA to Include** (IM Student) field is now labeled **Percent Retirement Assets to Include** (IM Student).
 - Additional Applicant Overrides II - Updates include the addition of the **Turn Off Home Value Cap** (IM Parent and IM Student), **Calculate Federal Taxes (EFM)** (IM Parent and IM Student), and **Project Assets (EFM)** (IM Parent and IM Student) fields. The **Cap Home**

Equity Factor (IM Parent and IM Student) field includes an update that allows more precise control.

The former **Use Anticipated Year Income (EFM)** (IM Parent and IM Student) field is now labeled **Use IM Income for EFM** (IM Parent and IM Student).

- Additional Applicant Overrides III - Updates include the addition of the **Alternate Available Income** field. Additionally, the 9.3.22/8.39 release removes the **Which (reported or computed) Parents' Adjusted Gross Income to use** field.

The former **Calculate Total Contribution from Assets using Country Coefficient** field is now labeled **International Asset Protection Allowance**.

- 2021-2022-Need Analysis Processing (RNAPR22) - Updates include aid year specific changes.
- 2021-2022 Need Analysis Result (RNARS22) - Updates include aid year specific changes.
- 2021-2022 Student Loan Data (RNASL22) - Updates include aid year specific changes.
- 2021-2022 Supplemental Need Analysis (RNASU22) - Updates include aid year specific changes.
- 2021-2022 Need Analysis Document Verification (RNAVR22) - Updates include aid year specific changes.
- 2021-2022 Miscellaneous Results Inquiry(RNIMS22) - Updates include aid year specific changes.
- Calculated Need Analysis Detail Inquiry (RNINAIQ) - Updates include aid year specific changes, along with the following changes to the Need Analysis Detail section:
 - Removal of the **Employment Allowance** (IM Parent and IM Student) field.
 - The former **IRA and Keogh** (IM Parent and IM Student) field is now labeled **IRA and Retirement** (IM Parent and IM Student).
 - **Biological Adoptive Parent** field label spelling correction (CR-000175136 resolution).
- 2021-2022 Need Analysis Global Policy Options Rules (RNRGL22) - Updates include aid year specific changes, along with the following:
 - Common IM Options - Update includes the addition of the **Select Income** (IM Student) and **Apply COLA** (IM Parent and IM Student) fields. Additionally, the 9.3.22/8.39 release removes the **Budget Duration for Independent, Budget Duration for Dependent, US Tax Calculation Option, Calculate PC for Independent, and Use Anticipated Year Income** fields.
 - Common EFM Options - Update includes the addition of the **Select Income** field. Additionally, the 9.3.22/8.39 release removes the **Use IM Imputed Asset Value, Use Anticipated Year Income, Use IM Income Overrides, and Use IM Data Assumptions** fields.
 - Additional IM Options - the 9.3.22/8.39 release removes the **Employment Allowance Rate, Employment Allowance Maximum, Regional Adjustment of IPA, and Regional ERA Adjustment** fields. Updates also include a field name change from **Percentage of IRA or Keogh** to **Percentage of Retirement Assets**.
 - Additional IM Options II - Updates include removal of the **Use Computed or Reported Parent AGI** field.
 - Additional IM Options IV - Updates include removal of the **Budget Duration Greater than 9 Months** field.

New processes

New processes include:

- 2021-2022 IM/EFM Calculation (RNPIM22) - Performs need analysis processing for the 2021/2022 aid year. Aid year parameters support 2021/2022 processing.

Note: The GORFEOB page includes an entry for RNPIM22, excluding the process from VBS FGAC.

The following items include additional tag related changes:

- Global Options Record Updates
- IMR - IM Record Updates
- IMRE - IM Extension Record Updates
- INAR - IM Need Analysis Results Record Updates
- 2021-2022 Need Analysis Comparison Report (RNRCP22) - Performs the comparison of FM data to IM data for the 2021/2022 aid year. The RNRCP22 Java processes replaces the RNECPxx COBOL processes used in previous years.

SQL scripts

Upgrade SQL scripts related to IM Need Analysis:

- rcrasmpi_083900.sql - CSS INAS Assumption Codes (RCRASMP)
- rgjbjjobsi_083900.sql - Creates entries for the process (RNRCP22 and RNPIM22)
- rgjbpdefi_083900.sql - Creates parameter definition entries for the process (RNRCP22 and RNPIM22)
- rgjbpdfi_083900.sql - Creates parameter definition entries for the process (RNRCP22 and RNPIM22)
- rgjbpvali_083900.sql - Creates parameter definition entries for the process (RNRCP22 and RNPIM22)
- rgjrjbmoi_083900.sql - Creates entry for new processes (RNRCP22 and RNPIM22)
- rgtvsdaxi_083900.sql - SDA Crosswalk/Conversion Table (GTVSDAX)
- rgubobjsi_083900.sql - Creates entries for the process (RNRCP22 and RNPIM22)
- rnrglbl_083900.sql - INAS Global Policy Options Table (RNRGLBL)
- robinstu_083900.sql - Global Institution Financial Aid Options Table (ROBINST)
- rorlogci_083900.sql - Logging Control Repeating Table (RORLOGC)
- rqueuec_083900.sql - AQ Queue Creation Table (RQUEUEC)

Miscellaneous

This release includes an updated `fm_ellucian.cer` (Ellucian certificate) used by the FM and IM Need Analysis batch processes.

Obsolete objects

Banner Financial Aid objects from the 2016 aid year (and earlier) are now obsolete.

Obsolete C processes

The following C processes are now obsolete:

Obsolete C	Obsolete C
RCRTP16	REROR16
RERCD16	RORFS16
RERCE16	RLRDU16
RERFI16	

Use the appropriate updated mass compile script to remove references to the processes listed above.

Script	Description
rescmplc.shl	Unix C compile script.
rescmplc.pl	Windows C compile script.

Obsolete COBOL objects

The REBCD16 COBOL process is now obsolete.

Use the appropriate updated mass compile script to remove references to the processes listed above.

Script	Description
rescmplc.shl	Unix C compile script.
rescmplc.pl	Windows C compile script.

Additionally, 2015/2016 College Board IM Need Analysis (INAS) related COBOL objects and miscellaneous COBOL objects are now obsolete for the Banner Financial Aid 9.3.22/8.39 release.

Obsolete INAS COBOL	Obsolete INAS COBOL	Obsolete INAS COBOL
FMCALC16	IMMSGE16	INLCL16
FMRJCT16	IMPLUS16	INTAX16
FMSNT16	IMTWEK16	RNECP16
FMTWEK16	INAS2016	RNEIN16
IMCALC16	INCOMP16	RNEIN16O
IMMAPI16	INFUNC16	RNEIN16S

Obsolete INAS COBOL	Obsolete INAS COBOL	Obsolete INAS COBOL
IMMAPO16	ININAR16	

Use the appropriate updated Banner 8.x mass compile script to remove references to the above IM Need Calculation objects (INAS) objects:

Script	Description
rcmp2016.shl	Unix INAS COBOL compile script for 2015/2016.
rcmp2016.pl	Windows INAS COBOL compile script for 2015/2016.

Note: The following IM Need Calculation (INAS) COBOL mass compile scripts no longer include references to `rcmp2016.pl` and `rcmp2016.shl`:

- `inascmpl.pl`
- `inascmpl.shl`

The following miscellaneous COBOL objects are now obsolete:

Obsolete Miscellaneous COBOL objects	Obsolete Miscellaneous COBOL objects
rnein16.pl	rnein16.shl

Obsolete copybooks

The following copybooks are now obsolete:

Obsolete copybooks	Obsolete copybooks	Obsolete copybooks
FEDWRK16	INAR16	SELIS116
FMCNST16	IWKGLB16	SELISR16
FMR16	MVISIR16	SELOVR16
FMREXT16	MVPROF16	SELPR116
FUNCWA16	MVPRSL16	SELPR516
GLOBAL16	MVZERO16	SELPRR16
IMCNST16	OVPROF16	TAXPRM16
IMR16	PLUSWA16	WSDECL16
IMREXT16	PROWRK16	WSOVRD16

Obsolete dbprocs

The following dbprocs are now obsolete:

Obsolete dbproc	Obsolete dbproc	Obsolete dbproc
rckca160.sql	rckpi161.sql	rekor160.sql

Obsolete dbproc	Obsolete dbproc	Obsolete dbproc
rckca161.sql	rekce160.sql	rekor161.sql
rcked160.sql	rekce161.sql	rekfm160.sql
rcked161.sql	rekci160.sql	rekfm161.sql
rckpi160.sql	rekci161.sql	

Use the updated `resdbpr.sql` (Banner Financial Aid database object mass-regeneration script) script to remove references to all of the obsolete package creation scripts listed above.

Obsolete Java objects

The following Java objects are now obsolete:

Obsolete Java	Obsolete Java
RCPCA16	RERIM16
RCPCT16	RNPFM16
RCPTP16	RNRNA16
REREX16	

Obsolete objects, miscellaneous

The following miscellaneous objects are now obsolete:

Obsolete objects	Obsolete objects	Obsolete objects
rprdu15.pl	rcrtp16.shl	rerim16.pl
rprdu15.shl	rebcd16.pl	rerim16.shl
rcpca16.pl	rebcd16.shl	rinsgl16
rcpca16.shl	rerce16.pl	rnpfm16.pl
rcpct16.pl	rerce16.shl	rnpfm16.shl
rcpct16.shl	rerex16.pl	rnrna16.pl
rcptp16.pl	rerex16.shl	rnrna16.shl
rcptp16.shl	rerfi16.pl	rlrdu16.pl
rcrtp16.pl	rerfi16.shl	rlrdu16.shl

Obsolete pages

The following pages are now obsolete:

Obsolete page	Obsolete page
READI16	RNASL16

Obsolete page	Obsolete page
REAOR16	RNASU16
RNANA16	RNAVR16
RNAOV16	RNIMS16
RNAPR16	RNRGL16
RNARS16	

Use the appropriate updated Banner 8.x mass compile script to remove references to the above page objects:

Script	Description
resform.shl	Mass form compile script.
resform.bat	Mass form compile script.

Obsolete views

The following views are now obsolete:

Obsolete view	Obsolete view
rova216.sql	rovay16.sql
rovad16.sql	rovsal6.sql
rovam16.sql	rovst16.sql

Use the updated Banner Financial Aid view mass-regeneration script (`resview.sql`) to remove references to the listed views.

Obsolete menus

The following menus are now obsolete:

Obsolete menu	Obsolete menu
2015–2016 Applicant Processing *RESAPPL16	2015-2016 Needs Analysis *RESNEED16
2015-2016 Electronic Data Exchange Menu (*RESEDE16)	

Delete scripts

Delete scripts remove obsolete objects associated with this release. The following delete scripts remove Ellucian-maintained objects and job control data related to obsoleted objects:


Script	Description
rgjbjobsd_083900.sql	Delete entries from Report/Process Definition Table.
rgjbpdefd_083900.sql	Delete entries from Parameter Definition Table.

Script	Description
rgjbpdfstd_083900.sql	Delete entries from Default Parameter Table.
rgjbpvald_083900.sql	Delete entries from General Jobs Parameter Value Table.
rgjrjbmod_083900.sql	Remove for 2015/2016 aid year.
rgjrjprmd_083900.sql	Delete entries from Job Parameter Set Rule Table.
rgobfeobd_083900.sql	Delete entries from FGAC objects excluded from FGAC processing rules table.
rgubobjsd_083900.sql	Delete entries from General Object Base Table.
rgubpaged_083900.sql	Delete mappings between forms and pages.
rgurmenud_083900.sql	Delete entries from General Menu Repeating Table.
rguroptmd_083900.sql	Delete Form option entries.

Updates

Resolutions

A *Resolutions Report* contains comprehensive and detailed resolution information for a release.

Each change request has a listed URL. Copy and paste the URL into a web browser to see more details about the change request on the Ellucian Customer Center. For resolution information in this release, click **More**  and then **Attachment** to select a zip file associated with the release. The zip file includes the Banner Financial Aid Resolutions Report.